#SpainFoodNation
Advisory Councils

Meeting Report and Recommendation
Japan

June 13, 2025

FWS Foods and Wines from Spain

#alimentosdespaña

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Introduction

On May 20, 2025, the "SPAIN FOOD NATION SUMMIT JAPAN 2025" roundtable was held at the auditorium of the Embassy of Spain in Tokyo. The event aimed to further enhance the value and strategic development of Spanish food and beverages in the Japanese market. It served as a dynamic platform where leading industry experts, buyers, and chefs gathered to engage in active discussions and exchange of ideas.

The roundtable was attended by Mr. Iñigo de Palacio España, Ambassador of Spain to Japan, and Mr. Luis Planas, Minister of Agriculture, Fisheries and Food of Spain, who visited from Spain. Their presence underscored the Spanish government's strong interest in strengthening ties with the Japanese market and demonstrated its commitment to supporting such efforts. Expectations were shared for deepening collaboration between the two countries, particularly in the food and wine sectors.

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#SpainFoodNation Advisory Councils

1.1.

Project Scope & Objectives 2025

With the goal of strengthening the presence of Spanish food and beverages in the Japanese market, an advisory council composed of experts in various fields was established. This council brings together professionals from a wide range of sectors, including distribution, sales, marketing, culinary arts, and education, with an emphasis on practical, experience-based proposals drawn from insights gained on the ground. During the discussions, diverse aspects such as changing consumer preferences, market structure trends, and institutional challenges were thoroughly analyzed. Strategic planning was undertaken with consideration of the cultural affinity between Spain and Japan.

1.2.

Methodology

Two preliminary meetings were held to identify the current situation and challenges in each field. Based on the discussions, key proposals were consolidated and presented during the panel discussions on the day of the roundtable. Clear themes were set for both the food and wine sectors, allowing for in-depth discussions focused on specific challenges and opportunities.

In the food sector, the overarching theme was “Spanish Cheese and Olive Oil: Redefining in the Japanese Market,” under which discussions centered on “New Positioning Strategies for Spanish Cheese in the Japanese Market” and “Redefining the Value of Spanish Olive Oil and the Challenge of Entering the Premium Market.”

In the wine sector, the theme was “From Price Competition to Value Competition: A New Strategy for Spanish Wine,” with discussions exploring "How to Create a 'Reason to Be Chosen' – Expressing the Appeal and Value of Spanish Wine" and "'Lightness' as a Gateway to New Value: Beyond Non-Alcoholic and Low-Alcohol."

1.3.

Advisory Council Members

In preparation for the roundtable, advisory councils composed of experts were established for the two sectors: food and wine. The Food Advisory Council consisted of six members, while the Wine Advisory Council had seven members. Both councils included professionals with diverse hands-on experience in areas such as distribution, sales, marketing, culinary arts, and education.

Aiming for the strategic development of Spanish food and beverages in the Japanese market, the councils provided multifaceted recommendations based on insights into consumer trends and industry structures. During the preliminary meetings and roundtable, council members actively shared case studies based on their own on-the-ground experience, pointed out specific challenges, and offered constructive opinions on future opportunities, resulting in highly practical and effective discussions.

The following is an introduction of the advisory council members.

Food Advisory Council Members

Akira NAKATAKE
Head Chef
Izurun

Guillermo GONZALEZ
Spanish Branch, President
EAT8

Midori NIIMURA
Executive Managing
Director
Sales & Marketing
Azalea Inc.

Shuichi KAMEYAMA
Adviser
Burra Foods PTY., LTD.
Japan Office

Tomohiro OYAMA
Manager Sales Division 1
Asahi Grant Company
Limited

Toshiya TADA
Chairman & Founder
The Olive Oil
Sommelier Association
of Japan

Wine Advisory Council Members

Alfonso MARTIN
Managing Director
Union Liquors K.K.

Chisako MORIMOTO
Wine Instructor
Academie du Vin

Kazuto SAKURAI
Owner
Wine bar LOS VINOS

Kumi UENO
Manager, Buyer
WINE CURATION

Naoto UCHIIKE
Owner, Wine Specialty
Store Petite Maison

Shigeru AOKI
Executive Chef
Bar de Ollaria

Yasushi TAMURA
President
MAVIE Corporation

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2.1.

Food
Key Takeaways

Spanish Cheese and Olive Oil: Redefining in the Japanese Market

The roundtable for food featured two panel discussions under a unified theme: “New Positioning Strategies for Spanish Cheese in the Japanese Market” and “Redefining the Value of Spanish Olive Oil and the Challenge of Entering the Premium Market.” Each discussion presented specific strategic proposals, taking into account the unique characteristics of the products and the challenges they face in the Japanese market.

Panel Discussion Part 1: New Positioning Strategies for Spanish Cheese in the Japanese Market

Core Insight
What is the current status of Spanish cheese in the Japanese market? What are the key challenges to improving its recognition and consumer awareness?
• Given the current situation of the cheese sector in Japan — marked by the depreciation of the yen and the EU-Japan Economic Partnership Agreement (EPA) —, Spanish cheese has strong growth potential in the Japanese market. This potential is especially notable for sheep's milk varieties, which are appealing to Japanese consumers due to their nutritional value.
• However, the primary challenge in increasing Spanish cheese sales in Japan lies in the product's very low level of recognition. Therefore, it is essential to raise awareness among both professionals and consumers about the diversity, quality, and pairing versatility of Spanish cheeses. Education and communication are thus fundamental pillars for the future success of the sector in this market.

The first part of the round table session began with an overview of the current situation of Spanish cheese and an analysis of consumption trends and market tendencies in Japan. According to Mr. Kameyama, domestic cheese consumption is being affected by rising prices and the depreciation of the yen, leading to a trend of "increased spending but decreased consumption volume." This indicates that finding the right balance between price and quantity is a key challenge.

On a more optimistic note, the EPA with the EU has led to tariff reductions, particularly on soft cheeses, providing Spanish cheese with a potential competitive advantage in the medium to long term.

