



Japan - oats for food

A report to the Processed Oats Partnership (POP) Program

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Key findings

Japan imports oats for food and feed purposes. This report focuses on food applications of oats, with reports on feed applications developed separately.

Oats have long been consumed in Japan. A major food manufacturer attests to introducing breakfast cereals – including oatmeal – into Japan in 1929.

However, until recently oat consumption in Japan has been modest, perhaps in part because of the tradition of eating rice. Also, the limited number of oat food products specifically targeted to the Japanese palate, and the somewhat subdued interest in fast and convenient food by a large portion of the population, have stifled demand. COVID19 likely assisted the increase in oat food consumption in Japan due to people opting for healthy and convenient foods during long periods of working from home. Oatmeal transitioned into a staple for some consumers.

Japanese imports of rolled oats have grown markedly over the last two decades to around 45,000 tonnes in 2022, with Australian oats being well regarded. Competition to Australian product has increased during this time with Finland, China, the USA and other countries now exporting oat products to Japan.

Oat groat imports have been increasing slowly since 2003 albeit from almost zero consumption. As with rolled oats, export competition is strong with several countries vying for market share.

Although a suite of domestic and globally produced oat products (including Australian products) are now available within Japan, breakfast cereals and oat milk dominate shelves. The substantial growth in granola and oatmeal consumption in Japan in recent years, combined with oat milk uptake, are a positive indicator for ongoing growth in the consumption of oat products within this market.

Oat exporters (e.g. Canada) and food manufacturers use a suite of mediums to attract consumers including social media campaigns, with celebrities delivering the messaging. The connection as a delicious, healthy and convenient rice replacement has been important in influencing Japanese consumer interest.

While most Japanese people are aware of oats, surveys indicate many have not yet tried oat products, such as oatmeal. The recent entry of oat milk from domestic and global manufacturers is helping build awareness to the merits of oat products.

Manufacturers, sometime in concert with convenience store chains, have the capacity to quickly produce innovative oat products altered to local needs (e.g. granola variants, oatmeal, oat udon, pearled oats).

Japanese food manufacturers have a multitude of ways of presenting the value of oats to consumers. Some manufacturers are emphasising to consumers they have used special manufacturing methods (e.g. pearling) to remove the unpleasant taste of oats. They continue to use their strong new product development capability to tailor oat food products to suit local tastes.

Given increasing consumer interest in healthy, convenient food, and the recent growth in oat products in Japan, there is clearly scope for additional sales volumes from Western Australia (WA), with this likely to continue to be a mix of raw and processed product.

Recommendations to POP

Japan, like many other countries, is gradually but increasingly embracing oats as a food. Competition for export of processed product into Japan is also increasing. Fortunately, at present, Western Australian and Australian oats are compared favourably to oats from many other origins.

As with many oat markets there is not any market failure in the development and presentation of new oat food products within Japan, particularly as most of this activity is managed by long established domestic and global food manufacturers with strong new product capability.

Western Australia is well placed to hold a reasonable market share, provided;

- Western Australia maintains the quality of processed oat products,
- the broader environments allow WA processed product to be price competitive, and
- service provision is of a good standard compared to our competitors.

To grow market share beyond organic levels, the WA industry will need to identify where it can add extra value to existing processes and capability.

Drawing on the information in this report, mechanisms through which the WA industry could add extra value are:

1. **Implementation of a cost-effective non-commercial oat information and technical connectivity program that is capable of being transferred across markets.** The intent being to provide key stakeholders in current and potential markets, including Japan, with “non-commercial” information and resources on the value and unique quality of WA oats to increase uptake against competitive product. Some information and resources needed are already in development through POP funding of AEGIC product innovation and development of an oat portal.
2. **Use the learnings from the information and technical exchange program to identify how WA industry can best support growth in current and emerging markets.** For example, the WA industry, including AEGIC and InterGrain, has considerable technical understanding of Japanese needs for wheat-based udon noodles. Regular delivery of information and technical support on WA oats could assist Japanese manufacturers and retail in the “fine tuning” of oat products in development such as oat noodles. In turn the two-way information exchange created will assist WA industry in improving its understanding of taste and smell, and other characteristics needs that are likely to influence demand either positively or negatively within Japan. Information that might help assist WA breeding or classification initiatives will also be obtained.

Introduction

To support the growth of the oat industry in Western Australia, both in value and volume, over the next 20 years, the State Government is providing \$10.12m to the Western Australian Agricultural Authority (WAAA) to manage the industry-led Processed Oats Partnership (POP) Program.

This report is provided as a component of Output 2 of the AEGIC based POP activities within the project titled “Economic lens to capture increased market value for oats through industry innovation and better targeted industry investment”. The purpose of the project is to provide

the POP and in turn Western Australian industry with a better understanding of the rates of growth in demand for oats and oat products in key and emerging markets. This knowledge will give useful market intelligence to oat marketers, oat producers, and oat processors to aid their strategic decision-making.

Imports of raw oats

Japan imports raw oats for food and feed purposes, total raw oat imports are around 47,000 tonnes annually (five-year average).

Canada is the leading exporter of raw oats to Japan, followed by Australia (Figure 1), Chile, USA and Uruguay are minor suppliers. Canadian oats are mostly used for feed purposes, with Australia and other countries focussing on supply of value-added processed product, mainly for food consumption.

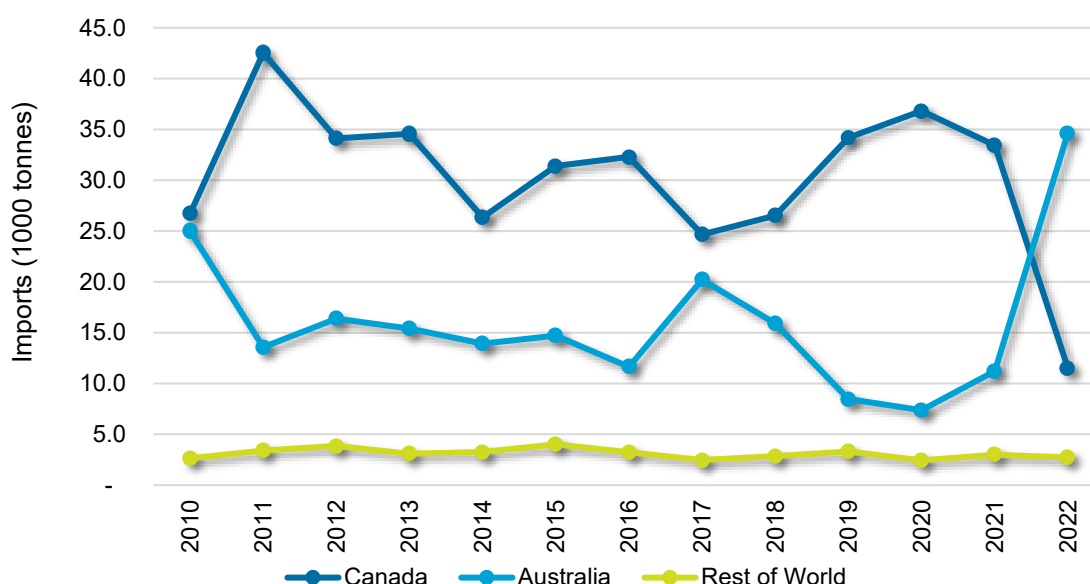


Figure 1: Main suppliers of raw oats to Japan

Source UNComtrade

Canada is intent on growing its share of the oat food market in Japan. The Prairie Oat Growers Association (POGA), supported with funds from the Canadian Government AgriMarketing Program, is conducting a social media campaign to build Japanese interest in Canadian oats for food purposes using project bloggers. In reporting results they advise:

Once again, the Japan–Kananootsumugi social media component of this campaign garnered excellent results. Social media views for the Facebook and website campaign exceeded the 2023 KPI for website & social media views (10M) within the first year of the campaign! By the end of the two-year project term, the target was exceeded by 305% with an average monthly reach of >1.2M Japanese consumers. Followers increased by 280%, finishing with just under 4K followers. New recipes were developed by project bloggers based in Canada, Mexico and Japan and translated into multiple languages for use across all three markets. The most recent highlights include a recipe for Otomiru no kyarottokeki (Oat-carrot cake), which received >32K in reach and >2.7K engagements. A recipe created

by Japanese food journalist Takanori Nakamura for *Otsu mugui no kanta n kama-yaki-fu pitsua* (Easy oven-baked pizza) garnered >20.7K in reach and >1.7K engagements.

