

Sprecher



Koki Araga
Senior Business Development Manager
Rakuten Group



Norman Langbecker
Regionalmanager Japan
OAV

Ilian Paron
Beiersdorf AG



Frank Robaschik
Korrespondent für Japan
Germany Trade & Invest



Christiane Süssel
Senior Managerin Ostasien
Germany Trade & Invest



Dr. Lucas Witoslawski
Stellvertretender Geschäftsführer
AHK Japan

Japans E-Commerce-Markt

Chancen für deutsche Hersteller

27. Mai 2025
9.30 - 11.00 Uhr



E-COMMERCE IN JAPAN

Marktvolumen, Anbieter, Alternativen

OAV/GTAI/AHK JAPAN, 27.5.2025

Frank Robaschik
Korrespondent für Japan
www.gtai.com



A large group of people, mostly in business attire, are posed for a group photo in a modern, spacious hall. The hall features a high ceiling with a complex glass and steel dome structure. Large, white, sculptural elements resembling stylized leaves or petals are suspended from the ceiling. The floor is covered with a red carpet. In the background, a large screen displays the text "GTAI-KONGRESS 2019". The overall atmosphere is professional and formal.

**Germany Trade & Invest (GTAI) ist die
Wirtschaftsförderungsgesellschaft der
Bundesrepublik Deutschland**

Japan 2024: Großer Player in Asien und der Welt



4.

größte Volkswirtschaft

32.500

US\$ BIP pro Kopf

124

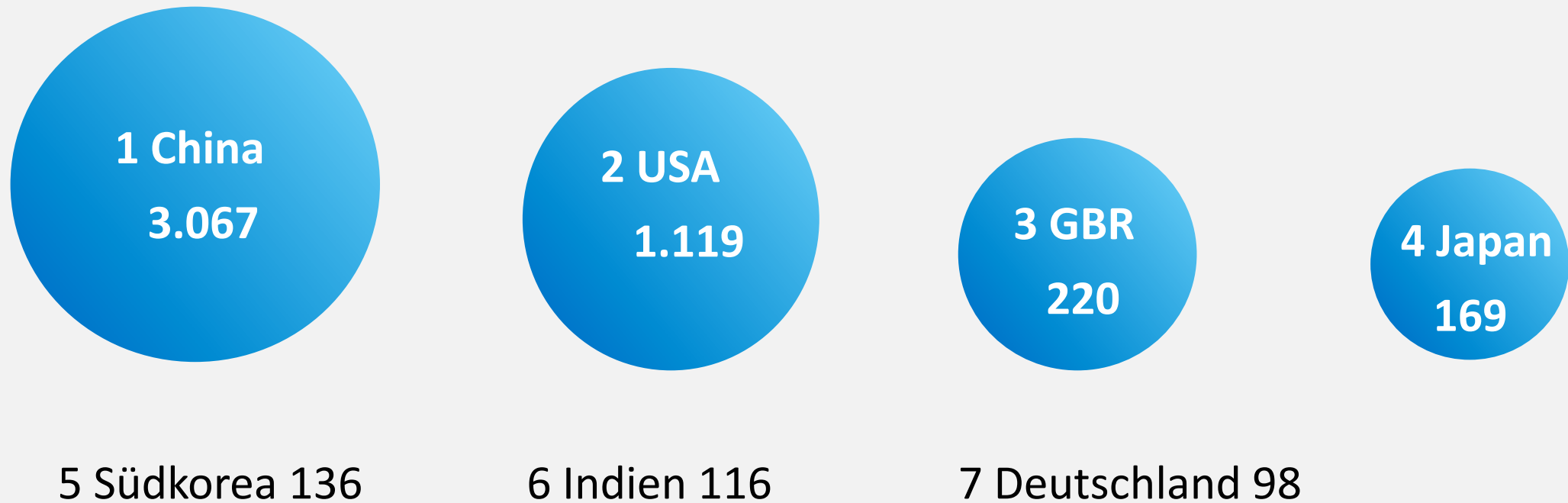
Millionen Einwohner

4.

höchste Ausgaben für F&E

Japan - ein Top-Markt für E-Commerce

Umsatz B2C in Mio. US\$ 2024 *

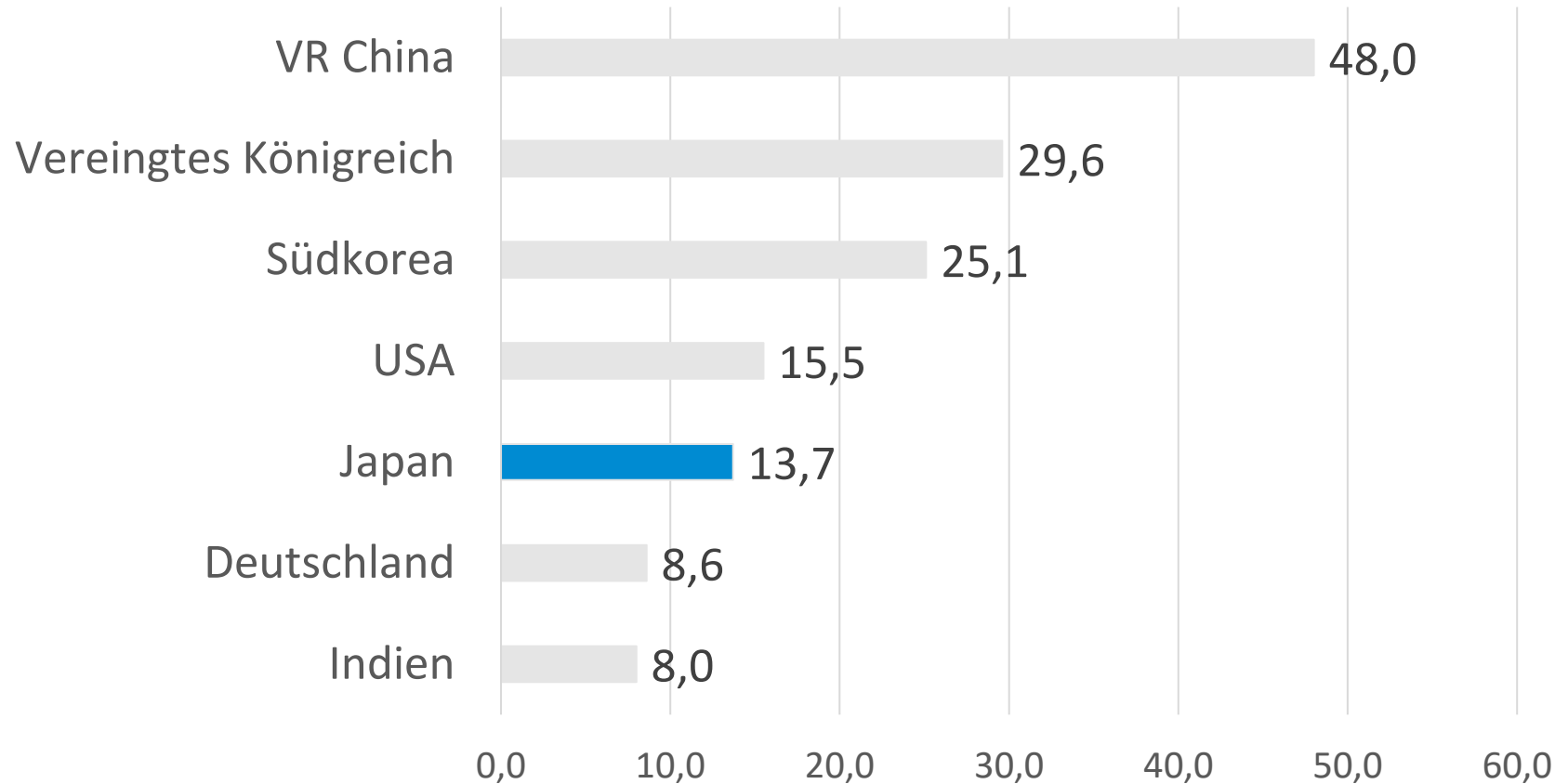


* Schätzung

Quelle: Emarketer Forecast, Juli 2024

Noch Potenzial nach oben

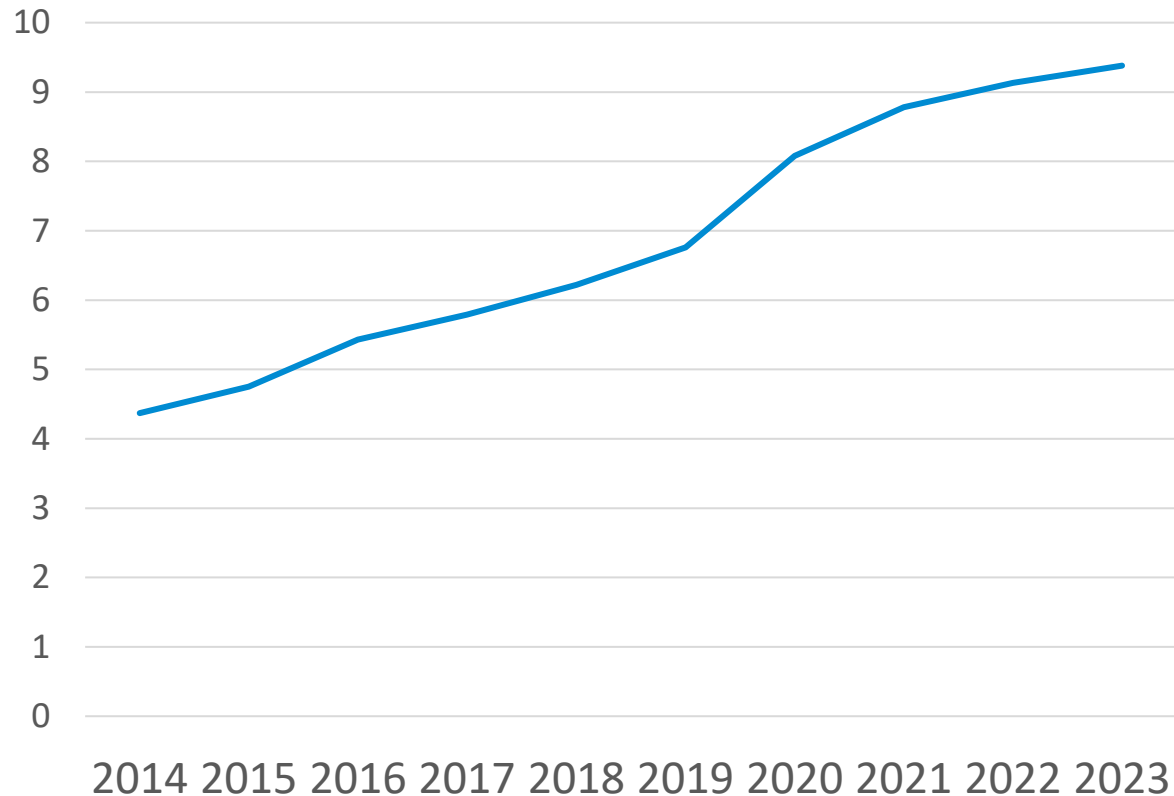
Anteil des E-Commerce am Umsatz des gesamten Einzelhandels 2023



