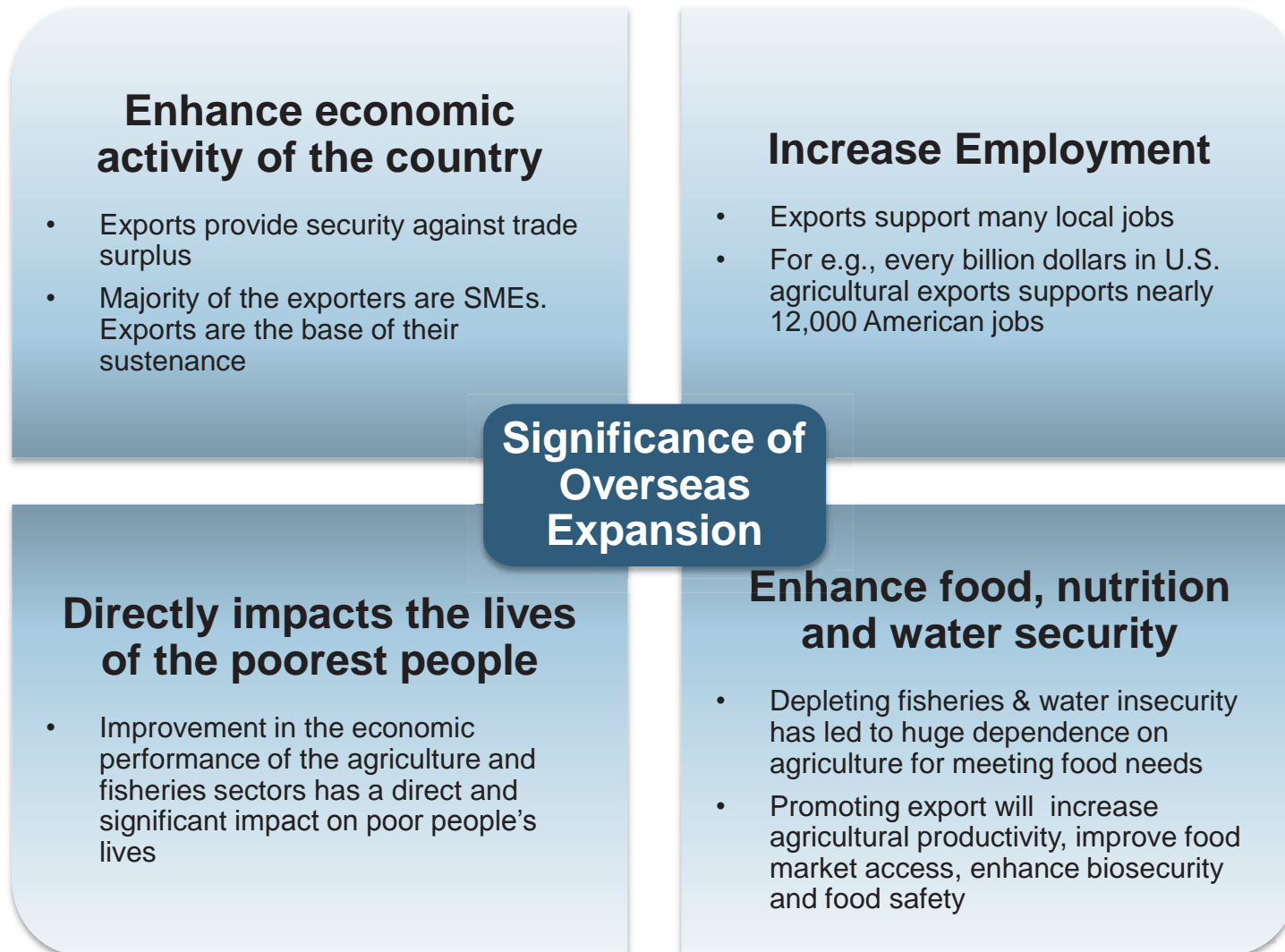


1-2. 海外における食産業の海外展開支援施策：海外展開の意義

海外政府は「自国の経済成長」及び、それに付随する「雇用の増加」「貧困の解消」という観点の他、「食品安全の向上」という観点でも海外展開をすすめている。

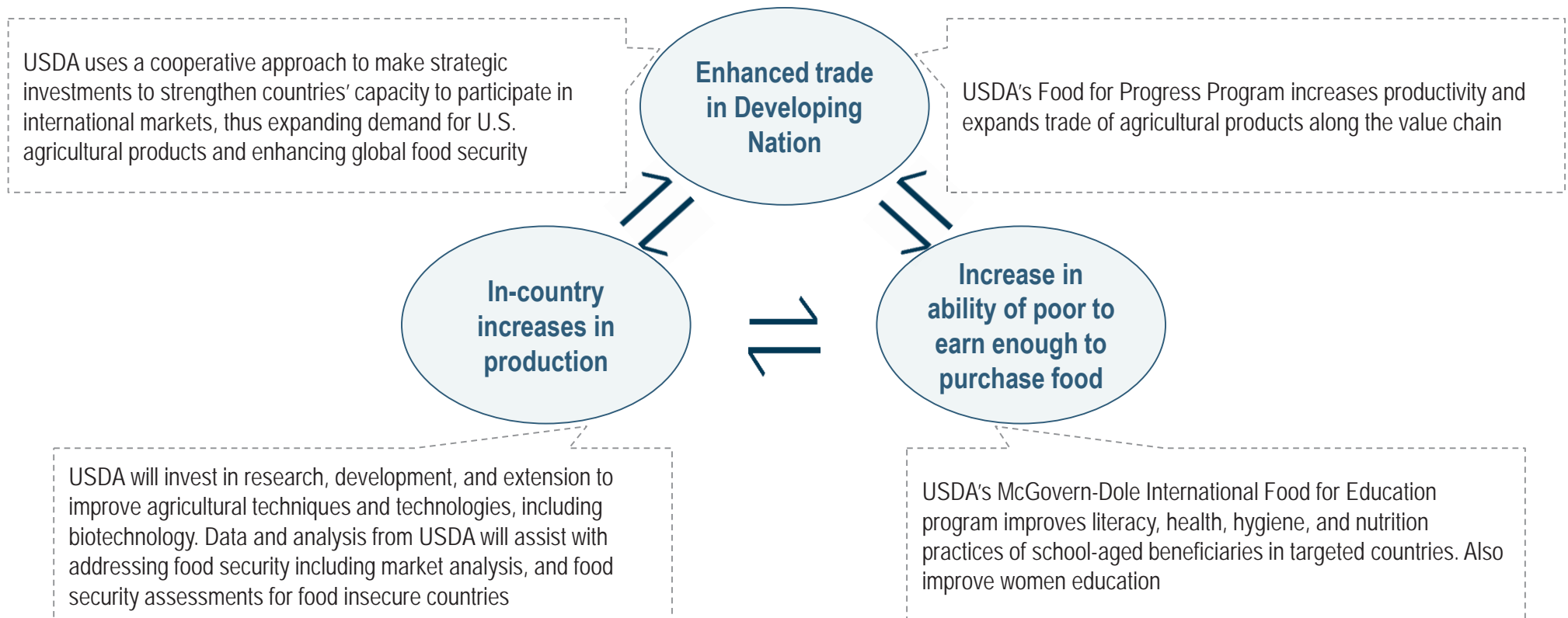


1-2. 海外における食産業の海外展開支援施策：海外展開の意義

例えば、米国は世界の食糧安全保障を強化し、米国が農業生産とバイオテクノロジーの輸出を発展途上国に輸出することを目指している。

- また、アメリカの戦略設定の特徴として、国内向けの戦略と併せて、海外展開の戦略に言及している。

US wants to increase Global Food Security For which US will promote agricultural production and biotechnology exports to Developing Nations



1-2. 海外における食産業の海外展開支援施策:サマリー

そのような意義のもと、各国は以下の支援を実施している(1/2)。

Issue		US	UK	France	Singapore	Summary		
輸出支援	経営資源	ヒト	● —	<ul style="list-style-type: none"> ● Provide high level training ● Have ITAs (International Trade Advisors) 	● —	● —	Not much support for human resources except for UK	
		モノ	● —	● —	● —	● —	—	
		カネ	<ul style="list-style-type: none"> ● Provide funds to promote exports ● Give loan & guarantee 	<ul style="list-style-type: none"> ● Provide funds to execute action plan, ● Give guarantee & credit insurance 	<ul style="list-style-type: none"> ● Funds for exploration expenses, foreign cust deposits, pre-financing ● Provide insurance 	● —	—	Countries provide multiple funds for different reasons – promotion, exploration, deposits etc.
		情報	<ul style="list-style-type: none"> ● Counselling & advocacy services on complete export process ● Organize trade events 	● Provide information & prepare action plan for exporting	● Research on export animation, pre-commercial opportunity, international regulations	● —	—	Info is extensively provided by all with added services of counselling, action plan preparation, events
	貿易・事業環境	規制	● —	● —	<ul style="list-style-type: none"> ● Provide simplified & shared regulatory kits ● Assist in custom, tariffs, TBT, import license 	● —	—	Only France provides assistance in regulatory aspects
		インフラ	● —	● Provide free online service to provide export sales leads	● —	● —	—	No country provides support in export infrastructure. UK provides online service
		商慣習	● Allow certain products to be sold at subsidised prices	● —	● —	● —	—	Not much support in export business practice

