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Newsletter

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 - JETRO’s participation in “Automotive & Electronics Summit 2009”

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 - Japan Spotlight, May/June 2009



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Recent Publications

Magazines:

1. Japan Spotlight, May/June 2009



Publisher's Note	~ Ban Weapon Exports to Africa http://www.jef.or.jp/journal/jef_contents_free.asp?c=3605
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Viewpoint	~ Facing Change: Some Issues for Japan&Women in Japanese Workplace http://www.jef.or.jp/journal/jef_contents_free.asp?c=3620
Promenade	~ My Memories as Exchange Student in U.S. http://www.jef.or.jp/journal/jef_contents_free.asp?c=3621
Asian View	~ Global Crisis & Asia: Finance, Stimulus & Free Trade http://www.jef.or.jp/journal/jef_contents_free.asp?c=3622
Japanese Craft and Art	~ Present of Urushi & Myself http://www.jef.or.jp/journal/jef_contents_free.asp?c=3623 ~ Traditional Craft Industries: Present Status & Moves to Activate Them http://www.jef.or.jp/journal/jef_contents_free.asp?c=3625
Challenging Region	~ "Japanese Carpets" Evolving through Tradition http://www.jef.or.jp/journal/jef_contents_free.asp?c=3626
Finance	~ Bank-held Shares Shaking Financial System http://www.jef.or.jp/journal/jef_contents_free.asp?c=3627
Economic Focus	~ Basic Strategy for Post-Crisis Growth http://www.jef.or.jp/journal/jef_contents_free.asp?c=3628
Culture	~ Jerusalem prize & "Departures" http://www.jef.or.jp/journal/jef_contents_free.asp?c=3629
Keeping up with Time	~ Reactor Decommissioning Plan in Spotlight http://www.jef.or.jp/journal/jef_contents_free.asp?c=3607



regional areas, including IKEA, the Swedish home furnishings company, and French outdoor advertiser, MCDecaux (which is part of JCDecaux).

* JETRO operates six Invest Japan Business Support Centers (IBSCs) across the country to provide one-stop support and service to foreign firms seeking to establish or expand their business in Japan. The centers, linked to relevant government ministries, agencies and regional governments, provide free temporary office space (for up to 50 business days), consultations with expert advisors, and access to a wealth of information. A total of 669 firms have utilized IBSC to set up their business in Japan since the first IBSC opened in Tokyo in 2003.

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4. 10th New Industry Creation Regional Collaboration Forum Building up International Cooperation in the Agricultural Industry

On June 10th, JETRO organized the “10th New Industry Creation Regional Collaboration Forum” at JETRO headquarters Tokyo , under the theme, “Building up International Cooperation in the Agricultural Industry.”

The forum, held as part of JETRO’s Regional Industry Tie-up (RIT) program, which promotes two-way industrial exchange and collaboration between regions in Japan and other countries, featured presentations and a panel discussion examining the latest trends in Japan’s agricultural industry. The forum also included a presentation on government activities in the Netherlands to promote the country’s agriculture industry and a case study of a promising new RIT project between Hokkaido and New Zealand.



W h a t ' s n e w o n t h e n e t ?

New Reports from JETRO

Below are some recently published reports now available on the JETRO website.

[*10 Advantages to Invest in Japan](http://www.jetro.go.jp/en/invest/whyjapan/)

<http://www.jetro.go.jp/en/invest/whyjapan/>

[*Japan's Growing Market for Pharmaceuticals and Medical Devices](http://www.jetro.go.jp/en/invest/reports/pdf/market090331.pdf)

<http://www.jetro.go.jp/en/invest/reports/pdf/market090331.pdf>

[*Sitting Tight on the Japanese Market](http://www.jetro.go.jp/en/invest/reports/pdf/insight090331.pdf)

<http://www.jetro.go.jp/en/invest/reports/pdf/insight090331.pdf>



Exploring Japan

“Introduction to the Retail Business in Japan”, a part of the JETRO’s “Invest Japan” report of “Attractive Sectors: Retail”

Major Forms of Retail Business in Japan

In Japan’s retail market, various businesses compete by taking maximum advantage of their distinctive characteristics. As social conditions and lifestyles have evolved, business conditions have diversified, markets have moved upscale and new opportunities have been created.

Basic retailers such as department stores, supermarkets, convenience stores (CVS) and specialty stores have transformed along with the changing times. Shopping centers that combine these retail businesses have been developed in a variety of urban and suburban formats, and offer a range of possibilities. In every case, branding and business development that address each area and target market are the key. Outlet malls and “100 yen shops” have also established a strong presence, and mail order sales via the Internet and mobile phones have been displaying remarkable growth as well.