Quelle: JETRO 2024 mit Bezug auf Emarketer

Bedeutung des E-Commerce in Japan steigt

Anteil des B2C-E-Commerce am gesamten Einzelhandel mit Waren in Prozent



* Fiskaljahre

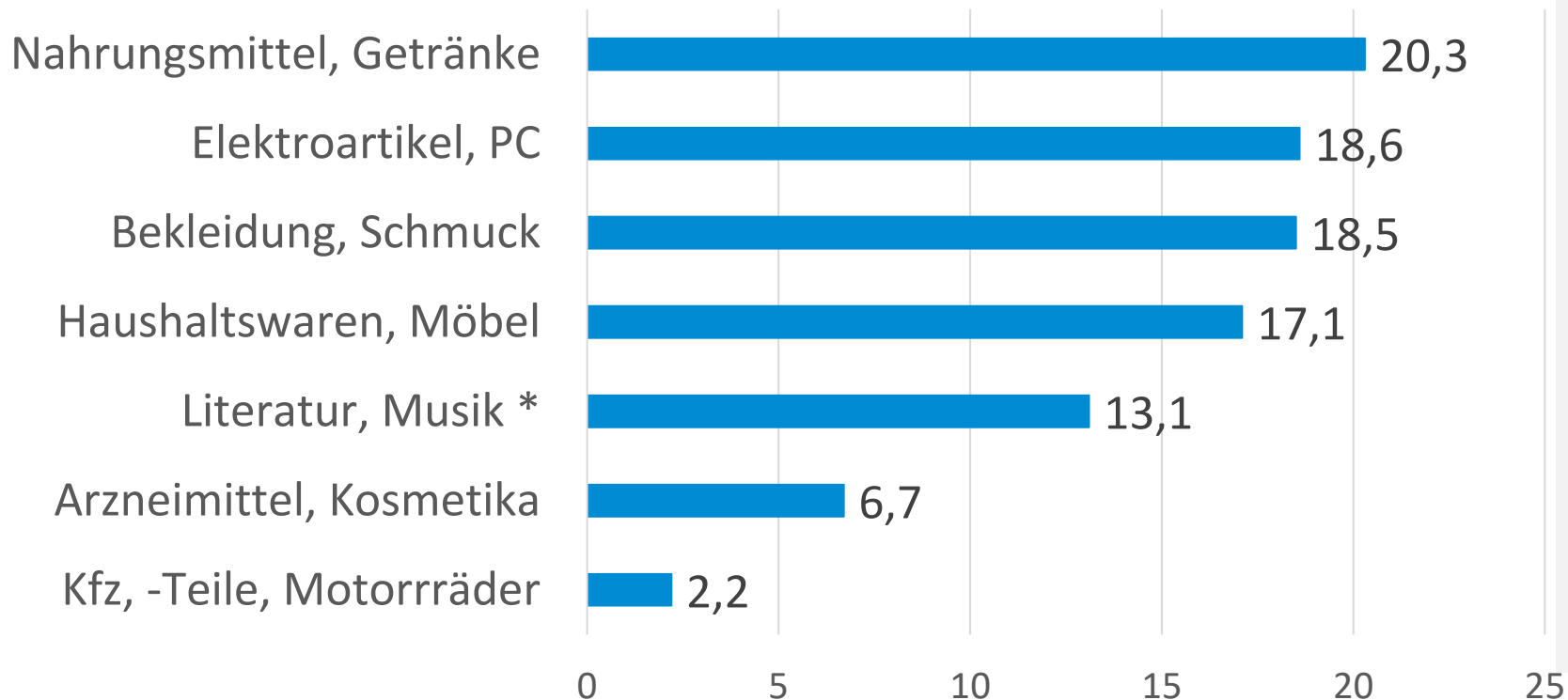
Quelle: METI 2024

E-Commerce-Anteil im Fiskaljahr 2023

Handel mit Waren darunter	9,4%
Literatur, Musik	53,5%
Elektroartikel, PC	42,9%
Bekleidung, Schmuck	22,9%
Arzneimittel, Kosmetika	8,6%
Nahrungsmittel, Getränke	4,3%

Top-Produkte im B2C-E-Commerce in Japan

■ Marktgröße im Fiskaljahr 2023 nach Kategorien in Milliarden US\$



Dazu kommen im digitalen Bereich u.a.

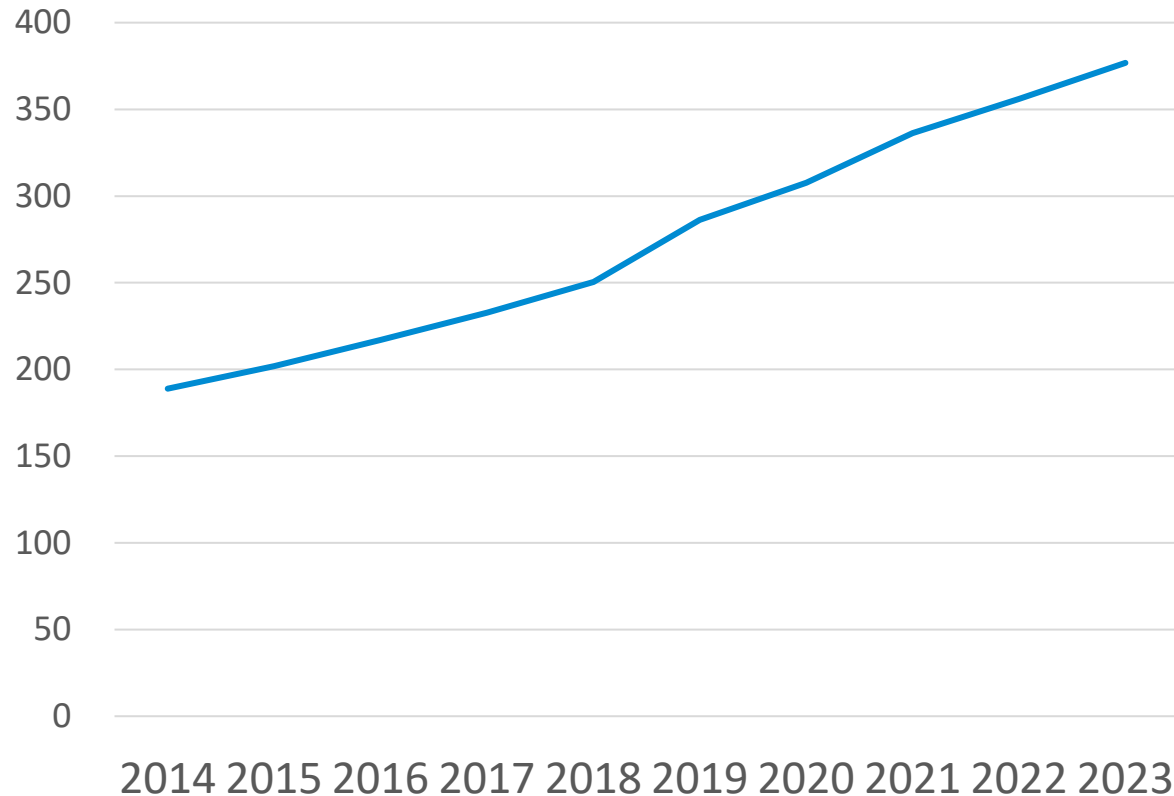
Reisen	22,1
Online-Spiele	8,7
Tickets	4,6
elektron. Publ.	4,6
Video-Streaming	3,3
Musik-Streaming	0,8