Japan's use of oats for feed is described in more detail in a separate AEGIC report titled "Japan - Oats for Feed."

Imports of processed oats

Japan's import of processed oats has increased markedly over the last two decades increasing from around 2,000 tonnes in 2003 to 47,000 tonnes in 2022. Most imports, around 45,000 tonnes, are rolled and flaked oats with the balance being oat groats. Oat groats (categorised under international HS Codes as 'Otherwise worked oats') are the whole kernel that is removed from the husk or hull.

Australia has played a particularly important role in the supply of rolled or flaked oats to Japan over the last two decades with its market share in 2022 being about 48% (Figure 2). Finland, China and USA and several other countries now regularly supply Japan's processed oats needs.

Demand for processed oats has increased on the back of Japanese consumer interest in health and nutrition and its use as a breakfast cereal.

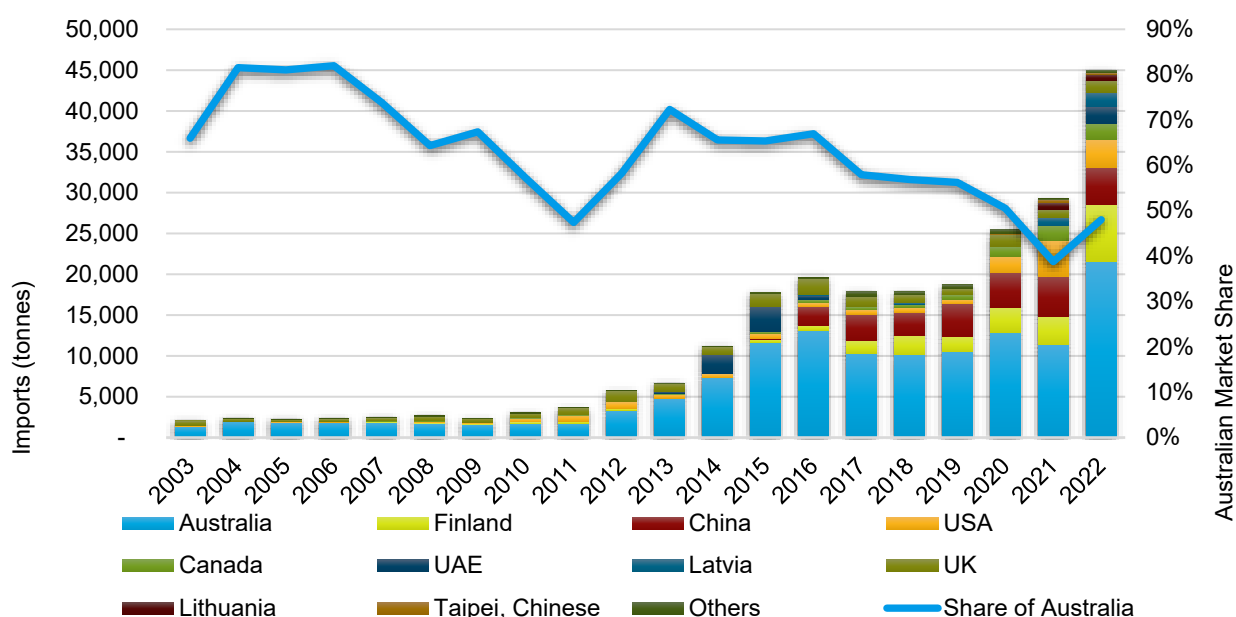


Figure 2: Japan's import of rolled or flaked oats (HS Code: 110412) 2003-2022 (tonnes)

Source: International Trade Centre (ITC)

The landed (Cost, insurance and freight or CIF) price of rolled or flaked oats to Japan is often in the range of A\$1,000-\$1,250 per metric tonne (Figure 3). These prices are indicative only, prices vary by country of supply with numerous factors impacting on the actual price.

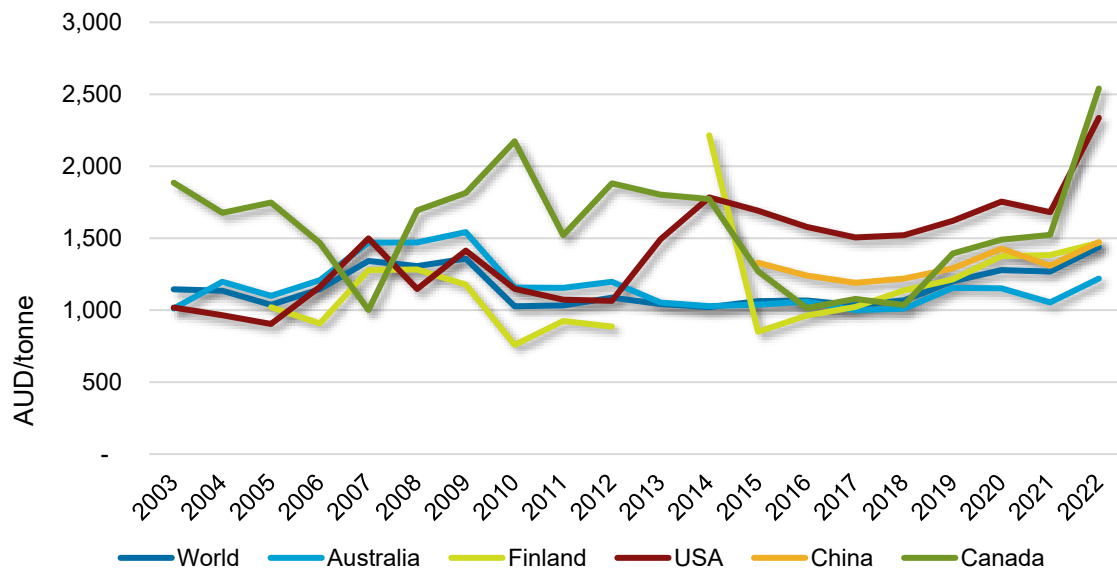


Figure 3: CIF Japan price of rolled or flaked oats by export country 2003-2022 (AUD)

Source: International Trade Centre (ITC)

Although still at modest volumes, Japan's otherwise worked oat imports (mostly oat groats) have increased since 2021. Australia is the dominant supplier, with Canada often the second largest supplier (Figure 4).