A highlight of the discussion was the potential of sheep's milk cheese. Mr. Gonzalez emphasized its distinctive Spanish flavor, high nutritional value, and suitability for lactose-intolerant consumers, factors that could serve as key differentiators in the Japanese market. Mr. Nakatake, who offers these cheeses in his restaurant, shared that unique varieties like Idiazábal and Manchego have been well received by Japanese consumers. He also suggested that Spain's distinctive pairing recommendations such as combining cheese with membrillo could enhance future sales strategies.

During the discussion, Mr. Oyama pointed out the issue of lack of product awareness, while Ms. Niimura noted the limited number of importers and distributors as another market challenge.

Moderator Mr. Gonzalo Ramos concluded the discussion by noting that while Spanish cheese shows growth potential in Japan, challenges remain in terms of low product recognition and consumer understanding. He stressed the need to reposition Spanish cheese, especially its uniquely strong category of sheep's milk cheese by promoting its nutritional benefits and digestibility to Japanese consumers.

He emphasized the importance of widely disseminating basic information and the appeal of Spanish cheese to both consumers and distribution stakeholders in Japan. Enhancing the presence of Spanish cheese is, he stated, "our responsibility." He wrapped up by recommending the continued and practical dissemination of information through platforms and tools provided by ICEX, including seminars and exhibitions such as FOODEX JAPAN.

Panel Discussion Part 2: Redefining the Value of Spanish Olive Oil and the Challenge of Entering the Premium Market

Core Insight

What is the current positioning of Spanish olive oil in the Japanese market? What kinds of strategies or tools can be used to strengthen its market position?

- While Spain stands as the world's foremost producer of olive oil, the breadth of its diversity and the excellence of its quality remain insufficiently recognized within the Japanese market.
- To successfully position Spanish olive oil in the Japanese market, it is essential to shift its image from a low-cost commodity to a premium product. This requires clear communication of its quality, regional diversity, and flavour profiles through educational efforts and intuitive labelling.

In the following session, speakers emphasized the need for Spanish olive oil to communicate its value based not only on price competitiveness, but also on quality and story.

Mr. Gonzalo Ramos opened the discussion by referencing preliminary meetings held by the advisory committee, stating that while Spanish olive oil is of high quality, it continues to be perceived in the Japanese market as an inexpensive, generic product. He stressed that a clear redefinition of Spanish olive oil as a premium line is now essential and set the stage for the panel.

Ms. Niimura pointed out that the recent surge in olive oil prices has created a growing number of chefs who has been "priced-out," making stable supply and the balance between price and quality a critical issue for the foodservice industry.

Mr. Tada highlighted the difficulty of educating consumers about olive oil quality. Despite running an educational institution for nearly 15 years, he noted that the distinctive flavors of Spanish olive oil shaped by region and variety are not sufficiently communicated to consumers. He also raised the issue that flavor differences are hard to discern just by looking at a bottle. As a solution, he introduced a case study where a flavor index was implemented for products awarded in international olive oil competitions, promoting visually intuitive labeling. He argued that such indicators can empower producers to actively promote flavor characteristics and deepen consumer understanding.

Mr. Ramos then invited Mr. Gonzalez to share his perspective. Mr. Gonzalez stated that the greatest challenge in establishing olive oil as a premium product lies in balancing price and quality. In Japan in particular, where consumers tend to prioritize price, promoting quality alone is not sufficient.

Mr. Nakatake added that, given the wide variety of flavor profiles and characteristics among olive oils, it is important to introduce user-friendly labeling that helps general consumers choose the right oil for specific uses. This, he argued, would play a key role in influencing purchasing behavior.

In his closing remarks, Mr. Ramos summarized the key points for redefining Spanish olive oil in the Japanese market. He emphasized that although Spain is the world's largest producer of olive oil, its diversity and quality are still underrecognized in Japan. Therefore, it is crucial to better organize and present this information, especially through more visually accessible methods.

He endorsed Mr. Tada's proposed flavor index and origin labeling as highly effective tools that combine educational value with clarity and recommended they be widely adopted in future promotional efforts. Furthermore, he stressed that establishing Spanish olive oil as a natural part of everyday life in Japanese households—beyond just premium positioning—will be vital to increasing consumer engagement.

Lastly, he concluded that campaigns such as "EAT SPAIN DRINK SPAIN" led by ICEX play a key role in communicating the background of production regions, usage variety, and cultural connections, and will be essential in paving the way for Spanish olive oil's success in the premium segment.

2.2.

Challenges

Over the past decade, Japan's imports of natural cheese have shown a consistent upward trend, remaining at a high level of around 260,000 tons annually since 2021. In 2023, imports exceeded 286,000 tons, and projections for 2024 suggest that figures will again surpass 240,000 tons. These figures highlight natural cheese as a staple imported food product with stable demand in the Japanese market.

However, recent developments such as rising global market prices and the depreciation of the yen have driven overall cheese prices upward. According to Japan's Ministry of Internal Affairs and Communications' "Household Survey," although household spending on cheese has increased, the actual quantity purchased is on the decline. In other words, consumers are spending more on cheese but receiving less in return.

Approximately 80% of Japan's cheese supply depends on imports, with domestic production accounting for only 20%. In this context, the imported cheese market is highly susceptible to price fluctuations. Spanish cheese, in particular, holds only a limited share within this market. Therefore, in order to strengthen its presence in Japan, it is essential to implement promotional strategies and awareness-raising efforts that highlight Spain's unique qualities—such as sheep's milk cheeses and products with Denomination of Origin (D.O.) certification.