* ohne digitale Medien

Quelle: METI 2024

Online-Einkäufe im Ausland nehmen zu

Online-Einkäufe in den USA in Milliarden Yen



im Fiskaljahr 2023

Online-Einkäufe im Ausland

in den USA 2,6 Mrd. US\$

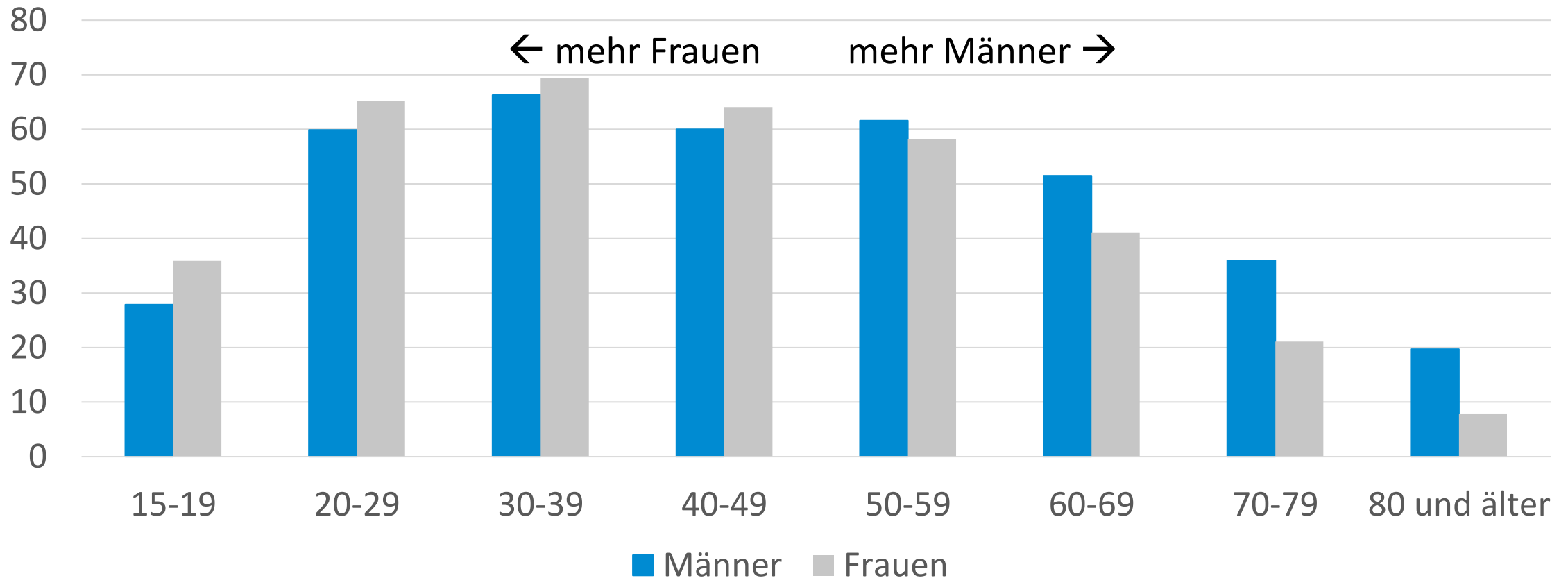
In China 0,3 Mrd. US\$

* Fiskaljahre

Quelle: METI 2024

Käufergruppen nach Alter und Geschlecht

Anteil der Personen, die online shoppen, an der Altersgruppe 2023 in Prozent *



* Käufe von Waren und Dienstleistungen ohne digitale Medien

Quelle: MIC 2024

Top-B2C-Online-Marktplätze

Umsatz 2023

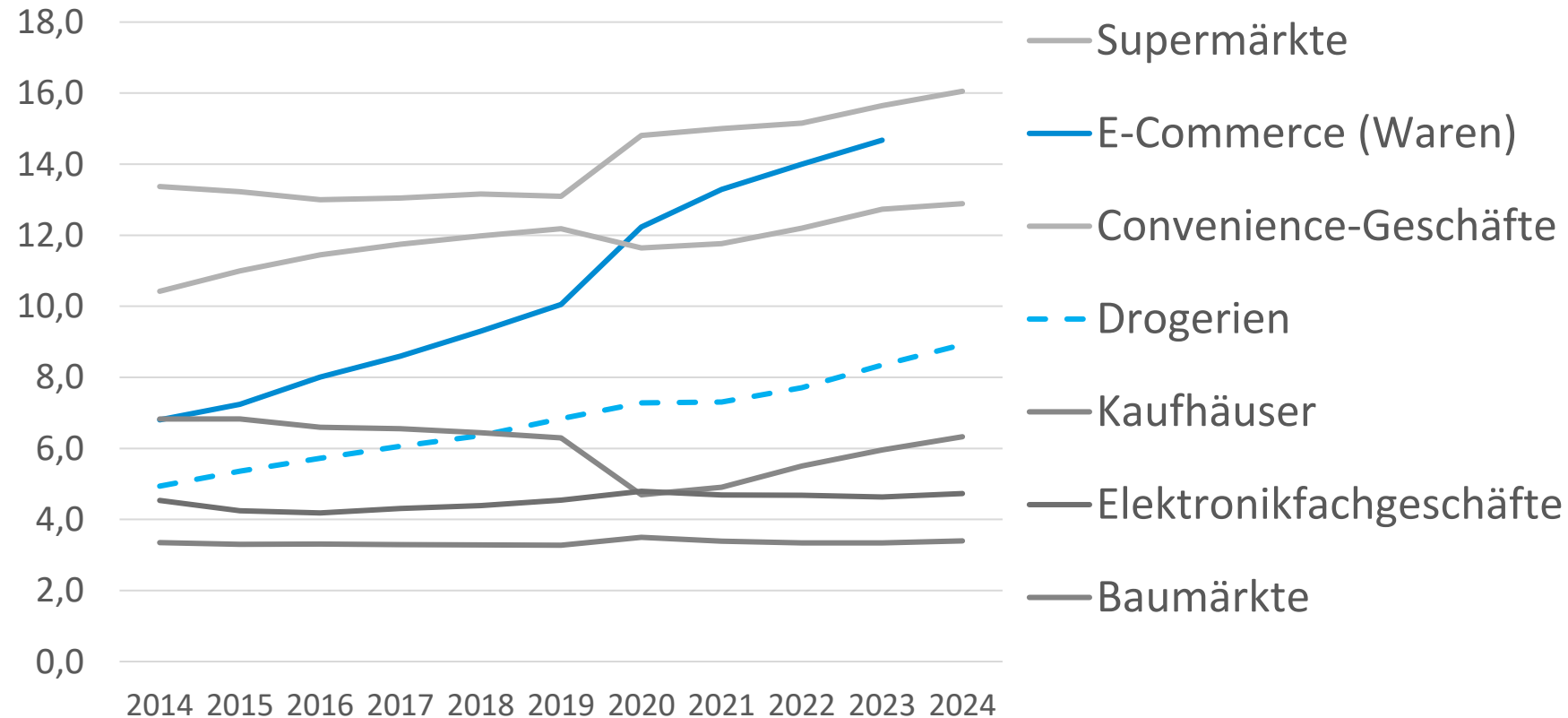


andere: u.a. Yahoo! Japan Shopping, Zozotown (Mode), Qoo10, au pay market

Quelle: Empowershop 2024

Umsatz verschiedener Handelstypen

in Billionen Yen



in Mrd. US\$

10,5

10,2

8,5

5,8

4,1

3,1

2,2

* Fiskaljahre

Quelle: METI 2024, 2025

Andere Player im Einzelhandel 1

Kaufhäuser	Isetan Mitsukoshi, Takashimaya, J Front Retailing (Daimaru, Matsuzakaya, Parco), Marui Group, H2O Retailing (Hankyu, Hanshin)
Supermärkte	Aeon, Seven and I Holdings (Ito-Yokado, York-Benimaru etc.), Life Corporation, Fuji (Aeon Group), Valor Holdings
Discounter	Pan Pacific (Don Quijote), Trial Holdings (Super Center), Daiso, OK, Kobe Bussan (Gyomu Super), Costco
Convenience-Geschäfte	7Eleven, FamilyMart, Lawson, JR Cross (New Days, Kiosk), Mini-Stop

Andere Player im Einzelhandel 2

Elektronikfachgeschäfte	Yamada Denki, Bic Camera, Yodobashi Camera, K's, Edion
Drogerien	Welcia, Tsuruha, Matsumotokiyoshi, Cosmos Pharmaceutical, Sundrug, Sugi Holdings
Baumärkte	Cainz, DCM, Kohnan Shoji, Komeri, Arclands (Musashi, Viva Home), Nitori, Ikea
Ausländische Waren	Kaldi Coffee Farm, Bioladen Bio c'Bon; Picard (Tiefkühlware), bereits oben aufgeführt: Costco, Gyomu Super, Ikea

Webadressen von Produkten der GTAI

Länderwebseite Japan

www.gtai.de/japan

Wirtschaftsdaten

www.gtai.de/wirtschaftsdaten-kompakt

Wirtschaftsausblick

www.gtai.de/wirtschaftsausblick

Branchenartikel zu Japan

[Link zu Branchenartikeln](#)

Wirtschaftsstandort

www.gtai.de/wirtschaftsstandort

Zoll und Einfuhr kompakt – Japan

www.gtai.de/de/trade/japan-wirtschaft/zoll-kompakt

E-Mail-Alert (individuelles E-Mail-Abo nach eigenen Länder-, Branchen- und Themenwünschen)

www.gtai.de/alert-service

Weitere Informationen unter

www.gtai.de/Japan

Rakuten Cross Border Business

May 2025

Overseas Sales Strategy Department

Rakuten Group Inc.

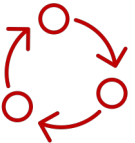




Rakuten Group and Rakuten Ichiba



Key Features of Rakuten Ichiba



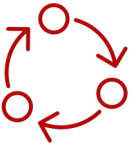
Onboarding Overview



Rakuten Group and Rakuten Ichiba



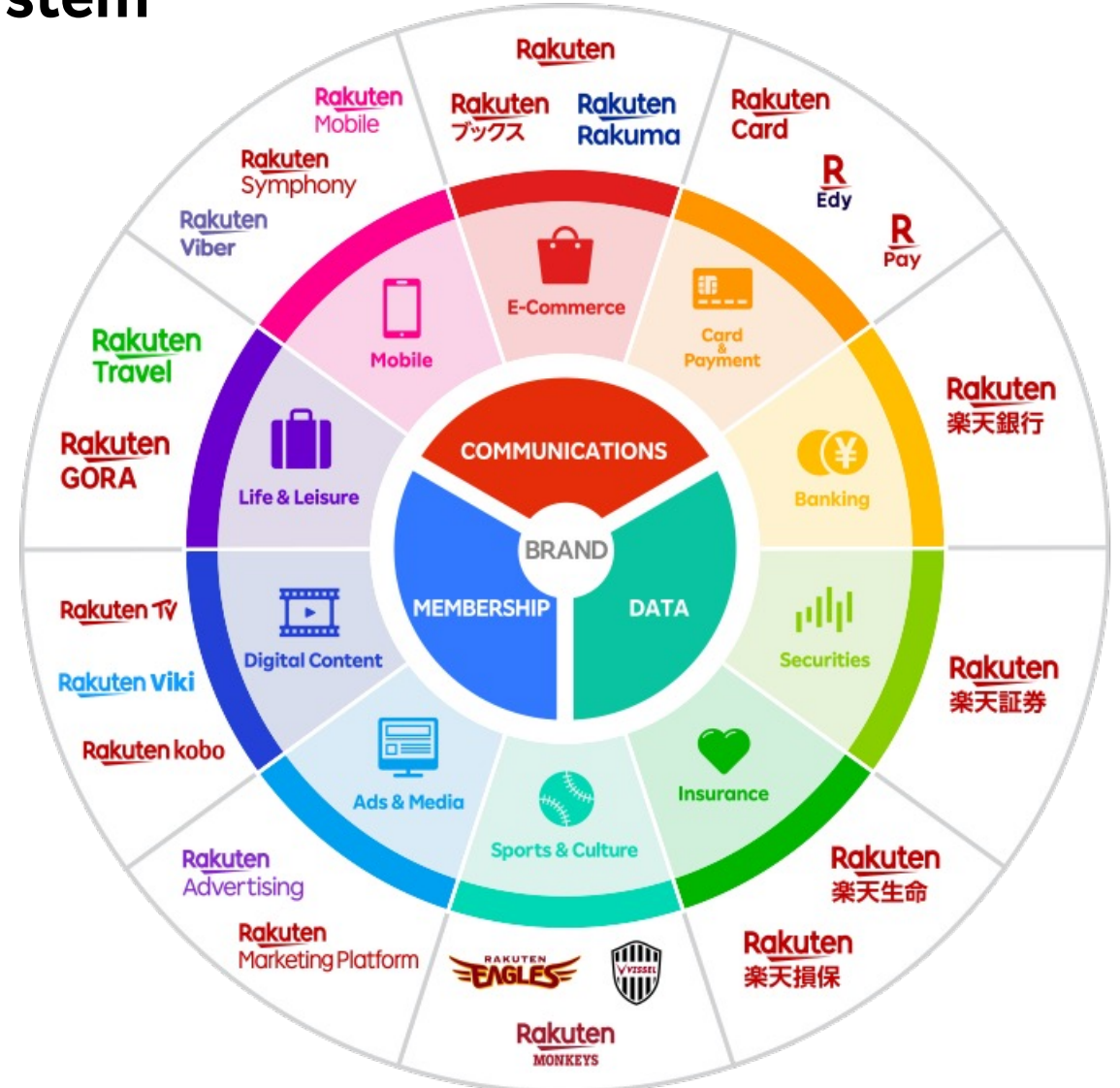
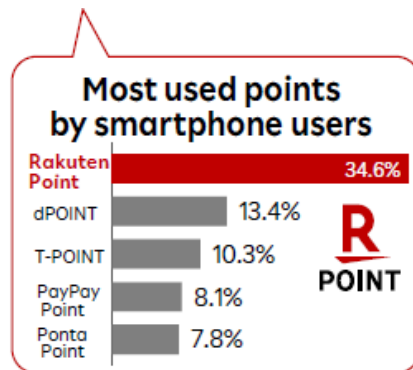
Key Features of Rakuten Ichiba