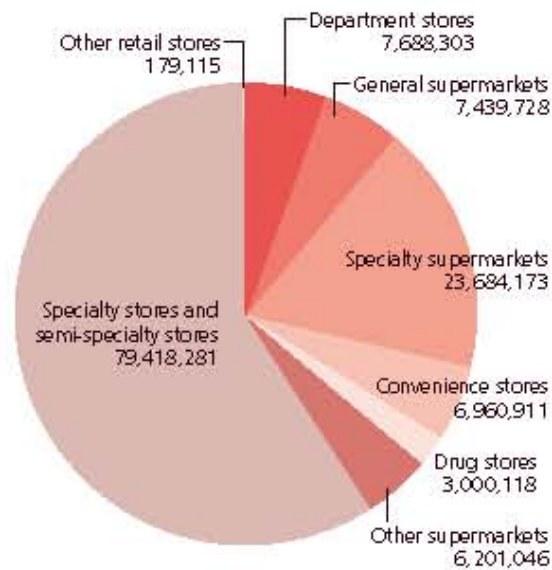
Form	Characteristics	Trends
Department store	Large-scale retailers in locations with a large population and convenient transportation that sell high-quality products such as clothing, food and interior/lifestyle items	Japan’s major department stores have been undertaking large-scale reforms since 2003. Other notable changes include improvements in customer service capabilities, sales promotions targeting their best customers and construction of barrier-free stores.
Supermarket: General Merchandise Store (GMS)	Large-scale stores that retail practical clothing, food and interior/lifestyle items. Characterized by extensive inventory and high volume sales.	Have greatly expanded sales floor space per store in recent years. In many cases located adjacent to shopping malls, or in large-scale multi-tenant facilities.
Supermarket: Supermarket (SM)	Retailers with sales floor space 250m ² or more, with specialty goods products accounting for 70% or more of all items sold (in the case of a food specialty supermarket, for example, foods account for 70% or more of all items sold)	Japanese are very particular about food, especially the freshness of vegetables and fish. Demand for foods selected with an eye for safety, worry-free consumption, and health creates an opportunity for competitive advantage that is not based solely on price.
Specialty store Semi-Specialty Store	Retailers that stock a limited number of specialty products sold by knowledgeable sales staff. (Specialty store: specialty products account for 90% or more of all items sold; Semi-specialty store: specialty products account for 50% or more of all items sold)	Specialty stores and semi-specialty stores still form the backbone of the retail sector, it is the category with the most foreign companies, including exclusive brand stores and apparel specialty shops.
Convenience Store (CVS)	Self-service retailers that deal mainly in food and beverages, and have a sales floor area between 30m ² and 250 m ² and whose business is open 14 or more hours per day.	Located in residential areas and along office streets, with around-the-clock operations being the norm. Have evolved as “life support bases” for consumers of all ages by offering services such as ATMs, payment windows for public utility charges and mail order payments, reservations and purchases of airline, movie, concert and other tickets, and receipt of products purchased by mail orders.

Annual Merchandise Sales (Million Yen)

1	Specialty stores and semi-specialty stores	79,418,281	5	Convenient stores	6,960,911
2	Specialty Supermarket	23,684,173	6	Other supermarkets	6,201,046
3	Department stores	7,688,303	7	Drug stores	3,000,118
4	General Supermarket	7,439,728	8	Other retail stores	179,115

Source: "Census of Commerce (FY2007) Bulletin", Ministry of Economy, Trade and Industry

Annual Merchandise Sales (million yen)



Source: "Census of Commerce (FY2007) Bulletin", Ministry of Economy, Trade and Industry