Cheese Supply and Demand Table in Japan

Items \ FY	2019	2020	2021	2022	2023
Domestic natural cheese production ① (②+③)	(98.7) 40,257	(105.2) 42,364	(107.0) 45,336	(101.8) 46,160	(97.8) 45,146
Processed cheese ingredients ②	(93.1) 19,402	(108.8) 21,107	(102.3) 21,585	(107.9) 23,281	(100.4) 23,377
Other than for processed cheese ingredients ③	(104.7) 20,855	(101.9) 21,257	(111.7) 23,751	(96.3) 22,879	(95.1) 21,769
Total amount of imported natural cheese ④ (⑤+⑥)	(102.6) 286,938	(98.5) 282,494	(97.9) 276,645	(92.9) 256,902	(94.8) 243,452
Processed cheese ingredients ⑤	(98.3) 92,175	(99.1) 91,338	(96.7) 88,296	(85.2) 75,197	(94.2) 70,807
Within the tariff quota	(89.3) 45,647	(103.1) 47,041	(104.3) 49,050	(104.2) 51,118	(97.2) 49,670
Other than for processed cheese ingredients ⑥	(104.8) 194,763	(98.1) 191,156	(98.5) 188,350	(96.5) 181,705	(95.0) 172,645
Natural cheese consumption ⑦ (③+⑥)	(104.8) 215,618	(98.5) 212,413	(99.9) 212,101	(96.5) 204,584	(95.0) 194,414
Processed cheese consumption ⑧ (⑨+⑩)	(98.4) 140,378	(101.9) 143,056	(99.5) 142,409	(92.0) 131,049	(92.4) 121,044
Domestic production volume ⑨	(99.0) 131,661	(101.6) 133,809	(99.4) 132,956	(92.3) 122,763	(92.7) 113,773
Import quantity ⑩	(90.4) 8,717	(106.1) 9,247	(102.2) 9,453	(87.7) 8,286	(87.8) 7,271
Total cheese consumption ⑪ (⑦+⑧)	(102.2) 355,996	(99.9) 355,469	(99.7) 354,510	(94.7) 335,633	(94.0) 315,458
Domestic production rate (%)					
Processed cheese raw material ②/(②+⑤)	17.4	18.8	19.6	23.6	24.8
Total cheese consumption (natural cheese base)	12.0	12.7	13.7	14.9	15.3

Note 1: The latest figures are preliminary figures.
Note 2: Of the domestic natural cheese production, ② for use as a processed cheese ingredient is the amount used as an ingredient from inventory and from that produced in the year in question.
Note 3: Apart from ③ and ⑥ for use as a processed cheese ingredient, the amount is used for direct consumption, commercial use, and other raw materials.
Note 4: The domestic proportion of total cheese consumption is estimated from the proportion of domestic natural cheese production in total cheese consumption converted to natural cheese.
Note 5: From the figures released in FY2016 to the figures released in FY2015, the category name has been revised to "Other than for use as a processed cheese ingredient" and "Natural cheese consumption for direct consumption" to "Natural cheese consumption."

Source: Research by the Livestock Bureau, Milk and Dairy Products Division

The discussions during the first preliminary meeting (April 22, 2025) and the second preliminary meeting (May 8, 2025) revealed the following challenges.

Challenges Identified in the cheese sector:

- Mr. Kameyama pointed out that due to the surge in cheese prices and the depreciation of the yen, there is a notable trend in the Japanese market where consumer spending on cheese is increasing while actual consumption volume is declining.

- Ms. Niimura highlighted the limited number of distributors handling Spanish cheese, stressing that the development of distribution channels remains a key challenge.

- Mr. Oyama noted that low product recognition and a lack of quality consumer-facing information are major obstacles preventing deeper market penetration.

- Mr. Tada raised concerns about the lack of promotion and educational systems, which results in the core value of cheese not being properly conveyed to consumers.

- Mr. Gonzales observed that Spanish soft cheeses, especially sheep milk cheeses, are underrepresented in the Japanese market and are often disadvantaged in terms of pricing. He emphasized the need for value-based differentiation, recommending stronger promotion for flagship products such as Manchego. He also highlighted the importance of promoting the digestibility of sheep milk, particularly in light of regulatory differences between the EU and Japan regarding lactose-free labeling. Moreover, he pointed out that EU certification systems such as D.O. and IG are not widely recognized in Japan, and suggested that linking cheese to experiential and cultural storytelling unique to Spain could be effective.

- Mr. Nakatake shared insights from the restaurant field, noting high evaluations of semi-hard cheeses such as Queso Manchego and Idiazabal, and stated that high-quality products can sell well even at premium prices.

- Some committee members also expressed concerns about the difficulty of importing these cheeses and the lack of clear demand beyond professional chefs, identifying these as significant barriers to market expansion.

Challenges Identified in the olive oil sector:

- Ms. Niimura highlighted that due to the recent price hikes, there is a growing number of chefs who have been "priced-out", making it increasingly difficult to use olive oil consistently in the foodservice industry.

- Mr. Gonzales noted that despite the high quality of Spanish olive oil, lack of price competitiveness poses a challenge to establishing a clear premium position. He also pointed out that many producers are small-scale, which results in limited promotional budgets and weak retail appeal.

- Mr. Tada emphasized that the diversity of olive oil flavors is still poorly understood in Japan. He raised the issue that bottle labeling alone does not effectively communicate flavor differences, highlighting the need for better visualization and flavor indication.

- Mr. Nakatake commented that labeling for intended usage (e.g., cooking, finishing, dressing) is often lacking, and providing such clear information is crucial for influencing consumer purchasing behavior.

- Mr. Oyama stated that in the foodservice sector, a proper balance between price and quality is essential. He emphasized that more effort is needed to promote finishing-use olive oils, and also suggested that redefining Spanish olive oil in the context of Spanish cuisine as a whole is critical. Like Italy, Spain should aim to create a "cultural boom" linking food products with a broader gastronomic experience.

- Some committee members pointed out insufficient promotional systems and inadequate information dissemination, as well as issues with labeling standards and the lack of awareness about the D.O. (Denomination of Origin) system in Japan.

2.3.

Opportunities

In Japan, the import volume of Spanish olive oil reached approximately 34.4 million kg in 2022, but declined to 27 million kg in 2023 and further decreased to 25.5 million kg in 2024, marking two consecutive years of decline. This contraction is primarily due to severe droughts and extreme heat in Spain, particularly in major production areas such as Andalusia, which have led to significant drops in harvest yields. These climatic challenges have also contributed to global supply shortages and rising prices in the international market.

Despite these setbacks, Spain remains the largest supplier of olive oil to Japan, accounting for approximately 60% of total imports, far surpassing Italy and Türkiye. However, Spanish olive oil continues to be perceived as a low-cost, generic product, and its quality and diversity are still underrecognized in the Japanese market.