Onboarding Overview

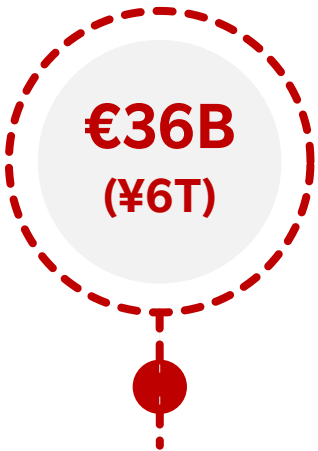
Rakuten Group Overview – Rakuten Ecosystem

- **70+** Services
- **1.8 Billion** Users Globally
- **650 Billion*** Points Issued
- **30+** Countries

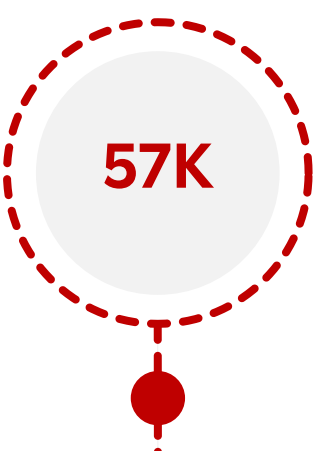


Rakuten Ichiba: Japan's Top E-commerce Marketplace

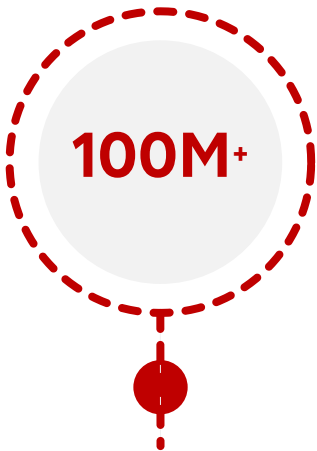
Empower Your Brand by Creating a Unique Store and Building a Loyal Customer Base



EC Service ANNUAL TRANSACTION



STORES



Rakuten MEMBERS

Rakuten Ichiba's Market Share

Ecommerce Markets

28.9%



Lifestyle Goods

43.2%



Apparel

40.5%



Food & Beverage

37.5%



Health Food

33.6%

Cosmetics

24.2%

Home Appliances/PCs

16.5%



<http://rakuten.co.jp/>



Source: Fuji Keizai Co., Ltd. [Current Status and Future of Mail Order and E-Commerce Business 2024] *Product categories are selected from the entire product range. All market shares (overall and by category) are for 2023.

How Rakuten Differs from Other Marketplaces



VS

Major Marketplaces



Shop Centric

Shopping through stores in a mall

Freedom to be creative & market brand awareness

Personal EC Consultants & Analytics

Business Model

User experience

Seller experience

Support

Product Centric

Buying items from a grocery store

Pure price competition

Help desk

Store Front Examples



Operating from Japan



Operating from UK



Operating from France

International Brands on Rakuten Ichiba

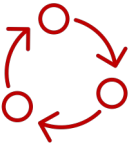
Brands can onboard with Rakuten Ichiba using
their **Japanese legal entity** or **directly with their overseas entity**



Rakuten Group and Rakuten Ichiba



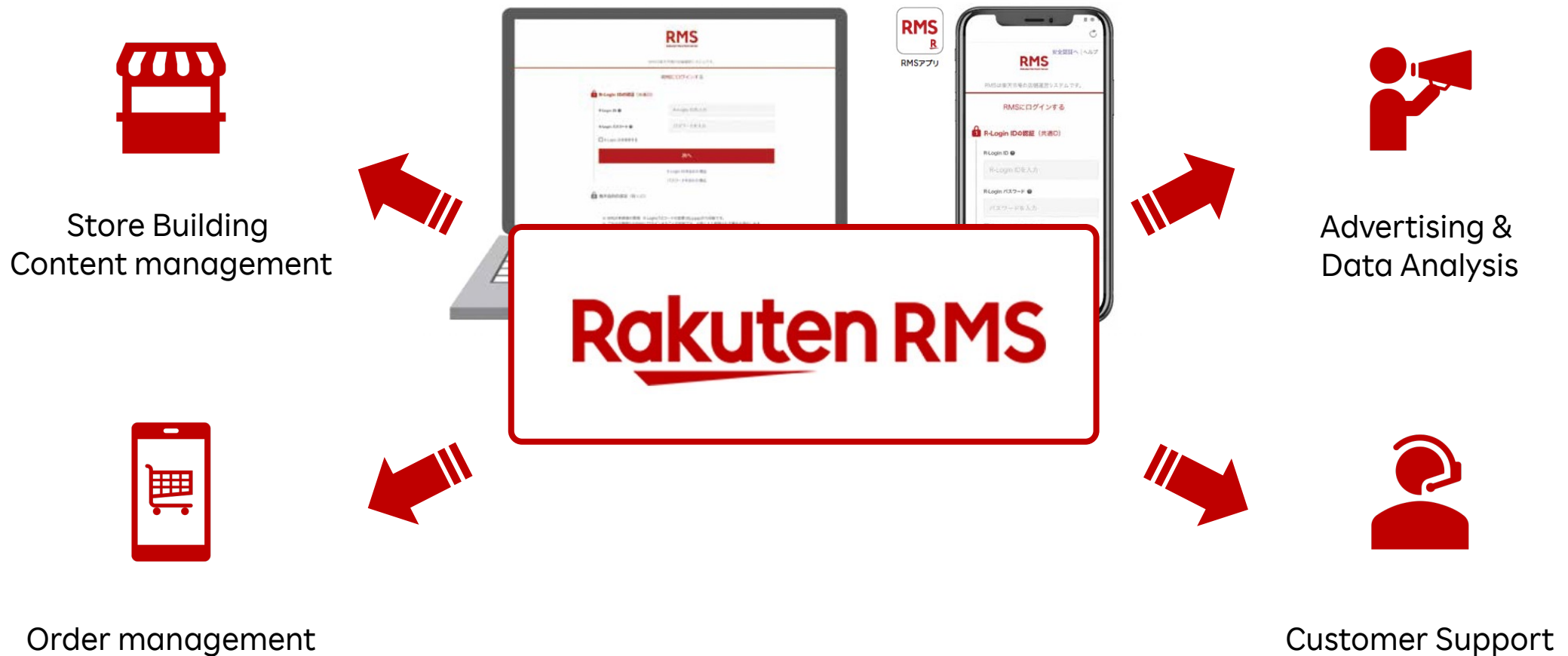
Key Features of Rakuten Ichiba



Onboarding Overview

Store Management System

All store operation can be managed through Rakuten Merchant Server.



Marketing tools to create a selling cycle

- To make your brand stand out, consider utilizing a diverse range of marketing tools.
- Strategically allocating resource aligning with your audience is a key for success.

Funnel stage	Required Action	Ad example
Awareness	Increase awareness	
Interest	Bring users to your page	
Purchase	Convert users for purchase	
Repeat	Retain & Create Loyal customers	

PPC

Display Ad

Coupon

Email

Social Media

Comprehensive E-Commerce Support: From Market Insights to Sales Growth

Phase
(Lead time)

Strategy & Partnership
(1-2 month)

Store Development
(1-2 Month)

Store Management

Rakuten
Point of Contact

~Onboarding~

Merchant Dev. Manager

~Launch~

Shop Open Advisor

~Driving Sales~

E-Commerce Consultant

Support Area

- ✓ Overview of eCommerce Business in Japan
- ✓ Market insight & knowledge
- ✓ Discuss & decide high level go to market strategy
- ✓ Explore Business Operation

- ✓ Guiding through Ichiba's store development
- ✓ Account setup advice
- ✓ Store design suggestions
- ✓ Merchandising guidance

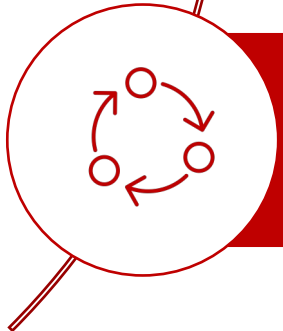
- ✓ Discuss target setting and marketing planning
- ✓ Performance feedback and improvement consulting
- ✓ Promotional guidance
- ✓ Any ongoing concerns