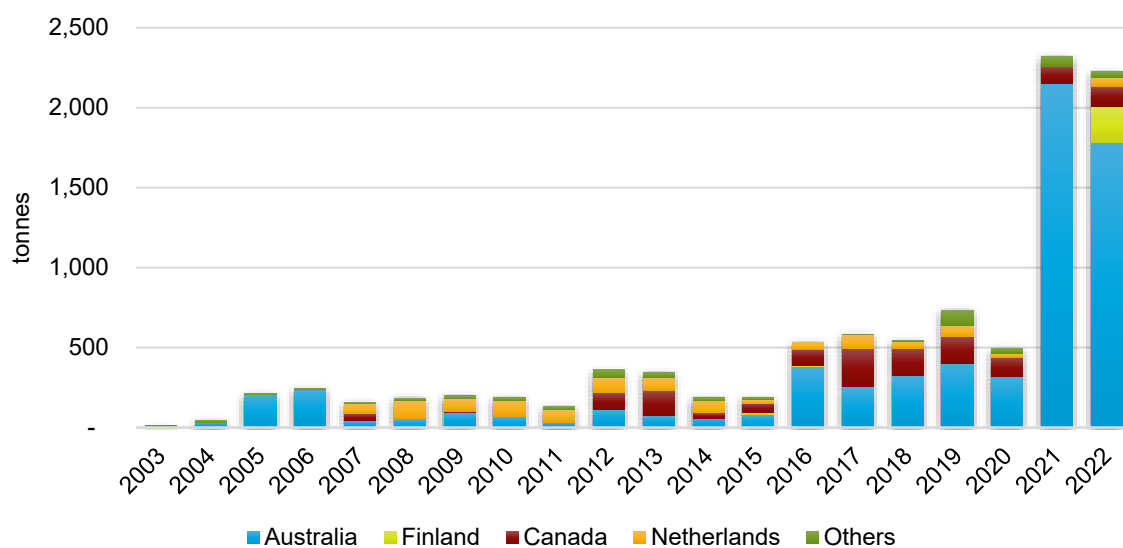


Figure 4: Japan's otherwise worked oats imports (HS code: 110422) 2003-2022 (tonnes)

Source: International Trade Centre (ITC)

Oat products in Japan

There is now a wide range of oat products available in Japan as evidenced by the stock on supermarket shelves and other retail stores (Figure 5).

Oat products in Japan

Location: Japan

Store type: Supermarket that stock their own house-branded items

Scale: 200 stores in Japan

Product categories and examples

Cereals: Instant oats using Australian oats

Pasta/rice: Oatmeal risotto using Australian oats

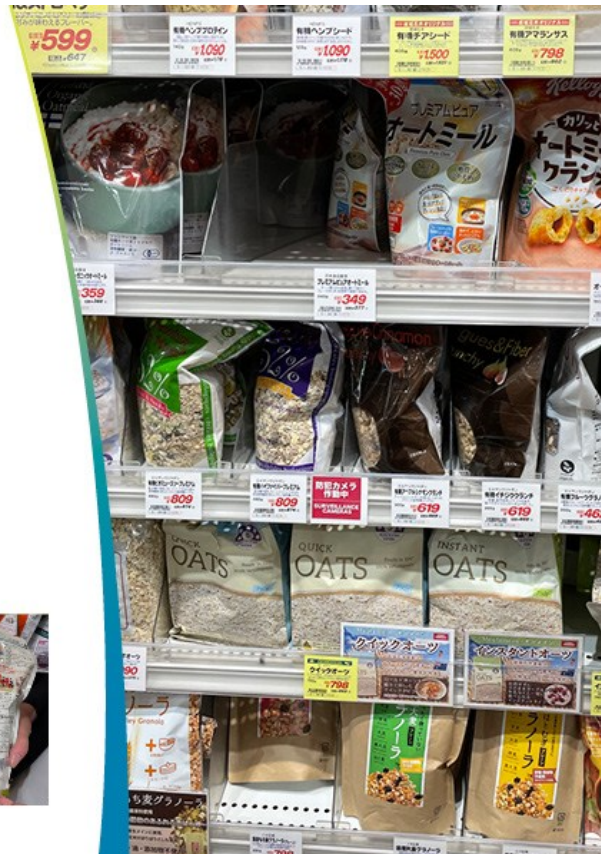


Figure 5: Oat products on supermarket shelves

Source: AEGIC

Appendix 1 contains additional photographs of oat products in Japan retail outlets.

Rolled oats

Rolled oats is a major ingredient for granola which now dominates the cereal product market in Japan. Granola is a breakfast food and snack food typically consisting of rolled oats, nuts, dried fruit and honey or other sweeteners.

Aggregated granola shipment volumes, as recorded by member companies of the Japan Snack and Cereal Foods Association, have increased from modest volumes twenty years ago to around 50,000 tonnes in 2022. By comparison, cornflake consumption volumes have remained relatively static over the last decade (Figure 6).

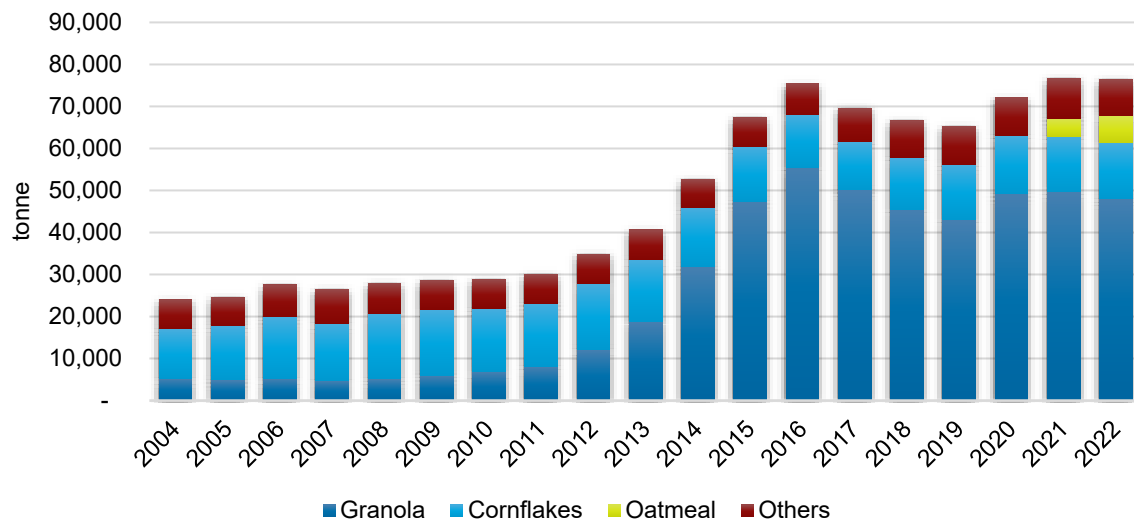


Figure 6: Shipment volume of cereal products 2004-2022 (tonnes)

Source: Japan snack and cereal foods association

Oatmeal

While the consumption of granola has plateaued in recent years, oatmeal sales have increased, particularly over the last few years. Figure 7 and Figure 8 illustrate the substantial growth of oatmeal sales in Japan since 2019.

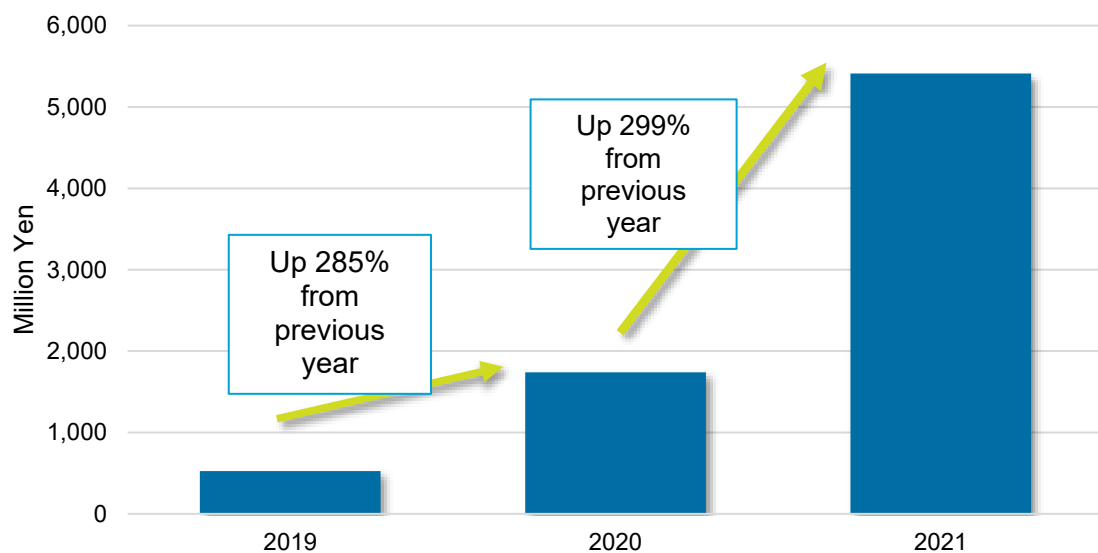


Figure 7: Oatmeal sales in Japan 2019-2021 (Japanese Yen)

The Marketing Data Bank in Japan estimated the domestic market scale of oatmeal In Japan at 2.3 billion yen in fiscal year 2020 and forecast growth of up 12 billion yen (approximately AUD128 million) in 2026.