Looking ahead, there is a pressing need to shift toward the premium segment by strengthening value communication through taste profiles, usage suggestions, and origin labeling (such as the D.O. designation). This will be essential for effectively differentiating Spanish olive oil and conveying its authentic value to Japanese consumers.

Import Volume of Olive Oil to Japan by Major Source Countries
2022–2024

(Unit: kg)

2022					
	EVO	VO	Other VO	Others	Total
Spain	24,992,683	3,839	1,697	9,413,481	34,411,700
Italy	15,969,377	27,204	13,488	3,879,878	19,889,947
Türkiye	3,967,154	655		334,935	4,302,744
Greece	665,469				665,469
Portugal	476,740			9,974	486,714
France		2,472			2,472
Others	292,054	2,492	638	30,225	325,409
Total	46,363,477	36,662	15,823	13,668,493	60,084,455

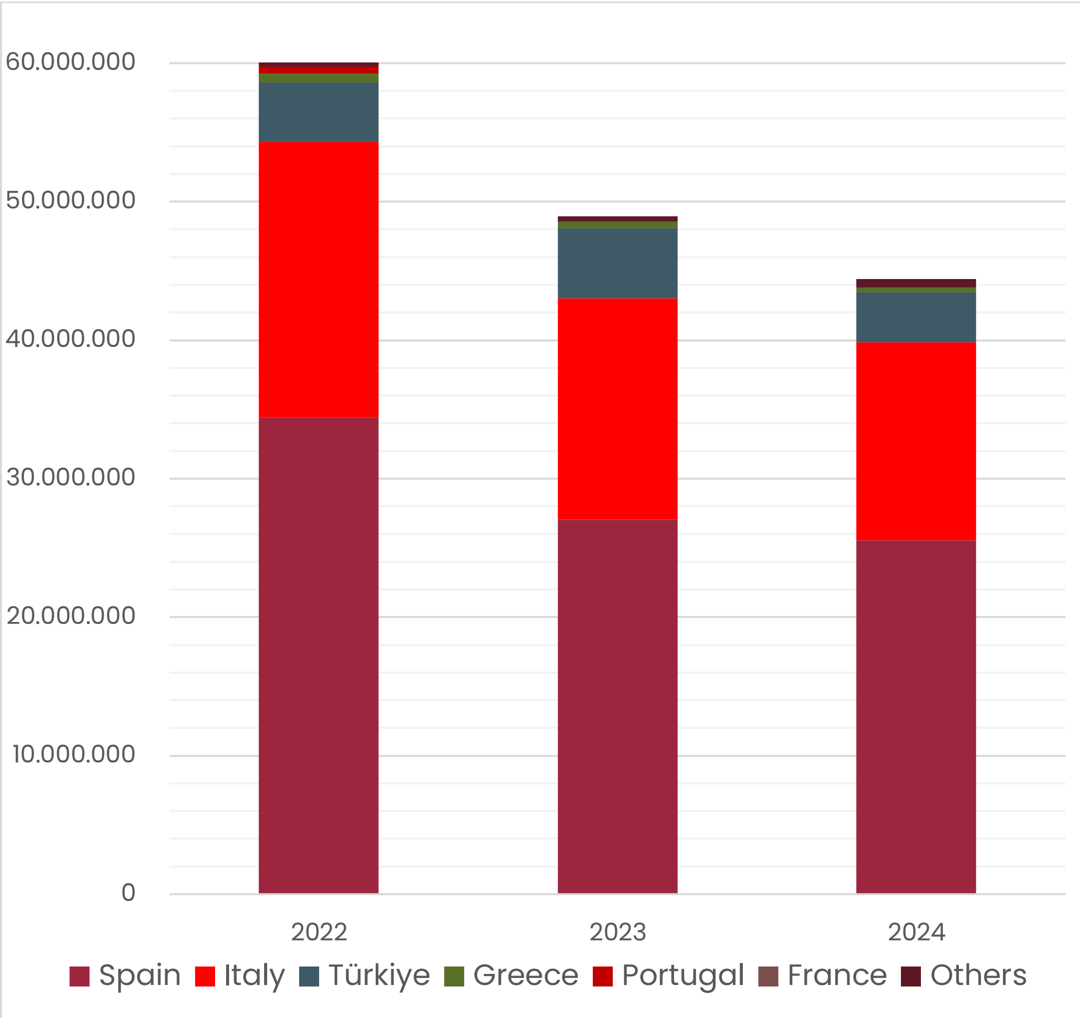
2023					
	EVO	VO	Other VO	Others	Total
Spain	19,887,706	3,200		7,147,262	27,038,168
Italy	12,953,188			3,024,144	15,977,332
Türkiye	4,819,004	1,448		242,191	5,062,643
Greece	481,851				481,851
Portugal		1,759			1,759
France		1,190			1,190
Others	336,961	4,948		40,641	382,550
Total	38,478,710	12,545	0	10,454,238	48,945,493

2024					
	EVO	VO	Other VO	Others	Total
Spain	20,154,309	3,028		5,417,435	25,574,772
Italy	11,843,131		133	2,434,610	14,277,874
Türkiye	3,445,881	11,064	7,610	143,951	3,608,506
Greece	361,708			10,183	371,891
Portugal		1,828			1,828
France		2,384			2,384
Others	537,503	4,132	0	22,053	563,688
Total	36,342,532	22,436	7,743	8,028,232	44,400,943

Source: Ministry of Finance, Trade Statistics

Olive Oil Imports to Japan by Major Supplying Countries (2022–2024)

(Unit: kg)



Source: Ministry of Finance, Trade Statistics

Discussions at the first preliminary meeting (April 22, 2025) and the second preliminary meeting (May 8, 2025) clarified the opportunities in the fields of cheese and olive oil, respectively.

Opportunities identified in the cheese sector:

- Mr. Kameyama pointed out that the EPA has created favorable tariff conditions, providing a tailwind especially for expanding sales of soft and semi-hard cheeses.