Rakuten Group and Rakuten Ichiba



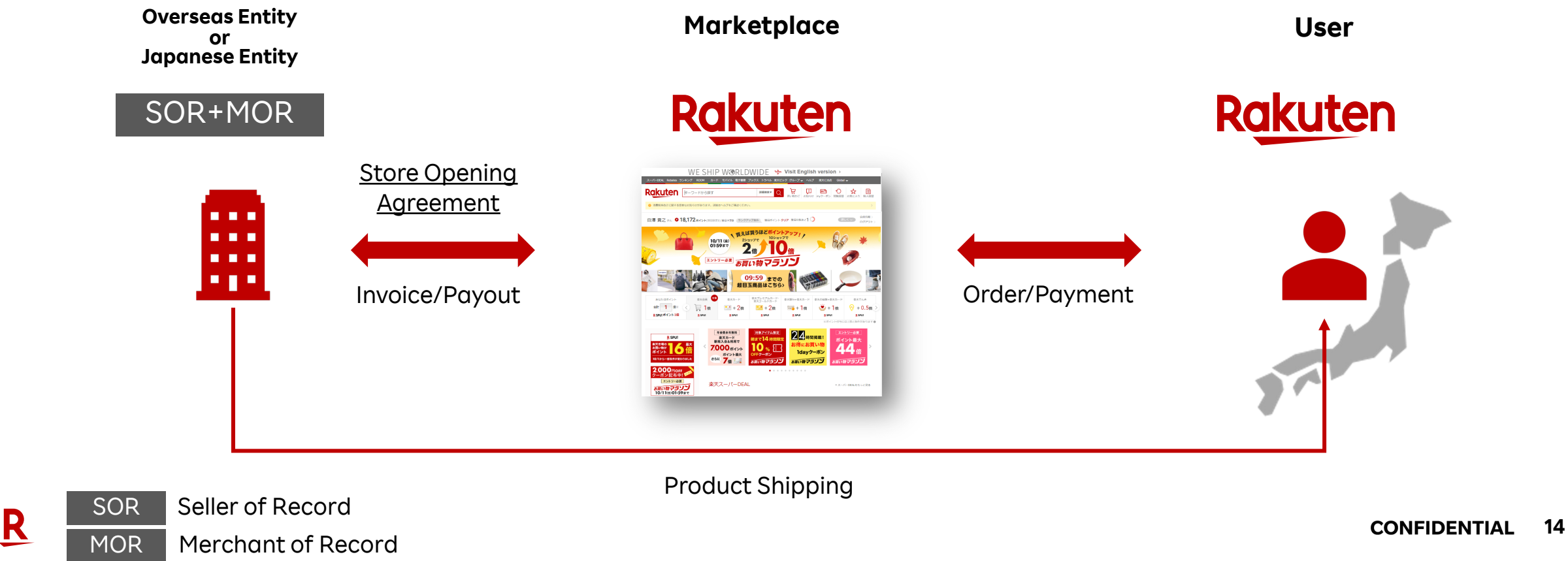
Key Features of Rakuten Ichiba



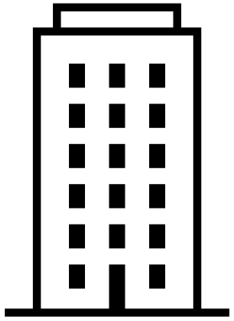
Onboarding Overview

Rakuten Ichiba Business Scheme – Overview

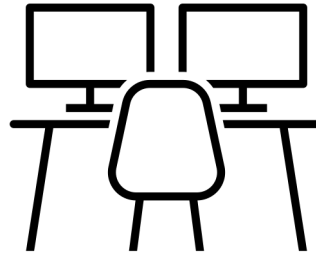
- Rakuten and the Company to sign a contract directly
- No Japanese entity is required
- You are responsible for **1) Store Operations, 2) Shipping**



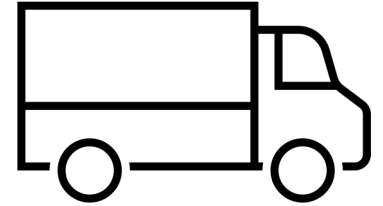
Rakuten Ichiba Business Scheme: Requirements



Established business
&
Experience in E-Commerce



Operating a Store in Japanese



Shipping to the User in Japan

Rakuten can support you in gathering the pieces necessary to join Rakuten Ichiba

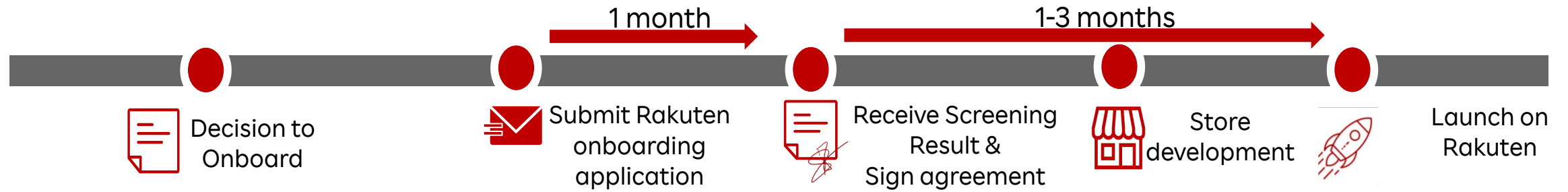
Rakuten Ichiba Business Scheme: Fees

Overseas Based Companies		
Rakuten	JPY	EUR
Registration Fee	¥60,000	About €360
Monthly Fixed Fee	¥65,000	About €390
Total Commission	Around 10%	
Listing Capacity	20,000 Items	
Contract Period	1 Year	
✓ Registration Fee: 1 Time Payment ✓ Monthly Fee: 2 Installments (6 months each) ✓ Subject to Foreign Exchange ✓ Deposit is required		



Note: Real time exchange rate: 1EUR = 165.10JPY

Timeline



Average 2-3 months to launch a store

Thank You



Contact us by scanning the QR code.
or
koki.araga@rakuten.com



Rakuten

The Rakuten logo is centered on a solid red background. It consists of the word "Rakuten" in a bold, white, sans-serif typeface. A white, stylized swoosh underline is positioned beneath the letters "aku", starting from the bottom of the 'a' and extending to the right, ending under the 'u'.