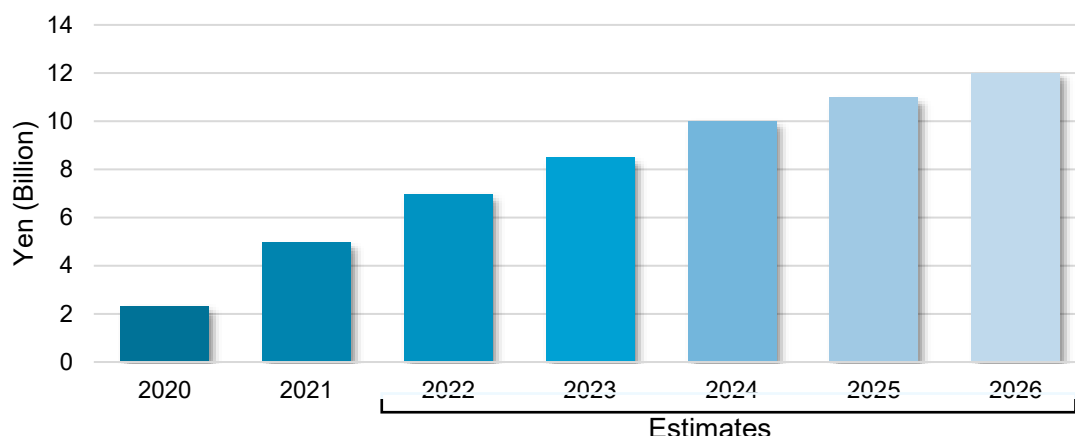


Figure 8: Estimate of the market scale of oatmeal in Japan 2021-2026 (Japanese Yen)

Source: Marketing Data Bank in Japan

In Japan, oatmeal is now promoted as a highly versatile food suitable for a wide range of applications. It can be incorporated in breakfast, lunch and dinner foods from risotto, rice porridge, okonomiyaki (savory pancake), a side dish as a substitute for minced meat or as a sweet addition to pancakes or cookies.

The number of people who eat oatmeal as a “staple food” has increased. Survey results (Figure 9) indicate that some consumers are substituting oatmeal for rice. Japanese food manufacturers have modified some oat products to suit Japanese tastes i.e. some Japanese people do not like the taste, aroma, and texture of oatmeal – food manufacturers are addressing this in new product development initiatives.

In Japan, many oatmeal consumers are women. It seems that there is still a considerable difference in awareness of oatmeal between men and women.

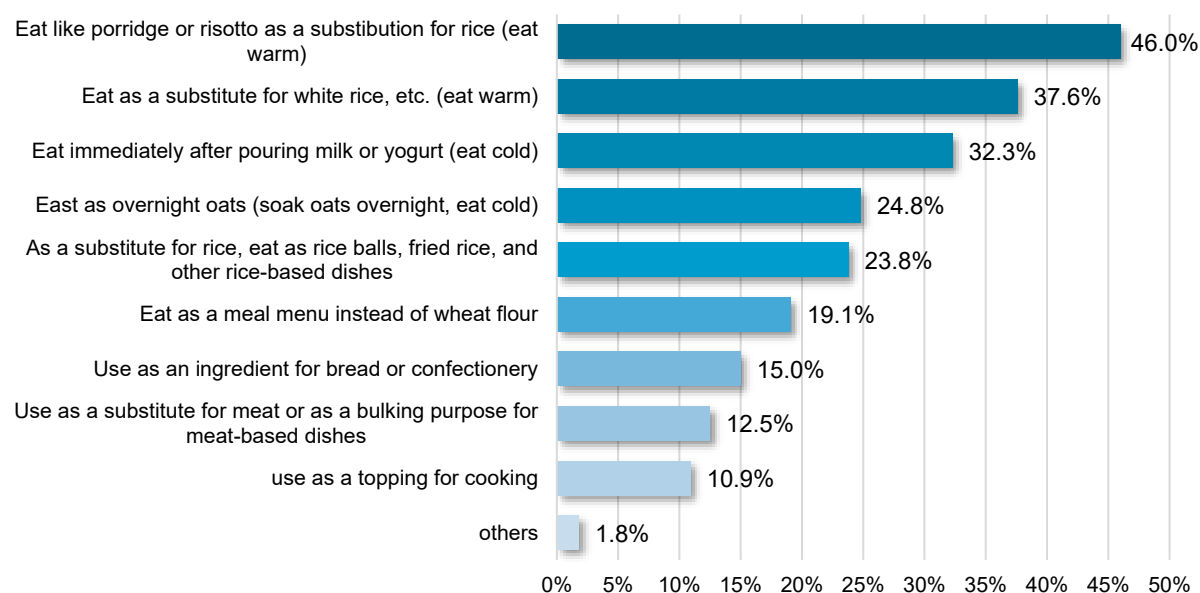


Figure 9: Survey - How do you usually eat oatmeal?

Source: Nissin Cisco survey, February 2022

Additional survey results are contained in Appendix 2.

The benefits of oatmeal are advertised e.g. oats, the raw material of oatmeal, contains a good balance of insoluble dietary fiber, which is said to be effective in suppressing rise in blood sugar level, and water-soluble dietary fiber, which has an intestinal regulation effect. In addition, it is rich in iron, vitamin B1, protein and is rich in nutritional value.

Oat udon

The development of oat udon (oat noodle) in Japan includes some examples of oat product innovation, and also some of the failures.

Lawson, a major convenience store chain, launched an oat noodle in Japan in 2021. The product, developed by a large Japanese flour mill and containing a small portion of oat flour, was discontinued due to low sales.

In October 2022, after enquiry from a different convenience store chain, another flour mill started oat noodle product development. The retail chain wanted good quality, good taste and mochi-mochi texture sought by Japanese consumers. Given the ratio of oat flour was 30% with thickener, rice flour and tapioca flour added, and no gluten mixed, the mill indicated it had been challenging to obtain a sufficient level of chewiness to meet Japanese preferences.

Product evaluation included eating trials with the involvement of the retail chain weekly or fortnightly, after new versions of the product with varying ingredient mixes were progressively created.

The mill soon produced a product rated highly by the retail chain and finished production trials using commercial manufacturing equipment. They anticipate the product will be launched in late 2023.

Oat milk

The oat milk market in Japan is expanding rapidly in both width (drinking demographic) and depth (number of cups consumed per person). Although the market size of oat milk is small compared to cow's milk and soy milk, it is showing the highest growth among all drinks including soft drinks. As a result competition in the oat milk market continues to increase.

Oat milk has excellent nutritional properties such as being gluten-free, cholesterol-free, and dietary fiber, and can be enjoyed by a wide range of people from adults to children. The biggest attraction to people is that it has a creaminess like milk, and it is easy to drink without the reported unpleasant taste common with plant-based drinks.

A major Japanese soymilk manufacturer that has recently commenced marketing oat milk, processed in Japan, has advised that in contrast to the soymilk market, almond milk has obtained about 20% share and oat milk about 4% share. They predict the oat milk market has grown about 106% from 2022. In Japan, it is predicted that the market value of oat milk will grow from about 2.8 billion yen in 2023 to about 5 billion yen in 2027.

An industry source advised that in addition to soy milk, oat milk is available at each coffee chain in Japan and "oat milk latte" has become popular within Japan. In the future, oat milk

will continue to compete with "soy milk" for vegans and people with lactose intolerance, and consumption will likely increase gradually, although not explosively.