- Mr. Gonzalez stated that sheep's milk cheese has the strength of being able to appeal as "lactose-free" to consumers with lactose intolerance. He also noted that even in the high-price range, added value can compensate, and strict quality certifications such as D.O. and IG can be key selling points for consumers who demand quality in imported cheese.

- Mr. Nakatake mentioned that semi-hard cheeses such as Manchego and Idiazabal have a strong track record and high evaluation in restaurants, and if the quality is good, they are accepted regardless of price.

- Mr. Oyama said that expanding processing into forms that are easy to incorporate into everyday meals such as sliced or shredded would lead to growth in the household market.

Opportunities identified in the olive oil sector:

- Mr. Tada pointed out that visualizing Spanish oils evaluated in international contests through tools like a flavor index could serve as material for quality appeals. He also noted that traceability displays using QR codes or blockchain technology, showing origin, variety, and harvest time, contribute to consumer reassurance and brand value enhancement.

- Mr. Nakatake and Ms. Niimura expressed the opinion that promoting classification by usage (e.g., finishing oil, cooking oil), which has not yet been established in the Japanese market, can support consumer choice.

- Mr. Gonzalez stated that clear differentiation from cheap commodity products is expected to establish a position in the premium market.

2.4.

Conclusions

Through discussions in the food sector, it has become clear that a redefinition of Spanish cheese and olive oil in the Japanese market is required.

Regarding cheese, differentiation strategies focusing on uniquely Spanish products such as sheep's milk cheese, along with labeling strategies that leverage institutional differences between Japan and Europe, have emerged as promising approaches. Despite challenges in distribution and awareness, pathways for expanded sales utilizing high evaluations in restaurants and tariff advantages have also been identified.

On the other hand, for olive oil, there is a need to present new value axes beyond price competitiveness, such as flavor and usage differentiation, highlighting the importance of education and visualization efforts as derived from the discussions.

For both product categories, proposing authentic Spanish experiential value and restructuring promotions are expected to contribute to mid- to long-term value establishment and an expanded presence in the Japanese market.

3

Wine

3.1.

Key Takeaways

From Price Competition to Value Competition: A New Strategy for Spanish Wine

The roundtable for wine featured two panel discussions under a unified theme: “How to Create a 'Reason to Be Chosen' – Expressing the Appeal and Value of Spanish Wine” and “'Lightness' as a Gateway to New Value: Beyond Non-Alcoholic and Low-Alcohol.” Each discussion presented specific strategic proposals, taking into account the unique characteristics of the products and the challenges they face in the Japanese market.

Panel Discussion Part 1: How to Create a "Reason to Be Chosen" – Expressing the Appeal and Value of Spanish Wine

Core Insight
Spanish wine is widely perceived in the Japanese market as an affordable and tasty option. How can Spanish wine communicate its value beyond price to strengthen its positioning in the Japanese market? • In order to effectively position Spanish wine as a product of choice within the Japanese market, it is essential to move beyond price-based appeal and focus on communicating its cultural richness, regional diversity, and emotional value. • Strategies such as storytelling, intuitive labelling, and immersive experiences can help convey the Spanish wine's unique identity. Emphasizing quality, origin, and certifications through digital and in-store channels will enhance consumer awareness. Sustained education and strategic engagement are essential to strengthening Spanish wine's position in the premium market.

This session discussed how to articulate and communicate the appeal and value of Spanish wine, which has so far been known in the Japanese market mainly for being "affordable and tasty," from perspectives other than price.

At the outset, moderator Mr. Pablo Conde pointed out that the inherent value of Spanish wine, including its cultural background, the uniqueness of its production regions, and its high quality, has not been fully communicated. He raised the question of what kinds of strategies could be employed at each point of contact with consumers.

Panelists shared ideas on how to promote value across various sales channels such as physical stores, e-commerce, and social media.

Ms. Ueno noted that in the e-commerce market, beyond price appeals, visually conveying information about producers and production regions can effectively verbalize the wine's appeal.

Mr. Uchiike highlighted that emotional values such as Spain's history, culture, and the warmth of its people strongly attract Japanese consumers, and emphasized the importance of store displays and product development that evoke Spanish streetscapes and landscapes.

Mr. Sakurai argued that basic information about Spanish wine is still insufficiently widespread, and that promotion efforts are needed to communicate its diversity and overall picture.

Mr. Martin mentioned that experiencing wines from various Spanish regions as memorable "moments" helps encourage repeat purchases.

Mr. Aoki responded to the question of "how cultural traditions of Spanish wine are incorporated into communication" by stating that many Japanese consumers already feel familiarity toward Spain, so emphasizing cultural background is not always necessary. However, to help consumers understand the diverse styles of Sherry, he offers tasting sets that allow people to enjoy and experience differences in flavor.

In response to Mr. Conde's question about how certifications and origin labels contribute to differentiation and trust, Mr. Tamura shared his perspective based on experience. When he visited Spain in 2000, organic wine production was still limited, but now Spain is one of the world's leading organic wine producers, with significantly improved quality. He emphasized that the rich fruitiness and variety of grape types are easy for Japanese consumers to understand, and that organic certification is an important symbol of the producer's effort and philosophy, playing a major role in differentiation.

Finally, Ms. Morimoto shared the view that "storytelling" and "experience" are indispensable when conveying the background and terroir of Spanish wine to consumers. As a practical example, he explained that, whenever possible, he visits wine regions personally and spends about an hour before tastings explaining with maps and detailed information based on his firsthand knowledge.

In summary, Mr. Conde emphasized that to accurately communicate the value of Spanish wine, ongoing consumer education and a deeper understanding of quality are essential. He pointed out that utilizing websites and digital tools is an effective means to disseminate information and that strategic use of such channels will be necessary going forward. He concluded by highlighting the importance of campaigns related to Spanish food culture and wine to enhance consumer knowledge and interest.

Panel Discussion Part 2: "Lightness" as a Gateway to New Value: Beyond Non-Alcoholic and Low-Alcohol

Core Insight

Interest in non-alcoholic and low-alcohol wines is growing both domestically and internationally. Could this trend represent a new business opportunity for Spanish wine in the Japanese market?

