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INTERNATIONALIZATION OF PORTUGUESE SME TO JAPAN: A  
FOCUS ON EXPORT BARRIERS

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Dissertation

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## **Abstract**

Exporting is the main internationalization method for most small and medium enterprises, but there is no consensus in the literature of a general categorization for the study of export barriers. Despite many studies about export barriers dedicated to different countries, few are the ones focusing on export barriers to Japan. Moreover, the economic partnership agreement between the European Union and Japan seems to make these studies less relevant, but Japan is still, nevertheless, perceived as a difficult market and hard to understand by companies. This study aims to fill the gap on the understanding of which barriers to export to the Japanese market do Portuguese small and medium enterprises perceive as most important. Methodologically, this study uses questionnaires subject to statistical analysis including an exploratory analysis and a factor analysis of the data. Interviews were also made but directed towards institutional agents with the goal of supplementing the questionnaires. The results show that most of the firms are export-oriented, but Japan is still a residual market for them. From the factor analysis, it was possible to reduce the export barriers list to 7 dimensions for a better understanding, and in most dimensions, firms perceive export barriers to Japan as moderately important.

**Keywords:** Export barriers; internationalization to Japan; Portuguese export SMEs.

## Resumo

A exportação é o principal meio de internacionalização para várias pequenas e médias empresas, mas não existe um consenso na literatura sobre uma categorização geral para o estudo das barreiras à exportação. Apesar de haver muitos estudos dedicados a diferentes países sobre barreiras à exportação, poucos são os que se focam em barreiras à exportação para o Japão. Além disso, o acordo para uma parceria económica entre a União Europeia e o Japão aparentemente torna esse estudo menos relevante, mas o Japão continua a ser, não obstante, visto como um mercado difícil e incompreensível pelas empresas. O objetivo deste estudo é colmatar a falha na compreensão de quais as barreiras à exportação para o mercado japonês as pequenas e médias empresas portuguesas percecionam como mais importantes. Metodologicamente, este estudo desenvolveu questionários sujeitos a análise estatística que incluiu uma análise exploratória e uma análise fatorial dos dados. Também foram feitas entrevistas direcionadas a agentes institucionais com o fim de suplementar os questionários. Resultados mostram que a maioria dos respondentes têm uma orientação virada para a exportação, mas que o Japão é ainda um mercado residual. Da análise fatorial foi possível reduzir a lista das barreiras em 7 dimensões para uma melhor compreensão, concluindo-se que empresas percecionam as barreiras à exportação para o Japão como moderadamente importantes.

**Palavras-chave:** Barreiras à exportação; internacionalização para o Japão; PME exportadoras portuguesas.

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## 1. Introduction

With more than 400 years' relationship between Portugal and Japan, the interaction has not been very strong. Although the relationship remained amicable, with a short troubled period during World War II, due to Timor-Leste (Gorjão, 2002), on the economic level the opportunities presented by the Japanese market have not been explored by the Portuguese companies (Raposo, 2013). Portuguese are known in Japan as the first Europeans to be in contact with Japanese people, but, contrary to the Dutch, Portugal did not capitalize on this historical connection to this day.

Japan ranks today as the third-largest economy in the world, despite having suffered from a severe economic downturn since the 1990s. Recently, the 2011 earthquake and tsunami have brought the country to the international spotlight, for the worst reasons. The COVID-19 pandemic, which put globalization at risk (Me & Fu, 2020), announces changes yet to be formulated to global trade. Nevertheless, for small and open economies like Portugal, internationalization continues to be an opportunity. The current trend of protectionism around the world (Hill & Hult, 2019), has not stopped Japan's willingness to reform its economy by opening it up to foreign companies. Gradually European products will gain a foot on the Japanese market as the EU-Japan Economic Partnership Agreement (EPA) runs its course.

According to Aicep (2021), Portuguese products have great potential in Japan, especially in terms of value, despite Japan being one of the most competitive markets in the world (Schwab, 2019). Trade between Portugal and Japan is still very modest, which could, in part, be explained by a lack of strategic planning on the Portuguese side (Raposo, 2013).

The present work derives its motivation from the newest developments on trade between the European Union and Japan, which can have a positive effect on trading prospects for Portuguese companies. Literature has analysed the potential of the new relationship between these two blocs, but little attention has been given to the barriers faced by Portuguese exporters. This study aims to understand the obstacles that Portuguese companies face in gaining a market position in Japan via exports. Although Portuguese companies tend to internationalize to markets that are psychically closer, "what appears on the surface to be psychically close may, in reality, be more distant than expected (O'Grady & Lane, 1996, p. 310)". I would like to argue that, what sometimes appears to be psychically far, such as different culture and social norms, may be closer than one thinks. Contrary to

what one may believe, the Japanese regard dearly the period on which the Portuguese came to Japan. Japanese people are well aware of the legacy the Portuguese left in their language and food, but do not know much about Portugal nowadays, besides that it is a European country.

Scarce studies on the internationalization of Portuguese companies to Japan are not exclusive to Portugal alone. The internationalization process and market entry choice have not been studied to fit "a Confucian society like Japan" (Uzama, 2009, p. 279). Previous research has mostly studied the internationalization of manufacturing companies, concluding that "no single international business theory can be used to adequately investigate the entry barriers" (Ojala & Tyrväinen, 2007, p. 694). Uzama (2009) observes that market entry theories were all based on Western economies, not focusing on a culturally distant market as Japan. In present-day, Japan ranks as the third-largest economy in the world, with a high purchasing power, attractive to many foreign companies that wish to sell their products at a higher price. The decision to internationalize to Japan will, however, demand an internal analysis of the company (e.g., resources) as well an external analysis of the target market (e.g., market potential).

This study focuses on export barriers that Portuguese SMEs face when exporting to Japan. Due to a lack of knowledge on this subject, the present study also wishes to identify the type of companies and reasons to export to Japan. By identifying the sectors and motivations, as well as the export barriers, it is hoped to better assess what opportunities lay ahead for Portuguese companies exporting or wishing to export to Japan.

The present study is structured as follows: section 2 is dedicated to the presentation of Japan as a destination market for Portuguese firms. Section 3 refers to the literature review that is mostly dedicated to present and discuss all types of export barriers. The literature review section ends with an analysis of empirical studies on export barriers that firms face when exporting to Japan. The following section presents the Methodology used. With the goal of assessing what type of firms and the barriers they face, questionnaires were sent to these companies. Section 5 reports the questionnaire results – descriptive analysis plus factor analysis. Finally, section 6 presents the main conclusions and limitations of this present study.

## 2. Context

### 2.1. Portugal and Japan

Portugal and Japan have a historical connection that goes back to almost 500 years. Remnants of the Portuguese legacy in Japan can still be found today, for example, in language, and in food, with the famous *Kasutera* cake (*Pão-de-ló*). Historical ties should be capitalized in order to spread what Portugal has to give to Japan, like the Dutch have done ever since their contact with the Japanese (Simões, 2017). Despite the historical connection, little has been done to take advantage of the opportunities Japan has to give, but some signs started to appear in the new millennium.

The internationalization of the Portuguese economy has been pointed out by successive governments as a way of growth in a struggled domestic market. A clear statement was made with the Council of Ministers Resolution n. ° 3/2010 to pursue the internationalization of the Portuguese economy where it can be read that the government “*assume a internacionalização da economia portuguesa como estratégia fundamental para uma recuperação económica sustentada*” (Resolução do Conselho de Ministros n. ° 3/2010). The official strategy is supported by AICEP Portugal Global - Trade & Investment Agency (Aicep), the government’s arm for international investment, which provides necessary support to Portuguese companies that wish to internationalize, while also capturing international investment to the country.

Traditionally, Portuguese companies have favoured psychologically closer markets, namely those in Europe, with Spain at the top. According to data from the Portuguese National Institute of Statistics (INE) (Instituto Nacional de Estatística, 2021) the main export markets for Portuguese companies, since 2011 – year that the Economic and Financial Adjustment Programme (ECB) was introduced –, have predominantly been Spain, France, Germany, the United Kingdom, and the United States of America (USA). Narrowing down to the Eastern Asia countries<sup>1</sup> (UNSTATS, 2021), plus the Republic of China (Taiwan), Japan jumped to the second client in 2020, while People's Republic of China (China) continued to be Asia’s main export market for Portugal (Figure 5 of Annex A).

The Balance of Trade with Japan (Figure 6 of Annex A), according to data from

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<sup>1</sup> According to the Statistics Division of the Department of Economic and Social Affairs of the United Nations, Eastern Asian countries include (i) China, (ii) China, Hong Kong Special Administrative Region, (iii) China, Macao Special Administrative Region, (iv) Democratic People’s Republic of Korea, (v) Japan, (vi) Mongolia, and (vii) Republic of Korea.

INE (2021), shows that Portugal, since 1974, has always had a trade deficit with Japan. The 4-year period from 1998 to 2001 saw the biggest deficit, with Portugal importing over 1 billion in euros (*mil milhões*), in the years 1999 and 2000. Trade deficit started to improve after 2001, with Portugal exporting almost 300 million euros of goods in 2007. Such mark would almost be reached again in 2020, with the country nearly closing the gap between exports and imports.

Exports to Japan in the last decade were modest, but from 2019 to 2020 there was a 61% increase in exports (Figure 7 of Annex A). The last nine years' exports to Japan grew at a 9% average, but if we exclude 2020, that growth drops to 4%. Despite governmental intentions to deepen the relationship with Japan, shown back in 2014, the biggest jump seems to have taken place only after the EU-Japan EPA entered into force in February 2019.

Over the last decade, (i) agri-food and beverages products dominated exports to Japan, followed by (ii) products from the chemical industries, and (iii) electrical devices and machines. Transport equipment, in the 2011-2020 period had its best year in 2011, with a little over 10 million euros of exports to Japan. However, in 2020, it surpassed the before mentioned categories combined, with a 2949% increase from the previous year. The upwards line was supported by this category (Figure 8 of Annex A).

Efforts to develop a strong commercial relationship with Japan increased in the new millennium. On the institutional level, especially from the Portuguese side, several high-level dignitaries have visited Japan since 2002 (*Japan-Portugal Relations (Basic Data)*, 2020), culminating with the visit of the Minister of Foreign Affairs, Paulo Portas, in 2013. The following year, for the first time, an incumbent Japanese Prime Minister visited Portugal, where he gathered with the Portuguese Prime Minister and discussed the strengthening of economic ties between both nations.

In the 2014 Joint Communiqué, Abe Shinzo<sup>2</sup> and Pedro Passos Coelho, besides the commitment to “continue to promote high-level political exchanges,” stressed the importance to increase trade and investment, deepen the cooperation in the fields of energy, food, agricultural, and livestock products, and tourism (*JOINT COMMUNIQUÉ By the Prime Minister of Japan and the Prime Minister of Portuguese Republic*, 2014). As data from INE shows (Figure 6 of Annex A), exports to Japan increased modestly, maintaining the trade deficit with Japan.

But perhaps the most important moment for the trade relations between Japan and

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<sup>2</sup> Name order in Japan dictates that the family name comes first followed by the given name.

Portugal will fall under the new EPA between the European Union and Japan. The EPA has been of great interest to both parties, with Karel De Gucht, European Commissioner for Trade (Gucht, 2013, p. 3), expressing that "Europe and Japan have both been hit by the global economic crisis. We both are high income economies with high technological know-how. We are facing slow growth, aging, shrinking populations and need to find export markets to find new growth (...)". Main concerns when negotiating the EPA were the regulatory barriers, but also the dismantling of non-tariff barriers.

Japan's commitment to open its market goes in hand with the Japanese government policies on promoting private investment. Has of 1 February 2019, the EPA entered into force, easing restrictions to foreign trade and investment. This agreement addresses tariffs issues, with Japan liberalizing its tariffs from 91% to 97% during the next 15 years, as well as non-tariff barriers, which is observed as a major obstacle to trade with Japan. On the tariff side, EU exporters hope to reduce tariffs on agriculture products; while hoping "to negotiate non-tariff measures on automotive, food safety and chemicals (Park, 2019, p. 175)", as well as having access to governmental procurement. The agreement has come to be known as Japan wanting to sell more cars to Europe, while Europe wanting to sell more of its agri-food products, including beverages, to Japan. Since Japan was already a country with low tariffs, the EPA focuses mostly on Non-Tariff Measures (NTM).

## **2.2. Japan**

### **2.2.1. Introduction**

Japan is an East Asian island country, comprised of five main islands, namely Hokkaido, Honshu, Shikoku, Kyushu, and Okinawa, and 6848 smaller islands with a total landmass of 377,974 km<sup>2</sup>. The biggest island is Honshu, home to the economic powers of Tokyo, Osaka, and Yokohama. 80% of the country is mountainous and covered with forests.

The country has a population of 126.17 million people, making it the 11th most populated country in the world. As of 2019, 59.5% of the population (75.05 million) is in the 15-64 years old range, and 28.4% of the population (35.89 million) is 65 years old and over (Statistics Bureau, 2020).

The majority of the population (Figure 1) is concentrated in the cities of the Tokyo Metropolitan Area, Osaka, Nagoya (Aichi Prefecture), and Fukuoka (Statistics Bureau, 2020).

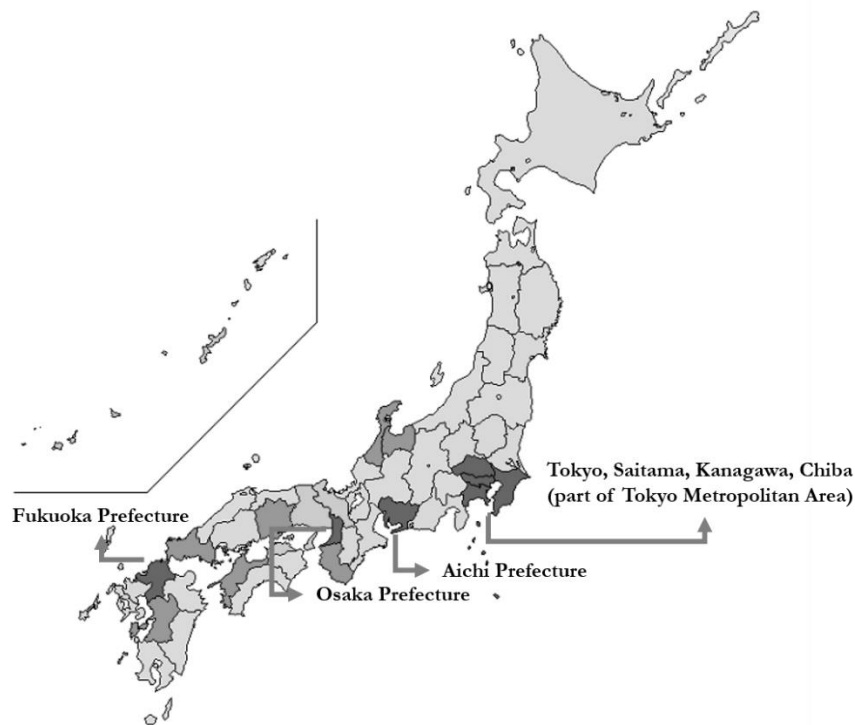


Figure 1 Population density (Source: Statistical Handbook of Japan 2020)

Politically Japan is a Parliamentary Constitutional Monarchy. The National Diet is the legislative power, divided into the Lower House and the Upper House, with the former being responsible for the legislation and the latter acting as an advisory panel (Haak & Haak, 2008). The executive branch is the Cabinet, currently led by Prime Minister Suga Yoshihide. Finally, judicial power is exerted via the Supreme Court (Statistics Bureau, 2020).

Japanese society falls into the dimension of the group. According to Hill & Hult (2019), the structure of a society can be divided into two dimensions: (1) individual vs group, and (2) stratification of society. The authors point out that in Japan the social status of a person is closely related to group membership. Group identification means more cooperation among departments of a company, and the promotion of a long-life relationship, represented, in the Japanese case, as the life-long employment system. Because of this sense of belonging to a group, there is a clear distinction between Japanese and non-Japanese.

Society is strongly influenced by its culture, that is, the “sum of the values, rituals, symbols, beliefs, and thought processes that are learned and shared by a group of people” (Cateora et al., 2011, p. 102). Although Japan adopted many western customs, policies,

technology, among others, that helped modernize Japan since the Meiji revolution<sup>3</sup>, Japanese characteristics still remain until this day, such as the prevalence of the group over the individual, cooperation, punctuality<sup>4</sup>, and respect of authority, that help maintain the harmony of the group (Hall & Hall, 1990; Padron et al., 2011).

The official language is Japanese and uses a unique writing system by combining three writing systems<sup>5</sup>. The complexity of the Japanese language is not only exacerbated by its written system, but also by the silent language (Hall & Hall, 1990, p. 106): “the Japanese language relies on very subtle cues and reveals the attitude of the speaker toward his interlocutors [...]”. In other words, it is important to understand the cultural system that shapes the language. The above description is what makes Japanese a high-context language, *i.e.*, transmits very little information in the spoken word. Doing business in Japan will require “to find the appropriate level of contexting” (Hall & Hall, 1990, p. 11) between high-level context societies, which expect others to understand and know the information being “transmitted”, and low-level context societies, which openly and constantly share information.

Although English has become the lingua-franca of international business, Japan ranks as a low-proficiency speaking country in English (EF Education First, 2020), therefore knowing the local language is a necessity that will bring in advantages and also avoid misinterpretations (Hill & Hult, 2019).

In modern Japanese, several foreign words are adopted, and still many of Portuguese origin, such as *botan* (button), *capitan* (captain), *pan* (bread), *coppu* (cup), among others.

### 2.2.2. Economy

This subsection will introduce a (1) brief introduction of Japan’s recent economic development, followed by (2) cultural aspects of doing business, (3) the inter-relational groups known as *keiretsu*, (4) the multilayer distribution system, and (5) Japan’s main trading partners.

**Japan’s recent economic development** began after the opening of its borders to

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<sup>3</sup> The Meiji revolution marked the opening of the Japanese borders to foreign influence. The head of power was transferred to the Emperor and the old stratification of society was abolished.

<sup>4</sup> Hall & Hall (1990) distinguish between monochromatic and polychromatic times systems. The first is a strict following of schedules, and the second the opposite. The Japanese abide by the monochromatic time system when doing business and by the polychromatic time system on their personal relationships.