E-COMMERCE IN JAPAN 🇯🇵 Beiersdorf

27.05.2025

Thomas Grunzke

Ilian Paron



MOBILE FIRST

Average commute time 1-way in Tokyo **58minutes!**

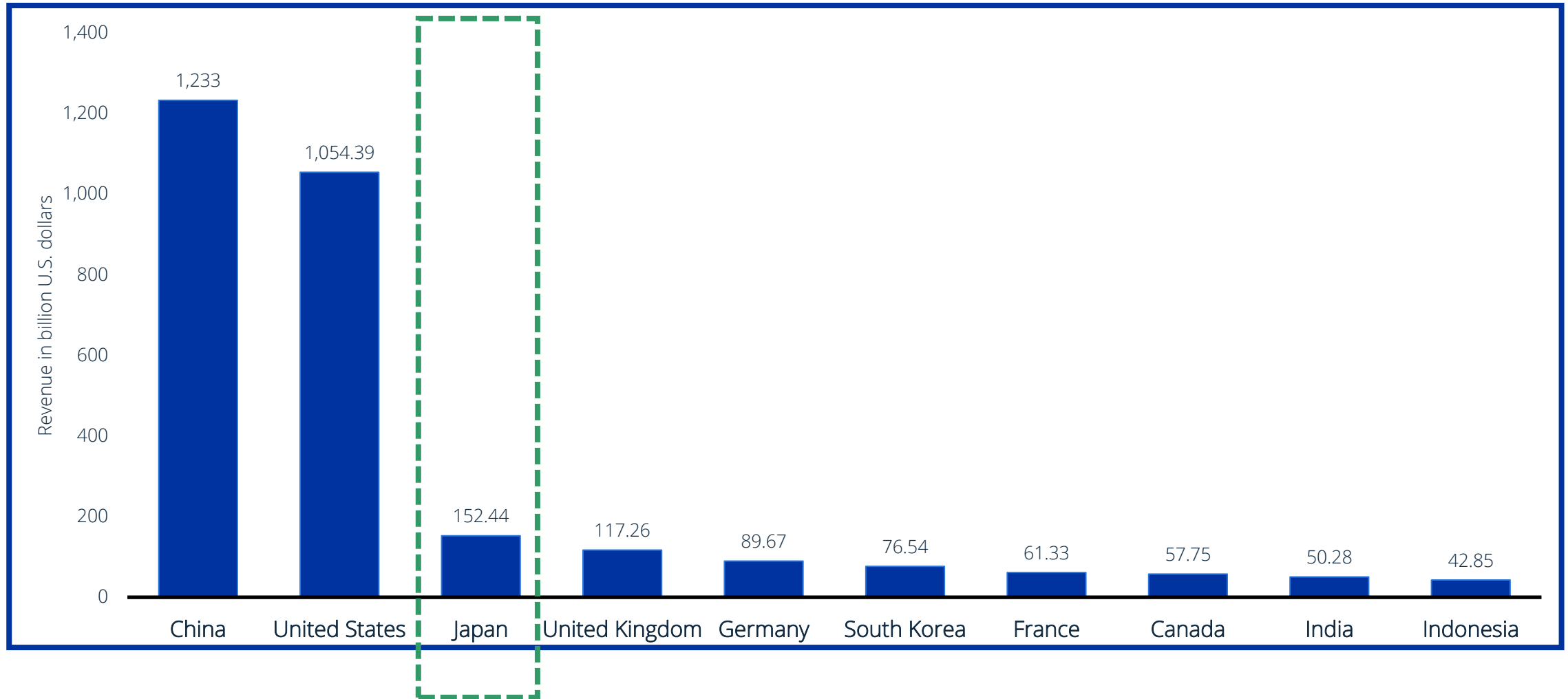


92% URBAN LIVING - LOTS OF BROWSING ONLINE

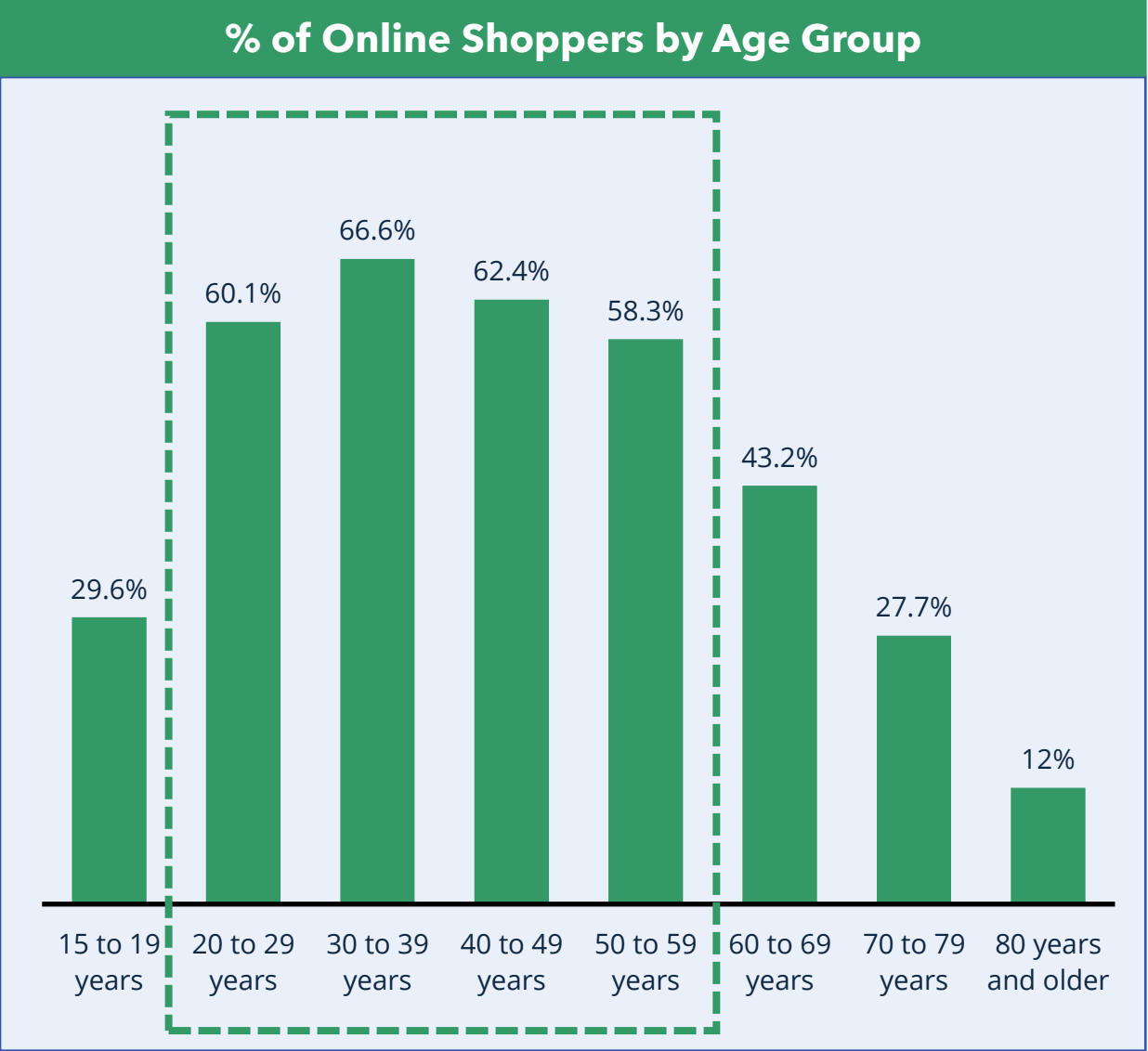
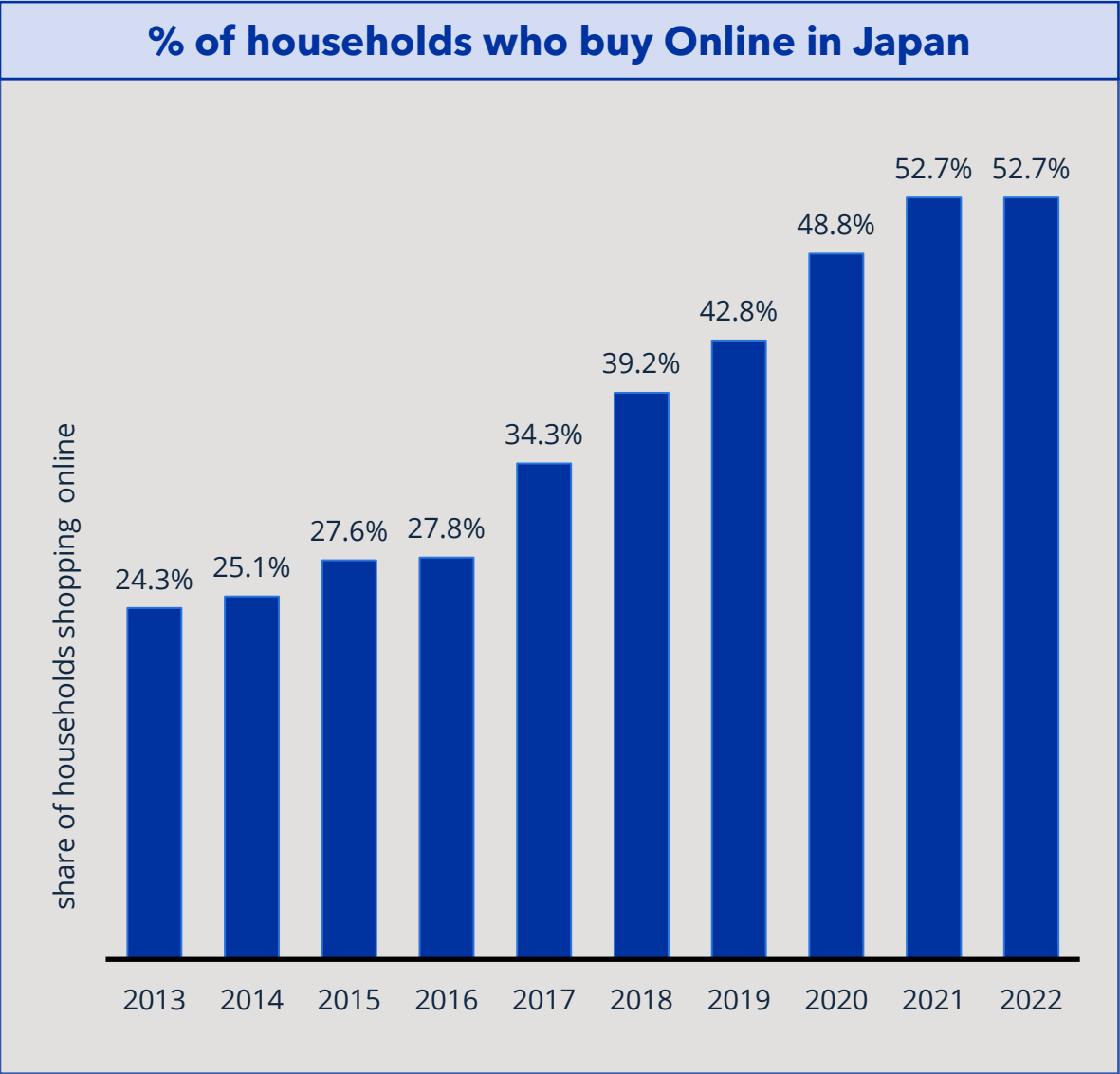




JAPAN IS THE 3RD LARGEST E-COMMERCE MARKET GLOBALLY



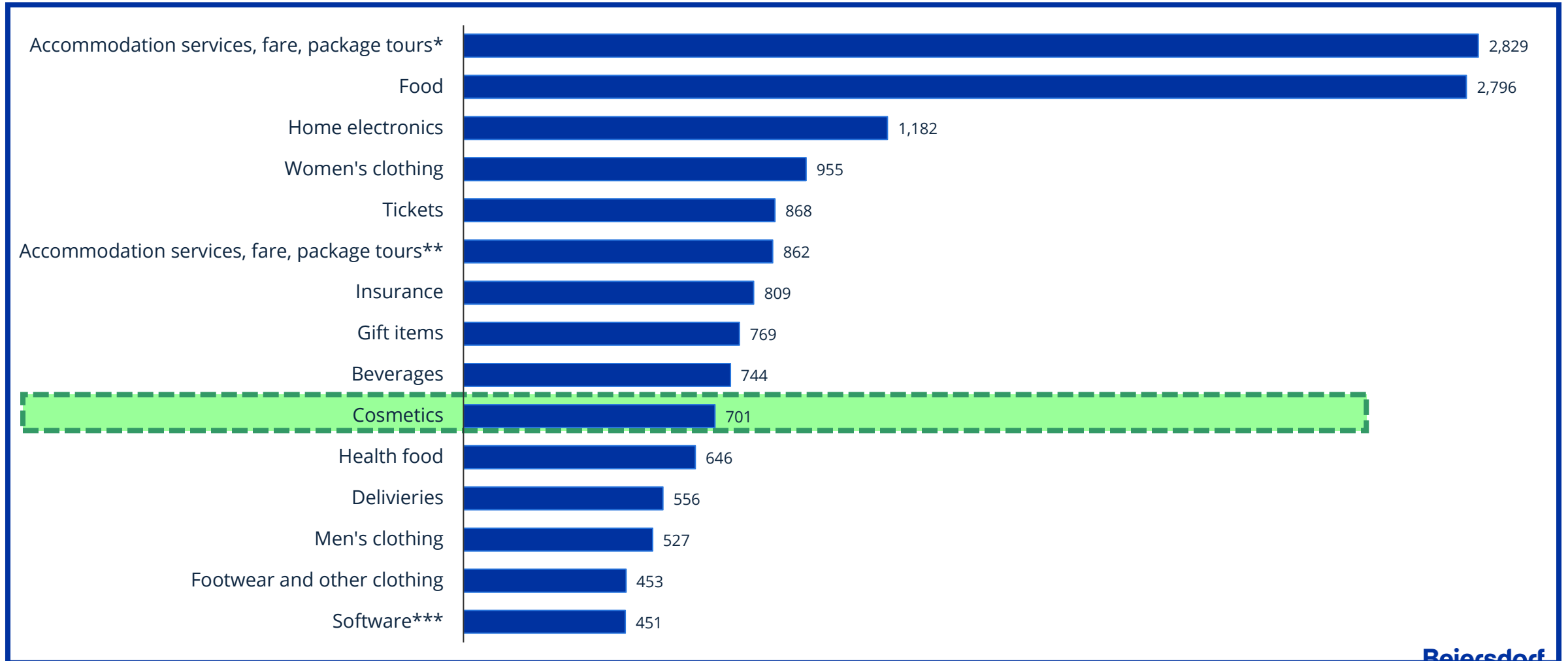
LARGE NUMBER OF JAPANESE SHOPPERS SHOP ONLINE





COSMETICS IS ONE OF THE LARGEST FMCG CATEGORIES WHERE JAPANESE ONLINE SHOPPERS SPEND MONEY

Average monthly household expenditure on online purchases in Japan 2024, by product category



Beiersdorf

KAO



BEIERSDORF



NIVEA KAO INTRODUCTION

NIVEA KAO - STRONG, RESILIENT PARTNERSHIP: KAO X BEIERSDORF

kao

NO.1 JAPAN MASS-TOILETRIES COMPANY

Beiersdorf

NO.1 GLOBAL SKIN CARE BRAND NIVEA

**54
YEARS**

NIVEA

SKIN CARE

DEODORANTS

8x4

HAND CARE

atrix

**3
BRANDS**

NIVEA-KAO

NIVEA-KAO

CATEGORIES AVAILABLE IN JAPAN



GERMANY & JAPAN

#1 SKIN CARE MASS MARKET BRAND*

Not just another
Skincare Brand but an **Icon**,
also in Japan.