1-2. 海外における食産業の海外展開支援施策:サマリー

そのような意義のもと、各国は以下の支援を実施している(2/2)。

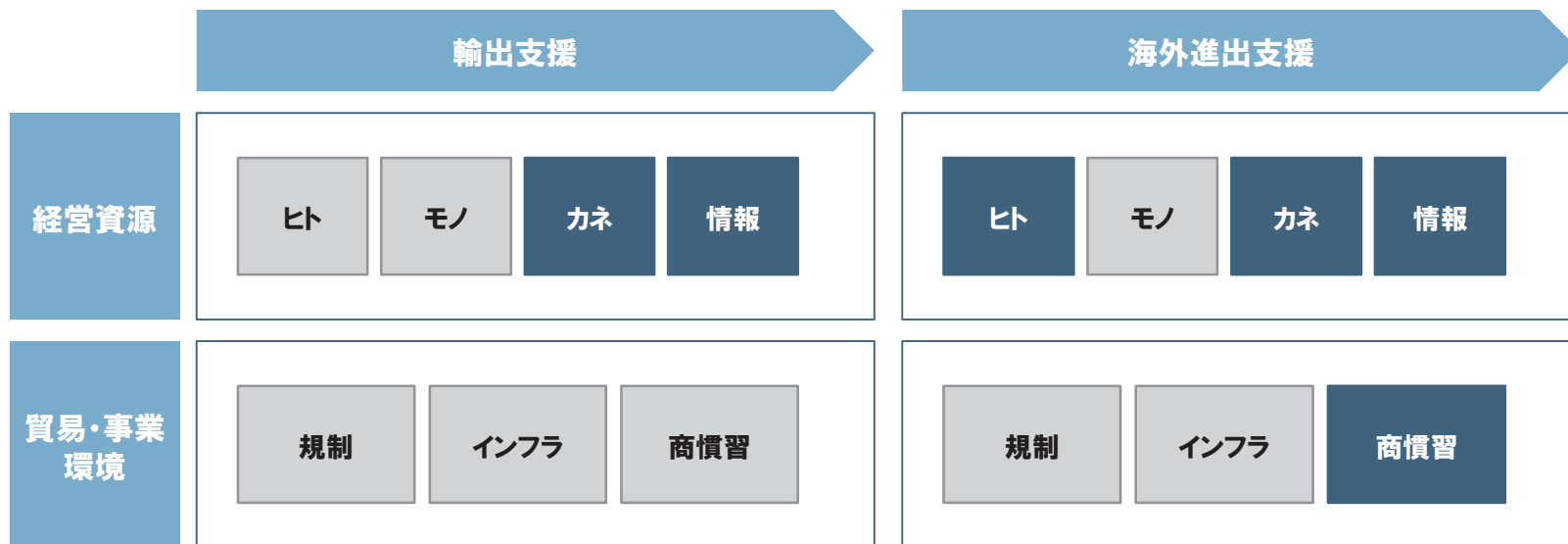
Issue		US	UK	France	Singapore	Summary	
海外進出支援	経営資源	ヒト	● —	● Provide high level training	● Provide young volunteers to work abroad	● Provide monetary support to recruit people & train them	Countries either provide resources or training or funds for it
		モノ	● —	● —	● —	● —	—
		カネ	● Provide funds (for promotion, market research etc.), guarantees, insurance	● —	● Provide funds (for market research), investment insurance	● Provide monetary support for market research, manpower, bidding, pilot, design, procurement, & sales	Funds are provided for multiple actions (promotion, research, manpower etc). Also provide insurance
		情報	● Provide various information such as technical info and free counselling	● Analyse market entry strategies for company	● Provide info on target market & sectors, their projects & tenders	● Have research database & publications ● Organize workshop, seminar & P2P learning	Information is provided via research database, events, seminars, etc on market, entry strategy & projects
	貿易・事業環境	規制	● —	● —	● —	● Monetary support for advisory on tax, legal, regulations, IP search, partnership model draft	Only Singapore supports monetarily in regulatory aspects
		インフラ	● —	● —	● —	● —	—
商慣習		● Build international demand & find buyers ● Connect with foreign sponsors	● Organize networking events ● Identify potential business partners	● Market prospection, promotion, negotiate for partnerships, PR	● Prepare internationalization strategy for company ● Business Development	End to end support is provided for business practices	

1-2. 海外における食産業の海外展開支援施策:サマリー

前頁までの各国支援をまとめると、輸出段階では、「カネ」と「情報」を主に支援し、海外進出段階では、さらに「ヒト」と「商習慣」の支援を実施しているといえる。

- ただし、海外進出段階の支援は農林水産業・食品に特化したものではなく、幅広い業種の中小企業に対する支援である。

各国が主に実施している支援の範囲（イメージ）



※農林水産業・食品特化の支援メニューあり

※農林水産業・食品特化の支援メニューなし
※主に中小企業向けの支援メニュー

1-2. 海外における食産業の海外展開支援施策:サマリー

(参考)また、米国・英国が、海外政府・企業への資金援助等、踏み込んだ支援策を展開しているのに対し、フランス・シンガポールは自国企業のみを対象とした支援策に留まる。

- 1) **USA is providing financial, technical and business assistance to American firms who wish to export and expand overseas. At the same time, USA is focussing on building international demand for their product and services by supporting overseas governments as well as private entities after entering overseas markets.**
- 2) **UK is focusing more on supporting private companies by providing tailor made strategies and supporting resources (financial, technical and others) before entering overseas markets. Unlike USA, UK tries to provide solutions specific to each company**
- 3) **Singapore is more focusing on overseas expansion than exports support. It mostly provides financial support for the companies who are willing to expand and the support is mainly before entering overseas markets.**
- 4) **France is focusing more on exports promotion than overseas expansion. Most of the policies are aimed at supporting before entering the overseas markets such as eliminating local regulations and restrictions on exports.**

1-2. 海外における食産業の海外展開支援施策

政府からの支援により、多くの企業が国際市場で自立し、成功している。

政府支援の成功事例

1. JM Grain Expands to UAE

Company Introduction:

JM Grain is a company that specializes in processing and exporting U.S. grown and graded pulse crops from Garrison, North Dakota

Support Summary:

Food Export uses funding from the Market Access Program (MAP) & hosts Food Export-Midwest and Food Export-Northeast's programs

Support Details:

The company participated in Food Export's Food Show PLUS!™ services at Gulfood in Dubai, U.A.E. At the event where Food Export assisted in facilitating meetings with buyers at the company's booth, JM Grain was able to secure new sales of \$156,000

2. Prima Cheese Expands to UAE

Company Introduction:

Prima Cheese supplies the shredded cheese found on many of the pizzas made in the UK, along with other assorted baked goods. Its customers include bakeries, food wholesalers and even supermarket giant, Asda

Support Summary:

UKTI has helped the company expand to international market

Support Details:

- a UKTI Trade Adviser helped decide which region to expand to
- The company also joined Passport to Export, the UKTI programme that gives exporting companies the tools they need to grow their business internationally
- Having identified the UAE as a potential market, Prima Cheese then commissioned an Overseas Market Introduction Service (OMIS) (also a UKTI service) to identify potential customers, before flying out to the UAE with the help of UKTI funding
- The OMIS came back with a list of 20 local businesses, and UKTI arranged meetings for the company with 16 of them

3. CybelAngel Expands to Finland

Company Introduction:

A cybersecurity French startup of 2013, which aims to protect businesses against online leaks

Support Summary:

Business France has helped the startup from the very beginning at all fronts

Support Details:

- Market Research to understand competitive scenario
- The company won the Slush pitching competition (a 2 day event where a company can meet 20-30 investors & pitch them one after the other), because of which it was able to meet many investors. Business France encouraged & coached the company for this.
- After winning, the company received a lot of attention from investors, media, clients & partners
- Expanded to Finland & Las Vegas in 2016 with Business France
- The COO of the startup was also invited by Business France to be a part of French delegation to the Global Summit of Women, which helped her meet other female leaders of various industries, promote the company on international platform

個別国詳細情報(米国)

1-2. 海外における食産業の海外展開支援施策 米国の支援策サマリー

		Government Support Policy for Overseas Expansion	Government Support Policy for Export
In the phase of studying for the expansion to foreign countries	Information	<ul style="list-style-type: none"> Free Counselling 	<ul style="list-style-type: none"> U.S. Export Assistance Centers to guide on process for exports Foreign trade missions Subscription services to access international markets, export trade show exhibits, export training workshops
Entry in local markets	Information gathering		<ul style="list-style-type: none"> Emerging Markets Program funds to promote exports to emerging markets through feasibility studies, market research, sectoral assessments, orientation visit, specialized training, & workshops Trade events to promote U.S., products and services
	Preparation for launching	<ul style="list-style-type: none"> Technical Assistance for Specialty Crops (TASC) provides funding for projects that address sanitary and phytosanitary (SPS) and technical barriers Low-cost training service 	<ul style="list-style-type: none"> Counselling and advocacy services throughout the export process
	Financial Support	<ul style="list-style-type: none"> Direct loans and guarantees for long term Political Risk Insurance Support for PE investment funds that invest in new & expanding emerging market companies 	<ul style="list-style-type: none"> Export Credit Guarantee (GSM-102) against defaults of commercial bank financing of agriculture commodity Facilities Guarantee Program (FGP) to facilitate the financing of manufactured goods & services exported Export Express loan Export Working Capital Loan International Trade Loan
Business expansion	Product development /market planning	<ul style="list-style-type: none"> Design of international marketing 	
	Sales & Promotion	<ul style="list-style-type: none"> Foreign Market Development Program (FMDP) to provide co-operator organizations with cost-share funding for activities that build international demand Market Access Program to fund consumer promotion, market research, tech assistance & trade servicing Quality Samples Program (QSP) allows manufacturers overseas to assess U.S. food & fibre products Help find international buyers Foreign market sales trips Connecting with foreign project sponsors through Reverse Trade Missions, conferences & workshops Provide grants directly to overseas sponsors who, in turn, select U.S. companies to perform Agency-funded project preparation activities. It includes feasibility studies and pilot projects, technical assistance & training programs for the foreign decision makers Introductions of qualified buyers and distributors in foreign countries to U.S. companies 	<ul style="list-style-type: none"> Export Incentive Program (DEIP) to allow certain dairy products to be sold at subsidised prices

1-3. 海外における食産業の海外展開支援施策:US Federal Government Agencies responsible for Export promotion

主に9の組織・団体が海外展開を支援している。

1. U.S. Department of Agriculture (USDA)
2. U.S. Department of Commerce
3. Export-Import Bank of the United States (Ex-Im Bank)
4. Overseas Private Investment Corporation (OPIC)
5. Small Business Administration (SBA)
6. U.S. Department of State
7. U.S. Trade and Development Agency (TDA)
8. Office of the U.S. Trade Representative (USTR)
9. U.S. Department of the Treasury

1-2. 海外における食産業の海外展開支援施策：U.S. Department of Agriculture (USDA)

USDAは、輸出促進、資金調達、補助金制度の支援メニューを展開。

Export Promotion Program	Foreign Market Development Program (FMDP)	<ul style="list-style-type: none"> Foreign Market Development Program (FMD) Provides co-operator organizations with cost-share funding for activities that build international demand for U.S. agricultural commodities. Activities financed include <u>consumer promotions, market research, technical assistance & trade servicing</u>
	Market Access Program (MAP)	<ul style="list-style-type: none"> Helps finance activities to market and promote U.S. agricultural commodities and products worldwide Activities financed include <u>consumer promotions, market research, technical assistance & trade servicing.</u>
	Emerging Markets Program (EMP) funds	<ul style="list-style-type: none"> Provides funding for technical assistance activities to promote U.S. exports to emerging markets worldwide. Activities include support such as <u>feasibility studies, market research, sectoral assessments, orientation visits, specialized training, and business workshops</u>
	Quality Samples Program (QSP)	<ul style="list-style-type: none"> Helps U.S. organizations provide small samples of their agricultural products to potential customers overseas QSP allows manufacturers overseas to assess how U.S. food and fibre products can meet their production need best.
Export Financing Programs	Technical Assistance for Specialty Crops (TASC)	<ul style="list-style-type: none"> Assist U.S. organizations by providing funding for projects that address sanitary and phytosanitary (SPS) and technical barriers that prohibit or threaten the export of U.S. specialty crops Activities include support such as Includes <u>seminars & workshops, study tours, field surveys, pest & disease research & pre-clearance programs</u>
	Export Credit Guarantee (GSM-102) Program	<ul style="list-style-type: none"> GSM-102 <u>guarantees against defaults of commercial bank financing</u> of agricultural commodity exports
Export subsidy program	Facilities Guarantee Program (FGP).	<ul style="list-style-type: none"> FGP provides <u>payment guarantees to facilitate the financing of manufactured goods and services</u> exported from the United States to improve or establish agriculture-related facilities in emerging markets
	Export Incentive Program (DEIP)	<ul style="list-style-type: none"> Allows exporters to sell certain U.S. dairy products in foreign markets at prices lower than the exporter's costs of acquiring them

1-2. 海外における食産業の海外展開支援施策: Overseas Private Investment Corporation (OPIC)

OPICは、新興市場における米国企業の開発への投資を支援。

Financing

- Direct loans and guarantees as small as a few million up to \$250 million for tenors as long as 20 years to projects that are unable to raise sufficient commercial financing, with specific programs for American small businesses
- **Example: Helping an Oklahoma business produce oil in Colombia**
Joshi Technologies Inc., a small business based in Tulsa, Oklahoma, used OPIC financing to extend the life of an oil field in Colombia. By using its innovative drilling technology, Joshi was able to 4,000 barrels of oil per day from a field that had been considered past its prime

Political Risk Insurance

- Coverage of up to \$250 million against losses resulting from currency inconvertibility, expropriation, regulatory risk, political violence and breach of contract, when private political risk insurance is not available.
- **Example: Mitigating the risk of a Maryland company doing business in Iraq**
Ellicott Dredges LLC used OPIC political risk insurance to support the sale of its dredging equipment in Iraq and other developing markets to help ensure those transactions proceed smoothly.