- Positioning "lightness" as a core value allows Spanish wine to resonate with evolving Japanese consumer preferences for health-conscious and low-alcohol lifestyles. Beyond simply offering non-alcoholic options, Spanish wines—particularly fresh whites and regionally distinctive varieties—can appeal through their versatility, food compatibility, and emotional experience.
- Communicating this value through storytelling, organic certification, and cultural relevance will be key. Embracing "lightness" not just as a taste profile but as a lifestyle concept opens new pathways for consumer engagement and market expansion.

This session discussed the growing domestic and international attention on the non-alcoholic and low-alcohol wine markets, focusing on the potential and future direction for Spanish wine. The background includes shifts in consumer behavior driven by health consciousness and lifestyle diversification, leading to a tendency to avoid beverages with higher alcohol content.

Mr. Martin pointed out that among younger consumers, there is a growing preference for fruity and light white wines, which presents new market opportunities for Spanish wines.

Mr. Uchiike emphasized that while traditional Spanish wine features such as "oak aging" remain important, there is increasing attention on Spanish white wines, especially Verdejo, with expectations for market development based on lightness of taste and food compatibility.

Mr. Sakurai noted that the trend toward "lightness" has continued in the Japanese market for about ten years, and Spanish wine aligns well with this trend.

At the session's conclusion, Mr. Conde posed the question to panelists: "Based on the discussion so far, what does 'value' mean for Spanish wine?" Each panelist shared their perspectives grounded in their experience.

Mr. Aoki highlighted that Sherry, a unique wine made only in Spain, holds value in its rarity, emphasizing the importance of providing consumers with a "good experience."

Mr. Martin explained that the value of wine can be enhanced when it is perceived as a joyful and healthy experience, especially through its pairing with Spanish gastronomy, particularly cheese.

Ms. Ueno pointed out that true value creation lies in promoting not only the affordable price but also the history, tradition, and regional uniqueness of Spanish wine, with particular importance placed on the growing presence of white wines in the market.

Mr. Uchiike expressed hopes that with the expansion of a culture in Japan where people enjoy affordable and delicious meals at home on weekends, Spanish wine will become naturally appreciated in households.

Mr. Sakurai stressed that Spanish wine offers a balance of competitive pricing and varietal diversity, and that it is important for general consumers to enjoy it more freely. Providers must actively embody and communicate this value.

Mr. Tamura suggested that clearly positioning organic wine as a premium choice would further enhance the value of Spanish wine. He also recommended improving the Japanese JAS organic certification system, which currently acts as a barrier, to create an environment where consumers can confidently choose Spanish organic wines.

Ms. Morimoto showed enthusiasm for raising consumer interest and understanding by shining a light on Spain's diverse wine regions, including unique areas like the Canary Islands.

In summary, Mr. Conde stated that to leverage the characteristic "lightness" of Spanish wine, value propositions must be made not only as standalone wines but with a focus on food pairing. He emphasized the potential to approach new consumer segments by promoting compatibility not just with Spanish cuisine but also actively with Japanese cuisine.

3.2.

Challenges

Over the past five years (2020–2024), Spain has consistently accounted for approximately 11–13% of Japan's total wine imports, establishing a solid position as one of the major supplying countries alongside France and Italy. However, this market share has shown little growth, highlighting the current need to shift from a traditional "price-driven" market position to one focused on "value-driven" appeal.

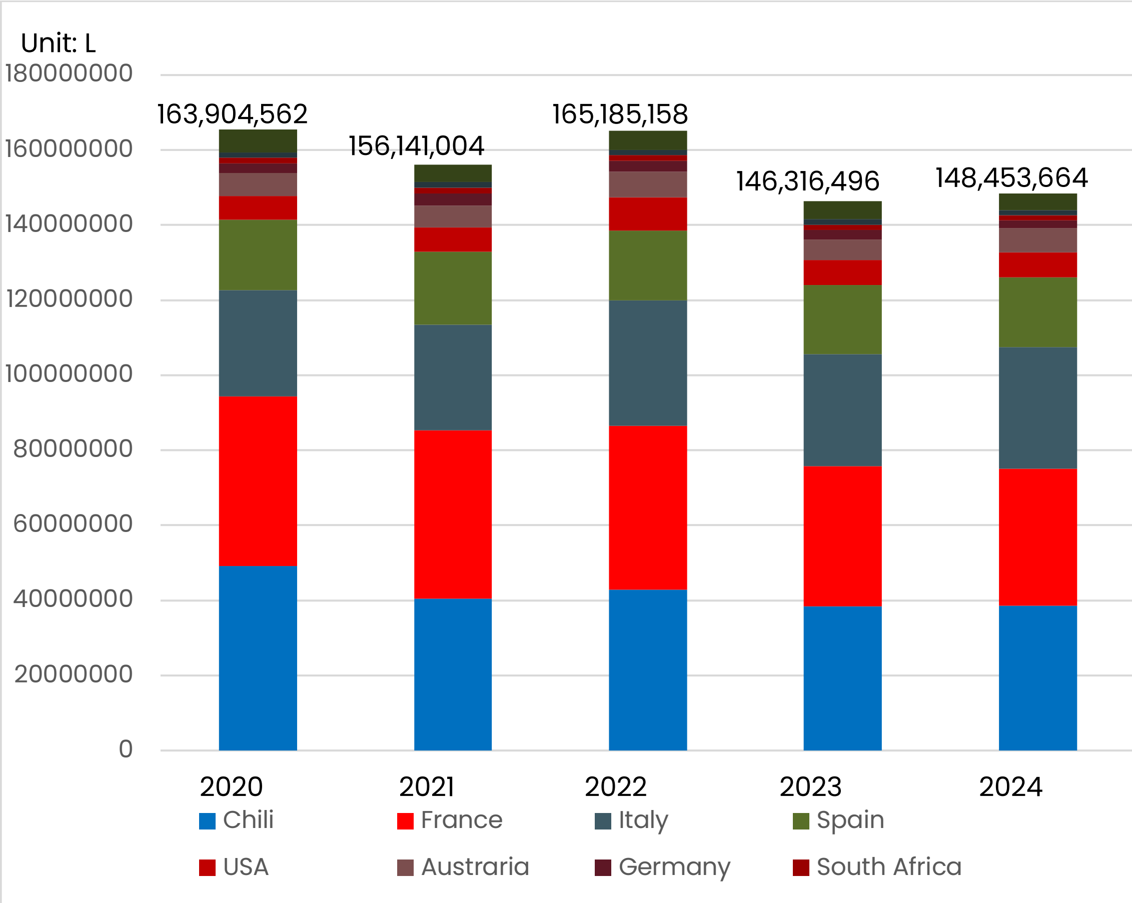
Wine Imports in Japan (Top 10 Countries), 2020–2024