<sup>5</sup> Besides kanji (Chinese characters), hiragana, and katakana (phonetic characters), it is common to also see the roman alphabet mixed.



the world, in the 19<sup>th</sup> century, during the modernization period. After losing the war, in 1945, Japan was subject to foreign occupation which led to several changes in society, government and in the economy. In the following decades, Japan's economy grew, at an average of 6.15%, from 1961 to 1990 (World Bank Group, 2021), becoming the second-largest economy in the world (Figure 2). This rapid growth became known as the Japanese economic miracle.

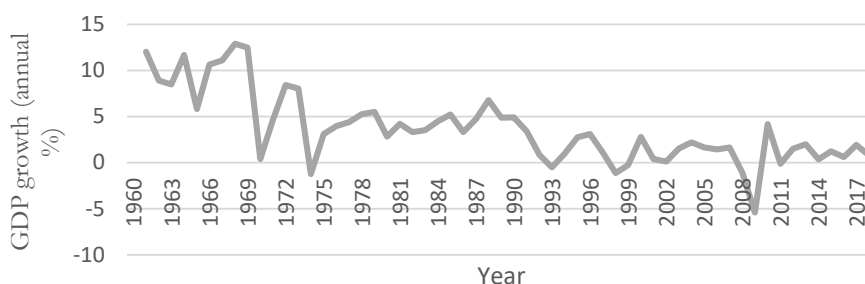


Figure 2 GDP growth (annual %) from 1961 to 2018 (Source: World Bank Open Data)

In the 1990s, the so-called Bubble “burst”, giving way to a slow economic growth decade, into what became known as “the lost decade”. Japan’s recovery started again by 2002, but was met with another downturn “as private consumption and investments in plant and equipment fell flat and so did production” (*Statistical Handbook of Japan 2019*, 2019, p. 26). The 2011 Great East Earthquake, which comprised the events of the earthquake, tsunami, and nuclear meltdown, weakened again the economy. Prime Minister Abe Shinzo, in 2013, launched its financial strategy, known as *Abenomics*, to stimulate the economy.

The economy is comprised of two types of industries: (i) an internationally competitive group of companies in the industries of automobile, consumer electronics, and robotics, and (ii) a lesser-known group of international companies in the industries of chemicals, civil aircraft, fast-moving consumer goods (FMCG), construction, retailing and transportation (Porter & Sakakibara, 2004). The latter type is benefitted by strict regulations that, not only keep foreign competitors at bay, but also impede innovation and fair prices that slow down the economy.

Despite the downturns, Japan ranks as the third-largest economy in the world and as a very competitive one. According to the World Economic Forum’s *The Global Competitiveness Report’s Index* (Schwab, 2019), Japan ranks 6<sup>th</sup> as the most competitive economy among 141 economies, ahead of Spain and Germany.

**Doing business in Japan** differs from western countries because the Japanese follow several unwritten rules, hard to understand for foreigners. The relationship established among businessmen is measured by its network of connections (*jinmyaku*) which will assert one's trust before others. Conflict is avoided at all cost in order to maintain a good relationship. As Melville (1999, p. 105) observes "once Japanese start interacting at a business level, the stability of the relationship is rarely maintained by the legal system. Rather, it is social forces [...] that maintain stability." Trust and cooperation are built via the relationships and not so much via the legal system. An example of cooperation is seen between the supplier and the distributor: in case a product does not sell, a compromise on short-term loss is established in order to maintain the relationship. Agreements are done in group, and therefore coming to a conclusion when dealing with the Japanese may take some time, even if after a meeting everyone seemed to agree. The communication style is one of not offending any party and, in business, language used is very formal or indirect, with the Japanese avoiding saying anything uncomfortable and negative.

**The interlink relationship among several companies, known as *Keiretsu***<sup>6</sup>, is another characteristic of the Japanese economy. Known business groups, such as Sumimoto Mitsui Banking Corporation, Bank of Tokyo Mitsubishi, and Sanyo, are *Keiretsu*. Although some authors mention that these have become less relevant (Haak & Haak, 2008; McGuire & Dow, 2008), and recent literature on the subject is scarce, the *Keiretsu* are part of the group-centred mentality of the Japanese, and is therefore important to know them. The *Keiretsu* can be divided into two types:

- (i) the horizontal *keiretsu*, which revolved around a bank and a trading company;
- (ii) and a vertical *keiretsu*, centred around a big industrial company, with close ties between distributors and manufacturers in the distribution system.

*Keiretsu* are a peculiarity of Japan that puts trustful relationships above short-term economic gains, as Min (1996, p. 28) observes: *Keiretsu* "is still an accepted form of business practice in Japan where a paternalistic business relationship developed by the distribution keiretsu precedes its economic inefficiency." Despite this, they present advantages to those involved.

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<sup>6</sup> This term has come to fall in usage. Nowadays, these type of companies are simply known as *guruuipu gaisha*, meaning company group.

Horizontal *Keiretsu* have as advantages the reduction of uncertainty from market pressures, access to financing, transfer of technology and information, as well as mutual assistance; Vertical *Keiretsu*, commonly referred to as Distribution *Keiretsu*, on the other hand, have a more asymmetric relationship among the companies involved. Nevertheless, the bonds tying a manufacturer to a supplier, or multiple suppliers, provide the group –although asymmetric in power positions –, confidence in assuring business (McGuire & Dow, 2008).

Studies from the early 2000s began to report some change, as these groups tried to adapt to the market changes brought by the recession, new regulatory environment, and the introduction of new technologies. However, research focusing on their impact is still scarce, and, because *Keiretsu* display a distinct cultural aspect of the Japanese (cooperation and collectivism), it is still necessary to take them into account (McGuire & Dow, 2008).

**The multilayer distribution system** is a clear sign of the established relationships among companies. The system is comprised of trading companies and several wholesalers that move merchandise along the distribution channel until it reaches retailers and the final consumers (Min, 1996).

The distribution system (Figure 9 of Annex A) is characterized by the (i) high number of small-scale retailers, which are related to the geography and shopping habits of the Japanese, (ii) the length of the distribution channel, with many middlemen down the stream before the product reaches the final customer, and the reliance on the just-in-time system to fulfill orders, (iii) the dominant position of the manufacturers, whom control the wholesalers by offering rebates, generous return-policy and by dictating price, and marketing strategies, and (iv) the close relationships among the actors involved, which may lead to monopoly situations by locking retailers into their systems (Fahy & Taguchi, 1995).

Japanese mountainous areas and the densely populated cities along the coasts mean that people have small living spaces and, therefore, need to shop constantly (Czinkota, 1985). Customers expect a high level of service and small retailers are open later and provide after-service support as well as delivering products immediately to the customers' houses. Although from a foreign perspective the system appears to be ineffective, Japanese customers express satisfaction with the system (Peterson et al., 1994).

The new millennium has brought some change to the traditional distribution system, as companies integrate technology into their systems. The retail structure is changing, technologies and supply chain management systems are being reformed. Since the recession from the 1990s, the number of retail stores overall began to shrink, such as food stores and

clothing stores, but convenience stores, on the other hand, started to grow. These stores began to implement their own distribution system (Melville, 1999), which spread to other industries. In this one, suppliers all deliver to one joint distribution centre, where sorting is done and then delivered. Other reasons for the change is the increase in the number of products and their short life cycle, which require more deliveries. The introduction of new management systems, with the support of new technologies, has also helped: POS has allowed stores to postpone orders to meet demand (Maruyama, 2004). The traditional distribution system began to coexist alongside a new one, which foreigners can take advantage of (Itoh, 2000).

**Japan's main trading partners** are in the East Asia & Pacific region, accounting for almost half of the total trade, followed by the regions of Europe and Central Asia, with a 15.58% share on imports, and 13.56% on exports to these regions (Group, 2019). As of 2018, Japan's main imports came from China, the United States, Australia, Saudi Arabia, the Republic of Korea, and the United Arab Emirates, according to the World Bank (World Bank Group, 2020). UN's Comtrade Database (UNCTAD, 2019) International Trade Statistics Yearbook reports that Japan's 2018 exports reached 738.2 bln US\$, and imports a total of 748.2 bln US\$. Main imports categories were "Machinery and transport equipment" (SITC section 7), "Mineral fuels, lubricants" (SITC section 3), and "Miscellaneous manufactured articles", accounting for more than half, according to the report.

### 3. Literature Review

Studies on the internationalization of foreign companies to Japan are scarce in the literature, with recent studies focusing mostly on the EU-Japan EPA. Because Japan is both geographically and culturally distant from Portugal, the level of uncertainty is higher. Internationalization decisions are greatly influenced by risk perception (Kraus et al., 2015). In order to minimize risk perception, decision-makers must have a wide array of information beyond the economic metrics that determine market potential and must also consider the cultural, administrative, geographical, and economic (CAGE) variables that affect the distance between two countries (Ghemawat, 2001). Having the necessary resources and information to minimize risk, however, is hard, especially in the initial stages of internationalization (Johanson & Vahlne, 1977; Johanson & Wiedersheim-Paul, 1975), which will influence the initial commitment of a company to a new foreign market.

The level of commitment to foreign markets is visible from the entry mode, with exports being the most cost-effective method of entering a new market. Exporting is the safest way to gain a foot in the foreign market. The relationships and knowledge gained will give advantages to those that wish to increase their level of equity. Exports and contractual agreements are non-equity entry modes, whereas equity modes include any that have foreign direct investment (FDI). Exporting can happen in two forms (Peng, 2009):

- *Direct exporting*: the company sells directly to the buyer in the foreign market;
- *Indirect exporting*: the company sells to a buyer in the home market which then exports to the foreign market;

Indirect exporting is safer because the company does not have to have the necessary resources to reach the foreign customer, but also lacks an understanding of the market where the product is being exported to. Direct exporting, on the other hand, the company has to establish a structure to adapt the product to the foreign market and consumer tastes, deal with exporting procedures, establish a relationship with distributors, as well as understand the institutions of the target market.

Internationalization, whether via FDI or exports, requires managers to take into account a country's "cultures, political systems, economic systems, legal systems, and levels of economic development (Hill & Hult, 2019, p. 32)" in order to be successful. Countries that are farther apart present more challenges besides the geographic distance, making it

necessary to understand, besides the legal system, among others, the consumers' tastes, culture, and traditions (Samiee & Mayo, 1990). Ghemawat (2001) proposed the CAGE framework to analyse and assess the cultural, administrative, geographic, and economic distances, and Peng (2009) developed a Tripod Strategy to help managers identify the competition environment (Industry-based View), the company's competitive advantage (Resource-based View), and the regulatory environment (Institutions-based View).

The present literature review is divided into three sections: (1) a review on the categorization of export barriers; followed by (2) a literature review on barriers to Japan, and (3) an introduction on current market changes.

### **3.1. Export Barriers**

Exporting is the entry mode into foreign markets that requires fewer resources and involves lower risks (Morgan & Katsikeas, 1997). Companies that choose to export indirectly do not have to worry about exporting procedures or adapting to customers' needs, but that also means that they do not have a deeper understanding of opportunities abroad. Direct exporting, on the other, requires exporters to establish a dedicated structure of that activity by having to know the exporting procedures, establishing a presence on the distribution channel abroad, and adapting the marketing mix. Most small and medium enterprises use this entry mode to develop their internationalization, yet they face multiple barriers in this respect.

Export barriers have an importance that differs from industry to industry, but also from governmental agencies that develop policies to help home companies in exporting, from those perceived by companies themselves (OECD, 2008). Perception of barriers by non-exporter and exporters is also relevant to the decision process (Leonidou & Katsikeas, 1996; Morgan & Katsikeas, 1997). The basic distinction by exporters and non-exporters show that lack of knowledge of the target market, and lack of the necessary resources to engage in that venture are major obstacles (Johanson & Wiedersheim-Paul, 1975).

In an effort to better understand perceived barriers, the OECD (2008, p. 59) study concluded that "there is close agreement between policy makers and SMEs as to the key barriers holding back SMEs from entering international markets" with both identifying "shortage of working capital to finance exports; identifying foreign business opportunities; limited information to locate/analyse markets; and inability to contact potential overseas

customers” (OECD, 2008, p. 59), as commonly perceived barriers. A new study (OECD, 2009) added the “lack of managerial time, skills and knowledge” to the key barriers.

Exporting is usually the first step to internationalization (Johanson & Vahlne, 1977). Despite this, no common assessment of barriers to exporting framework exists. Kahiya & Dean (2015) concluded that export barriers research in literature is divided into three: (1) comparison between barriers perceived by exporters and non-exporters; (2) how to overcome barriers; and (3) nature and impact these barriers have. Depending on how a firm faces these barriers, that can have a negative impact and lead firms to de-internationalize. Attempts to categorize the types of export barriers have some authors choose to group in areas (*e.g.*, marketing and finance), in a dichotomy style (*e.g.*, internal-external), and/or in an amalgamation of groups (knowledge and experience, procedures, resources, and exogenous) (Kahiya, 2018). Kahiya (2018) literature review identified more than 80 barriers (Table 24 of Annex B). The study, however, over a period of more than 40 years, does not include Japan in the top ten countries most researched.

### 3.1.1. Grouping Export Barriers

Leonidou (1995, 2004) has distinguished between internal (*e.g.*, resources, management, production) and external barriers (*e.g.*, home-government support, regulatory environment, exchange rate, consumer behaviour). Cateora et al. (2011) follows a similar approach with their International Marketing Task, contrasting elements which are controllable by the company with those which are uncontrollable, such as the domestic environment and the foreign environment (Figure 3). Marketing activities are “designed to plan, price, promote, and direct the flow of a company’s goods and services to consumers” (Cateora et al., 2011, p. 10). Exporting to a foreign country will bring a new level of uncertainty and affect those elements that are in direct control of the company, at the same time that it learns to deal with those uncontrollable elements.



Figure 3 Controllable and Uncontrollable Elements (Own elaboration)

Controllable elements are those related to the firm's resources and competencies, such as human and financial capital necessary to engage in the process of researching and establishing a direct channel with the target market's potential customers, suppliers, and partners (Cateora et al., 2011; Leonidou, 1995, 2004). Companies also have control over the marketing variables (marketing mix) related to the products or services being offered. Direct control over these elements means that the company depends on itself to tackle barriers found in these elements. For example, adapting one's resources (human and capital) to develop new products or adapting existing ones to the foreign market depends solely on the company, such as hiring a translator or a marketing expert for the target country.

The present study will follow Leonidou (2004) categorization, similarly as the OECD (2008) report did. Elements from the International Marketing Task (Cateora et al., 2011) will be added, and the adoption of controllable and uncontrollable wording will be used for better clarification between barriers that derive from the company (controllable) and those that the company has no power over (uncontrollable) (Figure 4).

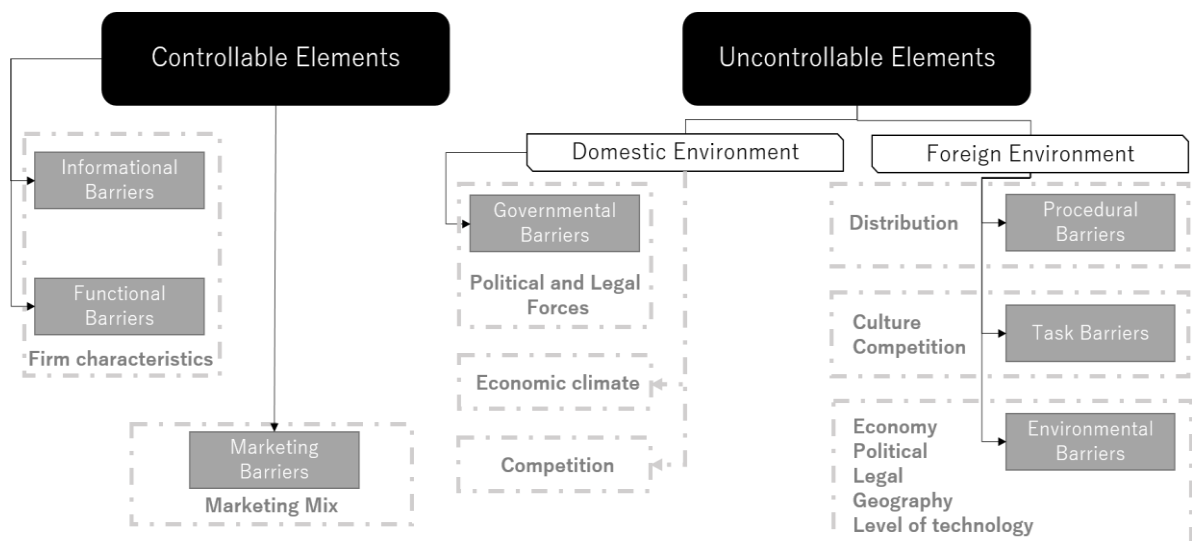


Figure 4 Grouping Barriers (Adapted from Leonidou, 2004, and Cateora et al., 2011)

Leonidou (2004) grouping consists of identifying internal (Controllable Elements) and external barriers (Uncontrollable elements). The latter can be subdivided into those related to the home country (Domestic environment) and host country (Foreign environment). OECD (2008) uses the same categorization with a few changes on naming, and grouping of barriers; additionally, OECD (2008) adds 8 new barriers (Table 25 of Annex B). Cateora et al. (2011) adds to the uncontrollable elements the economic climate and



competition inside one's country that may make it harder for a company to dedicate itself to a foreign market; and to the foreign market, the authors also consider a country's geography and the level of technology, which may differ and make it difficult to trade (Table 26 of Annex B).

Table 1 presents the categorization used for this study.

<b>Internal Barriers (Controllable Elements)</b> are those directly under the control of the enterprise, such as human and capital resources, management's strategy, and the marketing mix.
<u>Informational Barriers</u> are those concerned with acquiring relevant and reliable information about the target market, such as business opportunities and clients.
<u>Functional Barriers</u> are related to the management's plan for the export activities, such as proper allocation of time and financial, production, and human resources.
<u>Marketing Barriers</u> concern the marketing activities (production, promotion, pricing, distribution) necessary to engage in foreign markets.
<b>External Barriers (Uncontrollable Elements)</b> are those which a company cannot control whether coming from the domestic environment or the foreign environment.
<b>Domestic environment</b> refers to those barriers concerning the home market where the company operates, whether related to political, economic, or competitive forces.
<u>Governmental barriers</u> include legal barriers that may restrict an exporter's capability.
<u>Economic climate</u> includes barriers related to the home market's economic conditions.
<u>Competition</u> in the home market may penalize a company's effort to engage in international activities.
<b>Foreign environment</b> refers to those barriers concerning the host market where the company operates or wishes to operate.
<u>Procedural barriers</u> are those concerned with doing business in the target market, such as exporting procedures, communication with customers, and payments.
<u>Task barriers</u> refer to customer's specific habits and the competition already operating in the target market, which may have better knowledge of the market.
<u>Environmental barriers</u> are related to the host country's economic, political, legal, and socio-cultural aspects that will affect the exporting and penetration capabilities of the company, such as tariffs, regulations, economic condition, cultural traits, geography, and level of technology.