Investment Funds

- Support for emerging market private equity investment funds that invest in new and expanding emerging market companies.
- **Example: Supporting entrepreneurs and businesses in Africa**
OPIC-supported Emerging Capital Partners, based in Washington DC, has invested in a variety of businesses in Africa, including the Java House coffee chain, which was founded by an American entrepreneur and expanded into 41 coffee shops and restaurants in Kenya and Uganda

1-2. 海外における食産業の海外展開支援施策: Small Business Administration (SBA)

SBAの国際貿易局は、グローバル市場での中小企業の競争力強化をミッションとしている。

Opening Global Market Access for Small Businesses

- Free Counselling
- U.S. Export Assistance Centers to guide on process for exports

Opening Global Market Access for Small Businesses

- Free business consulting
- Low-cost training service
- Help find international buyers

Exporting finance programs

- Export Express loan
- Export Working Capital Loan
- International Trade Loan

State Trade Expansion Program (STEP)

- STEP awards are earned by U.S. state and territory governments to support projects that help U.S. small businesses sell their goods and services to foreign buyers.
- This includes participation in foreign trade missions, foreign market sales trips, subscription services to access international markets, as well as design of international marketing, export trade show exhibits, export training workshops, and more

1-2. 海外における食産業の海外展開支援施策:U.S. Trade and Development Agency (TDA)

TDAは米国農家と海外バイヤーとのマッチングや実証実験等のプロジェクトサポートを実施。

Connecting U.S. Firms with Foreign Buyers

- The Agency **connects foreign project sponsors with U.S. manufacturers and service providers** in order to open new export markets and identify commercial opportunities for U.S. companies through:
 1. **Reverse Trade Missions: Visits of foreign:** Reverse trade missions bring foreign decision-makers to the United States to observe the design, manufacture and operation of U.S. products and services that can help them achieve their development goals. strategically planned visits present excellent opportunities for U.S. businesses to establish or enhance relationships with prospective overseas customers.
 2. **Conferences and Workshops:** Worldwide conferences and workshops connect U.S. firms with foreign project sponsors. U.S. firms have the opportunity to meet one-on-one with overseas project sponsors

Project Preparation: Getting it right from the Start

- USTDA is unique among federal agencies in that it is mandated to engage the U.S. private sector in development projects at the critical early stages when the projects' technology options and requirements are being defined. USTDA provides grants directly to overseas sponsors who, in turn, select U.S. companies to perform Agency-funded project preparation activities. It includes:
 1. **Feasibility Studies and Pilot Projects:** U.S. company-led feasibility studies link foreign project sponsors with U.S. businesses at the critical early stage when technology options and project requirements are being defined
 2. **Technical assistance:** Technical assistance that supports legal and regulatory reform related to commercial activities and infrastructure development, the establishment of industry standards, and other market-opening activities
 3. **Training Programs:** USTDA provides training for foreign decision-makers to support the sale of U.S. equipment and services

1-2. 海外における食産業の海外展開支援施策: Export-Import Bank of the United States (Ex-Im Bank)

Ex-Im Bankは米国の製品・サービスの貿易を促進させるためのサポートを実施。

Trade Promotion and the U.S.
and Foreign Commercial
Service (Commercial Service)

- It is the main trade promotion unit of ITA
- Services include market research; trade events to promote U.S., products and services; introductions of qualified buyers and distributors in foreign countries to U.S. companies; and counselling and advocacy services throughout the export process

個別国詳細情報(フランス)

1-2. 海外における食産業の海外展開支援施策

フランスの支援策サマリー

		Government Support Policy for Overseas Expansion	Government Support Policy for Export
In the phase of studying for the expansion to foreign countries	Manpower	<ul style="list-style-type: none"> ● Provide young volunteers for a professional mission abroad during a flexible period of 6 to 24 months 	
	Money	<ul style="list-style-type: none"> ● Financial Support for Market Research 	
	Information	<ul style="list-style-type: none"> ● Studies, technical tools, materials, documentation ● Conferences, technical seminars ● Identify market opportunities 	<ul style="list-style-type: none"> ● Simplified and shared regulatory kits
Entry in local markets	Regulations for entries		<ul style="list-style-type: none"> ● Assist in customs and / or tariff aspects, technical aspects: sanitary & phytosanitary (SPS) and / or technical barriers to trade (TBT), Specifications, Labelling, Import License
	Information gathering	<ul style="list-style-type: none"> ● Market & Sectors ● Projects & Tenders 	<ul style="list-style-type: none"> ● Export Animation Research ● Pre-Commercial Opportunity Research ● Opportunity search, pre-sales operations ● International Regulations ● Seminars by international professionals for export topics
	Preparation for launching		<ul style="list-style-type: none"> ● Export Coordination ● Reception of foreign delegations ● Reduce administrative burdens on exports & help companies facing export regulatory problems
	Financial Support	<ul style="list-style-type: none"> ● Provide investment insurance abroad 	<ul style="list-style-type: none"> ● Insurance against the risk of commercial failure ● Compensation for exploration expenses ● Facilitate foreign customer deposits & pre-financing on company's behalf ● Provide credit insurance ● Provide foreign exchange insurance
Business expansion	Product development/ market planning	<ul style="list-style-type: none"> ● Communications strategies ● Market Prospection ● Fairs & Meetings B2B for promotional actions ● Find prospects for technology partnership ● Needs evaluation of company with regard to industrial & IP ● Facilitation of the negotiation & conclusion of industrial partnership agreements 	
	Sales & Promotion	<ul style="list-style-type: none"> ● Organize international events to increase brand visibility ● Professional Advertising ● Business Promotion ● Press Relations & Public Relations 	

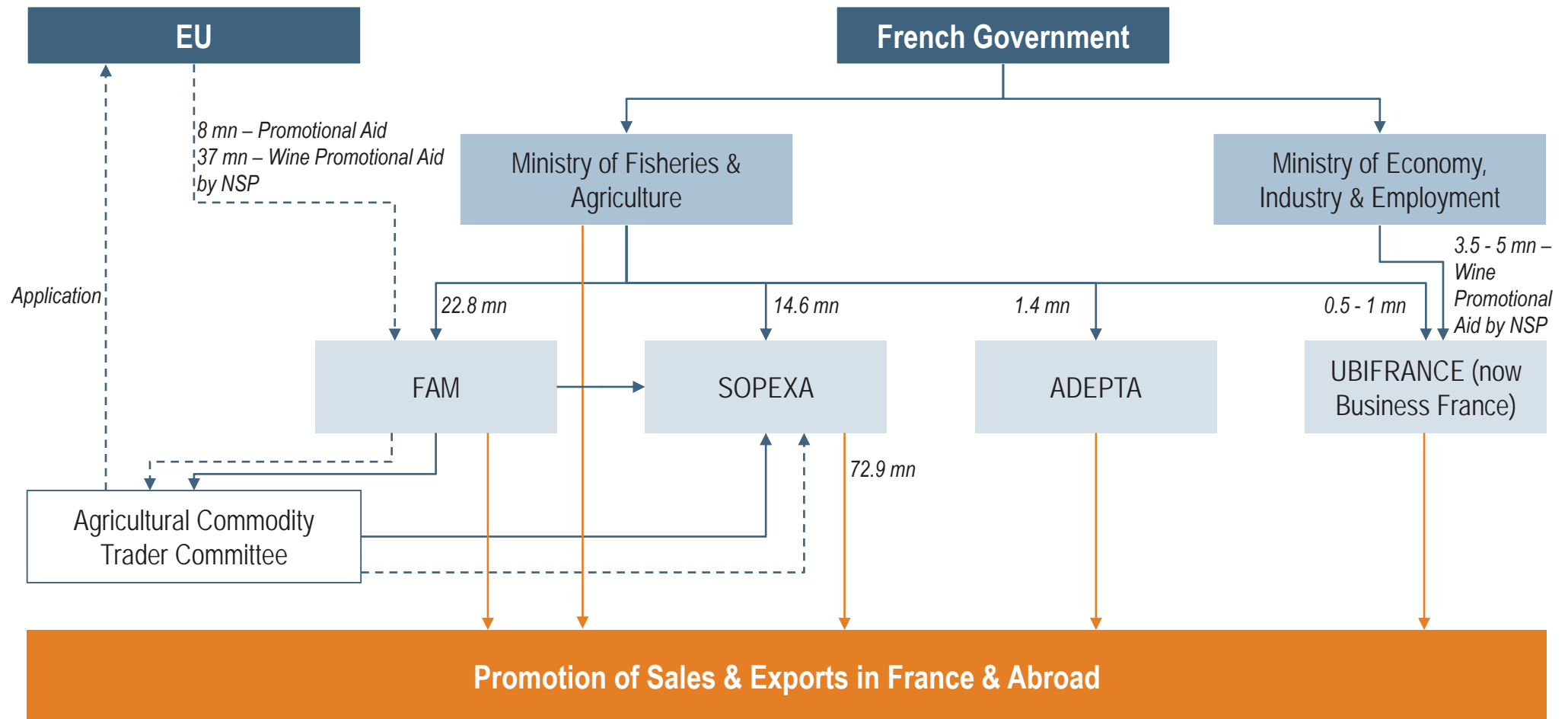
1-2. 海外における食産業の海外展開支援施策: Government Agencies responsible for Export promotion in France