	2020		2021		2022	
1	Chile	49,100,873	France	44,990,582	France	43,803,995
2	France	45,253,732	Chile	40,378,663	Chile	42,799,032
3	Italy	28,363,823	Italy	28,098,501	Italy	33,428,990
4	Spain	18,678,970	Spain	19,503,579	Spain	18,432,903
5	USA	6,394,101	USA	6,412,407	USA	8,969,333
6	Australia	6,032,325	Australia	5,824,487	Australia	6,850,399
7	Germany	2,718,925	Germany	3,183,387	Germany	2,856,549
8	Argentina	1,673,227	South Africa	1,654,653	Argentina	1,594,708
9	South Africa	1,538,140	Portugal	1,547,398	South Africa	1,528,685
10	Portugal	1,265,137	Argentina	1,477,639	Portugal	1,429,880
	Others	2,885,309	Others	3,069,708	Others	3,490,684
	Total	**163,904,562**	**Total**	**156,141,004**	**Total**	**165,185,158**

	2023		2024	
1	Chile	38,368,005	Chile	38,592,068
2	France	37,463,383	France	36,441,997
3	Italy	29,740,652	Italy	32,464,438
4	Spain	18,450,777	Spain	18,595,895
5	USA	6,686,450	USA	6,662,492
6	Australia	5,470,578	Australia	6,394,368
7	Germany	2,607,648	Germany	2,209,969
8	Portugal	1,448,059	Portugal	1,377,277
9	South Africa	1,377,503	South Africa	1,298,525
10	New Zealand	1,254,588	New Zealand	1,232,770
	Others	3,448,853	Others	3,183,865
	Total	**146,316,496**	**Total**	**148,453,664**

Source: Ministry of Finance, Trade Statistics

Wine Imports in Japan by Country (2020–2024)



Source: Ministry of Finance, Trade Statistics (2020-2024)

The discussions during the first preliminary meeting (April 22, 2025) and the second preliminary meeting (May 8, 2025) revealed the following challenges:

- Compared to France and Italy, the recognition of Spanish wine in the Japanese market remains relatively low, with a common concern among committee members being the prevailing image of Spanish wines as "cheap reds and sparkling wines."
- Mr. Sakurai and Ms. Ueno pointed out that the diversity of regions and grape varieties is not being adequately communicated, highlighting challenges in information organization and accessibility.

- Mr. Tamura and Mr. Uchiike noted that certification systems such as organic and D.O. are not well understood in the Japanese market, emphasizing the need to better comprehend import and non-tariff barriers related to these systems.
- Mr. Tamura also stated that the non-alcoholic and low-alcohol categories face high barriers in terms of equipment and production, making it difficult for small-scale producers to enter these markets.

3.3.

Opportunities

The discussions during the first preliminary meeting (April 22, 2025) and the second preliminary meeting (May 8, 2025) revealed the following opportunities:

- Many committee members noted that Spain's culture of mixing drinks and the lightness of Spanish wines are highly compatible with Japanese preferences, suggesting the potential for experiential promotions linked to pairings with Japanese cuisine, as well as contexts such as travel, music, and history.
- Mr. Uchiike and Ms. Morimoto stated that clearly highlighting the unique characteristics supported by Spain's diverse regions, soils, and grape varieties can enable differentiation from other countries.
- Mr. Tamura pointed out that leveraging Spain's achievement as the world's leading producer of organic wine would be an effective angle for promotion.
- Ms. Ueno mentioned that strengthening information dissemination through social media and various platforms can accelerate awareness expansion and brand building.
- Mr. Martin expressed that the friendly and cheerful brand image of Spanish wine is likely to be well received in the Japanese market.

3.4.

Conclusions

Through discussions in the wine sector, important insights were gained regarding the shift of Spanish wine from “price competition” to “value competition.”

First, the key to future success lies not in mere price advantage, but in building a storytelling wine that leverages Spain’s diverse regional characteristics, cultural backgrounds, and narratives. At consumer touchpoints, appropriate communication tailored to each channel such as physical stores, e-commerce, and social media is required, with particular emphasis on approaches appealing to emotional value and experiential aspects being confirmed as effective.

Second, amid the growing trend of non-alcoholic and low-alcohol beverages, Spain’s light wines and culture of mixing drinks demonstrate high compatibility with Japanese consumer needs, positioning these as new market opportunities. By focusing not solely on alcohol content but on the drinking experience and food pairing, Spanish wine can appeal to a broad range of consumers.

Additionally, Spain’s status as the world’s largest producer of organic wine is a major strength in promotion. Information dissemination from the perspectives of quality, environment, and health contributes to enhancing brand value. Going forward, alongside addressing institutional challenges in the Japanese market, it is necessary to strengthen “educational promotions” that communicate the unique characteristics of production areas and the stories behind the wines.

In summary, to maximize the potential of Spanish wine, it is essential to strategically and continuously convey its intrinsic attractions such as lightness, diversity, and cultural richness.

4

Actionable Ideas and Marketing Tactics

4.1.

Food

To strengthen the presence of Spanish cheese and olive oil in the Japanese market, it is essential to design carefully structured information and promotional strategies that are aligned with local needs and current challenges. Based on the proposals presented in preliminary meetings and roundtable discussions, the following concrete measures are suggested.