Table 1 Grouping Barriers: types of barriers (Adapted from Leonidou, 2004, and Cateora et al., 2011)

### 3.1.2. Studies on Japan

Studies on trade barriers with Japan using a specific framework are scarce. After conducting an online search using the databases Scopus, Web of Science, and EBSCO host, with a combination of the keywords "export barriers", "entry barriers", "Japanese market", and

“internationalization to Japan”, few studies were found that focused solely on the Japanese market. This section presents four studies (Table 2) that tried to provide a clear framework of barriers to trade with Japan, followed by 20 studies whose studies are not specific to export barriers, but nevertheless showcase barriers the Japanese market presents.

Samiee & Mayo (1990) distinguished between visible and invisible barriers and how they are influenced by the social and cultural characteristics of Japanese society. Visible barriers are tariff and non-tariff barriers, whereas invisible barriers are those influenced by social and cultural conditions, namely (i) buyer behaviour, (ii) distribution network, and (iii) oligopolistic competition. Government-led barriers include industrial targeting, regulations and standards, custom valuation codes, procurement codes, and intellectual property rights, which are also affected by social and cultural conditions. The authors advise that exporters must familiarize themselves with the societal and cultural elements that influence these systems, in order to gain a competitive advantage when dealing with the Japanese.

Czinkota & Kotabe (1999, 2000) studied how Japan’s business environment began to change in the late 1990s, by analysing the main perceived barriers to entry. Via questionnaire, the authors were able to group the found entry barriers into four groups: (i) unique Japanese business practices, (ii) high quality expectation and regulation, (iii) high operational costs, and (iv) buy Japan mentality. The authors notice that with the emergence of electronic commerce (e-commerce) and the financial constraints in Japan, several companies gained a foot in niche markets as Japanese socio-cultural characteristics diminish in the importance of doing business. Despite a certain change in the distribution system, the authors conclude that many of the regulations put in place by the government are still impediments.

Maguire, (2001) focused his study on how (i) non-tariff barriers, (ii) the negotiation process with the Japanese, and (iii) the consumer culture serve as barriers to sell in Japan. The author notices the inefficient regulations in favour of businesses over consumers, suggesting that it is important to understand the political environment ahead of the legal one. This aspect is closely related to the socio-cultural aspects mentioned by Samiee & Mayo (1990), necessary to also understand the Japanese negotiation style, which is influenced by respect, trust in personal relationships, and prevalence of the group over the individual. Consumer behaviour, such as the expectation of high quality and after-sales services, as well as the influence of the distribution channel are important barriers to trade with Japan.

Ojala & Tyrväinen (2007) have studied the barriers software SMEs encountered when internationalizing to Japan, and concluded that “no single international business theory

can be used to adequately investigate entry barriers (Ojala & Tyrväinen, 2007, p. 694).” The authors grouped similar barriers into three categories: (i) organization-related barriers were those directly connected to the firm’s capacity and devised strategy to tackle the market, (ii) sales process-related barriers include all activities necessary to sell the product, including the distribution, and (iii) target industry segment-related barriers concern to the environment, including the Japanese consumer behaviour and government regulations. From the interviews, the authors concluded that the most common barrier was convincing the headquarters to adapt to the market requirements, namely the high standard expectations of the Japanese clients. The other most common barriers were related to the environment, namely the Japanese slow purchasing process and difficulty in hiring local staff.

Author(s)	Barriers Categorization	Conclusions
Samiee & Mayo (1990)	(1) Visible and (2) Invisible barriers	Social and Cultural characteristics have an impact on Japan's barriers.
Czinkota & Kotabe (1999, 2000)	(1) Business Environment, (2) Regulations, (3) Costs of Doing Business, and (4) Consumer Behavior	Regulatory and Business environment are becoming “foreign-friendly”, but Consumer Behavior is still a major barrier.
Maguire (2001)	(1) NTB, (2) Business Environment, and (3) Consumer Behavior	NTB are important barriers.
Ojala & Tyrväinen (2007)	(1) Organization-Related Barriers, (2) Sales Process-Related Barriers, and (3) Target Industry Segment-Related Barriers	Convincing headquarters of the Japanese market-specific demands is a challenge.

*Table 2 Studies on Japan with barriers framework*

Despite these scarce four studies, several other studies (Table 27 of Annex B) have identified many barriers showcasing issues related to the controllable and uncontrollable elements. Following the distinction between controllable and uncontrollable elements, the following part will summarize barriers found in several studies.

**Controllable elements** include all “the necessary overall corporate resources, structures, and competencies that can limit or promote strategic choice” (Cateora et al., 2011, p. 12), or as Leonidou (2004, p. 281) phrases it: “barriers associated with organizational resources/capabilities and company approach to export business.” Following Leonidou’s categorization (2004), these include informational, functional, and marketing barriers.

Literature shows that companies struggle to gather the necessary information about the host market, such as business opportunities, clients, and the distribution channel due to

the high competition in Japan (Ojala & Tyrväinen, 2007; Samiee & Mayo, 1990; Simon & Palder, 1987). The struggle is because of short capacity or difficulty in hiring adequate personnel (Buckley et al., 1987; Maguire, 2001; Samiee & Mayo, 1990) and because of management's misunderstanding of the market demands (Ojala & Tyrväinen, 2007; Simon & Palder, 1987). The Japanese market demands a long commitment from companies, which will leave out firms that do not have the necessary financial resources to support the expansion (Czinkota & Kotabe, 1999, 2000; Simon & Palder, 1987). Companies that have sufficient resources to commit to Japan will learn that the Japanese consumer expects higher standards of quality, which may differ from the home country. The adaptation to the Japanese standards will increase costs. Higher product quality, attention to the packaging, availability of an after-sales team, and favourable product return policies, are observed by several authors as barriers (Buckley et al., 1987; Douglas & Craig, 1990; Maguire, 2001; Min, 1996; Padron et al., 2011; Simon & Palder, 1987; Wong et al., 1999). Promotion of the product must go hand-in-hand with a good corporate image, and must be constant, even if the product characteristics have not changed (Douglas & Craig, 1990). Despite these increased costs, several authors mention that the Japanese are not very price-sensitive, since they are willing to pay a premium as long as the product has high quality together with customer support, or after-sale (Douglas & Craig, 1990; Maguire, 2001; Simon & Palder, 1987).

In summary, controllable elements ask the firm to adapt resources (human and financial), management strategy, and marketing related variables to Japan. This strategic orientation is under control of the company, which will have to overcome all the uncontrollable elements.

**Uncontrollable elements** will raise the level of uncertainty of doing business, and this can be divided from those emanating from the home country, such as "political and legal forces, economic climate, and competition" (Cateora et al., 2011, p. 12), and those from the host country, with a higher level of uncertainty, which includes the same as those from the home country and, following Leonidou's categorization (2004), procedural, task, and environmental barriers.

Several studies pay more attention to elements that are not under the firm's control. Non-Tariff Barriers (NTB) are of special interest due to Japan's different regulatory environment. NTB can be defined as (Sunesen et al., 2010, p. 15) "all non-price and non-quantity restrictions on trade in goods and services. This includes border measures (customs

procedures, etc.) as well as behind-the border measures flowing from domestic laws, regulations and practices.” Authors observe that NTB on sanitary, phytosanitary, and technical barriers to trade are substantially higher, adding extra costs to foreign companies that must comply with the rules (Felbermayr et al., 2017; Sunesen et al., 2010). These regulatory barriers will keep foreign companies at disadvantage, as they have to face the high competition of the market (Ojala & Tyrväinen, 2007; Padron et al., 2011; Simon & Palder, 1987; Uzama, 2009). Established companies in Japan will already have a better understanding of the Japanese consumer traits and are, thus, better equipped to adapt to the market changes. One study shows that adapting to the customer’s needs is “the most important factor restricting EU exports to Japan” (Sunesen et al., 2010, p. 44). These constraints will increase costs and provoke delays in exports (Leonidou, 2004).

Adapting and overcoming bad consumer perceptions of foreign products is therefore essential. Consumer ethnocentrism, which can be defined as (Haghirian, 2011, p. 26) a “type of consumer behavior in which consumers are prone to evaluate products from their home market more favourably than imports, and in which certain consumer groups actually display hostility to the idea of purchasing imported goods”, is particularly evident in existent studies (Buckley et al., 1987; Czinkota & Kotabe, 1999, 2000; Haghirian, 2011; Mazur, 2016; Ojala & Tyrväinen, 2007; Samiee & Mayo, 1990; Wong et al., 1999). The image and reputation of the company that sells the product are as important as the product itself because Japanese consumers are risk-averse and need to trust the company first (Douglas & Craig, 1990; Haghirian, 2011). The proximity of the company to the home market and post-sale service is seen as a reason for the “Buy Japanese” mentality (Haghirian, 2011). This type of service is expected because Japanese tend to shop more often, within walking distance, due to the small living space the typical Japanese family has (Min, 1996; Pirog et al., 1997).

Environmental barriers to trade include economic, political-legal, and socio-cultural elements. Different cultural and social factors (Samiee & Mayo, 1990) have an impact on trade barriers. Japanese society, as a whole, is “regarded as a homogeneous group with [...] a flat income distribution, and relatively high educational levels”(Samiee & Mayo, 1990, p. 50), and with the peculiarity that women are in control of the household (Maguire, 2001). Unfamiliar business practices mean that negotiation styles between Japan and other countries differ. Some companies pointed the slow decision process as a barrier (Ojala & Tyrväinen, 2007), but that slow decision is a sign of the commitment Japanese are willing to make (Padron et al., 2011). That process is due to the structured business etiquette in Japan.

Foreigners must be aware of the importance of creating and maintaining personal relationships (Gehrt et al., 2005; Maguire, 2001), that in Japan the group is above the individual, and that respect and dignity are very important concepts to the Japanese. Such cultural traits affect the way Japanese do business, and the existence of established close business ties, which are impediments for new entrants (Bebenroth et al., 2014; Czinkota & Kotabe, 1999, 2000; Min, 1996; Ojala & Tyrväinen, 2007; Pirog et al., 1997; Yamawaki, 2004).

A particular barrier affected by the close relationships among business partners is the distribution system. Distribution is seen especially as very hard because the Japanese distribution is a long and complex network of middlemen with many small retailers and wholesalers that have strong ties among them (Bebenroth et al., 2014; Buckley et al., 1987; Gehrt et al., 2005; Maguire, 2001; Min, 1996; Ojala & Tyrväinen, 2007; Samiee & Mayo, 1990; Simon & Palder, 1987; Williamson & Yamawaki, 1991; Wong et al., 1999; Yamawaki, 2004). Distrust of foreign products and if foreign companies can commit and reply on time to satisfy orders are impediments (Douglas & Craig, 1990; Gehrt et al., 2005). The distribution system requires an understanding of the shopping habits, living space, geography, and relationships established in the distribution system. Due to the size of Japanese cities, the living space available is very small, leaving families without much space for storage. Associated with the constant search for fresh products, this influences families to shop constantly, and in the vicinity of their houses. Furthermore, the Japanese workforce usually receives bonuses twice a year, which influences the shopping habits for expensive products (Synodinos, 2001).

Doing business in Japan means also knowing the language (Buckley et al., 1987; Mazur, 2016; Sunesen et al., 2010). Several authors mentioned that companies trying to set business in Japan had a hard time recruiting local staff because of the Japanese recruitment system that starts at the University even before students graduate, and the lifetime employment system (Maguire, 2001; Ojala & Tyrväinen, 2007; Padron et al., 2011; Simon & Palder, 1987; Yamawaki, 2004).

The political environment of the host country can present itself as a barrier if companies do not make an effort to understand or comply with those socio-cultural factors. As an outsider, businesses trying to sell abroad may receive “unfair treatment at the hands of politicians, legal authorities, or both (Cateora et al., 2011, p. 14)” Although Japan is seen as a consensus society, with few litigations, the Japanese regulatory environment is considered to be a major source of NTB (Buckley et al., 1987; Felbermayr et al., 2017; Maguire, 2001;

Pirog et al., 1997; Sunesen et al., 2010; Uzama, 2009). Procurement codes in Japan are less regulated and transparent when compared to the European Union (Maguire, 2001), with the government giving preference to Japanese suppliers (Samiee & Mayo, 1990). Felbermayr et al. (2017, p. 35) observe that “while the EU market is open to Japanese railway providers, the EU cannot equally access the Japanese market.” Unfair rules towards foreign companies are prevalent such as biased procurement codes, regulations and technical standards, customs valuation codes, intellectual property, and industrial targeting policies (Samiee & Mayo, 1990). The available literature observes many technical and administrative barriers to trade on merchandise, food and agricultural products, pharmaceuticals and cosmetics, automobiles and automotive components, and services (Mazur, 2016; Sunesen et al., 2010), with Sunesen et al. (2010, p. 36) concluding this to be the cause “for the low volume of trade between EU and Japan.”

Controllable		Informational	Samiee & Mayo (1990), Ojala & Tyrväinen (2007)
		Functional	Simon & Palder (1987), Buckley et al. (1987), Czinkota & Kotabe (1999, 2000), Maguire (2001), Ojala & Tyrväinen (2007)
		Marketing	Simon & Palder (1987), Buckley et al. (1987), Douglas & Craig (1990), Wong et al. (1999), Maguire (2001), Padron et al. (2011), Haghirian (2011)
Uncontrollable	Domestic	Governmental	
		Economic Climate	
		Competition	
	Foreign	Procedural	Sunesen et al. (2010)
		Task	Simon & Palder (1987), Buckley et al. (1987), Samiee & Mayo (1990), Douglas & Craig (1990), Min (1996), Wong et al. (1999), Czinkota & Kotabe (1999, 2000), Ojala & Tyrväinen (2007), Sunesen et al. (2010), Haghirian (2011), Mazur (2016)
		Environmental	Simon & Palder (1987), Buckley et al. (1987), Samiee & Mayo (1990), Williamson & Yamawaki (1991), Min (1996), Pirog et al. (1997), Wong et al. (1999), Czinkota & Kotabe (1999, 2000), Maguire (2001), Yamawaki (2004), Gehrt et al. (2005), Ojala & Tyrväinen (2007), Uzama (2009), Sunesen et al. (2010), Padron et al. (2011), Bebenroth et al. (2014), Mazur (2016), Felbermayr et al. (2017)

Table 3 Studies by Barriers (Own elaboration)

In summary, several studies with different study goals were analysed to present the

barriers (Table 3). From this analysis, key themes appear in the literature. From the controllable side, marketing-related barriers, such as product quality and the need for after-sales service are the most prevalent. Informational and functional barriers, such as accessing information about the market, and management commitment to Japan are not mentioned very often, maybe because most studies focus on companies that actively chose to be in Japan. From the uncontrollable side, the analysed studies did not provide information about domestic barriers, but the majority paid attention to environmental barriers that emanate from Japan: the complex and long distribution channel, the prevalence of NTB, the close relationships established in the distribution channel that restrict the entrance of newcomers (*keiretsu*), and the regulatory environment.

Adaptation of the offer to the Japanese standards, as well as differentiation from what the intensive competition already has, is essential. Trust building among distributors and consumers is accomplished by showing commitment to the market. Regulatory reforms alone will not necessarily be the answer to trade barriers, due to the strong socio-cultural elements that influence consumer and business environments. Nevertheless, the business environment has been changing due to the slow growth of the economy, new distributions models presented by new businesses, and the changing consumer habits.

### **3.1.3. Changing Elements**

Despite Japan's challenges, several authors note that the market offers several opportunities (Haak & Haak, 2008; Melville, 1999), if commitment is made.

The economic downturn since the 1990s has given way to the appearance of price-conscious consumers, changes in the distribution system, and reforms on regulations that fomented NTB. The Japanese government has been trying to deregulate and open its markets to foreign investors by entering into regional trade agreements such as the EU-Japan Economic Partnership Agreement (EPA) which Portugal is part of. The *Abenomics* policies have the goal of reviving the economy after two decades of slow growth, making the market more attractive to foreign companies. Overall, deregulation, the openness of the distribution system, the growth of e-commerce, the transparency of rules and administrative procedures, the compliance to international standards, and the prospect of a growing GDP, present opportunities to foreign companies.

Authors point out some markets that have potential in Japan, such as information and communication technologies (ICT), automotive supply industry, environmental



technology, medical and health technology, and biotechnology (Haak & Haak, 2008).

Past studies have observed that price was not an issue (Douglas & Craig, 1990; Simon & Palder, 1987), but slower economic growth in the Japanese economy since the 1990s gave way to price-conscious consumers (Synodinos, 2001). Although the Japanese began to be cost-sensitive towards daily necessities products, they were still willing to buy expensive branded items. This dichotomy can be an opportunity since, compared to Portugal, the Japanese GDP per capita stands at 40,246.9 USD, as of 2019 (Group, 2021) (Figure 10 of Annex A).

Aicep (2017) presents a list of sectors in which Portuguese companies can be successful, such as fashion (clothing and leather shoes), home textiles, construction materials, utilitarian ceramics, food products, wines, furniture, renewable energies, and eco-business. These opportunities are further confirmed by Portugal's direct competitors from Spain, Italy, and Greece, already acting in these areas. No matter the price, however, quality continues to be an important requisite (Haghirian, 2011). The "Buy Japanese" mentality is said to be easily avoided by European products, because products from Europe already have a good reputation among Japanese consumers (Padron et al., 2011), and with the gradual rollout of tariffs to many European products, companies will only have to worry about who will distribute their products.