主に14の組織・団体が海外展開を支援している。

1. Ministry of Fisheries & Agriculture
2. Ministry of Economy, Industry & Employment
3. EU
4. FAM (France Agri Mer)
5. Business France (merger of UBIFRANCE & InvestInFrance)
6. UBIFRANCE (French agency for export promotion) (now Business France)
7. InvestInFrance (French agency for International Investment) (now Business France)
8. SOPEXA (International communication & Marketing Agency)
9. ADEPTA (Association for the Development of International Exchange of Agri-food Products and Techniques)
10. BPI France International
11. ANIA Export
12. CCI France International
13. Coface
14. OSCI

1-2. 海外における食産業の海外展開支援施策: French Export Promotion Budget Flow

フランス農業は、海外展開事業に関して、フランス政府とEUの双方から財政的支援を受けている。



---> French Govt Budget Flow

All numbers are in Euros

—> EU Subsidy Flow

1-2. 海外における食産業の海外展開支援施策:FAM (France Agri Mer)

FAMはフランスの農林水産業輸出を担う機関である。

- Born on 1st April 2009 from the merger of five agricultural boards (Ofimer, Office of Livestock, ONIGC, ONIPPAM and Viniflor) FranceAgriMer national establishment of agricultural products and the sea under supervision of the state, was created as part of the general review of public policies
- FAM, a national agricultural and sea products company, carries out its missions on behalf of the State, in conjunction with the Ministry of Agriculture and Food
- FAM implements the public policies of market regulation, ensures an economic watch which reinforces the efficiency of the sectors and promotes their organization
- Export Support Activities:

Facilitate / Relax Access Conditions

1. Customs and / or tariff aspects
2. Technical aspects: sanitary & phytosanitary (SPS) and / or technical barriers to trade (TBT)
3. Specifications
4. Labelling
5. Import License

Research Activities









1. Export Animation
2. Pre-Commercial Opportunity

Others

1. Financial Support
2. Export Coordination
3. Reception of foreign delegations
4. Negotiations and influence
5. Studies, technical tools, materials, documentation
6. Conferences, technical seminars
7. Opportunity search, pre-sales operations

1-2. 海外における食産業の海外展開支援施策:FAM Partners in Export Ecosystem Support

FAMは、さまざまなパートナー(公的機関と民間機関の両方)の助けを借りて、フランス企業へのサポートを提供している。

<p>Association for the Development of International Exchange of Agri-food Products and Techniques</p>  <ul style="list-style-type: none"> • Unites 245 companies specialising in farm inputs, equipment and services for agricultural and agrifood sectors in export markets • Provides a platform to member companies where they can share resources, knowledge and expertise 	<p>Association Nationale des Industries Agroalimentaires</p>  <ul style="list-style-type: none"> • The interface between public authorities & various organizations that provide export assistance in the food & drinks business 	<p>BPI France International</p>  <ul style="list-style-type: none"> • Subsidiary of the “Caisse des Dépôts” and of the State • If a company wants to develop sales abroad, Bpifrance & its partners (Business France & Coface) facilitates prospection, finances development, insures export project & helps in investing abroad 	<p>Business France</p>  <ul style="list-style-type: none"> • The national agency supporting the international development of the French economy, responsible for fostering export growth by French businesses, as well as promoting and facilitating international investment in France • Has 200 agrifood experts, both in France & in 70 other countries
<p>CCI (Chambers of Commerce & Industry) France International</p>  <ul style="list-style-type: none"> • Made of 111 French Chambers of Commerce & Industry in 81 countries, 900 employees, 32 000 member companies & 830 work stations made available for French SMEs • Offers assistance throughout all the stages of international development, information, trade missions, business development, etc. 	<p>Coface, expert in commercial risk</p>  <ul style="list-style-type: none"> • Coface manages on behalf of, & guaranteed by, the State a wide range of products designed to facilitate & secure French exports. • Each company is assisted at each stage of its export journey, from the prospection stage right up to the sales of its products or services, including any foreign investment. 	<p>OSCI, the Specialized Operators of International Trade</p>  <ul style="list-style-type: none"> • A professional federation of international entrepreneurs, encompassing – with the CGI, its confederation – 150 companies that assist exports and 2000 trading companies • Advise & assist companies in their sales & industrial projects in far flown countries 	<p>Sopexa, international marketing & communication agency for food, drink & lifestyle</p>  <ul style="list-style-type: none"> • Since 2013, the French Ministry of Agriculture has delegated a public service to Sopexa to promote French food, and French food culture, around the world • Advises & assists companies, brands, generic bodies and institutions in their communications strategies and in their business development in France and abroad

1-2. 海外における食産業の海外展開支援施策: Role of ANIA in Agri-Food Sector Export

ANIAは、複数の組織(食糧に関連の政府機関やメディア等)と協力し、支援を進めている。

**Inform, mobilize,
raise awareness and
support companies
to export**

1. Federate the member companies of the federations around international issues, particularly within the exporters' club
2. Promote agri-food companies with VIE
3. Encourage the porting of SMEs internationally by major groups
4. Prioritize strategic geographic areas
5. Establishment of the ANIA USA Export Club in connection with the agribusiness club of the French Embassy in Washington and the Foreign Trade Advisors to identify market opportunities and exchange between agribusinesses wishing to develop in the United States.

**Reduce
administrative
burdens on exports
& help companies
facing export
regulatory problems**

1. Participate in the work of the Technical Barriers Committee of FranceAgrimer as well as in the work of the SPS export committees for the concerned sectors
2. Follow the setting up of EXPADON2
3. Ensure that the positions of the agro-food industries within the MEDEF are taken into account

**Contribute to the
improvement of the
public support
system for export**

1. Bring the expectations and needs of agri-food companies to the actors of the public support system for export, particularly within the ANIA Export Commission
2. Encourage the establishment of a real "economic diplomacy" in support of the MEDEF
3. Ensure follow-up of the various agri-food business support programs and actions in connection with the Ministry of Agriculture and the Ministry of Foreign Affairs.
4. Analyze the results of public provisions for export support (Regional Plans for the Internationalization of Enterprises) to be launched with the help of ARIA
5. Coordinate the various initiatives in support of the actions of the family federator "better food", Catherine Chavrier, at the Ministry of Foreign Affairs
6. Put in place simplified and shared regulatory kits for agro-food companies

1-2. 海外における食産業の海外展開支援施策: Role of BPI France in Export Insurance

BPIFrance SAの子会社であるBPIFrance Assurance Exportは輸出関連の保証を提供。

Insurance Prospection	<ol style="list-style-type: none">1. Bpifrance offers insurance against the risk of commercial failure2. The company incurs its exploration expenses, Bpifrance compensates it for these expenses, & the company pays back according to the evolution of its export turnover
Export Risk Guarantee	<ol style="list-style-type: none">1. Bpifrance facilitates foreign customer deposits & pre-financing on company's behalf by ensuring the issuer / bank against the risk of non-repayment of amounts owed by the company (under the guarantee or pre-financing)
Credit Insurance	<ol style="list-style-type: none">1. Bpifrance guarantees the realization and the payment of the export contract or the repayment of the loan agreement that finances it
Investment Insurance Abroad	<ol style="list-style-type: none">1. Bpifrance insures company against political risks related to the countries in which the company wishes to develop2. To protect the company against these risks, it can cover itself by ensuring investments & benefit the bank that accompanies it with this guarantee3. Investment insurance covers all forms of foreign investment (including bank loans), regardless of amount
Foreign Exchange Insurance	<ol style="list-style-type: none">1. Bpifrance allows company to export in foreign currency without incurring currency risk2. This approach allows the company to respond to calls for tenders, negotiate punctual transactions or framework contracts with confidence3. Depending on the risk profile (one-off transactions or current business), Bpifrance products provide protection against exchange rate fluctuations

1-2. 海外における食産業の海外展開支援施策: Role of Business France in Export

Bussiness Franceは、ターゲット海外市場の商業パートナーとフランスの中小企業を接触させ、彼らのビジネスの促進を狙う。

International Events	<ol style="list-style-type: none">1. 600 annual events around the world to help companies in their international commercial action2. International trade fairs, meetings of foreign buyers, business forums3. Events are selected according to the sectors and countries with the most commercial opportunities4. By participating in these events, companies gathered under the "France" banner benefit from better visibility with local stakeholders and optimize their travel by meeting their future partners in one place
Information Hub	<ol style="list-style-type: none">1. Market & Sectors2. Projects & Tenders3. International Regulations
Prospect	<ol style="list-style-type: none">1. Market Prospection - provides market expertise in 70 countries & personalized services to identify & meet the right contacts2. Fairs & Meetings B2B - provides hundreds of collective promotional actions around the world3. Technology Partnership - helps innovative companies that are members of competitiveness clusters to identify opportunities for technological and industrial partnerships abroad
Promotion	<ol style="list-style-type: none">1. Professional Advertising2. Business Promotion3. Press Relations & Public Relations
Volunteers (Manpower)	<ol style="list-style-type: none">1. The International Volunteering in Enterprises (VIE), established by the law of March 14, 2000, allows French companies to entrust a young man or woman, up to 28 years, a professional mission abroad during a flexible period of 6 to 24 months, renewable once within this limit
Partner Offers	<ol style="list-style-type: none">1. Pre-diagnosis INPI - evaluate needs of the company with regard to industrial and intellectual property2. FORMATEx - conceives seminars animated by professionals of the international for export related topics3. Labelling - allows an operator to organize, in priority areas, collective actions, to support a larger number of French companies abroad, by lowering their participation costs4. Industrial Program France Quebec - facilitates the negotiation and conclusion of industrial partnership agreements between French and Quebec SMEs / SMLs

1-2. 海外における食産業の海外展開支援施策: Case Studies of Govt. Support for Export

(参考) ケーススタディを公開し、後続の助けとしている。

1. Broadpeak

Company Introduction:

Leader of video streaming and digital content technology
Established in 2010

Internationalization:

Started in 2012 to Singapore, 2014 to Brazil & US, 2016 to South America & India with help of CCI
In the spring of 2017, the CCI France Japan then established the Broadpeak company in Tokyo, and today houses two employees in the business center of the Chamber

CCI Support Details:

- partner hunt
- organizing partner meetings
- hiring professionals

Testimony:

Jacques Le Mancq, President and CEO of Broadpeak

"Meetings with quality interlocutors, a very dynamic team and a very professional service, here are key elements to remember teams of CCI France Japan. The first contacts are very promising and augur a rapid development growth. After a few weeks, appointments are bearing fruit and a start on possible partnerships with Japanese telecommunication operators. I am very satisfied with the content and quality of the work of the Business Support Teams of CCI France Japan. It's a stepping stone and partner of choice in our current and future development in Japan, and this is just the beginning!"