Alpro (Danone Japan) has played a key role in the oat milk market in Japan with it estimated they hold a 70% share in terms of value. Japan's oat milk market size was expected to expand seven times in 2021 compared to the previous year, to around 1.5 billion yen (A\$15.8 million, basis exchange rate of 95yen/A\$1). A representative of Danone Japan advised, "For about two and a half years, we have been growing at a doubling rate every year." Alpro oat milk retails around 174yen/250ml (A\$2.6/250ml).



Figure 10: Oat milk section in Japanese supermarket featuring "Alpro" oat milk

Source: AEGIC

Coca-Cola, the largest beverage company in Japan, released its new oat milk nationwide in 2022 (Figure 11) advising there had been an increase in health awareness and a variety of lifestyles such as vegetarianism and veganism. The milk retailed for around 162yen/200ml (A\$1.7/200ml)



Figure 11: Tasty Oat Milk released by Coca-Cola in 2022

Source: AEGIC

As elsewhere, oat milk positioning in Japan is highly competitive with a plethora of companies including Oatly, Sweden and Rokko Butter active particularly over the last two years. The latter entered the market with oat milk "Outside" from Singapore. In addition to being available at Amazon and some coffee shops, they have rolled out the product nationwide through all channels, mainly for food service use, but also for home use, including mass retailers. Examples of other companies that have launched oat milk products are described briefly below.

Kagome, Japan has launched a new brand, "Paddock-born Gentle Milk," and has been selling "Smooth (Nameraka in Japanese) Oats" along with "Mellow Soy" since March last year. Nameraka Oats is marketed as using carefully selected whole oats and is made with a unique combination of vegetables and fruits to create a plant-based drink that has a milk-like richness and is high in dietary fiber.

Kagome also markets "Vegetable Life (Yasai Seikatsu in Japanese) Oats + Aroma Oats Cafe. "Oats+" is made from whole grain oats, including the skin, and is characterised as containing healthy ingredients such as vegetable protein, soy isoflavones, polyphenols and dietary fibre.

Marusan-Ai has renewed its "Oat Milk" and launched a new improved product in March 2022 as "Oat Milk Craft", adding a larger size pack. This product uses Marusan-Ai's patented "grain-smooth manufacturing method" to process oats as raw materials, maintaining the gentle sweetness of oats while creating a soft taste that drinks easily and smoothly, with a milky white colour. The only two ingredients for this drink are oat milk and a stabiliser, it does not contain any flavourings or oils.

In March 2022, Sujata Meiraku, a Japanese dairy manufacturer, launched a new product called "Sujata's Oat Milk". The product is said to have a richer blend than existing oat milk, aiming to have physical properties like milk. The sweetness from saccharification, the proportion of fat, and various combinations have given it a milk-like taste.

Otsuka Foods, Japan released "Awesome (Sugoi in Japanese) Oat Milk" in April 2022. While there are many oat milk products that claim dietary fiber as a nutritional component, the package of "Sugoi Oat Milk" claims that it also provides iron and is low in fat.

Oat milk – more broadly

In addition to its nutritious value and healthy effect, some oat manufacturers or marketers attest oat milk has a lower environmental impact than in the production of cow's milk, making it environmentally friendly. Although the penetration of environmentally friendly products in Japan is lower than in Western countries this may increase over time.

There are various ways to measure the environmental impact of dairy and plant-based milks (Figure 12). A particularly striking way is land use. While 8.95 square meters of land is needed to produce just 1 litre of cow's milk, plant-based milks require just a fraction of that to make the same amount. For instance, at 0.66 m² for soy milk and 0.76m² for oat milk, oat milk uses 8% of the land needed for cow's milk.

It is a similar story for greenhouse gas (GHG) emissions. The production of dairy milk emits 3.15 kg of GHG per 100 ml, which is 4.5 times more than almond milk, and 3.5 times more than the same amount of oat milk. The production of cow's milk also uses more fresh water than any of the plant-based milks.

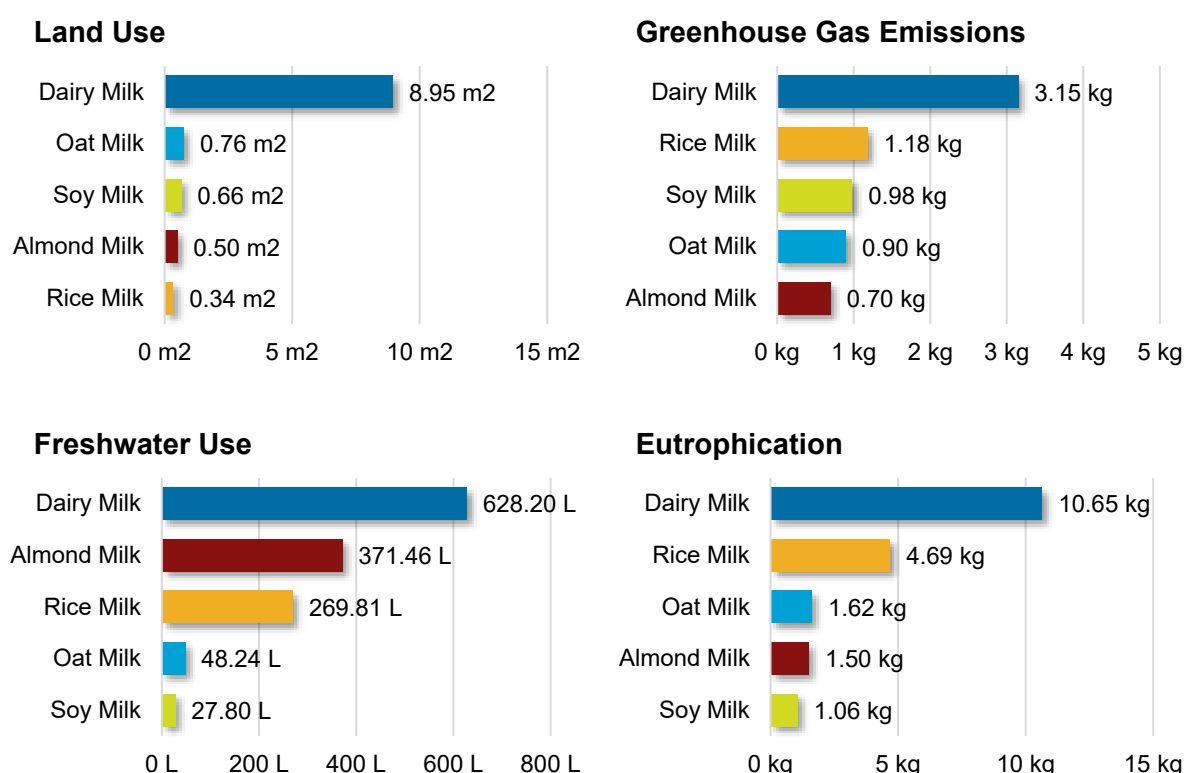


Figure 12: Environmental footprint of dairy and plant based milks: Resource use per litre of milk

Source: Poore, J & Nemecek, T (2018)

Oat competition and product range increasing

Competition in the oat food market in Japan is on the increase with the number of products and manufacturers vying for market share ever-changing. Examples of old and new oat market entrants and some of their recent initiatives are reported below.

Until March 2021, the oatmeal market in Japan was dominated by Nisshoku, with a share of about 80%. This company, that advertises they introduced oatmeal into Japan in 1929, uses comparative nutritional information between oats and rice and highlights the diversity of food applications within its advertising program (Figure 13). Other examples of advertising are documented later in this report.