The EPA can also be used as a brand marketing tool since many supermarkets have started to promote European products simply by mentioning the EPA to consumers that do not know the products (Kongstad, 2020). This agreement is a sign that the regulatory environment is becoming more European-friendly. Japan is the EU's second most important trade partner in Asia, and sixth worldwide (Eesbeek, 2020b). The agreement will have Japan eliminating 97% of tariffs on selected products, cooperating on regulation, and addressing some NTB (Felbermayr et al., 2019). Since entering into force, the EPA has already benefitted the European exports of wine (Porto, 2020), an area of great interest to Portuguese wine producers. Other sectors that will greatly benefit EU exporters are the sectors of "chemicals, textiles and clothing, metals, ceramics and glass, cosmetics, plastics, jewellery and precious stones, and wine" (Porto, 2020, p. 3).

Of particular interest are the Geographic Indicators (GI), with Portugal seeing from the start the protection of *Pêra Rocha do Oeste* (fruits category) and *Queijo S. Roque* (cheese category). GI are "a distinctive sign used to identify a product whose quality, reputation or other characteristic is linked to its geographical region" (Eesbeek, 2020a, p. 5). Although

Portugal starts with only those two products (Part 1 of the GI) and the recognition and protection of 9 wine-related areas (Part 2 of the GI), the EPA allows the addition of other GIs to the list (Annex 14-B of the EPA). Compared to other countries with a similar offer, Portugal has few GI references (Table 28 of Annex B).

Both parties commit to regulatory cooperation, giving way to eliminate many of the NTB. Although Japan has shown an interest to comply with international standards, it continues to apply its own rules and regulations even to products that have met European standards, by not accepting European (EN) and International (ISO) standards. Examples include the agriculture sector, with Japan still not complying with internationally acceptable food additives (Kongstad, 2020).

Besides the EPA, both parties have also signed a Strategic Cooperation Agreement, in 2018, and are working on an Investment Protection Agreement (IPA) (Lamsens & Teney, 2020).

As Japan tries to find new markets abroad for its companies, it is also trying to solve the shrinkage of its workforce. By slowly easing access of foreign workers to Japan, the government is also trying to bring women back to the labour force. More women are following career paths and delaying marriage and pregnancies. Attention to the image means that many women like to shop for fashion products as well as beauty products (Melville, 1999).

Another market potential is the elderly market, known as the “silver market” (Haak & Haak, 2008; Melville, 1999). Japan is the country with the oldest population in the world, which means that this portion of the population has savings to spend and is in need of medical care, as well as medical products. Not only are the older concerned with health, but so are the young and mothers with their children. There is a growing concern about consuming healthy products. One example is virgin olive oil, which has seen increasing growth since the 1980s (Capogna & Gómez, 2016).

The complex distribution system has been a focus of many studies, even if foreign companies could negotiate “directly with large stores concerning distribution, bypassing the entire wholesale network and much of the personal relationships and cultural imperatives that support the distribution system” (Samiee & Mayo, 1990, p. 54). Signs of openness have begun to appear as several foreign companies successfully established business, including Ikea and H&M (Bebenroth et al., 2014), a sign of openness to foreign and affordable products.

## 4. Research Methodology

The present section outlines the theoretical methods for this research. According to Saunders et al. (2016, p. 5) research can be defined as “a process that people undertake in a systematic way in order to find out things, thereby increasing their knowledge”. The authors indicated that researches may be quantitative, qualitative, or a mix of both. The first is associated with research that collects numerical data, while the second is with non-numerical data. The third option is a mixture of both: research may conduct an interview (qualitative research) but also use a questionnaire (quantitative research).

Following the literature review on internationalization theories and overall barriers to internationalization to Japan, this section will present the (1) research goal, (2) research strategy, and (3) sample.

### 4.1. Research Goal

The goal of this study is to identify and describe barriers that Portuguese small and medium enterprises (SMEs) exporting to Japan encounter. According to article 2 of the Annex of the Decreto-Lei n. ° 373/2007 de 6 de Novembro, SMEs are companies that employ less than 250 people, and whose total annual business volume does not exceed 50 million euros, or its total annual balance does not exceed 43 million euros. A small company employs less than 50 people and has a total annual business volume or total annual balance of fewer than 10 million euros; a micro company employs less than 10 people and its total annual business volume or total annual balance is less than 2 million euros. In Portugal, the latest data from 2019, data from the INE (2021), reveals that there are 1,318,330 million companies in Portugal, of which 99% were SMEs (Table 4).

<b>Definition</b>	<b>n</b>	<b>%</b>
Micro	1,265,671	96,0
Small	44,189	3,4
Medium	7,179	0,5
Big	1,291	0,1
Total	1,318,330	100,0

*Table 4 Total of enterprises by categorization in Portugal (Source: INE)*

According to Saunders et al. (2016), the purpose of studies can be exploratory,

descriptive, explanatory, evaluative, or a combination of any of these (Table 5). With the goal to contribute to the literature, a critical analysis of data collected is given in the Conclusion section, making this research a combination of descriptive and explanatory studies: a descripto-explanatory study (Saunders et al., 2016).

Type	Questions	Goal
Exploratory studies	What, How	To understand an event (issue, problem, situation).
Descriptive studies	Who, What, Where, When, How	To accurately describe an event.
Explanatory studies	Why, How	To explain relationship between variables.
Evaluative studies	How, What, Why	To assess the effectiveness of an event (business strategy, policy, programme, etc.)
Combined studies		

*Table 5 Purpose of Studies (Adapted from Saunders et al., 2016)*

## 4.2. Research Strategy

The research strategy will include two data collection methods: (1) semi-structured interviews with the most relevant institutional agent, namely Aicep, and a sectorial one, namely ViniPortugal (Annex E); and (2) questionnaires to the exporting companies (Annex C).

The descriptive nature of research aims to accurately describe events (Saunders et al., 2016). Among other research strategies, namely, experiment, archival research, case study, ethnography, action research, grounded theory, and narrative inquiry, the survey strategy was chosen.

The survey strategy is used to answer the questions of “what”, “who”, “where”, “how much” and “how many”. Due to the descripto-explanatory nature of this study, by answering these questions, a detailed and overall description of the barriers is expected to emerge. Furthermore, this strategy allows to perform a standardized interview to several companies (Brace, 2008; Saunders et al., 2016), and the collection of quantitative data that can be used to perform statistical analysis of the results (Saunders et al., 2016).

### 4.2.1. The questionnaire method

Questionnaires are one of the most popular methods used in business research (Saunders et al., 2016). A questionnaire can be self-completed or completed by the interviewer (Brace,

2008). For this study, web-based questionnaires will be used<sup>7</sup>, asking for the completion of them by the respondents. The benefits of time and cost-effectiveness are the reasons for this choice.

The questionnaire (Annex C) follows a similar approach to the OECD’s report on barriers perception (OECD, 2008). An adaptation of wording, similarly as presented in the literature review, will be used. The structure of the questionnaire is divided into 5 parts (Table 6), namely information on (1) Company details, (2) Company’s international experience, (3) Company’s internationalization to Japan, (4) Export’s barriers, and (5) Access to external support.

<b>Parts</b>	<b>Sections</b>	<b>n</b>	<b>Parts</b>	<b>Sections</b>	<b>n</b>
1	Company details	8	4	Export Barriers	31
2	International experience	6	5	External support	2
3	Internationalization to Japan	9		Total	56

*Table 6 Questionnaire structure and questions count*

Reasons for this division are due to the general information collected in parts 1, 2, 3, and 5, which have different types of answers; while part 4 presents the respondents with a set of questions and answers to assess the respondent’s perception and attitudinal behavior regarding export barriers. As Brace (2008) observes: “Respondents need to be helped to express attitudes and describe images, particularly to describe them in a format that we can analyse.” With this in mind, in part 4 of the questionnaire, the Likert scale will be used. Codification of the scale follows a similar approach to OECD (2008) questionnaire (Table 7), ranging from 1 (Not/Little important barrier) to 5 (Very important barrier).

<b>Scale</b>	<b>Meaning</b>
5	Very important barrier
4	Quite important barrier
3	Important barrier
2	Somewhat important barrier
1	Not/Little important barrier

*Table 7 Questionnaire codification*

The questionnaire was aided with an external document (Annex D) which

<sup>7</sup> An exception was opened to one of the respondents to whom the questionnaire was mailed.

respondents could access while answering the questionnaire. The document, written in Portuguese, contained the list of the barriers and a section with an explanation for each barrier.

#### 4.2.2. The interview method

The interview method is used to support the building of the questionnaire. From the available interview types, namely structured, semi-structured, and unstructured or in-depth interviews (Saunders et al., 2016), the semi-structured interview was chosen. This method gives space to the interviewee to express himself and for the researcher to learn about the vocabulary and issues at hand. Questions on key themes are prepared, but due to its flexibility, new questions can be made to further advance the discussion (Saunders et al., 2016). Following the literature review, the interview (Annex E) was divided into two sections, and included 6 themes, as Table 8 depicts.

##### **Part 1: About Japan**

Themes	1. Opportunities and Weaknesses
	2. EU-Japan EPA

##### **Part 2: About the Exporters to Japan**

Themes	3. Overall information about the companies
	4. Barriers companies face
	5. Expectations vs. reality
	6. Recommendations

*Table 8 Interviews parts and themes (Own elaboration)*

An additional interview was conducted with ViniPortugal (Annex E), following a similar structure.

### 4.3. Sample

For this study, the sample selection followed two criteria, namely: (1) companies had to be SMEs, and (2) to export or have exported to Japan. With the cooperation of Aicep's delegation in Tokyo, it was possible to access Aicep's database on companies selling to Japan. Additionally, the same request was made to the Portuguese Institute of Statistics.

The list from Aicep was a compilation from INE's list, from 2019; whereas the list received from INE was from 2020. Both lists provided with the company name, and address information. Aicep's list provided some direct contact information such as telephone

numbers and e-mail addresses, necessary to conduct the inquiry. However, after the organization of the 1024 entries, only 374 contained e-mail information. INE's list did not provide any contact information, besides the address, but did add information about the geographic location of the companies, type of business activity (CAE), as well as a ranking on export value. After compiling both lists, duplicates were eliminated, and an online search took place for the sourcing of e-mail contacts and telephone numbers. The list totaled 1072 e-mails. Save for a few websites that provided with the e-mail contact of the export department manager, most of the e-mails were for the general public, starting with names such as "geral", "info", "comercial", or "marketing".

Collection of data took place between April 27<sup>th</sup> and May 26<sup>th</sup>. One week before the first contact, a test period was conducted with 6 companies. Over the period of a month, batch e-mails were sent three times, on April 27<sup>th</sup> (1<sup>st</sup> batch), May 6<sup>th</sup> (2<sup>nd</sup> batch), and May 24<sup>th</sup> (3<sup>rd</sup> batch). Due to the low response rate from the 1<sup>st</sup> and 2<sup>nd</sup> batches (17 replies received), from May 10<sup>th</sup> to May 21<sup>st</sup>, 664 phone calls via VoIP (Skype) were placed, which contributed to the collection of different e-mails for the same firms. In the end, a total of 3524 e-mails were sent. From these contacts, 48 companies informed that they had never exported to Japan, although being cited in lists of either Aicep or INE.

## 5. Findings and Discussion

### 5.1. 2020 Exporter's profile (INE data)

#### 5.1.1. Location of exporters

A list by the Portuguese National Institute of Statistics (INE) was provided for the exporting companies for the year 2020 ( $n = 1003$ ). The list contains the addresses of the companies exporting to Japan and the corresponding economic activities code (CAE). From this data, at NUTS II level (Table 9), it was possible to conclude that the Northern region, comprises nearly 57% of the companies exporting to Japan. The second most important region is the Centre region, but with only 19%. The Metropolitan Area of Lisbon follows closely with 15.5%. The “Other” corresponds to companies registered outside of Portugal.

Region	n	%	Region	n	%
North	570	56.8	Algarve	13	1.3
Centre	191	19	Autonomous Region of Madeira	9	0.9
Metropolitan Area of Lisbon	155	15.5	Other	8	0.8
Alentejo	51	5.1	Autonomous Region of Azores	6	0.6
			Total	1003	100

*Table 9 Origin at NUTS II level of 2020's exporters*

Analysing at the NUTS III level (Table 29 of Annex B), the Metropolitan Area of Porto represents almost 30% of exporting companies. The Metropolitan Area of Lisbon ranks second, with 15.5%, representing a little more than half than the former. The third (9.8%) and fourth (6.8%) areas also belong to the Northern regions.

#### 5.1.2. Type of Economic Activity (CAE)

The 2020 exports type of businesses (CAE) was diverse, with the list presenting 56 different CAE. Table 30 (Annex B) lists the 13 most common CAE, which together represent nearly 80% of the companies that exported to Japan in the year 2020. The top 5 most common CAE ( $n = 537$ , or 53.5%) were 46 ( $n = 170$ ), corresponding to “Wholesale trade (incl. agents), exc. of motor vehicles and motorcycles”, followed by CAE no. 14 ( $n = 107$ ), corresponding to “Manufacture of wearing apparel”, CAE no. 15 ( $n = 91$ ), corresponding to “Manufacture of leather and related products”, CAE no. 47 ( $n = 87$ ), corresponding to “Retail trade, except motor vehicles and motorcycles”, and CAE no. 11 ( $n = 82$ ), which corresponds to “Manufacture of beverages”. To note that these 5 CAE account for a little more than half



of the total CAE ( $n = 56$ ). The type of industry is clear with CAE no. 14, 15, and 11, but with CAE no. 46 and 47, these can include products from other industries.

## 5.2. Questionnaire results

The following parts of this section present the results of the questionnaires. In total, 75 completed questionnaires were received, with 3 invalid questionnaires. From the sample, this represents 6.9% of the total. However, after an appreciation of the questionnaires, 12 had to be dropped because the respondents were out of the category of SMEs. In the end, 60 questionnaires were validated and subject to an exploratory and factor analysis.

### 5.2.1. Exploratory Analysis

#### 5.2.1.1. Part 1 – Company details

Part 1 of the questionnaire included 8 questions, with the goal of characterizing the respondents. The findings for those answers can be found below.

Results for the **foundation year** of the respondents can be found in Table 31 of Annex B. The oldest company was founded in 1922 (minimum value), and the youngest in 2018 (maximum value). There is no year that shows an increase of created companies as a response to the recent developments of trade with Japan. The years 1989 and 2018 were the years with the most founded companies, having both 3 companies.

The **economic activity classification** (CAE) of the respondents was diverse (Table 32 of Annex B). Looking at the 5 digits' level (sub-class), the most common CAE was 11021 (Manufacture of common wines and liquors,  $n = 5$ ), followed by 15201 (Manufacture of footwear,  $n = 4$ ), both representing 15% of the respondents. Other activities with more than 1 count ( $n = 2$ , each) include 14390 (Manufacture of other knitted and crocheted apparel), 46341 (Wholesale trade of alcoholic beverages), 46421 (Wholesale trade of clothing and accessories), and 46493 (Wholesale trade of toys, games and sports goods). Together they amount to 13.3% of the counts.

Analysing at the two digits' level (Table 10), the most common was 46 ( $n = 11$ ), which corresponds to the “Wholesale trade (includes agents), except of motor vehicles and motorcycles”, followed by 11 ( $n = 7$ ), corresponding to “Beverages industry”, 10 ( $n = 6$ ), which corresponds to “Food products industry”, 13 ( $n = 6$ ), corresponding to “Manufacture of textiles”, and 15 ( $n = 5$ ), corresponding to “Manufacture of leather and leather products”.

CAE	n	%	CAE	n	%	CAE	n	%
01	1	1.7	15	5	8.3	29	1	1.7
03	1	1.7	16	2	3.3	32	1	1.7
10	6	10	20	3	5	44	1	1.7
11	7	11.7	23	2	3.3	46	11	18.3
12	1	1.7	25	2	3.3	47	2	3.3
13	6	10	27	1	1.7	71	1	1.7
14	4	6.7	28	1	1.7	72	1	1.7

Table 10 Two-digit level CAE count

In conclusion, the CAE corresponding to the Wholesale trade (46), Beverages industry (11), Food industry (10), and Manufacture of textiles (13), combined compose 50% of the respondents (Table 33 of Annex B).

Results on **company size** (Figure 11 of Annex A; Table 34 of Annex B) reveal a left skewed distribution (Fisher's coefficient is 1.2), meaning the prevalence of small and medium companies.

The mean size of companies is nearly 54, but the median is almost 23. The smallest companies have 1 employee ( $n = 2$ ), and the largest 200 employees ( $n = 2$ ), with nearly half the companies with 20 employees or less and a large number of companies with less than 10 employees. There is a sharp fall in the number of companies at 20 employees and a gradual decrease after that number up to 200 employees. The first quartile (approximately 7 employees) is composed of micro companies (up to 9 employees) and the third quartile is 88. The coefficient of variation is 110.4%, showing a high spread among companies, because of large differences among company sizes.

Looking at the division between Micro, Small and Medium companies (Table 11), there are 16 micro companies and 22 small companies, representing 63.3% of the sample. Furthermore, the remaining (36.7%) are medium companies.

Designation	n	%	Designation	n	%	Designation	n	%
Micro	16	26.7	Small	22	36.7	Medium	22	36.7

Table 11 Micro and SMEs Count

A question was included about the presence of **foreign capital** in the company. Only 8.3% ( $n = 5$ ) of the companies have foreign capital. 90% have no foreign capital, 6.7% have up to 15% ( $n = 4$ ), and 3.3% ( $n = 2$ ) have more than 50% of foreign capital, including one

being 100% foreign-owned.

Respondents provided a **3-year average of their turnover** (Figure 12 of Annex A; Table 35 of Annex B). Distribution is left skewed (Fisher's coefficient is 2.7) with half of the companies with a turnover up to 3 million euros (median). Furthermore, the first quartile is €707,884 and the third quartile is of 9 million euros, showing the predominance of small values. The lowest value is 10 thousand euros, and the highest turnover value of 43 million euros. Sharp falls in the number of companies occur at €2,000,000 and €5,000,000 and further decrease at higher values up to €20,000,000. No companies have a turnover larger than €20,000,000 and less than €43,000,000€. The highest turnover is €43,000,000 (a single company). Spread is very high, as shown by the coefficient of variation (127%), as a consequence of large differences among companies.