2. Accuracy

Company Introduction:

Accuracy, created in Paris in 2004 by former partners of Arthur Andersen, is the only European player of global reach, totally independent, whose job is to quantify the strategic issues of the directors of companies and their shareholders

Internationalization:

In 2016, Accuracy's Singaporean subsidiary was created with the assistance of the French Chamber of Commerce in Singapore

CCI Support Details:

- creation of the structure
- obtaining visas
- temporary offices
- ongoing administrative support

Testimony:

David Thornes, Director of the Singaporean subsidiary

"We received solid support at all stages of the process: creation of the structure, obtaining visas, temporary offices and ongoing administrative support. This made it easier to find and develop our premises, recruit new recruits, communicate and develop the subsidiary, as well as carry out ongoing assignments"

個別国詳細情報(英国)

1-2. 海外における食産業の海外展開支援施策

英国の支援策サマリー

		Government Support Policy for Overseas Expansion	Government Support Policy for Export
In the phase of studying for the expansion to foreign countries	Information	<ul style="list-style-type: none"> ● Business opportunities by sector and/or market 	<ul style="list-style-type: none"> ● Export Marketing Research Scheme ● Practical insights on key export topics via articles, videos and webinars
Entry in local markets	Information gathering	<ul style="list-style-type: none"> ● Market advice ● Bespoke events such as product launches 	<ul style="list-style-type: none"> ● Detailed assessment of readiness to export ● Workshops on stages of exporting ● Help with market research and visits to target markets ● Advice and guidance from International Trade Advisers (ITAs) ● Trades events and missions ● Access to a community of new exporters and potential partners/service providers
	Preparation for launching	<ul style="list-style-type: none"> ● High level training ● Event networking and tradeshow opportunities ● Help with the linguistic and cultural aspects of doing business overseas ● Support during overseas visits ● Arranging meetings with key contacts ● Analysis of market entry strategies 	<ul style="list-style-type: none"> ● Action plan development for export activity
	Financial Support	<ul style="list-style-type: none"> ● Access to competitive finance to overseas buyers 	<ul style="list-style-type: none"> ● Funding to execute action plan ● Guarantees to banks ● Credit insurance ● Buyer and supplier credit facilities ● Guidance on sources of trade finance through regional network of Export Finance Advisers
Business expansion	Product development/ market planning	<ul style="list-style-type: none"> ● Business matching 	
	Sales & Promotion	<ul style="list-style-type: none"> ● Identification of potential business partners 	<ul style="list-style-type: none"> ● Free online service providing export sales leads, sent direct via UKTI's global contacts network. List of support include Incoming business opportunities, access to competitive finance to overseas buyers

1-2. 海外における食産業の海外展開支援施策:UK Government Agencies responsible for Export promotion

主に4の組織・団体が海外展開を支援している。

1. UK Trade and Investment (UKTA)
2. UK Export Finance
3. Foreign and Common wealth office (FCO)
4. British Exporters Association (BExA)

1-2. 海外における食産業の海外展開支援施策:UK Trade and Investment (UKTI)

UKTIは英国に複数の拠点を構え、国際市場で成功するためのアドバイス、各種サポートを実施。

Developing international trade potential	Passport to Export	<ul style="list-style-type: none"> It helps SMEs new to exporting to build their trade capacity. This service is delivered locally by international trade advisers (ITAs) with private sector experience. The service lasts twelve months List of support activities include: <u>a detailed assessment of readiness to export, an action plan for export activity, funding to execute action plan, workshops on stages of exporting, help with market research and visits to target markets, high level training, event networking and tradeshow opportunities, advice and guidance from International Trade Advisers (ITAs), business matching, trades events and missions</u>
	Export Marketing Research Scheme	<ul style="list-style-type: none"> Helps to carry out export marketing research on all the major aspects of any export venture; on topics such as market size and segmentation; regulations and legislation; customer needs, usage and attitudes; distribution channels; trends; and competitor activity, strategy and performance List of support activities include: <u>advice on how to conduct or commission market research, whether the information already exists in published market research reports, financial support to conduct the research</u>
	Export Communications Review	<ul style="list-style-type: none"> This offers companies help with the linguistic and cultural aspects of doing business overseas, including cultural awareness reviews and communications planning. List of support include: <u>comprehensive review of all written and verbal communication including your website, A review of brochures, leaflets, technical documentation and packaging, Preparation for an overseas tradeshow or exhibition, Social media guidance including the use of blogs, International e-commerce and the logistics of setting up an online trading platform access to funding</u>
	Open to Export	<ul style="list-style-type: none"> Open to Export provides with invaluable export knowledge from trusted sources List of support include: <u>Access to a community of new exporters and potential partners/service providers, Business opportunities by sector and/or market, Practical insights on key export topics via articles, videos and webinars</u>
Accessing International Markets	Overseas Market Introduction Service	<ul style="list-style-type: none"> This service enables you to grow your business globally through the provision of bespoke market research and in-market assistance List of support include: <u>market advice, support during overseas visits, arranging meetings with key contacts, analysis of market entry strategies, bespoke events such as product launches and identification of potential business partners</u>
	Business Opportunities Alerts	<ul style="list-style-type: none"> A free online service providing export sales leads, sent direct via UKTI's global contacts network. List of support include: <u>Incoming business opportunities, access to competitive finance to overseas buyers</u>

1-2. 海外における食産業の海外展開支援施策:UK Export Finance (UKEF)

UKEFは、輸出における金融ソリューションを提供している政府機関である。

UK Export Finance (UKEF)

- Help exporters with their cash-flow, protect them against not being paid and ultimately help them fulfil their export contracts
- Services include Guarantees to banks, Credit insurance, Buyer and supplier credit facilities, Guidance on sources of trade finance through regional network of Export Finance Advisers

個別国詳細情報(シンガポール)

1-2. 海外における食産業の海外展開支援施策

シンガポールの支援策サマリー

		Government Support Policy for Overseas Expansion	For Export
In the phase of studying for the expansion to foreign countries	Manpower	<ul style="list-style-type: none"> ● Recruitment of C-suites & critical talent (Only Monetary) ● Overseas market attachments ● Customised training (Only Monetary) ● International HR strategy (Only Monetary) 	
	Equipment/Land	-	
	Money	<ul style="list-style-type: none"> ● Market feasibility study and Market Research (Only Monetary) 	
	Information	<ul style="list-style-type: none"> ● Research Databases and publications such as IE Insights and Market 101 Guides ● iAdvisory Seminars for Market Knowledge ● iAdvisory Workshops for capability building ● iAdvisory Exchange for peer-to-peer learning 	
Entry in local markets	Regulations for entries	<ul style="list-style-type: none"> ● Advisory on tax, legal, import and export regulations (Only Monetary) ● IP search, filing and registration (Only Monetary) ● Drafting of franchising, distributorship and JV agreement (Only Monetary) 	
	Information gathering	<ul style="list-style-type: none"> ● Identification of overseas Licensees/ Franchisees. Agents and Distributors and joint Venture Partners ● M&A Due Diligence (Only Monetary) 	
	Preparation for launching	<ul style="list-style-type: none"> ● Bidding (Only Monetary) ● Pilot & Test Bedding (Only Monetary) ● Overseas marketing presence 	
Business expansion	Product development/ market planning	<ul style="list-style-type: none"> ● Internationalization Strategies- tailored product and sales strategy for each country ● Financial Management- support for financial management in overseas markets (Only Monetary) ● Intellectual Property Management- Support for protecting IP overseas (Only Monetary) 	
	Procurement	<ul style="list-style-type: none"> ● Supply Chain Management (Only Monetary) 	
	Manufacturing/delivery	<ul style="list-style-type: none"> ● Design (Only Monetary) 	
	Sales	<ul style="list-style-type: none"> ● Overseas Marketing (including online) and PR activities (Only Monetary) ● Participation in overseas trade fairs ● Branding and Social Media (Only Monetary) ● E-Commerce (Only Monetary) ● Franchising and Licensing (Only Monetary) ● Business development 	

1-2. 海外における食産業の海外展開支援施策: International Enterprise (IE) Singapore (1/2)

IEシンガポールは世界中に35以上のオフィスを構えて、シンガポールの海外展開を推進している。

- IE Singapore is the **government agency that promotes international trade and partners Singapore companies to go global.**
- They have offices over **35 locations** across the globe



- *Please note that from 2018 Q2, IE will be merged with SPRING*
- *SPRING (The Standards, Productivity and Innovation Board) is a statutory board under Ministry of Trade and Industry*

1-2. 海外における食産業の海外展開支援施策:International Enterprise (IE) Singapore (2/2)

IEはMRAとGCPの2つの包括的なプログラムで海外展開を促進。

- Through its comprehensive assistance schemes, they partner Singapore-based companies to **strengthen their competitiveness and compete on the global stage** against the very best in their industries.
- IE attracts and anchor global trading companies in Singapore by promoting its unique advantages as a global trading hub.
- To help companies internationalise more effectively, IE Singapore (IE) has simplified its assistance into two comprehensive programmes
 - ✓ Market Readiness Assistance (MRA)
 - ✓ Global Company Partnerships (GCP)
- These two comprehensive programs support a plethora of activities to help Singaporean companies globalize such as feasibility studies, alliances with foreign companies etc.,
- In 2013, more than 26,000 companies, over 85% of them SMEs, received financial and non-financial assistance from IE, including access to some \$775 million in trade and financing loans.

1-2. 海外における食産業の海外展開支援施策: Types of assistance provided

二種類の支援プログラムの概要は以下の通り。

Market Readiness Assistance (MRA) Programme

Objective:

Broad based help to **SMEs taking their first steps overseas**

Financial Assistance:

- MRA Grant

Networking and Learning

- Seminars and Market info
- Insights and Publications

There are three types of support provided under this grant:



Overseas
Market Set-Up



Overseas
Business Partners



Overseas Market
Promotion

Global Company Partnership (GCP) Programme

Objective:

Broad based help to **SMEs taking their first steps overseas**

Financial Assistance:

- GCP Grant
- Double Tax Deduction (DTD)
- Financing Schemes

Advisory and Business Development

- Global network (e.g. 35+ overseas offices)

There are three types of support provided under this grant:



Capability
Building






Market Access



Manpower
Development

1-2. 海外における食産業の海外展開支援施策：MRA Programme Details

MRAは3つの活動を通して支援を提供しており、1年間に1社あたり最大20,000ドルを提供。

MRA Grant	Features	Quantum of Support
<p>Overseas Market Set up</p> 	<p>List of supported activities</p> <ol style="list-style-type: none"> 1. Market feasibility study 2. Advisory on tax, legal, import and export regulations 3. IP search, filing and registration 4. Drafting of franchising, distributorship and JV agreement 	<ul style="list-style-type: none"> • 70% of eligible third party costs • Up to \$20,000 cap per company per fiscal year • Up to 2 applications per company per fiscal year • One activity per application form
<p>Overseas Business Partners</p> 	<p>List of supported activities</p> <p>Identification of potential:</p> <ol style="list-style-type: none"> 1. Licensees/ Franchisees 2. Agents and Distributors 3. Joint Venture Partners 	
<p>Overseas Market Promotion</p> 	<p>List of supported activities</p> <ol style="list-style-type: none"> 1. Overseas Marketing and PR activities: Marketing and PR agency fees for marketing campaigns, including organizing in-store promotion, road show or pop-up stores 2. Online Marketing Activities: Search engine marketing and/or optimisation, Social media marketing, Listing on global e-commerce platforms 3. Participation in overseas trade fairs: Space rental & construction cost (capped at 36 m²) 	

1-2. 海外における食産業の海外展開支援施策：GCP Programme Details

GCPは、以下の3つの活動を実施。



1-2. 海外における食産業の海外展開支援施策: Case Studies of Govt. Support to Food Companies

(参考) ケーススタディを公開し、後続の助けとしている。

1. SAKURA chicken

Company Introduction:

SAKURA chicken – is a chilled chicken brand which boasts succulent meat and lower fat and cholesterol content, is the brainchild of Singapore's second largest poultry producer, the Kee Song Group

(Note: Sakura chickens are bred using a Japanese farming technology in which chickens live in a temperature-controlled, clean environment with enough space for them to roam about while listening to Mozart)

Support Summary:

IE supported Kee Song Group in **expanding its Sakura chicken brand to other countries**

Support Details:

- IE has taken Kee Song representatives on a mission to Chongqing in China **and introduced potential poultry-farming partners** there to the company
- IE has also **linked Kee Song with the Malaysian Investment Development Authority** to gain **access to investment incentives** as it has plans to embark on egg production in Johor
- Last year, IE also **supported Kee Song in a branding project** through the Global Company Partnership scheme. The company needed to strengthen its brand platform and identity to stand out competitively in local and overseas markets.