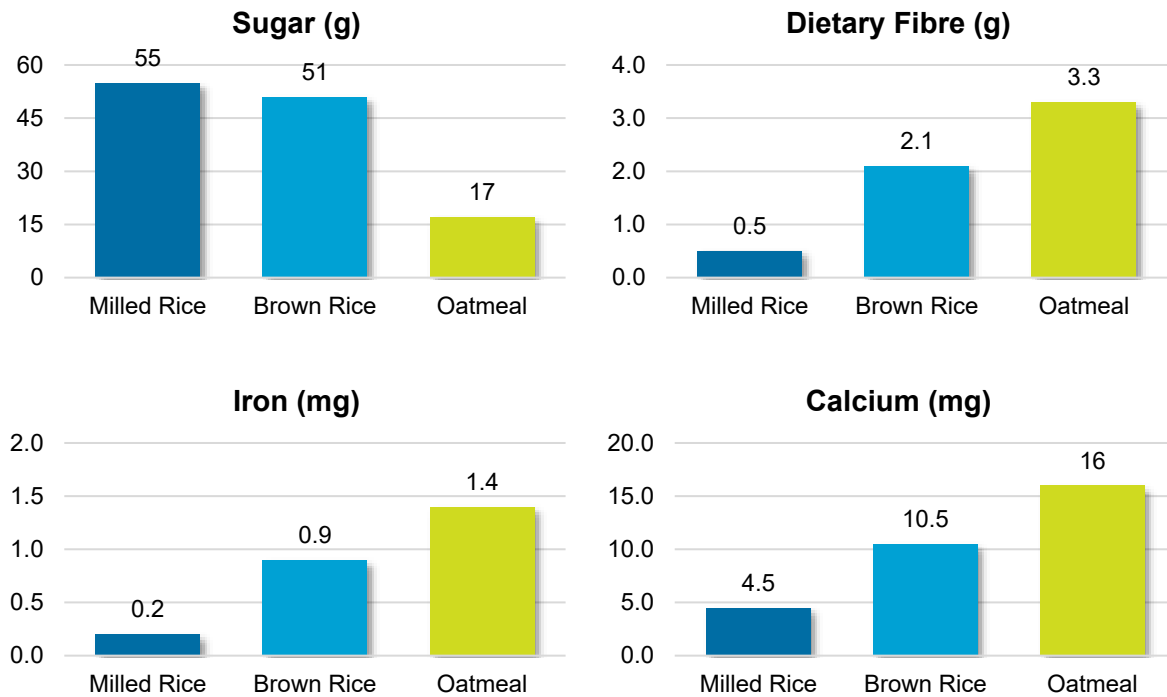


Figure 13: Comparison between Nisshoku's pure oatmeal and rice

Source: Nisshoku, (Nippon Food Manufacturers), Japan

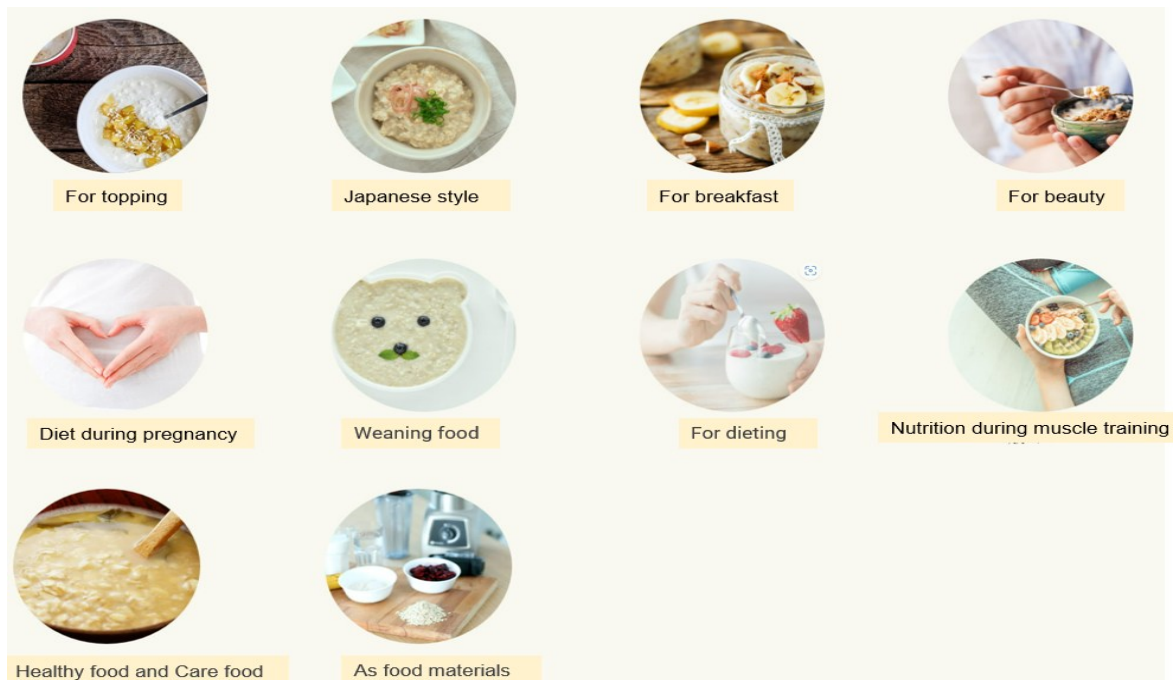


Figure 14: Example of oatmeal advertising

Source: Nisshoku (Nippon Food Manufacturers)

See Nisshoku's website (link below), for additional information on oat product promotion across the uses shown in Figure 14.

<https://www.oatmeal.co.jp/>

In April 2021, Kellogg's Japan launched "Kellogg's Oatmeal". In September of the same year, Nisshin Cisco introduced the Oishii (Tasty) Oatmeal series. Calbee launched the "Baked Oats" series in April 2022 (Figure 15). With the entry of these manufacturers, the variety of products has expanded and now includes plain, flake, flavoured and nutritious versions of oatmeal and toppings.



Figure 15: Examples of new oatmeal products

Source: Nisshin, Kellogg's and Calbee

Japanese consumer perception of oatmeal is changing from a diet food to a healthy food, but its taste and texture, relative to rice, may be impacting its use as a regular meal within Japan. Domestic manufacturers are continuously extending and improving the range of products and advertising to suit local taste and consumer preferences.

Kellogg's and Nisshoku launched oatmeal rice in 2022 with other food companies including Hakubaku and Shinmei marketing new oatmeal rice and oat rice products in 2023. Kellogg's "Chewy oatmeal rice" packaging shows oatmeal in a bowl and is labelled "oatmeal rice" emphasising that it is a new way of eating oatmeal.

Product advertising focuses on consumer convenience and association with rice with the tag line "90 seconds in the microwave! It's like eating rice".

In addition to convenience food texture is also very important to Japanese consumers. While Australian rolled oats are already steamed and rolled making them ready to eat after microwave cooking oat groats require longer cooking (e.g. in a rice cooker) before being ready to eat like rice. Oat groats have a chewy texture with rolled oats a sticky texture.

Manufacturers such as Hakubaku are producing multi-grain rice mixes, barley foods (e.g. mochi mugi: high beta glucan glutinous barley and barley tea). Shinmei, a major rice wholesaler, has recently started selling "My Oatmeal Rice," a product they developed in concert with Nishida Barley Pearling Company. They have focused on getting as close as possible to the eating quality of white rice, easy to cook and ready to eat. They use specialised processing techniques (e.g. pearling and specialised steaming processes) to manufacture easy to eat oats without unpleasant smell or taste.

Advertising focus

Oat manufacturers and marketers in Japan commonly use health, texture and convenience attributes to attract consumers, see examples below. Also note the use of rolled oats and oat groats and the variation in pricing of the products.