Respondents were asked to provide a **percentage of their export sales based on their 3-year average turnover** (Figure 13 of Annex A; Table 36 of Annex B). Distribution is right skewed (Fisher's coefficient is -0.7), showing that most companies are export-oriented. This is further supported by the average of 66%, and the median of 75%. The lowest value is 2.6%, but it rapidly increases within the first quartile, up to 42.5%. There is a sharp increase at 90%, with many companies with larger weights and with the highest weight equal to 100% ( $n = 3$ ), and 4 (6.6%) have 99% of sales in foreign markets.

The **3-year average of export percentage to Japan** (Figure 14 of Annex A; Table 37 of Annex B) based on the export turnover from the analysed companies show that Japan is a residual export market for most of the respondents. The average is 6.8%, and the distribution is strongly left skewed (Fisher's coefficient is 4.1), which means that small values are predominant. The lowest value is of 0% of exports to the Japanese market in the past three years, with many companies (nearly half) with 1% or less and the majority of companies (63%) with 2% or less. Sharp falls in the number of companies occur at 1% and 2% and an important fall at 5% followed by further decreases. Spread among values is very low, as shown by the coefficient of variation (2.4), and only two companies have Japan representing more than 50% of their exports, namely 60%, and 100%.

#### 5.2.1.2. *Part 2 – Internationalization details*

Part 2 contained 6 questions with the goal to make an assessment of the company's internationalization profile.

The **internationalization year** of the respondents can be found in Table 38 of

Annex B. The oldest internationalization took place in 1932 ( $n = 1$ ), and the most recent in 2019 ( $n = 1$ ). The years which combine most internationalizations are 1986 with 6 companies and the year 2008, with 4 companies. Other years that stand out are 1998, 1999, and 2000 ( $n = 3$ , each). There was 1 missing value in this count.

Analysing by decade (Table 12), every decade after 1970 stands out, with the decade of the 2010s having the most internationalizations ( $n = 15$ ).

<b>Decade</b>	<b>n</b>	<b>%</b>	<b>Decade</b>	<b>n</b>	<b>%</b>
1930	1	1.7	2000	11	18.3
1970	4	6.7	2010	15	25.0
1980	14	23.3	Missing	1	1.7
1990	14	23.3	Total	60	100.0

*Table 12 First internationalization by decade*

Regarding the **internationalization method** of the company's first internationalization, nearly every respondent ( $n = 57$ ) refers to "Exports" as their first internationalization. Foreign Direct Investment was selected by 1, with the remaining 2 indicating "other" and writing "Sales stand on a European Championship" and "Online sale".

The most common **first country of internationalization** (Table 39 of Annex B) respondents indicated was Spain, (23.3%). France and the USA both represent 11.7% of the responses, and the United Kingdom 10%. European countries stand out with 9 countries, followed by 4 American (north and south) countries, 1 African, 1 from Oceania, and only 1 Asian (Japan). There were 3 missing values.

The **number of foreign countries** a company is present at the time of the questionnaire can be consulted in Table 40 of Annex B. Values range from 0 ( $n = 1$ ) to 65 ( $n = 2$ ) with the most frequent counts being 10, 15, and 30 ( $n = 6$ , each). Very few countries are present in a low number of countries such as 3 countries or less and note that a single company is not present in any country at the time of the questionnaire. On the contrary, many companies are present in a very high number of countries such as 30 countries or more (22 companies or 36.7%).

The average is nearly 23 and the median is 15. Distribution is left skewed (Fisher's coefficient is 0.8), and the spread is high, as indicated by the coefficient of variation (76.7%), showing a high difference between companies. The first quartile is 10 countries and the third

is around 34. This range shows the predominance of moderate or high number of countries (Table 41 of Annex B).

A question was also included to assess if a company had a **dedicated export department**. More than half of the respondents (35 companies or 58.3%) said to have a dedicated export department or at least one export manager.

A multiple response question to assess if companies had **human resources with Japan-related competencies** was included. If respondents had Japanese people in their human resources team, it was asked them to ignore the other options. Results are displayed in Table 13. Given options included “no”, “worked in Japan”, “has a university degree related to Japan”, “speaks Japanese”, and “other”, where respondents could specify anything else.

	n	%
No	29	46.8
Japanese person	3	4.8
Worked in Japan	1	1.6
University degree related to Japan	1	1.6
Speaks Japanese	1	1.6
Other	27	43.5
Total	62	100.0

*Table 13 Japan-related competences answers*

Only 3 companies confirmed having Japanese people working in their companies. Another company confirmed having someone with high exposure to Japan, having answered to have a collaborator that has a University degree related to Japan, worked in Japan, and that can speak Japanese. The option “other” was chosen by 27 companies. Answers were varied: “sales Person” ( $n = 3$ ), “foreign markets manager”, “contact with Japanese importers at international exhibitions”, “regular trips to Japan”, “domain of the English language” ( $n = 2$ , each), “agent”, “Portuguese”, “international marketing and commerce manager”, “contacts with Japanese companies”, “broker”, “worked with Japanese people”, “international relations university degree”, “trip to Japan”, “local agent”, “technical and commercial skills”, “contact with importer fluent in Portuguese”, “Japan is not an important market”, “commercial director has significant experience in dealing with Japan”, “Japanese agent”, “collaborator in Macao”, and “Japanese client” ( $n = 1$ , each). Some answers are not clear on their intention, such as “Portuguese”, and “domain of the English language”. Others are related to their human resources skills (marketing and foreign commerce-related skills,

university degree, experience in working with Japan, sales team), and direct contact with Japan (visits to the country, importers, agents, clients). From these answers, respondents show to not have in-house competencies related to Japan.

#### 5.2.1.3. Part 3 - Internationalization to Japan details

Part 3 of the questionnaire was solely dedicated to the Japanese market. 9 questions were asked, with 3 being multiple responses.

The first question was concerned about the **year of internationalization to the Japanese market** (Table 42 of Annex B). The oldest internationalization took place in 1975 ( $n = 1$ ), and the most recent in 2020 ( $n = 4$ ). The years 2019 ( $n = 8$ ), 2016 ( $n = 6$ ), 2020 ( $n = 4$ ) and 2015 ( $n = 4$ ) comprise around 37% of choices. Although the oldest internationalization to Japan is from 1975, most of the respondents ( $n = 52$ ) had their first sale to Japan take place in recent decades. The period from 2010 to 2019 corresponds to more than half of the answers ( $n = 35$ ), and the first decade of the new millennium to around 22%. There were 2 missing values.

In their internationalization to Japan, most companies (91.7%) chose Exports as their first **internationalization method** to Japan (Table 43 of Annex B). Contractual Agreements were selected by 2 respondents, and 2 chose Other. The latter option had respondents indicating “sales via Japanese athletes that participated in an international championship”, and “international exhibition”. There was one missing value.

Several options were provided on **the motives that led companies to internationalize to Japan** (Table 44 of Annex B). With more than 10% of options chosen, “order received” ranks highest (22%), followed by “purchasing power of the Japanese consumers” (18.7%), “market size” (14%), “export-oriented company” (12%), and “prestige/notoriety” (11.3%). One of the respondents wrote that Japan was the only Asian market receptive to their products, and another presented its motive due to a previous license agreement. This was a multiple response question, and, on average, respondents chose 2.5 of the given options.

A question on the **distribution methods** (Table 45 of Annex B) utilized was included. Local distributor was selected by 38% ( $n = 29$ ) of the respondents, and 32.5% ( $n = 25$ ) to directly sell to their final clients in Japan. Nearly 21% also chose to have an agent. Combined, these represent almost 91% of the answers.

Respondents, on average, chose 1.3 of the options. One of the respondents indicated

to have a local distributor, to sell directly, to sell online, and to sell on international exhibitions. Others ( $n = 5$ ) indicated to have a local distributor and an agent; 2 respondents indicated to sell directly, to have a local distributor, and to have an agent.

A question on **export regularity to the Japanese market** was presented to the respondents. More than half ( $n = 36$  or 60%) of companies said to regularly export to Japan, and 40% only occasionally (Table 46 of Annex B).

Assessment of companies' **perception of the necessary effort to export to Japan** was also included (Table 47 of Annex B). Respondents that considered the market to be very demanding (30%) and demanding (31.7%) accounted for 61.7% of the answers. Almost 30% considered the market to be neutral, only 3.3% considered the market to be a little demanding, and 6.7% not to be demanding at all.

Another question on **assessment on how companies evaluate the EPA** helped understand companies' commitment to this market. Almost half (43.3%) indicated to not know how the EPA could support their business. This could mean that companies did not actively try to take advantage of the EPA. For 33.3% of the respondents, the agreement did not bring any change to their business with Japan. Only 9 companies (15%) indicated that the EPA brought big support on their internationalization to Japan. Another 5 companies confirmed that the EPA added some support (Table 48 of Annex B).

Companies were also asked to indicate if they also **exported to nearby countries of Japan**, as shown in Table 49 of Annex B. Around 12% said not to export to any other Asian market. China and its autonomously administrative regions of Hong Kong and Macao account for 47.4% of the total selections. South Korea and Taiwan were indicated 33.5% of the times.

This was a multiple response question, and, on average, respondents indicated 2.3 of other countries they export to in Asia. Besides of those already provided on the list, respondents also indicated Malaysia ( $n = 3$ ), Singapore, Thailand ( $n = 2$ , each), and Vietnam ( $n = 1$ ), as markets they also export to.

A final question was included with the goal to understand how companies **perceived other Asian markets to be similar to Japan** (Table 50 of Annex B). The option to collect most answers was "None", with 37.5%. South Korea was indicated around 29% of the times, followed by Taiwan (12.5%), and Hong Kong (9.7%). Only 2 respondents said to not know.

This was also a multiple response question, and, on average, companies indicated 1.2 number of countries that are similar to Japan. 10 respondents selected up to 2 markets to be

similar to Japan, and 1 respondent responded up to 3 markets to be similar to Japan, namely China, Hong Kong (China), and South Korea.

5.2.1.4. *Part 4 - Export barriers*

Part 4 of the questionnaire was divided into two sections, namely one dedicated to the internal barriers (questions 1-16) and another to the external barriers (questions 17-28). Below (Table 14) results for each question are presented<sup>8</sup> and an explanation for each individual barrier is given in Annex F.

Barrier	Not/Little Important		Somewhat Important		Important		Quite Important		Very Important	
	n	%	N	%	n	%	n	%	n	%
1	9	15.0	11	18.3	17	28.3	15	25.0	8	13.3
2	9	15.0	8	13.3	18	30.0	19	31.7	6	10.0
3	12	20.0	13	21.7	21	35.0	11	18.3	3	5.0
4	13	21.7	15	25.0	22	36.7	4	6.7	6	10.0
5	23	38.3	13	21.7	17	28.3	7	11.7	0	0.0
6	21	35.0	18	30.0	12	20.0	9	15.0	0	0.0
7	12	20.0	17	28.3	17	28.3	8	13.3	6	10.0
8	12	20.0	17	28.3	8	13.3	16	26.7	7	11.7
9	15	25.0	18	30.0	11	18.3	13	21.7	3	5.0
10	15	25.0	16	26.7	12	20.0	14	23.3	3	5.0
11	12	20.0	13	21.7	17	28.3	15	25.0	3	5.0
12	16	26.7	13	21.7	17	28.3	11	18.3	3	5.0
13	13	21.7	8	13.3	13	21.7	19	31.7	7	11.7
14	12	20.0	17	28.3	17	28.3	11	18.3	3	5.0
15	11	18.3	9	15.0	13	21.7	14	23.3	13	21.7
16	10	16.7	10	16.7	19	31.7	18	30.0	3	5.0
17	10	16.7	9	15.0	13	21.7	19	31.7	9	15.0
18	13	21.7	12	20.0	17	28.3	16	26.7	2	3.3
19	12	20.0	16	26.7	21	35.0	6	10.0	5	8.3
20	35	58.3	13	21.7	8	13.3	3	5.0	1	1.7
21	12	20.0	10	16.7	19	31.7	11	18.3	8	13.3
22	11	18.3	8	13.3	13	21.7	17	28.3	11	18.3
23	10	16.7	9	15.0	18	30.0	17	28.3	6	10.0
24	19	31.7	17	28.3	17	28.3	7	11.7	0	0.0
25	16	26.7	5	8.3	23	38.3	14	23.3	2	3.3
26	14	23.3	11	18.3	19	31.7	12	20.0	4	6.7
27	13	21.7	17	28.3	16	26.7	12	20.0	2	3.3
28	9	15.0	15	25.0	15	25.0	14	23.3	7	11.7

<sup>8</sup> The highlighted cells represent the most selected options.



*Table 14 Export barriers results*

In summary, on the internal barriers, respondents indicated that their production capacity to meet demands from the Japanese market (barrier 5) to be the least important barrier ( $n = 23$ ), followed by the perception as a barrier (barrier 6) of a company's financial capacity to support export activities to Japan ( $n = 21$ ). On the external barriers, respondents did not perceive receiving payments from Japan (barrier 20) as an important barrier ( $n = 35$ ). The second least/not important barrier was concerned about the political and economic situation of Japan (barrier 24), with 19 respondents perceiving this barrier as not or very little relevant. On the opposite side, among the importance of these barriers, no "very important" option had the majority among all the barriers. Three barriers (5, 6, and 24) were not perceived as very important by any of the respondents. The two barriers (15 and 22) to be mostly perceived as very important by the respondents were "excessive cost of transport/insurance" ( $n = 13$ ), and "lack of knowledge by the Japanese consumers of the company's offer" ( $n = 11$ ).

Respondents were also invited to indicate other barriers other than those mentioned in the list. 12 respondents indicated the following additional barriers: legal and sanitary issues, issues with transportation, cultural differences, demanded effort on the follow-up, time difference, visa issues, competition, problems in dealing with the Japanese, import quotas, regulation, no competition culture, lack of investment from the Portuguese side to promote the Portugal brand, language, strict attention to any defect or error that may occasionally occur, lack of specialized distributors in a specific field, shipping time, lack of knowledge of the "real" Japan, constant brand adaptation, and shipping costs ( $n = 1$  each).

The additional barriers indicated by the respondents seem to overlap the already mentioned barriers. Table 51 of Annex B allocates the provided barriers by the respondents to the barriers already in the list. Five barriers are related to internal barriers, and the remaining 18 barriers to external barriers. One of the respondents indicated (#19) that, in the beginning, there were problems with transportation, but did not provide further details.

Another respondent indicated that the company had difficulties in getting to know the real Japan (#1); two stressed the efforts demanded on adapting products to the Japanese market (#2 and #3), and one on how demanding it was to be constantly sending samples (#11). Another respondent noted that Japanese people were not very open in dealing with foreigners, and that did not resonate with other Asian markets the company was present at

(#11). One indicated that in Japan there was no competition culture, with local distributors not willing to do business with the company if it already had a distributor/client (#18). Finally, a respondent complained that it was hard to get a visa to enter Japan (#10), but this situation is exceptional due to the Covid-19 pandemic which led the Japanese government to impose a strict travel ban to any foreigners coming from abroad in 2020<sup>9</sup>.

The final question of this part was for respondents to rank, in order of importance, those barriers they considered to be most important. Table 15 presents the most 10 mentioned barriers by the respondents<sup>10</sup>. 14 respondents chose not to respond.

#	Barrier	n	#	Barrier	n
1	Barrier 15	8	6	Barrier 19	5
2	Barrier 28	7	7	Barrier 22	4
3	Barrier 27	6	8	Barrier 26	4
4	Barrier 2	5	9	Barrier <sup>o</sup> 1	3
5	Barrier 8	5	10	Barrier 21	3

*Table 15 Ten most common barriers (ranked by importance)*

Barrier 15 (excessive transportation costs), ranks at 1<sup>st</sup>, followed barrier 28 (customs costs). These two barriers are related to the financial capacity companies can support for their export activities, which are greater for more distant markets, as well as for markets with higher regulations. The third most common barrier is barrier 27, related to the Japanese market regulations. This could be explained by the small size of firms that responded to the questionnaire, as well as internationalization experience to Japan, as shown in Table 42 of Annex B.

#### 5.2.1.5. Part 5 - Institutional support

The last part of the questionnaire was included to identify if companies requested institutional support such as Aicep or Chambers of Commerce. Half of the respondents ( $n = 30$ ) said to use such services.

A final question was given for the respondents to present their reasons (Table 52 of Annex B). Access to institutional support for networking purposes was selected 30% of the times, followed by access to privileged information (27.7%), and to participate in business

<sup>9</sup> This policy even included foreign residents in Japan, but not Japanese nationals coming from abroad.

<sup>10</sup> Other barriers that were mentioned two times are barriers no. 7, 8, 9, 11, and 25. Barriers no. 3, 4, 5, 6, 12, 13, 14, 17, 23, and 24 were mentioned one time.

missions to Japan (20%). The least chosen option was access to finance (9.23%). Respondents also provided some reasons for requesting or not external support. One respondent said to request such support due to specific regulations related to their business, and two to gain logistic support when participating in exhibitions in Japan. Finally, four respondents provided their reasons for not contacting such institutions, namely high costs, unfavourable past experience ( $n = 2$ ), and that their business is very specific that these institutions could not help them.

### **5.2.2. Factor Analysis**

For a better understanding of the relationship between barriers, a factor analysis (FA) was conducted. FA is a data reduction procedure that looks to “identify a small number of factors [...] that may be used to represent relationships among sets of interrelated variables [...]” (George & Mallery, 2020, p. 258).

The first step is to check whether the data is appropriate for factor analysis. The item-total correlations (Table 53 of Annex B) range between 0.272 and 0.766 (average correlation equal to 0.565). Such values are mostly moderate or high with a single low correlation. Therefore, the homogeneity of the 28 items (barriers) of this scale is acceptable or even good.

A number of reliability measures are displayed in Table 54 of Annex B. Internal consistency was checked with Cronbach’s alpha test, after splitting the scale into two halves, with values being very high. The correlation between both halves is also high. Average corrected item-total correlation is moderate. The average inter-item correlation is acceptable, with many moderate or high correlations. Guttman split-half coefficient and Spearman-Brown coefficient are both high. All these measures show a good scale’s reliability.

The Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy for the overall scale is 0.752 and the values for each item (Table 55 of Annex B), are moderate or high, all larger than 0.5. Therefore, the factorability of the correlation matrix is good and factor analysis can be run with the data.