2. IE-SFMA e-commerce initiative

Company Introduction:

The Singapore Food Manufacturers' Association (SFMA) is a professional and active trade association formed in 1967 by local food manufacturers with the purpose of developing and promoting the local food manufacturing industry

Support Summary:

IE partnered the SFMA to help Singapore food companies **leverage e-commerce channels to access the China market**. A Singapore shop has since been established on four platforms – Tmall(天猫), Jindong(京东), Baobeigezi(宝贝格子) and WeChat's e-store(微店)..

Support Details:

- The Singapore shop on Tmall is the first country-led transaction page on the site. Since its launch in August 2015, over 60 companies (in food, fashion and furniture) has participated listed on the marketplace, offering more than 250 items to consumers. Of these, **44 companies are expanding into China for the first time**.
- This approach benefits companies, in a few ways:
 - ✓ **Market knowledge building:** Companies learnt about their product positioning and pricing vis-à-vis existing products
 - ✓ **Cost effectiveness:** The clustering of Singapore products increases cost-competitiveness as companies share facilities like warehouses and logistics, & conduct joint marketing

3. Agrocorp International

Company Introduction:

Agrocorp International is a global agri-commodity trading and processing company specialising in the physical trading of various agricultural commodities such as pulses, wheat, rice, oilseeds, sugar, cotton and edible nuts with a presence in 12 countries

Support Summary:

IE is supporting Agrocorp to embark on a more **aggressive overseas expansion plan**, focusing on downstream processing.

Support Details:

- IE Singapore is supporting Agrocorp through its **Internationalisation Finance Scheme**, which would help it secure financing for the **expansion projects** it is pursuing in Myanmar, India and Bangladesh this year.
- IE is also working with Agrocorp to **identify and develop investment opportunities** in markets like Australia and India, as well as to develop partnerships with research institutes on product development to **expand its portfolio of products**.

目次

0. 本事業の背景及び位置付け

1. 関連情報等の調査・整理

1-1. 日本の食品関連事業者・生産者の海外展開状況と課題

1-2. 海外における食産業の海外展開支援施策

1-3. 事業者・生産者の海外展開に資する関連情報

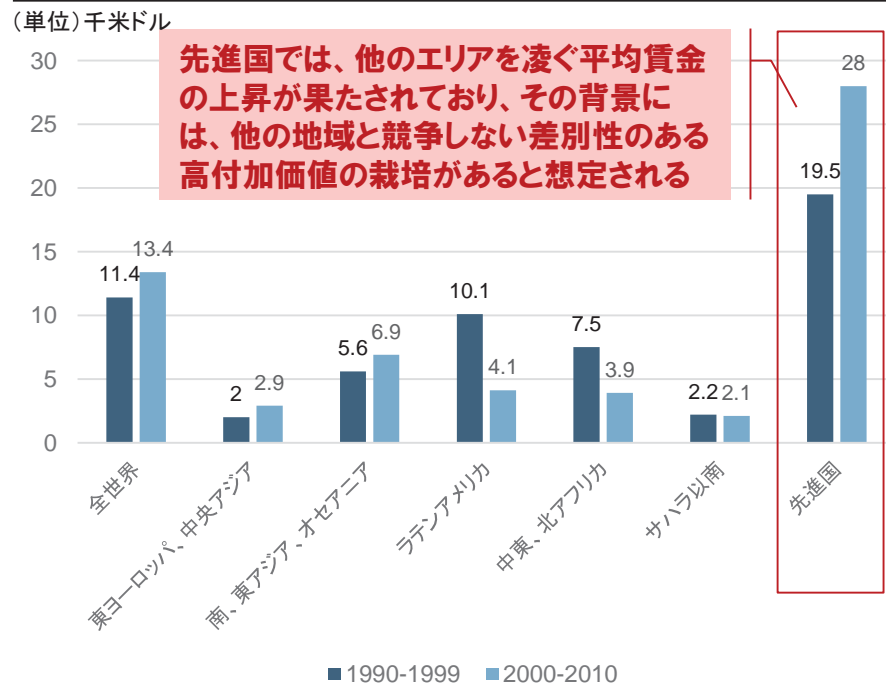
2. 研究会等での検討・取りまとめ

1-4. 事業者・生産者の海外展開に資する関連情報

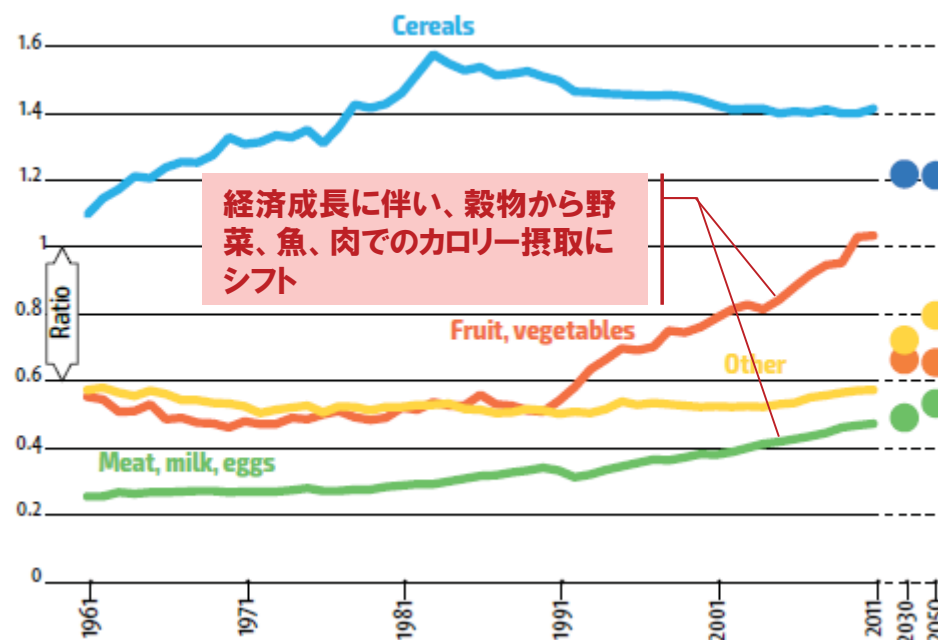
現地調査からの主要な示唆 - 1. マーケット状況と将来のトレンド
 : 世界の農林水作業のトレンド ~高付加価値市場とカロリー摂取シフト市場~

- 世界の農林水産業は成長を続けているものの、先進国と途上国でその主たる成長領域は異なり、その大きなトレンドを抑えた上で、日本の農林水産業は海外に打って出ることが重要である。
 - 先進国: 所得向上につながる高付加価値の農林水産物が市場成長を牽引
 - 途上国: 穀物でのカロリー摂取から野菜、魚、肉にシフトしていく中で農林水産物が成長
- なお上記以外にも、食糧不足を背景とした貧困国への食糧援助という形の食品の輸出入も存在する。

【トレンド1】 高付加価値の農林水産物により成長を果たす
 (途上国及び先進国の農業分野従事者の平均賃金の変化)



【トレンド2】 カロリー摂取が穀物から野菜、魚、肉にシフトする中での成長
 (低・中所得国の高所得国と比較した一人あたりカロリー摂取量)



1-4. 事業者・生産者の海外展開に資する関連情報

現地調査からの主要な示唆 – 1. マーケット状況と将来のトレンド
 : 農林水産業のグローバルトレンドに対する日本の農林水産業への期待・チャンス

- 今回調査を行ったアメリカ、中国、ベトナムのいずれの国においても、日本の農林水産業に対する期待は存在した。
- ただし、単なるカロリー摂取の転換という意味合いでの日本の農林水産物に対する期待はベトナムと中国で聞かれたが、アメリカではそのような声は聞かれなかった。

期待・チャンス グローバル トレンド	ベトナム	中国	アメリカ
<p>穀物でのカロリーを摂取から野菜、魚、肉にシフトしていく中での農林水産物市場</p>	<p>△</p> <ul style="list-style-type: none"> ✓ 需要も増えているため、生産量を今後拡大させていくための投資が必要となるため、将来的なパートナーとして投資を行ってくれる日系企業を求める(Dalat Agri Food) 	<p>△</p> <ul style="list-style-type: none"> ✓ 付加価値がそれほどない一般野菜・果物等は大量生産などにより対応可能(公開情報) ✓ 仏、米、豪の一般野菜・果物等に関する農地などを中国企業が買収する動きが広まっている(公開情報) 	<p>×</p> <ul style="list-style-type: none"> ✓ Selina's Valleyでは野菜・果物が世界中に輸出されている ✓ "Kitazawa" というアメリカ資本の種子会社を通じて、以前からアジア系の作物の種子が普通に流通している(カリフォルニア大学)
<p>高付加価値の農林水産物市場</p>	<p>△</p> <ul style="list-style-type: none"> ✓ 温帯野菜の技術や機械等はベトナムでは少なく日本の農林水産業から学べる(にこにこ野菜) ✓ マグロ、カンパチ、タコなどは、一部ハンドキャリーしてでも日本から調達することもある(Sushi Bar) 	<p>○</p> <ul style="list-style-type: none"> ✓ 付加価値を提供しやすいオーガニックなどは、政府の優遇政策等によって価値提供が可能(沱沱工社) ✓ 日本のオーガニックは認証基準が高く、付加価値が高い(沱沱工社) 	<p>○</p> <ul style="list-style-type: none"> ✓ アメリカ西海岸では日本含めたアジア系の食品の市場ポテンシャルが高まっている(カリフォルニア大学) ✓ 日本の野菜は、アメリカの野菜と比較させて際立たせると売れる可能性がある(くら寿司)