Oatmeal rice/oat rice

Maker	Kellogg's	Kellogg's	HAKUBAKU	HAKUBAKU	SHINMEI (Rice wholesaler)
Product Name	Oatmeal Rice	Oatmeal	Oat Rice	Oatmeal Rice	My Oatmeal Rice
					
Main oat type	Two kinds of Rolled Oats	Instant Oats	Oat Groat	Rolled Oat	Oat Groat
Country of Origin on label	Australia	Australia	Australia	Oatmeal (processed in Japan)	Oatmeal (pearled and processed in Japan)
Appealing Points	- Chewy and Mochi-mochi texture 100% whole grain oats with no additive 60% less sugar, 6 times more dietary fiber in comparison with 150g of white rice - Convenience 90 seconds in microwave after steeping for 5 minutes in water	100% oats with no additive 1/3 sugar, 6 times more dietary fiber in comparison with 150g of white rice - Convenience 60 seconds in microwave after adding water	- Tasty and Chewy texture 100% whole grain oats - Rich in nutritious value (Insoluble/soluble dietary fibre, Iron and Vitamin B1) - Easy to eat without the unpleasant <u>particular</u> smell - Easy to cook with white rice or 100% oat grout (without rice)	- Rich in nutritious value (Dietary fibre, Iron and Vitamin B1) - Plump and chewy texture, easy to eat with <u>similar</u> to white rice texture, easy to arrange for various recipe/food menu - Convenience 90 seconds in microwave just after pouring water	- Easy to eat without <u>particular</u> unpleasant taste based on special processing technique 1) Special pearling skill Remove the starch layer which reduces <u>flavours</u>, such as sugar within a few percent 2) Pressure & steam process using pressure cooker By applying pressure, the oats are quickly steamed with high-temperature steam, giving a delicious finish to oats that tend to get dry - Rich in protein, dietary fibre, and iron with *Amino acid score 100 100% oatmeal, Can be eaten like white rice - Easy to cook with white rice
Online sales price (Yen & A\$, @95yen=A\$1)	463yen (@A\$4.9)/300g	416yen (@A\$4.4)/330g	540yen (A\$5.7)/300g	324yen (A\$3.4)/150g	680yen (A\$7.2)/500g *Amino acid score: A score that determines whether the 9 types of amino acids that cannot be produced in the body are present, 100 is a full maximum score.

Some common or targeted themes in oat product branding and messaging include:

- Rich in fermentable dietary fibre (beta glucan): Approximately 20 times more dietary fibre than white rice. Approximately 3.5 times more dietary fibre than brown rice.
- Rich in iron and vitamin B1 as well.
- Oat 100%.
- Low carbohydrates.
- Easy to cook due to the thin instant type.
- Easy to eat due to plain taste, without unpleasant oat smell, and easy to make across many kinds of dishes/recipes because of a special Japanese roasting process.

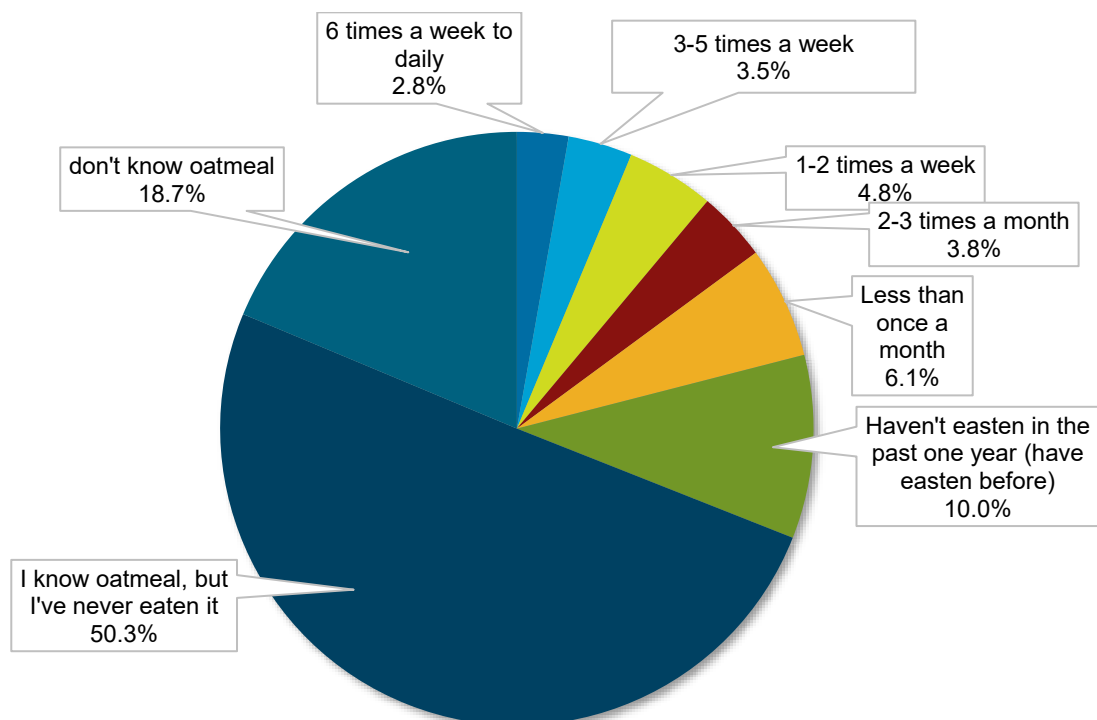
Appendix 1- Oats surveys and media

The following information provides further broad indicators on Japanese manufacturing and consumer interest in oats.

Surveys

Nissin Cisco conducted internet based multiple choice surveys, on oatmeal, in February 2022.

The results below indicates that around 50% of survey respondents were aware of oatmeal but had not eaten it.



Have you eaten oatmeal in the past one year?

Source: Nissin Cisco survey, February 2022

The survey then asked people who had eaten oatmeal, for the past one year, why they consumed oatmeal.

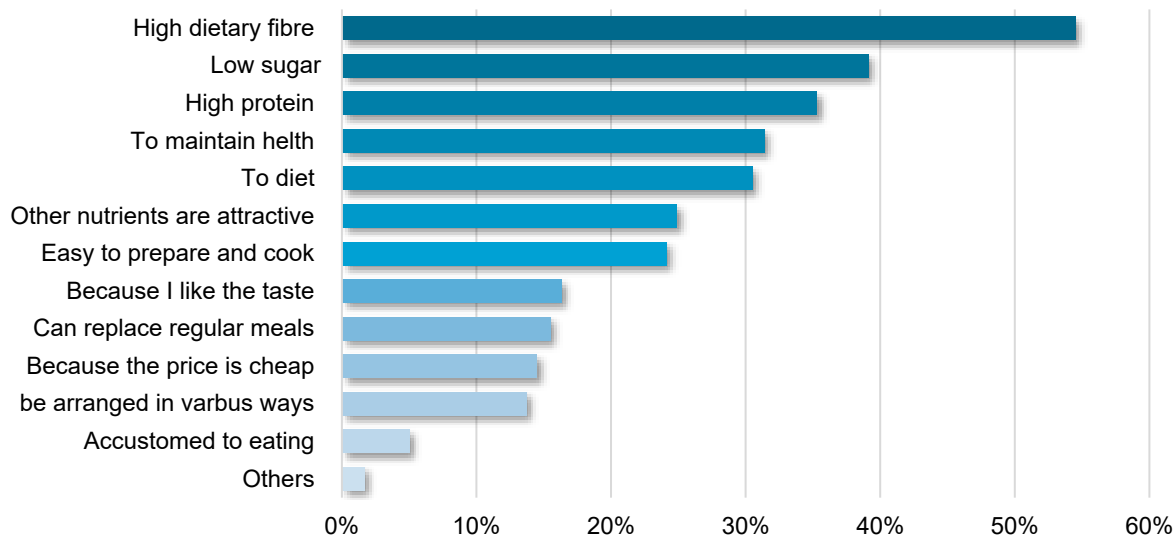


Figure 16: Responses to survey question "What are your reasons for eating oatmeal?"

Source: Nissin Cisco survey, February 2022

Survey target: 12,048 people aged 15 and over (5,248 male, 6,800 female)

Price, taste, content quantity and amount of dietary fibre were ranked highly by survey respondents, when asked what they valued in buying oatmeal.