A factor analysis was run with extraction by principal components (Table 56 of Annex B). Several criteria are commonly used to determine the number of factors to be retained. Kaiser’s rule selects factors with eigenvalue larger than 1, leading to a 7-factor solution and explaining 74.3% of the total variance, a good proportion, and a reasonable number of factors. Pearson’s rule selects factors explaining at least 80% of the total variance

which leads to a 9-factor solution and explains 80.9% of the total variance, a good proportion but a large number of factors. Therefore, the 7-factor solution was chosen according to Kaiser's rule.

The results of factor analysis forced to 7 factors with extraction by principal component analysis and varimax rotation with Kaiser normalization are displayed in Table 57 of Annex B. The table shows the item loadings for each factor, highlighting the largest loading of each item, the factor eigenvalues, proportions of explained variance and communalities.

Loadings are acceptable or high. Communalities are all larger than 50% and are acceptable or high. Below corresponding items and factors are explained.

The first factor has high loadings of the items (barriers) 1, 2, 13, 14, and 17. These barriers, except for barrier 17, are internal barriers, considered to be in direct control of the companies (Table 16). The two marketing barriers can be a consequence of the two informational barriers, since without proper information it will be more difficult for companies to find a partnership and control their presence in the market. Lack of governmental support can mean that companies find it even harder to access the market on their own terms. Following this explanation, this factor can be called as the dimension to **“Barriers to information and business opportunities”**. In other words, this factor represents the difficulty in accessing the necessary information that will lead to business opportunities in Japan. These findings are similar to OECD (2008) study, which analyses the perception of SMEs from several countries. Barriers from this dimension rank on the top 20, namely barrier 1 ranks as 3<sup>rd</sup> most important on that study, followed by barrier 2 as the 2<sup>nd</sup> most important, barrier 13 at 5<sup>th</sup>, 14 at 19<sup>th</sup>, and 17 at 9<sup>th</sup>. Providing information in Japanese, such as a website, is always recommended, as interviews have shown (Annex E) if companies want to be successful in establishing partnerships (Ojala & Tyrväinen, 2007). These difficulties may be exacerbated also due to the difficulty in breaking the already established informal relationships among Japanese firms (Maguire, 2001). Nevertheless, knowing “the Japanese culture, life style, and how business and government operate is a must (Samiee & Mayo, 1990, p. 63).”

Item	Barrier Type	Designation
1	Informational	Limited information to locate/analyze the Japanese market
2	Informational	Identify business opportunities in Japan

13	Marketing	Difficulty in establishing a partnership/representation in Japan
14	Marketing	Difficulty in maintaining control over representation/image in Japan
17	Governmental (Domestic)	Lack of home government assistance/incentives for export activities

*Table 16 First dimension: barriers to information and business opportunities*

The second factor has high loadings of the items (barriers) 7, 8, and 9 (Table 17). These three barriers are internal barriers and are related to product development, as companies must consider all the specifications (barriers 8 and 9) for the development of a product for the Japanese market (barrier 7). As Leonidou (2004, p. 288) refers “this problem becomes even more acute in view of the diversity of customer preferences across countries.” Then, this factor can be called as the dimension of **“Product development requirements”**. SMEs on the OECD (2008) study ranked barrier 7 as the 20<sup>th</sup> most important barrier. These barriers may be more relevant due to the size of the respondents. Barriers 7 and 8 will be less relevant for standardized products or whose uniqueness is the selling point. Uniqueness may be a winning strategy if companies want to avoid the “buy Japanese” mentality (Haghirian, 2011). No matter how unique, barrier 9, however, will always have to be met, due to the differences in language. On the other hand, as Ojala & Tyrväinen (2007) refer, only companies that needed to meet specific requirements had the extra work of adapting or developing new products for the market. But adaptation to the tastes and different living conditions of the Japanese is necessary (Samiee & Mayo, 1990), and this is confirmed by Sunesen et al. (2010) that revealed this to be the biggest restriction in their study.

Item	Barrier Type	Designation
7	Marketing	Developing new products for the Japanese market
8	Marketing	Meeting the Japanese export product quality, standards, specifications
9	Marketing	Meeting export packaging and labelling requirements

*Table 17 Second dimension: product development requirements*

The third factor has high loadings of the items (barriers) 21, 22, 23, 25, and 26 (Table 18). These barriers are external barriers (out of the control of the company), with the first three being related to customer and competition barriers (Cust. & Comp.) and the last two to the business environment (Business Env.). Even when a company has a strong domestic market, competing in Japan may lead it to bet on niche markets in order to succeed

(Leonidou, 2004), as it seems to be the case with Portuguese wine producers in Japan (Annex E). Then, this factor can be called as the dimension of **“Market and business culture challenges”**. The different business environment and its implications (informal relations, nationalist sentiment, among others) is a consequence of the Japanese culture, which presents a challenge to outsiders (Czinkota & Kotabe, 2000; Samiee & Mayo, 1990). Barrier 25 requires companies to study the culture and business practices, knowing concepts such as (i) the concept of face, (ii) informal relationships, and (iii) the group mindset (Maguire, 2001). The latter may be an explanation for why the purchasing process in Japan is considered to be slow (Maguire, 2001; Ojala & Tyrväinen, 2007). Barrier 23 ranked as the 16<sup>th</sup> most important barrier on the OECD (2008) study. Barrier 22 may be overcome as companies gain clients, and their reputation and credibility increase as a consequence (Ojala & Tyrväinen, 2007).

Item	Barrier Type	Designation
21	Cust. & Comp.	Understanding the different customer habits and attitudes
22	Cust. & Comp.	Low awareness by Japanese consumers of the Portuguese offer
23	Cust. & Comp.	Keen competition in the Japanese market
25	Business Env.	Japanese business culture and practices

*Table 18 Third dimension: market and business culture challenges*

The fourth factor has high loadings of the items (barriers) 11, 12, 18, and 27 (Table 19). Two of the items are related to a company’s marketing capability (internal barriers) to offer competitive prices as well as to gain a foot in the distribution market. The remaining two are out of the control of the company and are related to rules that the company has to comply with, namely the export procedure and the Japanese market norms and regulations. Then, this factor can be called as the dimension of **“Barriers to distribution”**. This dimension comprises the invisible barriers of the relationships that make the distribution system (Samiee & Mayo, 1990). The complex distribution system means that some companies will not be able to extract information on the end-users of their products (Ojala & Tyrväinen, 2007), information that would be necessary to suppress barriers 1 and 2. In the OECD (2008) study, companies ranked the difficulties in understanding foreign markets distribution system (barrier 12) as the 18<sup>th</sup> most important barrier (out of 49), and barrier 11 as the 12<sup>th</sup> most important.

Item	Barrier Type	Designation
11	Marketing	Offering products with a competitive price-quality relation
12	Marketing	Complexity of the Japanese distribution system
18	Procedural	Complex export procedures for Japan
27	Tariff. & Non-Tariff	Specific Japanese market norms and regulations

*Table 19 Fourth dimension: barriers to distribution*

The fifth factor has high loadings of the items (barriers) 15, 16, 19, and 28, as shown in Table 20. This factor aggregates two barriers in control of the company and two out of its control. This factor can, therefore, be called as the dimension of **“Geographic constraints”**. Transportation costs will be higher for markets that are too far away and most relevant for small companies, which will incur more risks and bear higher costs due to insurance (Leonidou, 2004). This is confirmed by other companies in other studies (Czinkota & Kotabe, 2000). Barriers 16 and 19 will demand extra work from firms that have to visit the market in order to establish a relationship with a Japanese market, but many, due to their size and financial pressure, may find this unfeasible over time, as pointed out by Aicep (Annex E). OECD (2008) study had companies ranking barrier 15 as the 10<sup>th</sup> most important barrier, and barrier 19 as 4<sup>th</sup>.

Item	Barrier Type	Designation
15	Marketing	Excessive transportation/insurance costs
16	Marketing	Adjusting export promotional activities to Japan
19	Procedural	Difficulties in directly communicating with Japanese customers, due to time difference (8~9 hours) and geographical distance
28	Tariff & Non-Tariff	High cost of customs

*Table 20 Fifth dimension: geographic constraints*

The sixth factor has high loadings of the items (barriers) 3, 4, and 10 (Table 21). All these barriers are controllable elements (internal barriers) and are related to the pool of human resources a company has at its disposal. Then, this factor can be called as the dimension of **“Qualified and dedicated human resources to work with Japan”**. Lack of Japan-related skills was pointed out by almost all of the respondents. Knowing how to deal with Japan is essential as pointed out by ViniPortugal (Annex E) if companies want to create successful relationships. However, Ojala & Tyrväinen (2007) refer that the most common barrier was convincing headquarters of Japanese market requirements. Although

in a different context, were related to small companies. Finding the time to deal with the Japanese market is essential, because the Japanese are looking for trustful relationships above all (Min, 1996) and are constantly testing that relationship as pointed out by Aicep (Annex E). OECD (2008) study had SMEs ranking barrier 3 as the 6<sup>th</sup> most important barrier, and barrier 4 as the 7<sup>th</sup> most important.

Item	Barrier Type	Designation
3	Functional	Lack of managerial time to deal with the Japanese market
4	Functional	Insufficient quantity of and/or untrained personnel for working with the Japanese market
10	Marketing	Offering technical/after-sales service in Japan

*Table 21 Sixth dimension: qualified and dedicated human resources to work with Japan*

The seventh factor has high loadings of the items (barriers) 5, 6, 20, and 24 (Table 22). This factor aggregates two internal barriers (5 and 6) and two external barriers (20 and 24). These are related to the size of the company, production capacity, and working capital to deal with external barriers that may arise from the Japanese market. Then, this factor can be called as the dimension of **“Constraints due to company’s low capacity”**. Given the export orientation of the firms, barrier 5 is perceived as the least important barrier. Barrier 6 was ranked as the most important barrier on the OECD (2008) study, although the document alerts that this may be more a consideration on cash flow concerns than access to finance; barrier 20 ranks as the 15<sup>th</sup> most important.

Item	Barrier Type	Designation
5	Functional	Lack of excess production capacity for exports to Japan
6	Functional	Shortage of working capital to finance exports to Japan
20	Procedural	Difficulty in collection of payment from Japan
24	Business Env.	Political and economic conditions in Japan

*Table 22 Seventh dimension: constraints due to company’s low capacity*

In summary, a common categorization of export barriers has not been possible in the literature, due to the complexity and diverse nature of barriers that can have an impact on companies (Kahiya, 2018). A list of barriers based on the works of Leonidou (2004) and complemented by OECD (2009), was used as a template, leaving space for respondents to provide with their own barriers if they chose to. The dichotomy of controllable and



uncontrollable was used, but in the literature on barriers to trade with Japan it was possible to find some authors categorizing barriers differently, as discussed in Section 3.1.2. (Table 2). Czinkota & Kotabe (2000) also resorted to a factor analysis – although not using the same barriers list – providing four categories as displayed in Table 2 of section 3.1.2.

This study, recurring to factor analysis, presents a new categorization. The result was the grouping of controllable and uncontrollable barriers into 7 dimensions, which can be categorized into research barriers (dimension 1), product development barriers (dimension 2), Japanese business culture (dimension 3), distribution barriers (dimension 4), distance barriers (dimension 5), human capital barriers (dimension 6), and firms' capacity (dimension 7).

Table 58 (Annex B) shows the distribution of the responses for each subscale (dimension) (the percentages in the table are computed relatively to the total of each subscale)<sup>11</sup>.

- **Barriers to information and business opportunities:** “Quite important” and “Very important” are the most frequent responses (83 responses or 23.7% each), followed by “Important” (78 responses or 25%), “Somewhat important” and “Little/Not important” (53 responses or 15.1% each). Therefore, the importance of this subscale is moderately high (“Important”, “Quite important” and “Very important” together represent 69.7% of responses);
- **Product development requirements:** “Somewhat important” is the most frequent response (52 responses or 25.9%), followed by “Little/Not important” (39 responses or 19.4%), “Quite important” and “Very important” (37 responses or 18.4% each) and “Important” (36 responses or 17.9%). Therefore, the importance of this subscale is moderate (“Important”, “Quite important” and “Very important” together represent 54.7% of responses);
- **Market and business culture challenges:** “Important” is the most frequent response (92 responses or 27.1%), followed by “Quite important” and “Very important” (71 responses or 20.9% each),

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<sup>11</sup> The scale used is the same as in the analysis for each individual barrier (Annex E).

“Little/Not important” (63 responses or 18.5%) and “Somewhat important” (43 responses or 12.6%). Therefore, the importance of this subscale is a moderately high (“Important”, “Quite important” and “Very important” together represent 68.9% of responses);

- **Barriers to distribution:** “Important” is the most frequent response (67 responses or 23.6%), followed by “Somewhat important” (55 responses or 19.4%), “Little/Not important”, “Quite important” and “Very important” (54 responses or 19% each). Therefore, the importance of this subscale is moderately high (“Important”, “Quite important” and “Very important” together represent 61.6% of responses);
- **Geographic constraints:** “Important” is the most frequent response (68 responses or 25.8%), followed by “Quite important” and “Very important” (52 responses or 19.7% each), “Somewhat important” (50 responses or 18.9%) and “Little/Not important” (42 responses or 15.9%). Therefore, the importance of this subscale is moderately high (“Important”, “Quite important” and “Very important” together represent 65.2% of responses);
- **Qualified and dedicated human resources to work with Japan:** “Important” is the most frequent response (55 responses or 27.9%), followed by “Somewhat important” (44 responses or 22.3%), “Little/Not important” (40 responses or 20.3%), “Quite important” and “Very important” (29 responses or 14.7% each). Therefore, the importance of this subscale is moderate (“Important”, “Quite important” and “Very important” together represent 57.3% of responses);
- **Constraints due to company’s low capacity:** “Little/Not important” is the most frequent response (98 responses or 37%), followed by “Somewhat important” (61 responses or 23%), “Important” (54 responses or 20.4%), “Quite important” and “Very important” (26 responses or 9.8% each). Therefore, the importance of this subscale is moderately low or low (“Important”, “Quite important” and “Very important” together represent 40% of responses);
- **Scale:** “Important” is the most frequent response (450 responses or 23.7%), followed by “Little/Not important” (389 responses or 20.5%),

“Somewhat important” (358 responses or 18.8%), “Quite important” and “Very important” (352 responses or 18.5% each). Therefore, the importance of the overall scale is moderately high (“Important”, “Quite important” and “Very important” together represent 60.7% of responses).

Concerning goodness-of-fit, the number of non-redundant residuals with an absolute value larger than 0.05 is 125 (or 33%) which shows a good fit (a percentage of such residuals no larger than 50% means a good fit). The Goodness of fit index (GFI), the Adjusted Goodness of fit index (AGFI), and the Root mean square residual (RMR) are 0.99, 0.98 and 0.051 respectively which shows a very good fit (a good fit is for GFI and AGFI larger than 0.9 and an RMR less than 0.1 and a very good fit is for GFI and AGFI larger than 0.95 and an RMR less than 0.05)

Croanbach’s alpha was used to measure scale reliability (internal consistency) and it is displayed in Table 23 for the overall scale and for each subscale. Alpha is very high for the overall scale, is high for five subscales and good for the other two (high reliability is for alpha of at least 0.8). Therefore, the reliability of the scale and of the subscales is high.

<b>Subscale</b>	<b>Alpha</b>
1 Barriers to information and opportunities	0.842
2 Product development requirements	0.876
3 Market and business culture	0.828
4 Barriers to distribution	0.859
5 Geographic constraints	0.773
6 Qualified and dedicated human resources to work with Japan	0.810
7 Barriers related to the dimension of the company	0.764
Scale	0.933

*Table 23 Reliability*

## 6. Conclusion

Japan and Portugal have a historic relationship, but whose ties are not very strong as of 2021. With many export-oriented companies in Portugal, the goal of this study was to analyse the perception of barriers to export to Japan. Findings show that most respondents consider the analysed barriers to be moderately important to their export efforts to Japan.

Even though the Portuguese offer is not well known in Japan, with the EU-Japan EPA and the good historical image Portugal has in Japan, Portuguese companies, allied with Portuguese institutions, should work to reach the level of its direct competitors in the minds of the Japanese consumers. But Japan is considered to be a difficult market, one that even with low tariffs is difficult to penetrate by foreign enterprises. With the goal to discover which barriers are perceived as most important, this study focused its analysis on barriers to export. Literature on export barriers to Japan is scarce, and few studies are developed on the relationships between Portugal and Japan.

This study starts to present the current Portugal-Japan trade relationship, followed by an introduction of Japan, its territory, political system, economy, and business environment.

Second, an analysis of the literature on export barriers categorization is given and an adapted list of barriers from other authors is developed. With so many barriers traversing many fields, a proper categorization was necessary to simplify the process. In order to complement that list, a literature review on barriers to trade with Japan was made. Few were the studies found that focused solely on export barriers to Japan but nevertheless presented an understanding of challenges foreign companies face in Japan. A compilation of those findings was made and indicated in the export barriers categorization. New perspectives on Japan are also giving, especially as literature began giving importance to Japan because of the EPA.

Third, interviews were conducted with actors working with Japan but whom are not exporters themselves, with the goal of learning more about the country and for the development of the questionnaire. The questionnaire was then sent to a list of Portuguese exporters over the period of one month.

Fourth, an exploratory analysis of the results is given. This part of the analysis had its main goal to present a characterization of the respondents. Results show that the majority of the respondents were small companies, with half having 20 or fewer employees. Respondents economic activity was diverse with the most common being in the sectors of

manufacture of wines and liquors, manufacture of footwear, manufacture of other knitted and crocheted apparel, wholesale trade of alcoholic beverages, wholesale trade of clothing and accessories, and wholesale trade of toys, games and sports goods.

These companies were export-oriented, and more than half internationalized to Japan in the last decade. From the sample, 60% said to export regularly to Japan, but this market still represents very little on their export turnover (average is 6.8%). More than half, considered Japan to be demanding at variable degrees, and 43.3% said to not know about the EU-Japan EPA. Half of the respondents said not to use any institutional service, such as Aicep. Although 35 replied having a dedicated export department, only 3 firms indicated employing Japanese people, and 1 having someone with Japan-related competencies, including speaking Japanese.

Fifth, factor analysis was conducted to reduced barriers to dimensions that represent relationships between controllable and uncontrollable barriers. The total number of dimensions presented are 7, namely (1) barriers to information and business opportunities, (2) product development requirements, (3) market and business culture challenges, (4) barriers to distribution, (5) geographic constraints, (6) qualified and dedicated human resources to work with Japan, and (7) constraints due to company's low capacity. Dimensions 1, 3, 4, and 5 are rated as moderately high important; whereas dimensions 2 and 6 rate is moderate, and dimension 7 rate is moderately low or low important.