1. Enhancing the appeal of sheep's milk cheese

   Leverage the characteristics of sheep's milk cheese, which is suitable for those with lactose intolerance, by clearly conveying messages such as "easy to digest" or "lactose-free" through in-store materials and point-of-purchase displays. Emphasize the authenticity of D.O. cheeses such as Manchego and Idiazabal.

2. Expanding pairing suggestions for foodservice and retail

   Provide pairing recipes featuring Spanish cheese and olive oil with red meats, game, and vegetable-based dishes. Share actual case studies and usage examples by professionals to encourage adoption in foodservice channels.

3. Promoting understanding of labeling and standards

   Given the limited recognition of European geographical indication systems such as D.O. and IG in the Japanese market, create educational videos and in-store materials that explain their value in terms of quality assurance and regional identity. Include content highlighting their potential as indicators of flavor. Incorporate Mr. Tada's suggestions on "flavor indexing" (e.g., strength, aroma, spiciness, bitterness) and visual labeling to develop easy-to-understand and practical tools, applicable not only for consumers but also for retailers and foodservice professionals.

4. Developing experiential cultural promotions

   Building on Mr. Tada's insights, organize experiential events that feature Spanish cheese and olive oil alongside traditional Spanish cuisine and cultural storytelling to enhance emotional engagement and brand appeal.

5. Improving information and promotional materials

   Create brochures and video content for both retail and foodservice sectors, introducing an overview of Spanish cheeses (especially sheep's milk cheeses), their key varieties (e.g., Manchego, Idiazabal), defining characteristics, and optimal serving suggestions. Similarly, develop materials explaining the differences in types, flavors, and uses of olive oil, and consider organizing practical seminars for professionals.

4.2.

Wine

To shift from price-based competition to value-based competition in the Spanish wine market, it is essential to develop marketing strategies that leverage cultural depth, emotional appeal, and diversity. Based on proposals from the committee members, the following action plan is outlined.

1. Strengthening educational and experiential promotions

   Organize seminars and tastings where participants can learn about the background, regions, and grape varieties of Spanish wines. Host events that allow attendees to experience food pairings with both Spanish cuisine and Japanese dishes.

2. Utilizing social media and digital platforms

   Promote storytelling-based content on Instagram and YouTube, and implement emotionally engaging campaigns in collaboration with influencers to build awareness and resonance.

3. Leveraging differentiation assets

   Visualize and highlight stories about organic wines, D.O. certifications, and traditional grape varieties. Use these elements in promotional materials, in-store point-of-purchase displays, and e-commerce platforms.

4. Developing channel-specific materials

   Create educational tools tailored to both retail and foodservice channels, including varietal maps, explanations of certification systems, and pairing suggestions. Utilize these resources to support sales activities.

5. Building a cohesive brand image

   Reflecting Mr. Martin's proposal, develop a consistent visual identity and brand messaging that emphasize key attributes of Spanish wine such as vibrance, diversity, and lightness.

5

Final Considerations

General Strategy

<Main Challenge>

To enhance the presence of Spanish food and wine products in the Japanese market, a clear, long-term communication strategy is essential. One-off promotional efforts are insufficient; instead, sustained engagement is required to redefine and convey the value of these products. In particular, raising awareness among both professionals and consumers about the unique qualities and diversity of Spanish offerings is key to deepening understanding and appreciation in Japan.

<Featured Solution Proposals>

- **Educational and Experiential Campaigns**: Initiatives such as the ICEX-led "EAT SPAIN DRINK SPAIN" campaign will play a central role in communicating the distinctive characteristics of Spanish products to consumers through immersive experiences.

- **Collaborative Branding Efforts**: Building a strong SPAIN brand identity through coordinated actions involving government bodies, industry professionals, and consumers is crucial.

- **Channel-Specific Communication**: Tailored messaging for each distribution channel—physical retail, e-commerce, websites, and social media—will maximize impact. Digital tools are particularly effective for broad dissemination.

- **Gastronomic Synergy**: Emphasizing the natural affinity between Spanish and Japanese cuisines, including pairing Spanish products with both traditional Spanish and Japanese dishes, can enhance cultural resonance.

Food Sector

- **Olive Oil**

<Main Challenge>

Although Spanish olive oil is well-established in Japan, it is often perceived as a low-cost, generic product. Its premium quality and regional diversity remain under-communicated, particularly in the premium market segment.

<Featured Solution Proposals>

- **Visual Communication Tools**: Utilize flavour indexes, D.O. certifications, and origin labelling to convey quality and authenticity. Categorizing oils by usage can also guide consumer choices.
- **Cultural Integration**: Position Spanish olive oil as a staple in everyday Japanese life. Creating a broader "cultural boom" that links olive oil to lifestyle and gastronomy can drive deeper consumer engagement.

- **Cheese**

<Main Challenge>

Spanish cheese has strong growth potential in Japan but faces challenges due to low brand recognition and limited consumer knowledge.

<Featured Solution Proposals>

- **Information Dissemination**: Use platforms such as Foodex and ICEX-hosted seminars to educate both distributors and consumers about the appeal of Spanish cheese.
- **Focus on Sheep's Milk Varieties**: Highlight the health benefits and regional authenticity of sheep's milk cheeses.
- **Storytelling Around Iconic Cheeses**: Promote D.O. cheeses like Manchego and Idiazabal through compelling narratives.

- **Consumer Education at Point of Sale**: Provide practical tips on storage and serving to enhance the consumer experience and understanding.

Wine Sector

<Main Challenge>

Spanish wine is primarily recognized in Japan for being "affordable and tasty," but its intrinsic value and high quality are underappreciated. A shift from a price-driven to a value-driven market position is necessary, supported by educational promotion.

<Featured Solution Proposals>

- **Narrative-Driven Marketing**: Develop storytelling that emphasizes:
  - Cultural heritage rooted in terroir, grape varieties, and winemaking traditions
  - Regional diversity across Spain's wine-producing areas
  - Organic certifications and D.O. labeling as markers of quality
  - Light, fresh wine styles and a culture of drink mixing that align well with Japanese cuisine and climate
  - Emotional appeal to foster a deeper connection with consumers

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6

Photos


ICEX
Spain, a land of taste
A worldwide celebrated array of flavours.
A country scattered with richness.
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