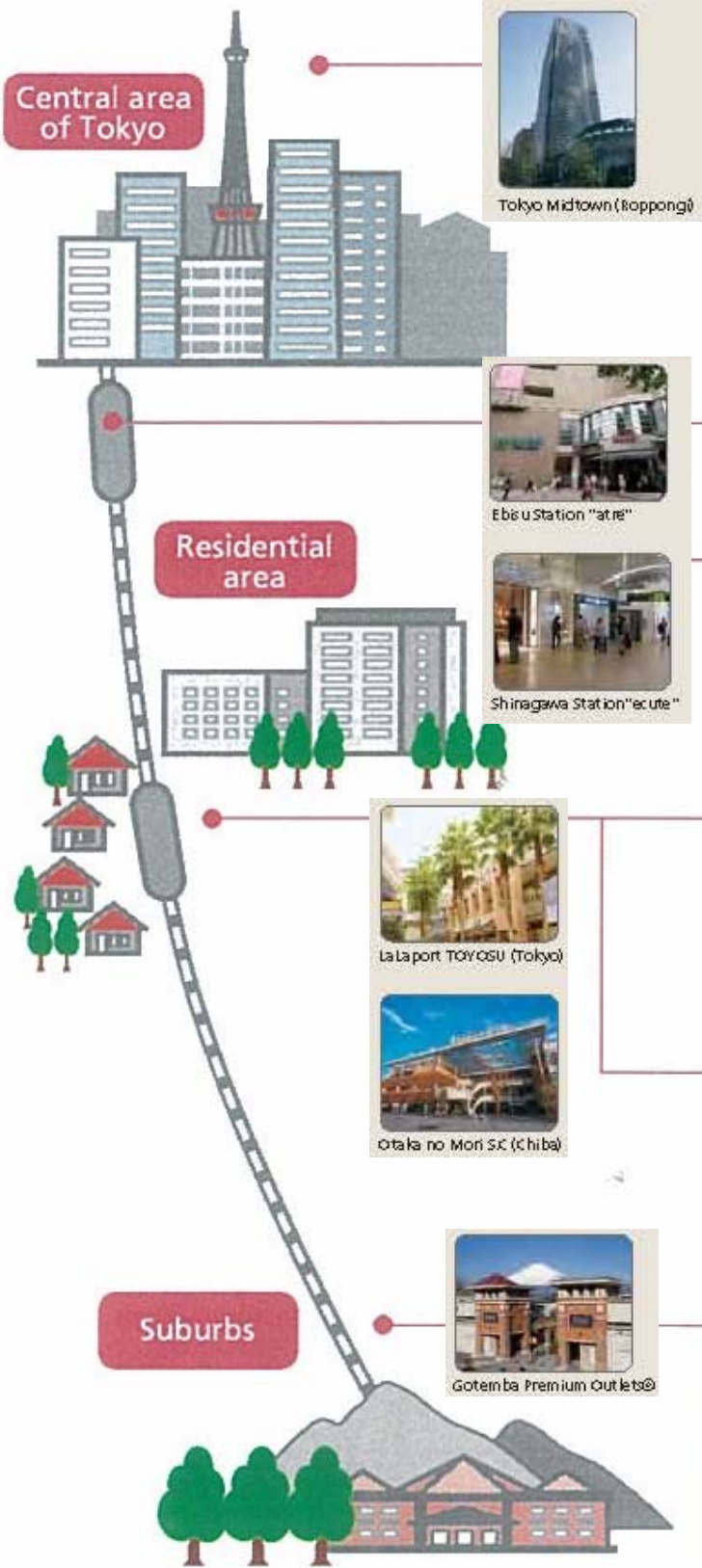
Shopping Center Industry Trends

Japan has approximately 2,800 shopping centers, with estimated gross sales of 27 trillion yen in FY2007 (Japan Council of Shopping Centers research)

These shopping centers seek to support consumers' new lifestyles by bringing together a range of stores, centered on apparel brands by manufacturers and select shops, as well as service business such as restaurants and cinemas.

Moreover, shopping centers are increasing rapidly in attractive locations near mass transit stations, including within buildings located above or across from stations and even within stations themselves.

Types of Shopping Centers



Offer high-end products
Central urban hybrid commercial facility
 Located in city center or near major stations, the facility is formulated in combination with shopping centers, offices, museums and hotels, etc.

Cater to daily commuters
Station building Customers can enter the building directly from the station; bustles with crowds of tourists and individuals commuting to work and school.
Ekinaka
 Commercial facilities located inside station premises, referred to as "ekinaka," have been spreading rapidly in major metropolitan areas that serve multiple train/subway lines.

Provide combined entertainment and Shopping experience
 Themed formats, regional formats, etc. Located near residential areas, in a facility that combines a shopping center with restaurants and amusement facilities. Spreading rapidly in major metropolitan areas that serve multiple train/subway lines.
Local-community type commercial establishment
 Located near residential areas, and provides local convenience and daily needs. Has a large parking lot as an annex.

Offer lowest possible prices
Outlet malls
 Outlet malls offer numerous retail stores aimed at product inventory clearance. Located in the vicinity of an expressway interchange or near a main suburban station.

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