1964

1st import
to Japan

1977

NIVEA Soft added
to NIVEA Creme

1992

2011

100y. campaign



@Cosme
GrandPrix

2018

50 years NIVEA
Creme JPN



*(excl. face and personal care)

NIVEA - A FAMILY BRAND IN

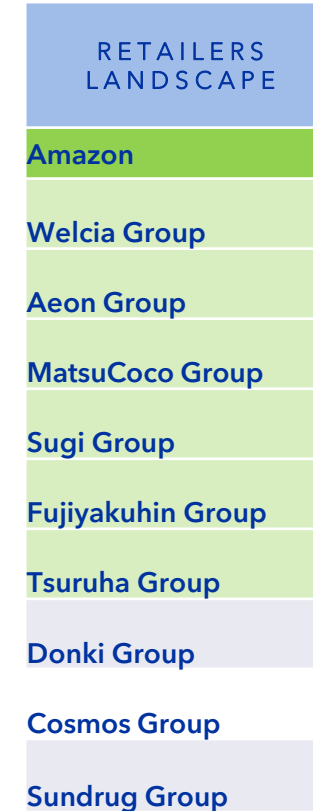
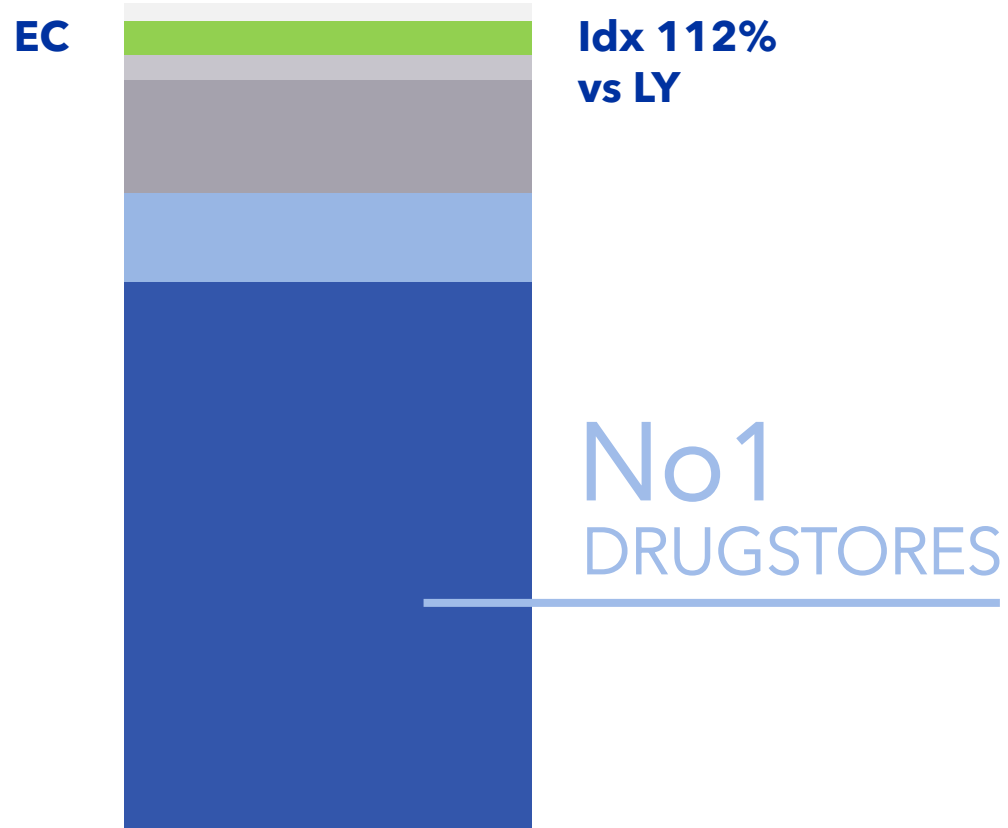


Built around family usage, especially mother/kid

NIVEA ECOMMERCE IN JAPAN

SALES COMPOSITION

NIVEA KAO SALES CHANNELS COMPOSITION



DIFFERENT ROLES OF EC

			
30~40year old, especially FAMILY	30~40 year old female shop for herself	30~40 year old female, more lifestyle	20~30 year old YOUNG females
80% COME FROM SEARCH ENGINES! → IMPORTANCE OF SEO/SEA	SHOP FOR MORE ENTERTAINMENT OFFERS	SHOP FOR MORE LIFESTYLE OFFERS	TEST / TRIAL / SHARE REVIEWS FEEL PART OF COMMUNITY
BULK SHOPPING SUBSCRIPTION	INFORMATION TRIAL PURCHASE	INFORMATION	INFORMATION TRIAL PURCHASE

FOCUS SALES

FOCUS INTEREST BUILD



**GLOBAL
INFRASTRUCTURE**
brand shop

NIVEA (ニベア)

Follow

[HOME](#)[クリーム](#)[ボディケア](#)[リップケア](#)[UV](#)[ボディウォッシュ](#)[メイク落とし](#)[MORE](#)

カテゴリーから選ぶ



医薬部外品



CONSUMERS EXPECT LOWER PRICES ONLINE

IN JAPAN THE LOWEST PRICE CAN BE FOUND ONLINE ALMOST
HALF THE TIME COMPARED TO MOST COUNTRIES

amazon

matching
pricing system

OFFLINE
PRICING

AD

Key word search
Banner ad.

COOP fee

Listing
Promotion entry

ONLINE
PRICING

MARGINS
PRESSURE



PROFITABLE PRODUCT MIX + DEDICATED OFFER FOR ONLINE



Nivea Cream Care Body Wash, European White

EXCLUSIVE
SIZES

amazon
exclusives



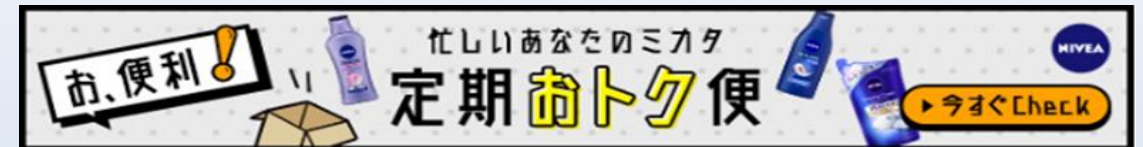
Nivea UV Water Gel EX Parent and Child Set

VALUE SETS



JAPANESE ARE EXTREMELY FOND OF SPECIAL DISCOUNTS AND SPECIAL OFFERS

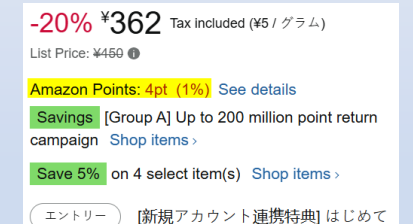
On-going price discounts



Lifetime discount approach



Ad-hoc price promo



Use your Points
Pay for your shopping with Amazon Points. Use 1 Point for 1 yen.

Japan-only: **Amazon points**



SPECIAL EVENT

1



MOST IMPORTANT -
every July
2024 Health & Beauty
category +250% sales
- SUMMER HIGHER SPEND -

2



3



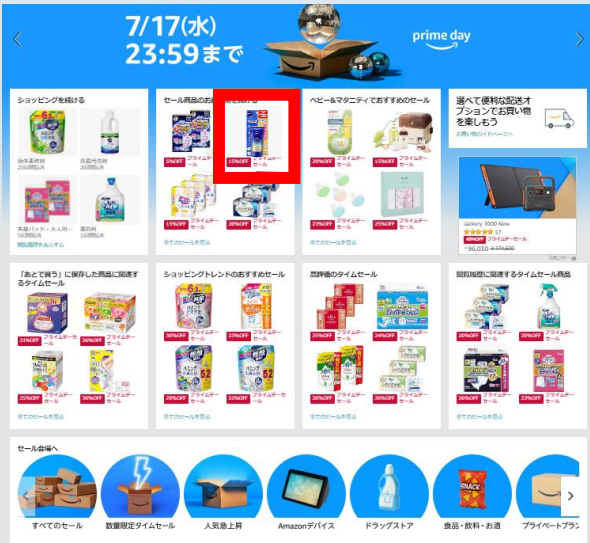


SPECIAL EVENT

1



MOST IMPORTANT -
every July
2024 Health & Beauty
category +250% sales



NIVEA SUN promo,
along different
"summer" products



SPECIAL EVENT

2

AMAZON
BEAUTY STORE

BEAUTY DAYS



ロハコ限定
NIVEA夏セット

15%OFFクーポン	15%OFFクーポン	15%OFFクーポン
【数量限定】【ロハコ限定】NIVEA (ニベア) アトリックスギフトボックス 限定マグカップ + ...	【数量限定】【ロハコ限定】NIVEA (ニベア) アトリックスギフトオリジナル紙袋 + ぬいぐるみ...	【数量限定】【ロハコ限定】NIVEA (ニベア) ギフトセット オリジナル紙袋 + ポーチ + ニベア...
2,890円 (税込) 2890円/個 1%OFF	2,100円 (税込) 2100円/個 1%OFF	2,680円 (税込) 2680円/個 1%OFF