1-4. 事業者・生産者の海外展開に資する関連情報

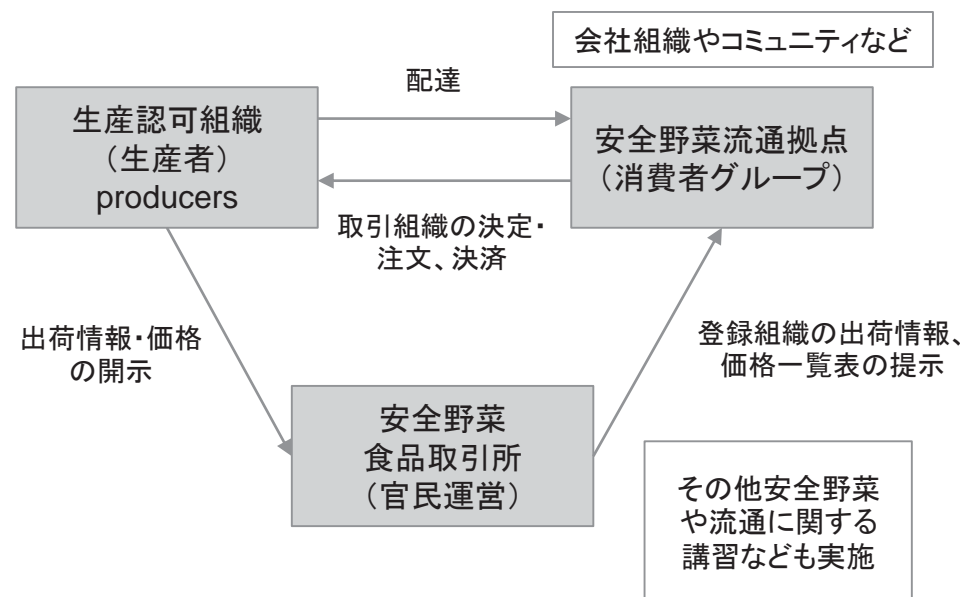
参考)ベトナムは、安全野菜への取り組みがスタートするもののマーケット・定義が曖昧

- ベトナムの「安全野菜」とは、政府が定める安全基準に従った生産・加工・処理などを行った野菜・果物・きのこ類等を指し、消費者のニーズが少しずつ芽生えてきている。
- しかしながら、ベトナムには、農産物の安全基準・認証制度が4つ存在しており、1990年代から基準の統一や整合性合わせなどが行われているが、十分な結論には至っていない状況。
- 加えて運用上でも様々な課題も存在し、生産者・消費者の両面から、信頼出来る基準へと改善していくことが求められる。
 - ハノイ市では、基準の設定だけではなく、2011年に民間企業と連携して安全野菜食品取引所を設置するなどの対策も進めている。

安全野菜の基準

規定名	概要	現状・課題など
Viet GAP	<ul style="list-style-type: none"> ASEAN GAPを参考にベトナム農業農村開発省が定めた農業生産管理基準。 認証には農産物、生産規模、土壌・水・肥料情報などに対してチェックリストがあり、それらを満たすことが求められる。 	<ul style="list-style-type: none"> 内容が複雑、認証取得のために資金が必要(土壌・水質分析や設備整備等)。 生産者自身の認知度の低さと教育機会の少なさからなかなか広まらない。
Basic GAP	<ul style="list-style-type: none"> VietGAPの簡易版。 Viet GAPにあるチェックリスト65項目を25項目にまで減らし、必須項目も奨励項目に変更。 	<ul style="list-style-type: none"> 簡素化されているものの、「認証」に対する信用が低く、十分な浸透には至っていない。
各自治体による規定	<ul style="list-style-type: none"> 各省・市の農業局により残留農薬、寄生虫数などの基準を規定している。 	
有機野菜	<ul style="list-style-type: none"> 化学肥料・化学農薬、除草剤などの不使用を規定している。 	<ul style="list-style-type: none"> 消費者の認知度が低い状況。

ハノイでの安全野菜の流通のしくみ



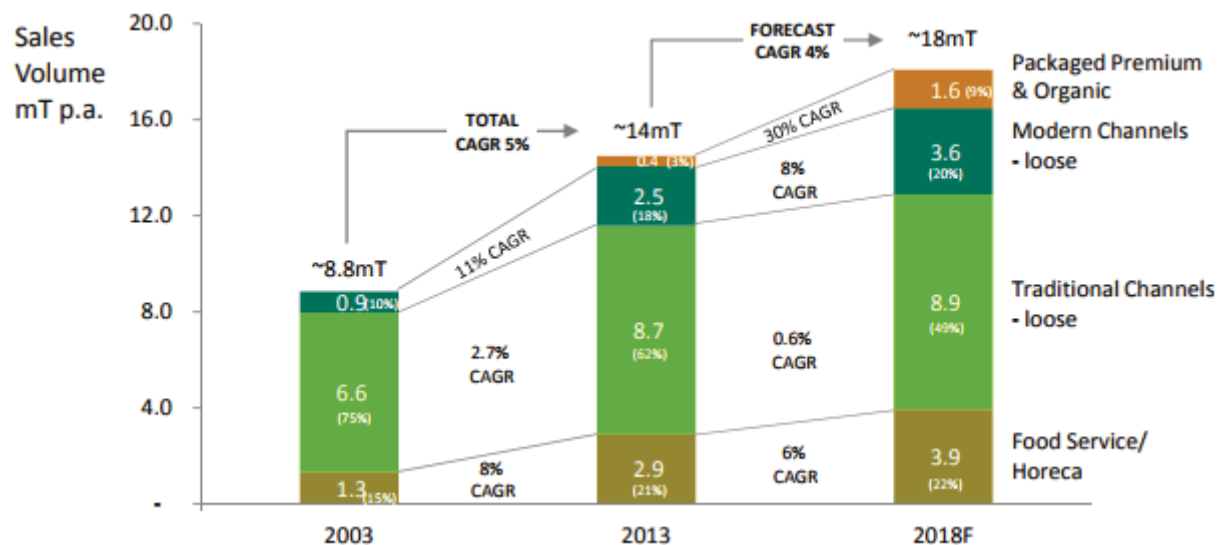
出所)JETRO「ベトナムにおける高付加価値野菜の栽培・流通関連制度調査」
アジ研ワールド・トレンドよりNRI作成

1-4. 事業者・生産者の海外展開に資する関連情報

参考)中国の第一級都市では、Packaged premiumやOrganicの市場が萌芽してきている

- Packaged Premium and Organic segment is already substantial (at least 400kT in 2013 and growing rapidly (forecast 30% per year growth; this may be conservative)
- Packaged and organic produce sold at a 3-8x premium compared to traditional channels (eg Wetmarkets)
- However, outside first tier cities, the packaged premium and organic segment is currently smaller and confined to wealthy satellite cities such as Tianjin (near Beijing) and Hangzhou, Suzhou and Nanjing (near Shanghai)

Development of the Vegetable Market In First Tier Cities



Key growth drivers

- Market growth driven by migration to Tier 1 cities (3.3% CAGR) and growing per capita consumption (1.7% CAGR)
- Channel shift to supermarkets, hypermarkets and online
- Emergence of premium packaged segment & organic

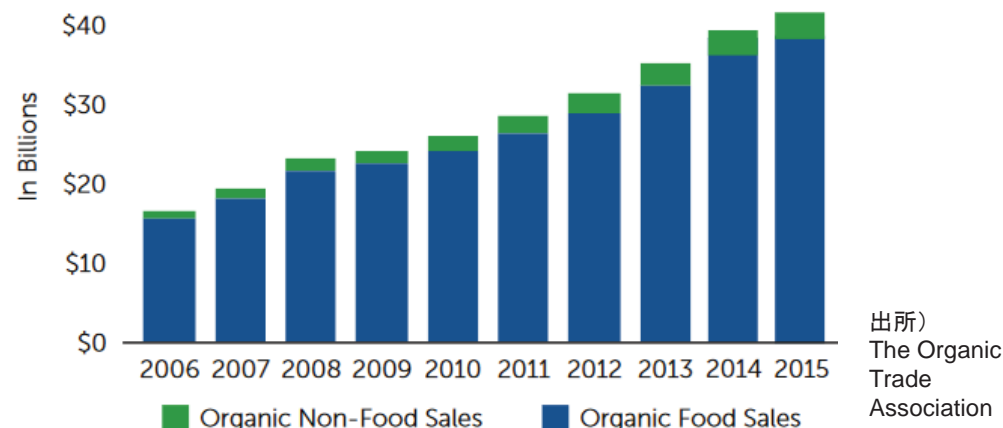
- Continued inward migration but slower growth of per capita consumption due to market saturation
- Continued shift to modern channels and rapid growth of premium packaged and organic segments

1-4. 事業者・生産者の海外展開に資する関連情報

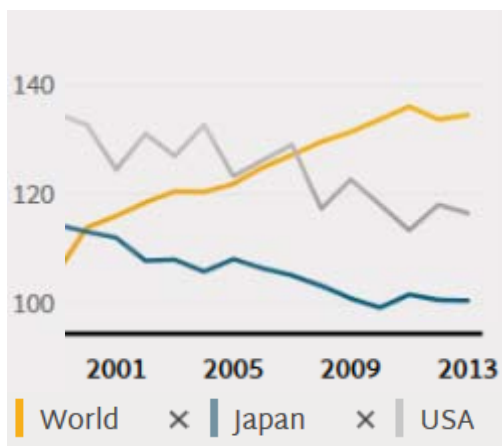
参考) アメリカのニューヨークの若者層は半数以上が多少の値段の違いよりも品質を重視

- アメリカは、日本と同じく減少傾向にあるものの、日本より野菜の一人あたり消費量が大きい国であり、人口数も考慮すると日本より市場規模としては魅力的な国であるといえる。
- また、多少高くても質の良い野菜を買うようにしている人の割合が日本よりも高く、実際にオーガニックといった新たなマーケットが成長しており、市場環境及び市場シェアの変化の中で日系の参入余地が生まれているものと想定される。

オーガニック食品市場の推移



一人当たりの野菜消費量



出所) Helgi Analytics

多少高くても質の良い野菜を買うようにしている割合



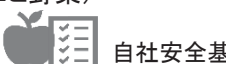


出所) カゴメ「アメリカと日本の野菜摂取に関する意識調査」

1-4. 事業者・生産者の海外展開に資する関連情報

現地調査からの主要な示唆 — 1. マーケット状況と将来のトレンド
 : 参考)日本の農林水産業の調査対象国における展開事例


- ベトナムでは、現状小さな高付加価値農産品市場でビジネスを成立させるため、消費者を捕まえるための自社店舗を設置したり、加工品として更に付加価値を高めることで収益確保を図っている。
 - また、将来的に市場が大きくなることを期待し、自社独自の基準づくりなどを行いデファクト化を狙う事業者もいる。
- 中国では、アサヒビール等の日本企業体が、オーガニック事業への投資を行った。収益化に5年の時間を要したが、現在は、事業として成立するようになり、中国大手の新希望集団への事業売却へと辿り着いた。
- アメリカでは健康志向、日本食の需要、若者の嗜好の変化等からワサビ需要が高まっている。