With these dimensions, it is possible to get a clear image of the export barriers perception from the sample. The only barrier to be considered high in importance is "identifying business opportunities in Japan" (barrier 2); whereas barriers considered to be moderately high in importance include "limited information to locate/analyse the Japanese market" (barrier 1), "difficulty in establishing a partnership/representation in Japan" (barrier 13), "excessive transportation/insurance costs" (barrier 15), "adjusting export promotional activities to Japan" (barrier 16), "lack of home government assistance/incentives for export activities" (barrier 17), "understanding the different customer habits and attitudes of the Japanese" (barrier 21), "low awareness by Japanese consumers of the Portuguese offer" (barrier 22), "keen competition" (barrier 23), "Japanese business culture and practices" (barrier 25), and "high cost of customs" (barrier 28). Therefore, all barriers on dimension 1, except 14, are moderately important and one is high (barrier 2); all barriers on dimension 3 are moderately important to the respondents; and 3 barriers (15, 16, and 28) on dimension 5 are moderately important.

Other studies provided categorization of the barriers: Samiee & Mayo (1990) presented a division between visible and invisible barriers; Czinkota & Kotabe (1999, 2000) performed a factor analysis leading to 4 dimensions on which barriers were analysed, namely business environment, regulations, cost, and consumer behaviour; Maguire (2001) grouped barriers into NTB, business environment, and consumer behaviour; and Ojala & Tyrväinen (2007) categorized into organization-related, sales process-related, and target industry segment-related barriers. However, these studies did not follow the same list as the present study, therefore presenting different categorizations for each. OECD (2008) study, on which this study's questionnaire is based, provides a ranking by the respondents of the 20 most important barriers to them: "shortage of working capital to finance exports" ranks as the most important, followed by "identifying foreign business opportunities" and "limited information to locate/analyse markets". These two last barriers are part of dimension 1 of this study and show the internal difficulties companies face in getting relevant information on foreign markets.

After identification of which barriers are most relevant to the respondents, this study hopes to fill a gap in the knowledge of export barriers to the Japanese market. By following a well-accepted export barriers categorization by Leonidou (2004) in the literature, and by conducting a questionnaire similar to OECD (2008), this study presents a target-market specific analysis. With factor analysis, it was possible to further categorize those barriers into dimensions, providing a new framework for further analysis. Barriers to information and opportunities (dimension 1) were considered to be the most relevant. This can be due to the different language, which makes it harder to access information on the country, as well as enough experts on the market, and literature on the subject. Nevertheless, further research is needed in order to understand the reasons. Dimension 3 may be a consequence of dimension 1 since, without proper information on the market, it will be harder for companies to understand the business culture and customer habits. Lastly, dimension 6 is important due to the geographical distance, which cannot be overcome, unless products are distributed online, but that is not analysed in this study.

This study's biggest limitations are related to information, due to the scarce studies on export barriers to Japan. For future research, it would be interesting to conduct case studies with a group of exporters in order to further analyse the reasons behind these perceptions, as well as with Japanese importers that know the Japanese market better.

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# Annexes

## Annex A: Figures

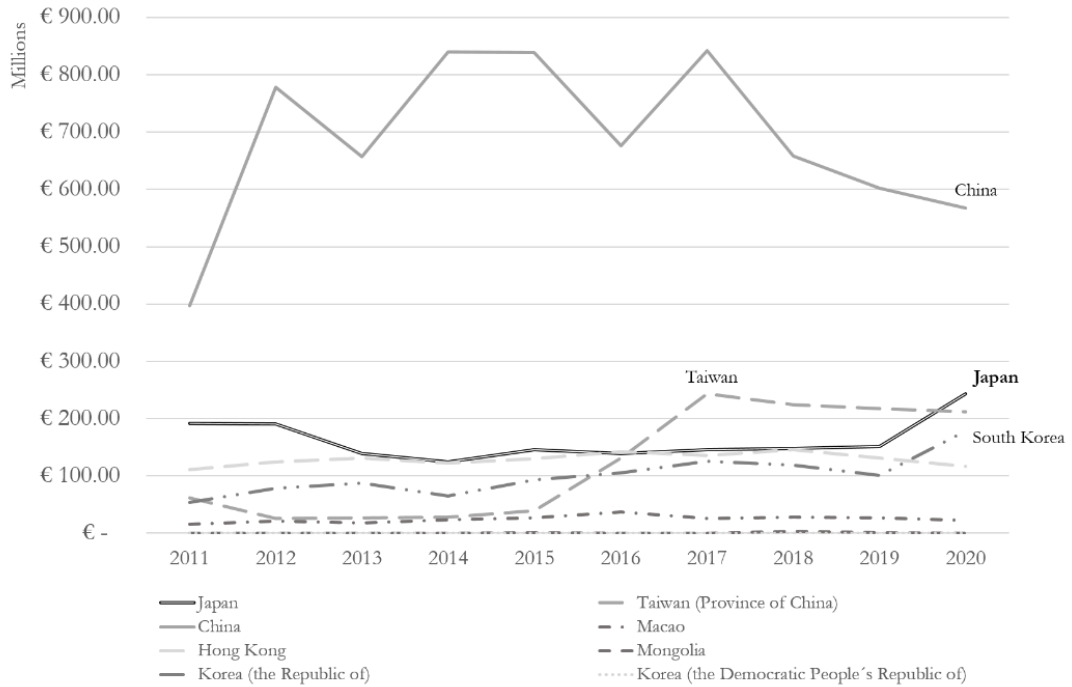


Figure 5 Far East Asia markets (Source: INE)

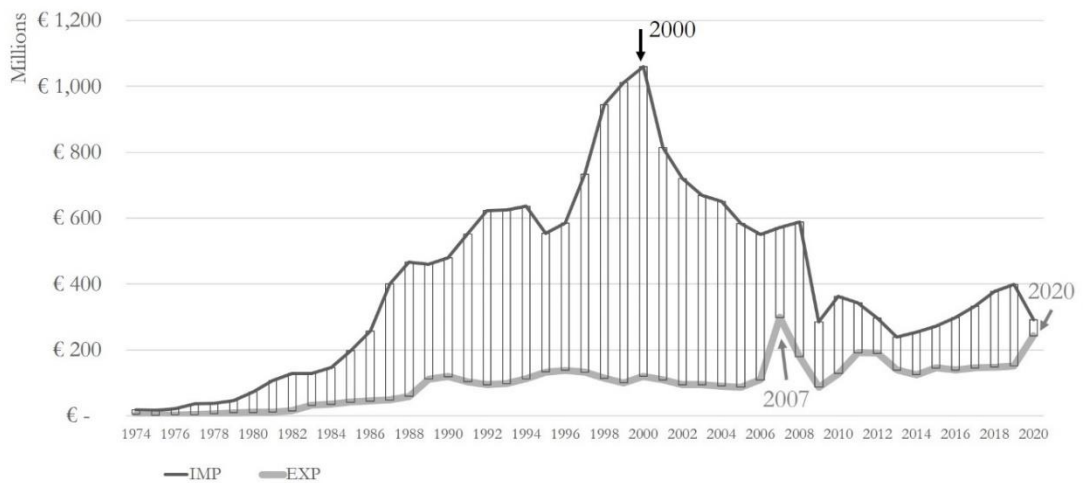


Figure 6 Balance of Trade 1974-2020 (Source: INE; Own elaboration)

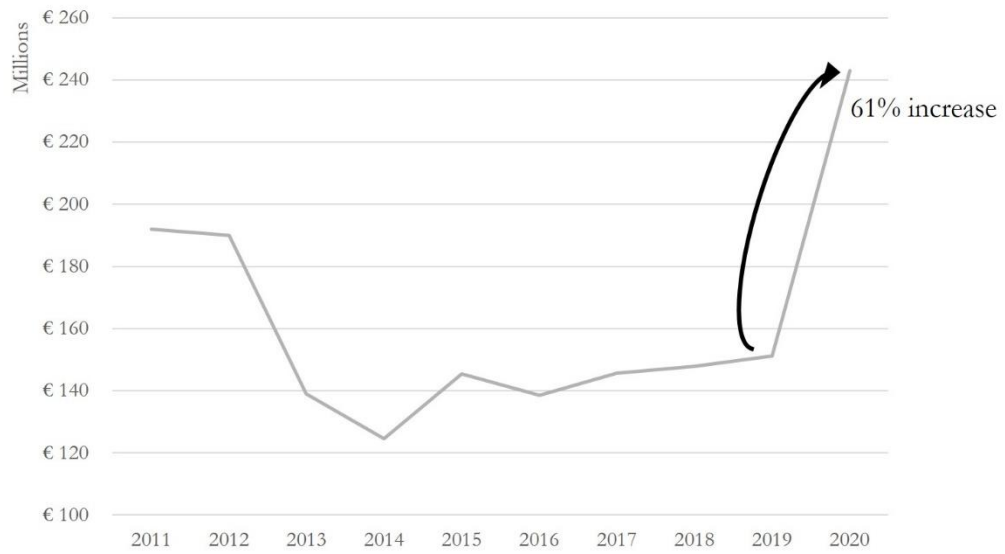


Figure 7 Total Exports to Japan in Millions of Euros (Source: INE; own elaboration)

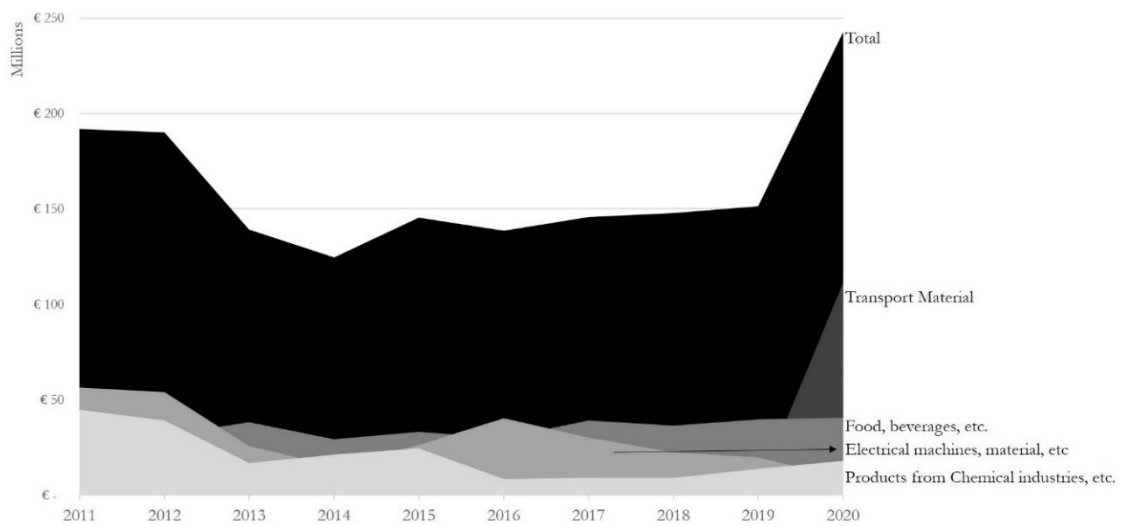


Figure 8 Four main exports to Japan compared to total (Source: INE; Own elaboration)

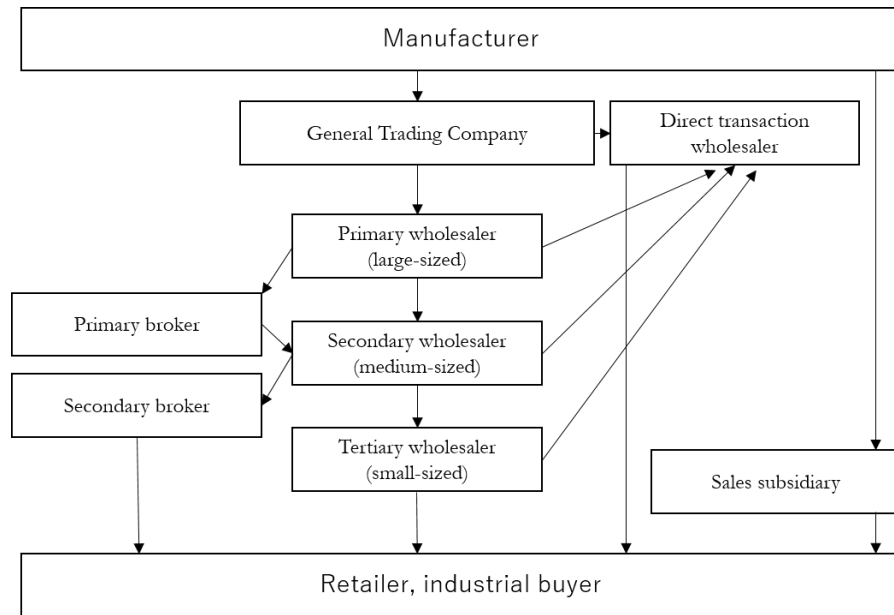


Figure 9 Marketing flows of the Japanese distribution channel (Source: Min, H. 1996)

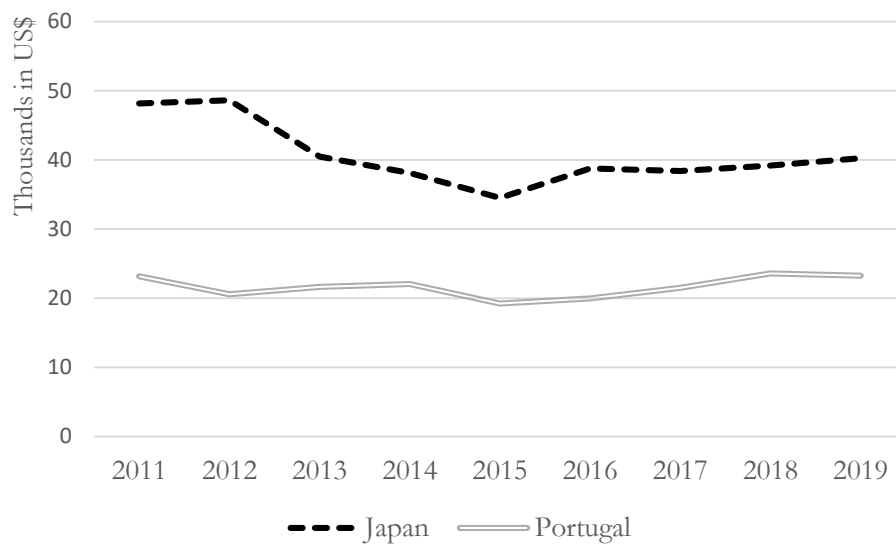


Figure 10 Japan's GDP per capita compared with Portugal (Source: World Bank)