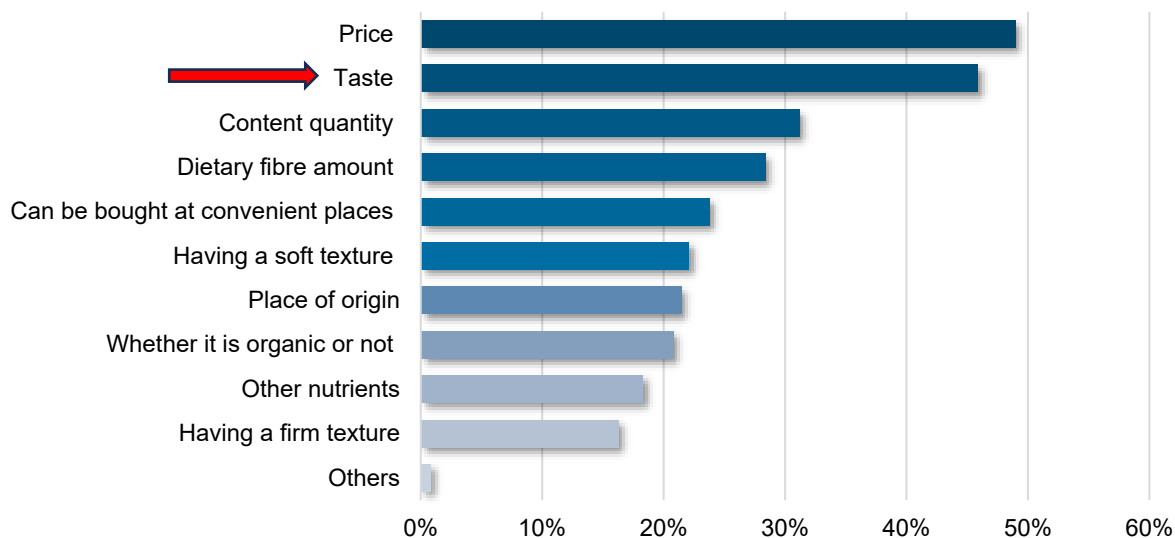


Figure 17: Survey responses to question "What do you value when buying oatmeal?"

Source: Nissin Cisco survey, February 2022

High dietary fibre, taste, high protein and price ranked highly as good points of oatmeal.

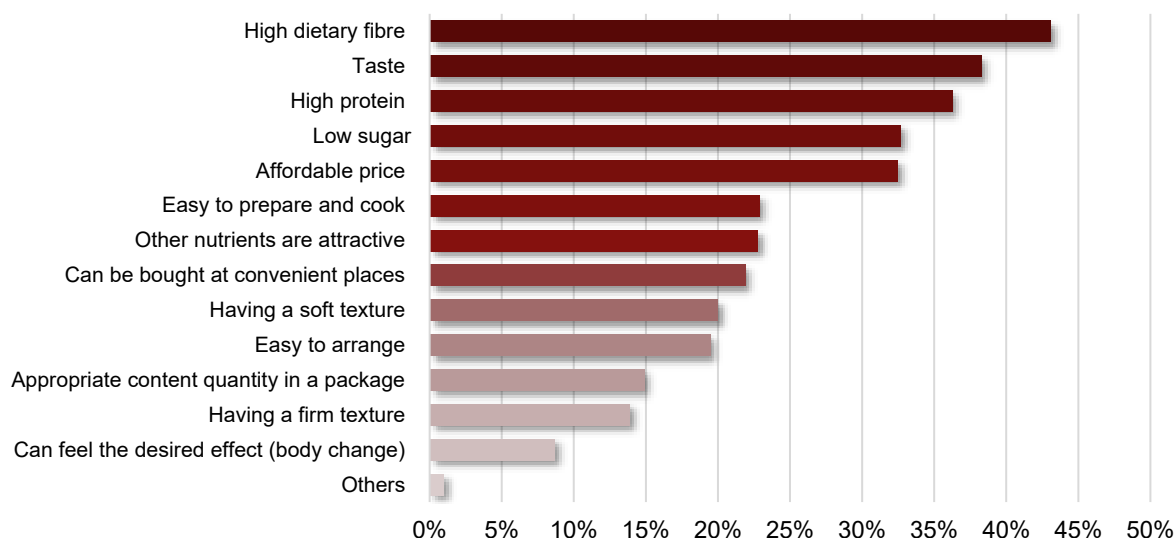


Figure 18: Responses to survey questions "What do you like about oatmeal - good points of oatmeal? "

Source: Nissin Cisco survey, February 2022

Although the awareness of oatmeal is high at 81.3%, 50.3% of the respondents answered that they know about it but have never eaten it." Also, the number of people who have eaten oatmeal remains at 31.0%, but 21.0% have eaten it for the past one year, and only 11.1% eat it at least once a week. This shows that there is still considerable room for growth.

In September 2022, the major recipe video platform "Kurashiru" conducted a survey of 4,035 members of its e-mail magazine on "changes in food consciousness brought about by the corona disaster". The COVID-19 pandemic served to bolster consumers' focus on health and the role of a nutritious diet in maintaining physical and mental wellbeing. The long period of time spent at home due to remote working, with limited opportunities for exercise and tendency towards overconsumption of food, increased consumers' awareness of weight management issues. Females, concerned about gaining weight and interested in improving overall health, became more interested in oat products. The ready-to-eat meal simplicity, convenience and storage stability also appealed.

In this survey, the ranking of "oatmeal + ○○ search" was published. The table below records the change in search words of products made with oatmeal over the period 2019-2022.

Oatmeal + ○○ search

2019	2020	2021	2022
Cookie	Cookie	Cookie	Okonomiyaki
Banana	Banana	Banana	Banana
Baby food	Pancake	Okonomiyaki	Cookie
Pancake mix	Risotto	Pancake	Risotto
Pancake	Okonomiyaki	Risotto	Pancake
Okonomiyaki	Scorn	Rice ball	Kimchi
Yogurt	Yogurt	Yogurt	Egg
Risotto	Soy milk	Kimchi	Bread

*Banana: Banana oatmeal cookie is one of the most popular recipes



Oatmeal rice ball (onigiri)



Curry and oatmeal rice



Oatmeal as the “fourth rice” following white rice, brown rice and multi-grain rice.

Appendix 2 - Oat products and labelling

The photographs below example some of the range of oat products in Japanese supermarkets and some key messages within the product labelling.

Moulamein Instant Oats

- Directly imported by Seijoishii Supermarket Co.
- Australian oats.
- Creamy taste when heated.
- Instant type that can be eaten as is with yogurt or milk without heating.

Product label in Japanese

- Moulamein Instant oats.
- Ingredients: Oats (contains some wheat).
- Origin country: Australia.
- Nutritional information (per 100g):
- Amount of heat: 413kcal, Protein: 12.8g, Fat: 10.8g, Carbohydrates: 65.6g, Salt equivalent amount: 0.01g (estimate).



Premium Pure Oatmeal: Nisshoku (Nippon Food Manufacturer)

<https://www.oatmeal.co.jp/>



- Nisshoku sources oatmeal from Finland, Australia, Canada, USA and Sweden. AUS on the label means that Australian oatmeal is used for this package.

Appendix 3 - Imports from Latvia and Lithuania

In Japan, price and wage increases have been very slow compared to other countries around the world. The wholesale supermarkets probably played a large role in the spread of oatmeal in that they purchase and sell cheaper oat products from countries such as Latvia and Lithuania enabling the availability to price conscious consumers. Internet sales have also assisted.



Internet sales of Latvian organic Oat Flakes @328 yen/500g pack



Internet sales of Latvian Oat Flakes @185 yen/500g pack



Internet sales of Canadian Rolled Oats @646 yen/1kg pack.