Changes in Tastes and Flavors

By Hideaki Nakahara

The dietary life of the Japanese people leaves little to be desired. Or at least that's the conclusion that might be drawn from trends in food consumption since the mid-1970s. Over the past 10 years there has been virtually no change in the nation's per capita caloric intake or the intake of protein. Family budgets also show evidence of surfeit. While total household consumption has risen 18% over the past five years, spending on food is up just 10%. Be it in calories or coinage, Japan's food market has reached saturation point. Yet statistics tell only half the story.

Japanese today have more opportunities to encounter new, different and delicious flavors than ever before. Rising income levels have of course played a part. But equally important has been a shift in behavior patterns. Exactly what relation is there between these changing lifestyles, tastes and behaviors, and the dietary life of the Japanese?

Housewives find jobs outside the home. They enroll in cultural enrichment classes. And naturally they try to cut down on the time they have to spend doing housework to make room for these new occupations. These trends, and especially the upswing in the number of working women, has generated new demand for food that is simply and easily prepared. Both sales and consumption are soaring of frozen foods and snacks, "retort foods" ready to be popped into the oven or hot water, takeout lunches and other pre-prepared meals.

Growing concern with staying healthy and eating the right food has boosted sales of items such as low-salt soy sauce and *miso* bean paste.

Japanese housewives used to shop every day for fresh produce to go into the evening's meal. No longer. The fastest-growing slice of the pre-prepared food market today is in ready-to-cook meals for microwave ovens. First put on the market just two years ago, these conveniently packaged products sharply reduce cooking time. Since half of all Japanese homes had microwave ovens by the end of January 1987, the market is huge. Now more than 30 food companies offer microwave meals, with in excess of 200 dishes on their menus.

Every year the Japanese also grow more aware of the importance of sports and a healthy lifestyle. Not surprising, then, that consumer awareness of health foods is also on the rise. There has been a clear increase in selective purchasing of foods that are regarded as healthy—low-calorie sweeteners, low-salt soy sauce and low-salt *miso* bean paste, to name but a few. Even with such innovative products, sales of those traditional staples of Japanese cooking, soy sauce and *miso* paste, have been sagging for more than a decade because of their notoriously high salt content. At the same time, there has been an increase in sales of mayonnaise and salad dressing. Mineral water, malt beers, low-temperature pasteurized milk, organically grown vegetables and other health foods enjoy growing popularity.

Two qualities that have recently become popular reveal some of the key characteristics of today's food market. They are "lightness," and the "hot and spicy" boom.

What is lightness? One example is the beer market, where the trend today, regardless of whether the beer be domestic or foreign, is away from bottles in favor of cans. Beer, it seems, is to be drunk as casually as a soft drink. This is what Japanese advertising copywriters mean by "lightness." Or again, they might mean the shift over the past few years in traditional bars and pubs from heavy, "bitter" drinks to mixes of white liquor and carbonated drinks, known as *chuhai* and "sours," that are lighter on the tongue.

Chinese oolong tea, known for its light texture, has become one of the most popular drinks in Japan, even becoming available hot or cold from vending machines. Then there are the "fashionable rice balls" currently popular among Japanese girls. Sporting such unusual names as "Salmon Roe Goes for a Walk," the rice balls containing salmon roe and other fillings are meant to be eaten literally on the run. They are smaller than normal rice balls, and come in multicolors and clever packaging.

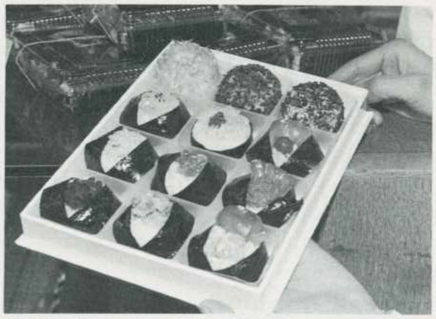
Light, hot, spicy

The other big catchphrase in today's food market is "hot and spicy." For the past few years, diners have been flocking to restaurants serving curries, ethnic foods and spicy Korean cooking. Japanese, it seems, are now seeking sharp, almost extreme stimulus in everything from pub snacks to candy and junk food.

Yet the "hot and spicy boom" does not mean that Japanese people have tired of "lightness." Far from it. In today's food market, these seemingly contradictory preferences can easily coexist. Hit products no longer equal the whole market.