ベトナム	
小売店舗 設置による 出口確保	ハノイでは小売店舗による展開が比較的容易なため、自社で店舗を構えることで収益を確保(にこにご野菜)  生産 → 自社店舗
加工機能 による付加 価値の提 供	安全野菜の販売では収益を確保できないため、加工を行うことで収益性を確保(Honest Sea)  生産 → 自社で加工
自社ブラン ドでの展開	現地の安全野菜の信頼が低く、顧客のニーズを把握することで自社ブランドの信用を勝ち取る(にこにご野菜)  自社安全基準

中国	
オーガニック 事業への 投資	<ul style="list-style-type: none"> • 2006年に、アサヒビール、住友化学、伊藤忠商事の共同出資による山東省でのオーガニックファームへの投資事業。 • 農地の広さは1,500ムー • 乳牛の飼育や野菜、イチゴなどの生産・販売 • 最初の5年間は土地転換で収益がないが、現在は北京、上海、日本に高品質の農産物を提供



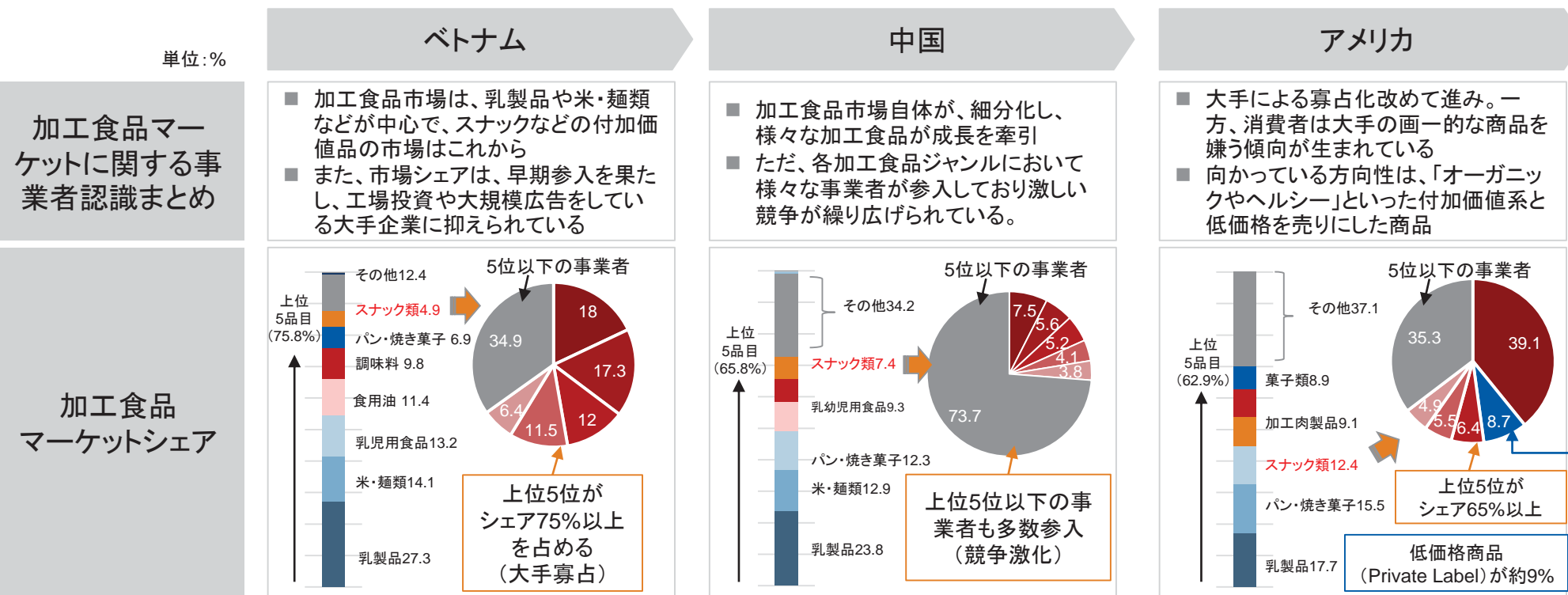
中国食品大手の新希望集団に売却
 農業事業のために約100haを借りていたが、それでも黒字化するためには規模が不足、2017年2月まで赤字を続けていた。

アメリカ	
ワサビ栽培 や 栽培実験	<ul style="list-style-type: none"> • 現地で日本料理、フュージョン料理が広まる中でワサビ需要も拡大。 • 結果、温室栽培の実験を4年前より実施する研究者やワサビの茎からの苗の増殖を行う事業者(Courd)などが登場してきた。 • ワサビは付加価値が高く、収益性があると期待されている。  <p>オレゴンの事業者「OregonCoast Wasabi」のワサビ農園の様子</p>

1-4. 事業者・生産者の海外展開に資する関連情報

現地調査からの主要な示唆 - 1. マーケット状況と将来のトレンド
 : 世界の加工食品市場のトレンド ~安価市場と高付加価値市場、そして超低価格型市場~

- 加工食品は、過去、欧米中心の「画一的だが、大量生産で安価な商品」供給ビジネスによって牽引されてきた。
 - 莫大な費用で広告宣伝・流通網づくりを行い、認知度と顧客数を増やし、自社工場の稼働率を高めていくことが事業成功のポイント。
- その潮流は、現在、ベトナムや中国といった途上国において、現在も広まりを見せている。
- 一方で、アメリカでは、顧客経験価値ニーズの高まりや所得の二極化などから、そのトレンドからの変化が生まれており、それは「高付加価値商品市場の拡大」や「プライベートブランドなど画一的かつ、さらに低価格な市場」といった形でデータ上でも把握することが出来る。
 - なお、高付加価値商品市場の拡大は、途上国の一部富裕層においても同様の動きがある。












1-4. 事業者・生産者の海外展開に資する関連情報

現地調査からの主要な示唆 – 1. マーケット状況と将来のトレンド

: 加工食品のグローバルトレンドに対する日本の加工食品への期待・チャンス

- ベトナムには大量生産分野への期待があり、ベトナム・中国・アメリカそれぞれからは、高付加価値商品への声が聞かれた。
 - ベトナム: 成長する加工食品(菓子類、飲料)においてマーケットシェア獲得への貢献、マーケットは小さいが高付加価値品として展開
 - 中国: 成長著しい高付加価値品(安心安全や高品質というブランド)での展開
 - アメリカ: 高付加価値品(エスニックといった顧客体験価値商品)としての展開

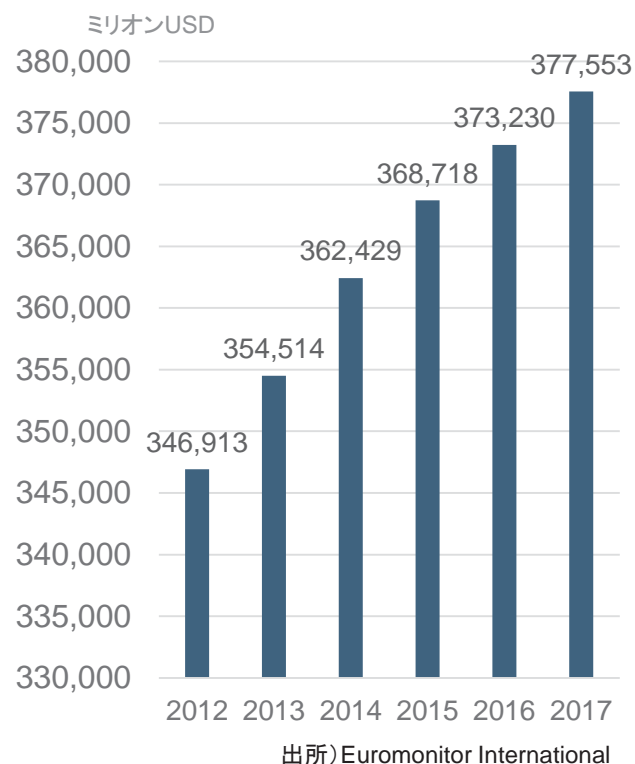
	ベトナム	中国	アメリカ
画一的だが、大量生産で安価な商品市場	 <ul style="list-style-type: none"> ✓ エースコックは市場のニーズに合った製品を開発しシェア1位 ✓ 今後成長が期待される領域としてチルド製品などが挙げられている 	 <ul style="list-style-type: none"> ✓ 既存メーカーは、既に日系や他外資との提携し、品質管理のノウハウなどを取得済み。新たな、提携の可能性は低い(康師傅など) 	 <ul style="list-style-type: none"> ✓ Nestle、Con Agra等の大手も近年では市場の二極化により売り上げが減少傾向となっている(Kahiki Foods)
高付加価値商品市場	 <ul style="list-style-type: none"> ✓ 健康・機能食品などのニーズは近年出てきており、その技術を日系企業から学びたい(Bibica) 	 <ul style="list-style-type: none"> ✓ 菓子類に関しては日本製が見栄えがよく市場への浸透は期待できる(上海慎昌) ✓ 栄養・健康食品の輸入は関心高(上海慎昌) 	 <ul style="list-style-type: none"> ✓ ユニークな食材は高価格市場でも可能性があり、ソースやヌードル(焼きソバ)、冷凍すしなどがあげられる(Kahiki Foods)
プライベートブランドなど画一的かつ、さらに低価格な商品市場	 <ul style="list-style-type: none"> ✓ 現状小売市場の9割以上が伝統小売となっており、現時点では、プライベートというよりも家内工業の低価格市場が殆ど(JETRO) 	 <ul style="list-style-type: none"> ✓ 中国のPB売り上げシェアは食品小売全体の1.3%と未成熟な市場(Nielsen) 	 <ul style="list-style-type: none"> ✓ PBの取扱いは価格次第(Brooke Rice) ✓ デリで寿司を取り扱うことも魅力的だが、価格が高くなるのがネック(Brooke Rice)

1-4. 事業者・生産者の海外展開に資する関連情報

参考)アメリカの加工食品市場では、高付加価値な中小ブランドへのM&Aが行われている

- アメリカの加工食品マーケットは、市場拡大を続けているが、2017年は過去5年で最も成長が小さい年となった。背景としては、今までの加工食品ではない、飲食業や惣菜の伸びが背景にある。また、小売業者は、店舗改装等を通じて、デリの強化や店内飲食の強化を図っている。
- 一方で、加工食品の業界内では、今までの大量生産・大量消費から離反する動きがあり、それに伴い、大手食品は、中小の技術や新商品を求めてM&Aを活発に行っている。キーワードとしては、“small-batch”, “craft”, “artisanal” が挙げられる。

加工食品市場の推移



大量生産・大量消費からのシフト(大手企業による中小専門食品ブランド買収)

企業	買収活動	画像
Kellogg Co	2017年10月: 米国で最も急成長している栄養バーブランドであるRx Barを傘下に加えた	
Campbell Soup Co	2017年7月: 有機野菜スープで成長するPacific Foodsを買収し、独自の有機スープおよびスープ製品のポートフォリオを拡大	
ConAgra	2017年4月: 高級スナックブランドのTHANASI Foods LLC 2017年9月: Angie's Artisan Treats	

出所) 各社ホームページより