Special NIVEA pack
+ TARGETED SAMPLING

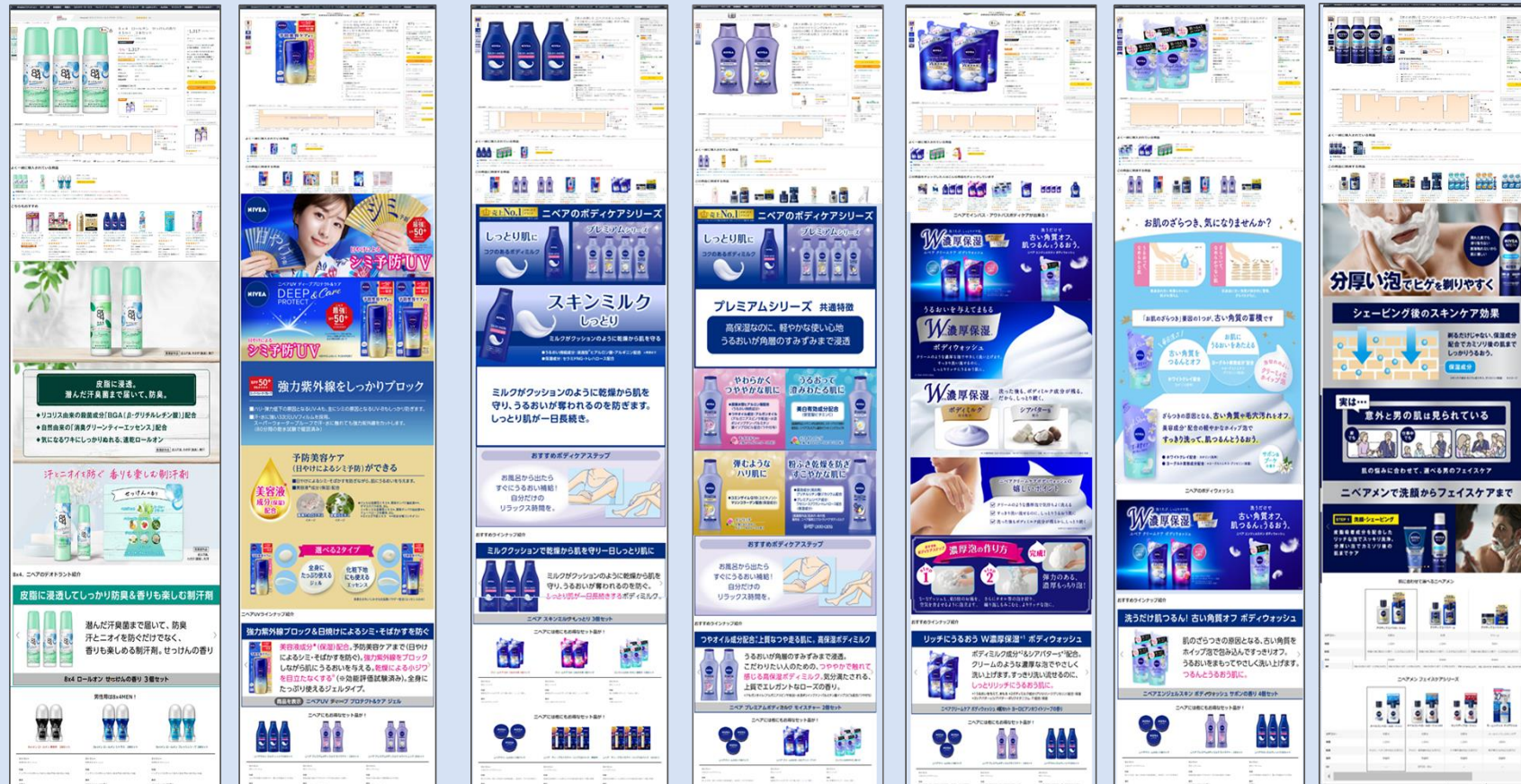


Online buzz
~ RATES &
REVIEWS

ACHIEVE IMAGE OF QUALITY, ALSO BY PERCEPTION

A+ CONTENT IS THE MINIMUM

- MORE TEXT, MORE INFORMATION, MORE CLUTTER ☺
- DESIGN CODES FROM THE WEST DO NOT APPLY IN JAPAN



JAPANESE ONLY!

eCommerce sites must be linguistically and culturally understandable to the Japanese buyers

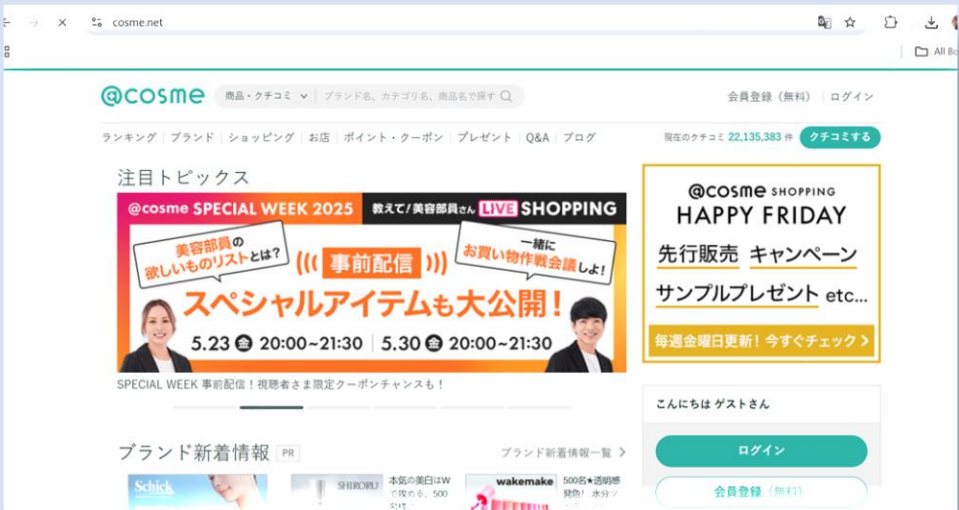
A+ CONTENT IS THE MINIMUM



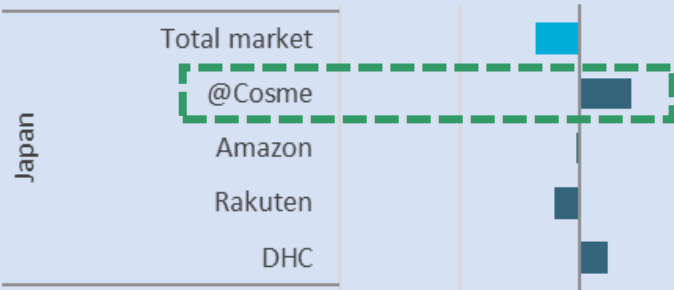
eCommerce sites must be linguistically and culturally understandable to the Japanese buyers

THE RISE OF PHY-GITAL – COSMETICS FOCUS

COSMETIC
COSMETIC REVIEW SITE → #1 ECOMMERCE



FASTEST E-COMMERCE GROWTH



CAGR in Q1 E-Commerce Sales by Retailer, 2022-2024,
Euromonitor

NIVEA ECOMMERCE IN JAPAN



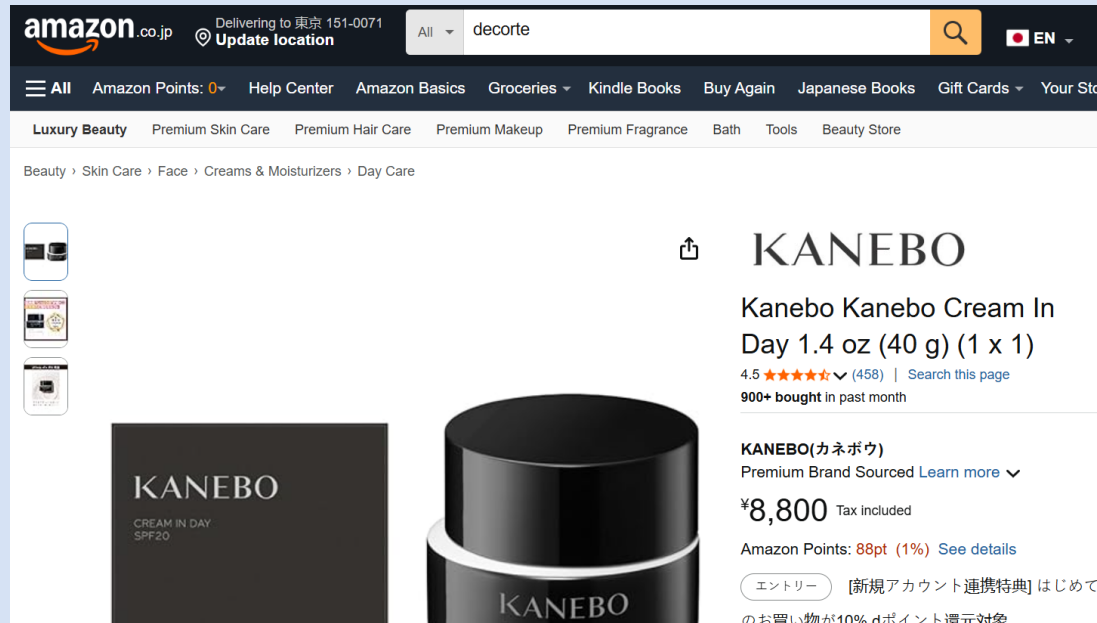
ONLINE REVIEWS
+ STORE SALES
= **WEEKLY
RANKINGS
ON/OFFLINE**



Beiersdorf

FOCUS COSMETICS: MUST 3RD PARTY + OWNED CHANNEL

amazon



PREMIUM
COSMETICS

“VITRINE” MUST-HAVE FOR CREDIBILITY

owned channel



MANUFACTURER E-RETAILER FOR ALL BRANDS

KAO



KOSÉ

公式オンラインショップ
My KAO Mall

Maison
KOSÉ

SHIPPING IS OF TOP IMPORTANCE

DON'T LOSE IT AT THE LAST MILE...



Land of convenience, Japanese **expect to receive their orders same or the very next day.**

Fully reliable local courier companies deliver on the same.

Reputation/ conversion risk for delays or misorders

 **ARIGATO**
ありがとうございます
GOZAIMASU

DANKE!



- Für weitere Informationen:

- **www.gtai.de**

- **Wirtschaft in Japan**

- Ansprechpartner

- christiane.suessel@gtai.de (Wirtschaft)
 - julia.merle@gtai.de (Recht)
 - klaus.moebius@gtai.de (Zoll)