As consumers have learned the truth about the additives and preservatives in the food they take off store shelves, they have begun seeking the "real thing," be it in the raw materials or the preparation of the food they eat. This preference means more work for producers and cooks, and even for the consumer.

Yet the fact remains that Japanese towns are bursting with fast-food outlets. Contradictory though it may appear, Japanese are greedily seeking both natural goodness and quick convenience. It is not uncommon to see people on their way home from buying "handmade *tofu*" stop off at the local hamburger stand for a quick bite. The desire to eat delicious food without making a big fuss about it



The trend toward greater sophistication has led to the appearance of "fashion" food items such as these unusual *onigiri* (rice balls).

"Retort foods" that are quick and simple to prepare are in great demand.

Authentic foreign cuisine is highly popular among many Japanese.

Photo: Restaurante Comida Española "Vidrio"

has created a new market of its own—luxury delicatessens and high-class Chinese noodle stands.

Grouping together some of the best-selling foods of the past five years provides a quick survey of market trends:

Group A—pre-prepared lunches, soup stock, snack foods, frozen foods, bread, restaurant meals.

Group B—independently distributed rice, handmade sausages, regular coffee, beef.

Group C—cheese, dairy products, spinach, sardines, *tofu*, margarine, mayonnaise.

Each food group has its own secret for success. The A group answers the need for quick, convenient foods. B group foods satisfy hunger for the real thing. And the C group goes along with the health boom. Clearly, the foods that sell best are those that best track changing behavior patterns and expectations.

Tastes are not all that have changed in Japan's food market. Even the flow of information has been transformed. In the past, information on food was dominated by the producer, with those upstream leading those downstream. Now, however, the industry is chasing the downstream information circulating among consumers and appearing in information magazines and flyers.

The diversity symbolized by the simultaneous popularity of ethnic, hot and handmade foods has had yet another result—every year now, the food industry puts between 3,500 and 4,000 new products on the market. Often these products do not stand alone, but are part of a series or family of foods; and nowadays, a series is considered a hit if it brings in some ¥1-2 billion. As elsewhere in the Japanese economy, the trend in the food industry is toward small-lot production of more varied goods.

Today, the same emphasis on flexibility on the production line found in the auto industry is being sought of food producers and distributors. In order to respond to the new diversity in consumer needs, advanced information hardware like VANs and point-of-sale systems need to be made available, not only to executives, but to the men and women in the field, allowing them adjust their output and its distribution to changing consumer needs. Today there is only one hard and fast rule in Japan's new-look food market—"anything goes."

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Table 1: **Monthly Average Household Food Expeditures**

(¥)

	Total consumption	Foods total	Rice	Bread	Noodles	Flour and others	Fresh fish	Dry and salted fish	Fish paste products	Other fish products	Fresh meat	Processed meat	Milk	Milk products	Eggs	Fresh vegetables
1969	70,386	24,345	3,512	455	407	113	1,814	502	416	360	2,061	399.	918	276	795	1,871
1975	157,982	50,479	4,659	1,072	980	327	4,433	1,126	752	876	4,855	1,028	1,529	490	1,255	4,086
1980	230,568	66,923	5,822	1,724	1.258	393	5,886	1,873	1,012	911	6,179	1,354	1,835	594	1,207	5,665
1985	273,114	73,735	6,233	1,945	1,423	388	6,157	2,081	1,022	1,065	6,482	1,409	1,834	719	1,077	5,887
Rate of increase in spending 1980–1985 (%)	118	110	107	112.8	113.1	99	105	111	101	117	105	104	100	121	89	104

	Dried goods & seaweeds	Soybean products	Other vegetable products & seaweed products	Fresh fruit	Fruit products	Oils & fats	Seasoning	Pastries & snacks	Pre-prepared staple	Other pre-prepared foods	Tea	Coffee & cocoa	Other beverages	Liquors	Eating out
1969	391	327	377	1,467	63	141	1,055	1,514	118	710	195	99	677	1,239	1,789
1975	691	743	885	2,951	118	406	2,131	3,340	318	1,900	387	256	1,387	2,326	4,415
1980	790	928	1,207	3,227	140	419	2,418	4,168	719	3,158	500	464	1,551	3,054	7,257
1985	816	1,117	1,342	3,642	140	416	2,664	4,552	1,075	3,738	509	512	1,543	3,520	9,015
Increase (%)	103	120	111	113	100	99	110	109	149	118	102	110	99	115	124

Source: Compiled from "Living Statistics 1987," National Living Center