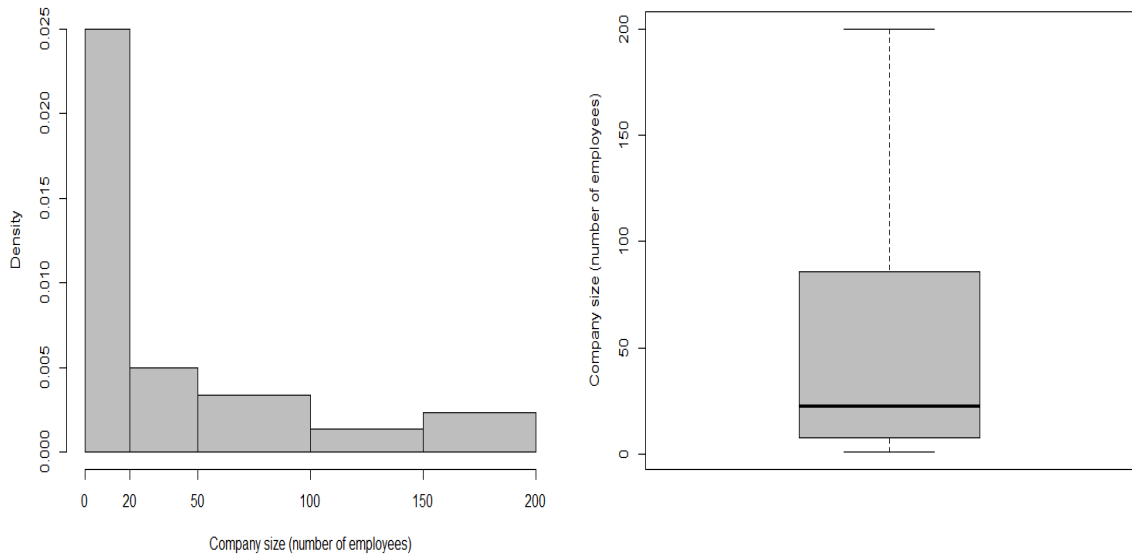


Figure 11 Company size

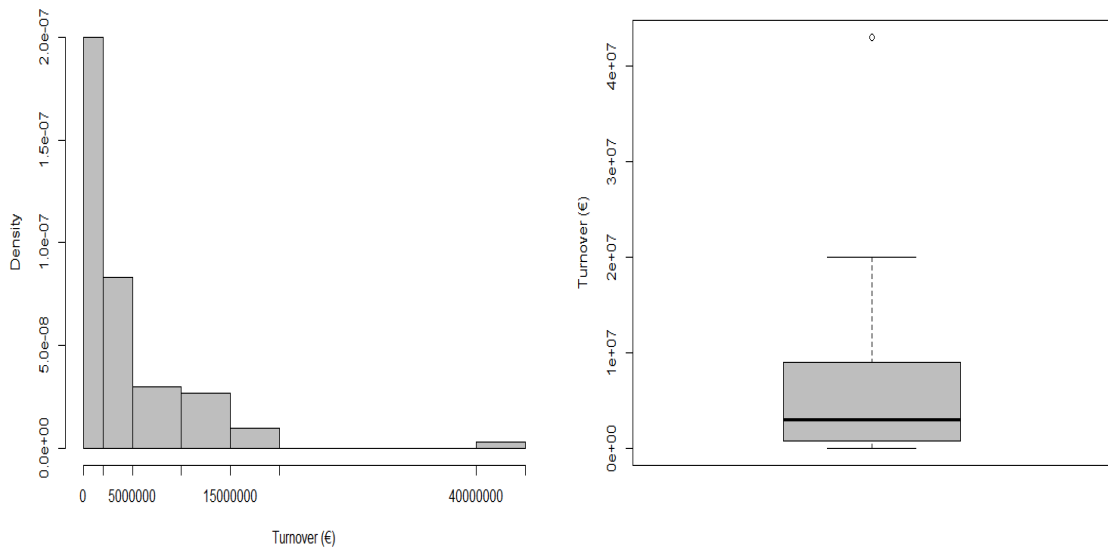


Figure 12 3-year average of turnover



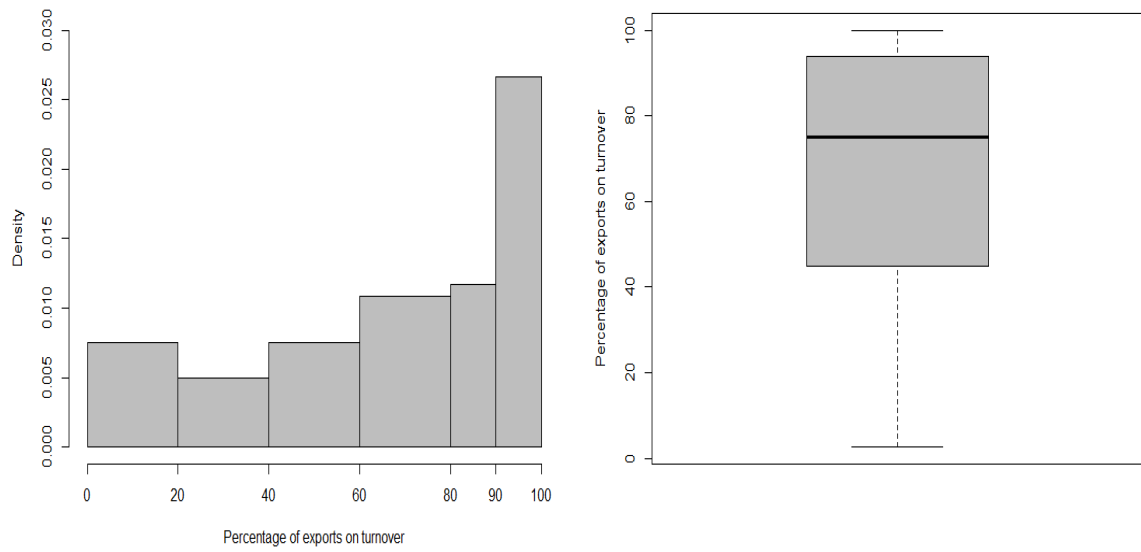


Figure 13 Histogram and Box-plot for Export weight

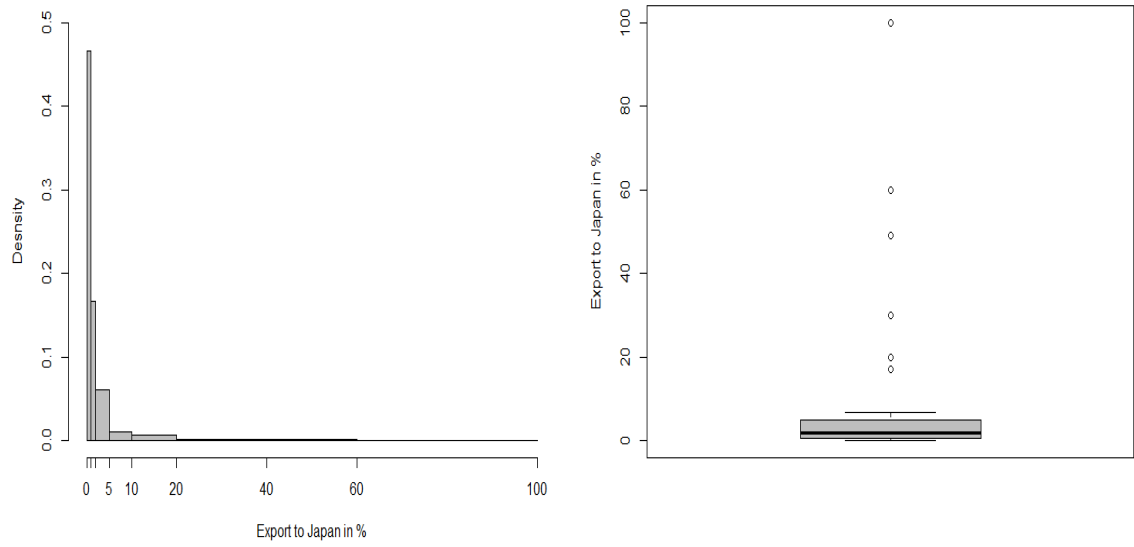


Figure 14 Histogram and Box-plot for export weight to Japan

## Annex B: Tables

#	Barrier item	Dimension
1	Strong competition in overseas markets	External
2	Inadequate/untrained personnel for exporting	Internal
3	Locating a suitable agent/distributor	Internal
4	Gathering data/information about foreign markets	Internal
5	Preparing/handling export documentation	Internal
6	Exchange rate risk/fluctuation	External
7	Delays/difficulties in collecting on foreign payments	External
8	High tariff barriers	External
9	Excessive transportation/insurance costs	External
10	Lack of government incentives/support	Internal

*Table 24 Top Ten Most Research Barriers (Adapted from Kabiya, 2018)*

Leonidou (2004)		OECD (2008)	
<b>Internal Barriers</b>		<b>Internal Barriers</b>	
<b>Informational Barriers</b>		<b>Informational Barriers</b>	
1	Limited Information to Locate/Analyze Foreign Markets.	1	Limited information to locate/analyze markets
2	Problematic International Market Data	2	Unreliable data about the international market
3	Identifying Foreign Business Opportunities	3	Identifying foreign business opportunities
4	Inability to Contact Overseas Customers	4	Inability to contact potential overseas customers
<b>Functional Barriers</b>		<b>Functional Barriers</b>	
5	Limited Managerial Time to Deal with Exports	5	Lack of managerial time to deal with internationalization
6	Inadequate/Untrained Export Personnel	6	Insufficient quantity of and/or untrained personnel for internationalization
7	Lack of Excess Production Capacity for Exports	7	Lack of excess production capacity for exports
8	Shortage of Working Capital to Finance Exports	8	Shortage of working capital to finance exports
<b>Marketing Barriers</b>		<b>Product and Price Barriers to Marketing</b>	
<i>Product</i>		9	Developing new products for foreign markets
9	Developing New Products for Foreign Markets	10	Adapting export product design/style
10	Adapting Export Product Design/Style	11	Meeting export product quality / standards / specifications
11	Meeting Export-Product Quality Standards/Specification	12	Meeting export packaging/labelling requirements
12	Meeting Export Packaging/Labeling Requirements	13	Offering technical/after-sales service
13	Providing Technical/Aftersales Service	14	Offering satisfactory prices to customers

### *Price*

- 14 Offering Satisfactory Prices to Customers
- 15 Difficulty in Matching Competitors' Prices
- 16 Granting Credit Facilities to Foreign Customers

### *Distribution*

- 17 Complex Foreign Distribution Channels
- 18 Accessing Export Distribution Channels
- 19 Obtaining Reliable Foreign Representation
- 20 Maintaining Control Over Foreign Middlemen

### *Logistics*

- 21 Supplying Inventory in Overseas Markets
- 22 Unavailable Foreign Warehousing Facilities
- 23 Excessive Transportation/Insurance Costs

### *Promotion*

- 24 Adjusting Export Promotional Activities

## **External Barriers**

### **Procedural Barriers**

- 25 Unfamiliar Exporting Procedures/ Documentation
- 26 Problematic Communication with Foreign Customers
- 27 Slow Collection of Payments from Abroad

### **Governmental Barriers**

- 28 Lack of Home Government Assistance/ Incentives for Exporting
- 29 Unfavorable Home Government Rules and Regulations

### **Task Barriers**

- 30 Different Foreign Customer Habits/ Attitudes
- 31 Keen Competition in Overseas Markets

### **Environmental Barriers**

#### *Economic*

- 32 Poor/Deteriorating Economic Conditions Abroad
- 33 Foreign Currency Exchange Risks

#### *Political-Legal*

- 34 Political Instability in Foreign Markets
- 35 Strict Foreign Country Rules and Regulations
- 36 High Tariff and Nontariff Barriers

#### *Sociocultural*

- 37 Unfamiliar Foreign Business Practices
- 38 Different Sociocultural Traits

- 15 Difficulty in matching competitors' prices
- 16 Granting credit facilities to foreign customers

## **Distribution, Logistics and Promotion Barriers to Marketing**

- 17 Complexity of foreign distribution channels
- 18 Accessing export distribution channels
- 19 Obtaining reliable foreign representation
- 20 Maintaining control over foreign middlemen
- 21 Difficulty in supplying inventory abroad
- 22 Unavailability of warehousing facilities abroad
- 23 Excessive transportation/insurance costs
- 24 Adjusting export promotional activities to the target market

## **External Barriers<sup>12</sup>**

### **Procedural Barriers**

- 25 Unfamiliar exporting procedures/paperwork
- 26 Difficulties communicating with overseas customers
- 27 Slow collection of payments from abroad

- 28 Difficulties in enforcing contracts and resolving disputes

### **Governmental Barriers**

- 29 Lack of home government assistance/incentives
- 30 Unfavorable home rules and regulations
- 31 Unfavorable host/ foreign rules and regulations

### **Customer and Competitor Barriers**

- 32 Different foreign customer habits/attitudes
- 33 Keen competition in overseas markets

### **Business Environment Barriers**

- 34 Poor/deteriorating economic conditions abroad
- 35 Foreign currency exchange risks
- 36 Unfamiliar foreign business practices
- 37 Different socio-cultural traits
- 38 Verbal/nonverbal language differences
- 39 Inadequacy of infrastructure for e-commerce
- 40 Political instability in foreign markets

### **Tariff and Non-Tariff Barriers**

<sup>12</sup> Note: highlighted cells indicate new added barriers on the OECD (2008) study.

- 41 High tariff barriers
- 42 Strict foreign rules and regulations
- 43 Inadequate property rights protection (e.g. intellectual property)
- 44 Restrictive health, safety and technical standards (e.g. sanitary and phytosanitary requirements)
- 45 Arbitrary tariff classification and reclassification
- 46 Unfavorable quotas and/or embargoes
- 47 High costs of Customs administration
- Other Barriers**
- 48 Open question
- 49 Open question

Table 25 Barriers comparison between Leonidas (2004) and OECD (2008)

Leonidou (2004)	OECD (2008)	Cateora et al. (2011)
<b>Internal Barriers</b>		
Informational	Informational	Research
Functional	Functional	Firm Characteristics
Marketing	Marketing	Marketing
<i>Product</i>	<i>Product and Price</i>	<i>Product</i>
<i>Price</i>		<i>Price</i>
<i>Distribution</i>	<i>Distribution, Logistics and</i>	<i>Channels of Distribution</i>
<i>Logistics</i>	<i>Promotion</i>	
<i>Promotion</i>		<i>Promotion</i>
<b>External Barriers</b>		
<b>Domestic</b>		
Governmental	Governmental	Political/Legal forces
		Competitive structure
		Economic climate
<b>Foreign</b>		
Procedural	Procedural	Structure of distribution
Task	Customer and Competitor	
Environmental	Business Environment	
<i>Economic</i>		Economic forces
		Competitive forces
<i>Socio-cultural</i>		Cultural forces

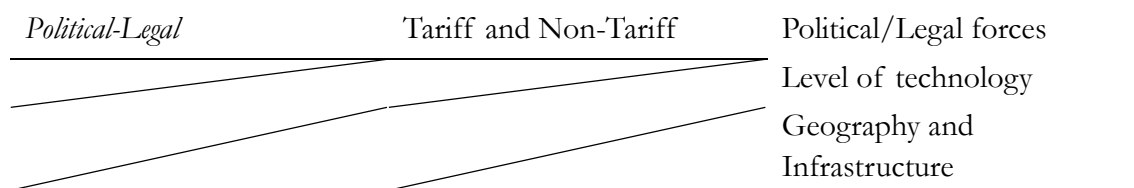


Table 26 Barrier Grouping Comparison

Author(s)	Study Object	Conclusions
Simon & Palder (1987)	Successful entry strategies.	Reforms on regulation alone will not diminish psychological barriers.
Buckley et al. (1987)	European FDI in Japan as a market entry strategy.	FDI is a lower risk strategy, even if returns are not high enough.
Samice & Mayo (1990)	Socio-cultural influence on trade barriers.	Invisible barriers play a significant role on the business, regulatory, and consumption environments.
Douglas & Craig (1990)	Successful entry strategies.	Adaptation (to quality), differentiation (of offer), and corporate image are important.
Williamson & Yamawaki (1991)	Assessment of the distribution system.	Showing long term commitment is necessary to establish relations with distributors and consumers.
Min (1996)	Assessment of the distribution system.	Regulations, <i>keiretsu</i> , and shopping behavior are perceived as barriers.
Pirog et al. (1997)	Socio-cultural influences on distribution.	Socio-cultural values and regulations influence the close-linkage among those in the system.
Wong et al. (1999)	Assessment of foreign rice acceptance in Japan.	Consumer perception, regulations, historical and cultural ties, are barriers for foreign rice.
Czinkota & Kotabe (1999, 2000)	Study on the changing environment and its impact on barriers.	Regulation still plays an important role as an NTB.
Maguire (2001)	Analysis of political, legal and cultural aspects as barriers.	The close ties established in the distribution system can be overcome.

Yamawaki (2004)	Exit patterns of manufacturing foreign firms in Japan.	<i>Keiretsu</i> , distribution system, and access to the labour market do not affect exit decisions.
Gehrt et al. (2005)	Assessment of informal trade barriers among Japanese intermediaries.	Exporters must prove their commitment and the quality of fruits is more important than the appearance.
Ojala & Tyrväinen (2007)	Barriers encountered by Software SMEs.	The most common barriers was convincing management to Japan's market requirements.
Uzama (2009)	Market Entry Model Selection.	Regulatory reforms is contrasted with <i>Keiretsu</i> , strong competition, and the "buy Japanese" mentality.
Sunesen et al. (2010)	Report on perceived Trade Barriers between Japan and the EU.	Customer requirements is the most perceived barrier, followed by NTB.
(Padron et al., 2011)	Assessment of FDI in Japan by EU firms.	The three main issues when investing in Japan are related to language, taxes and labor cost.
Haghirian (2011)	Assessment of the Japanese consumer behaviour.	Mistrust of foreign products is a barrier, but price sensitivity is also increasing.
Bebenroth et al. (2014)	Institutional barriers perceptions.	Regulatory reform is not enough due to informal institutions, such as behavior and traditions.
Mazur (2016)	Main barriers for European enterprises.	Regulations, strong competition, language and consumer behavior are perceived as very difficult to overcome.
Felbermayr et al. (2017)	Impacts of the EU-Japan EPA.	Pharmaceutical, food, beverages and tobacco, and moto vehicle industries will benefit.

Table 27 Empirical studies on barriers to trade with Japan

#	Country	Part 1 - Total	Part 2 - Total
1	Portugal	2	9 <sup>13</sup>

<sup>13</sup> The 9 geographic indicators mentioned in Part 2 of Section A of Annex 14-B are Alentejo, Bairrada, Dão, Douro, Lisboa, Vinho da Madeira, Vinho do Porto, Tejo, and Vinho Verde.

2	Spain	18	24
3	Italy	19	26
4	Greece	4	3

Table 28 Total GIs protections included compared to Spain, Italy and Greece (Source: EPA; own elaboration)

Region	n	%	Region	n	%
Metropolitan Area of Porto	289	28.8	Médio Tejo	15	1.5
Metropolitan Area of Lisboa	155	15.5	Viseu Dão Lafões	15	1.5
Ave	98	9.8	Lezíria do Tejo	14	1.4
Cávado	68	6.8	Algarve	13	1.3
Tâmega e Sousa	61	6.1	Alto Alentejo	10	1.0
Aveiro Region	46	4.6	Madeira	9	0.9
Leiria Region	39	3.9	Beira Baixa	8	0.8
Coimbra Region	28	2.8	Other	8	0.8
Alto Minho	27	2.7	Terras de Trás-os-Montes	6	0.6
Oeste (West)	24	2.4	Açores	6	0.6
Alentejo Central	20	2.0	Baixo Alentejo	4	0.4
Douro	20	2.0	Alentejo Litoral	3	0.3
Beiras and Serra da Estrela	16	1.6	Alto Tâmega	1	0.1

Table 29 Origin at NUTS III level of 2020's exporters

CAE	n	%	Designation
46	170	16,9	Wholesale trade (incl. agents), exc. of motor vehicles and motorcycles
14	107	10,7	Manufacture of wearing apparel
15	91	9,1	Manufacture of leather and related products
47	87	8,7	Retail trade, except of motor vehicles and motorcycles
11	82	8,2	Manufacture of beverages
13	56	5,6	Manufacture of textiles
23	42	4,2	Manufacture of other non-metallic mineral products
01	35	3,5	Crop and animal production, hunting and related service activities
10	34	3,4	Manufacture of food products
16	28	2,8	Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials
32	24	2,4	Other manufacturing
25	22	2,2	Manufacture of fabricated metal products, exc. machinery and equip.
29	20	2,0	Manufacture of motor vehicles, trailers and semi-trailers
Other	205	20,4	
Total	1003	100,0	

Table 30 2020 Exporters' CAE

<b>Year</b>	<b>n</b>	<b>%</b>	<b>Year</b>	<b>n</b>	<b>%</b>	<b>Year</b>	<b>n</b>	<b>%</b>
1922	1	1.6	1974	1	1.6	1996	1	1.6
1928	1	1.6	1975	1	1.6	1997	2	3.3
1941	1	1.6	1978	1	1.6	1998	1	1.6
1945	1	1.6	1980	2	3.3	1999	2	3.3
1948	1	1.6	1981	1	1.6	2000	1	1.6
1949	1	1.6	1982	1	1.6	2002	1	1.6
1950	1	1.6	1983	1	1.6	2006	1	1.6
1955	1	1.6	1986	2	3.3	2008	2	3.3
1957	1	1.6	1987	1	1.6	2010	1	1.6
1963	1	1.6	1989	3	5.0	2011	1	1.6
1964	1	1.6	1990	2	3.3	2013	1	1.6
1966	2	3.3	1991	1	1.6	2014	2	3.3
1968	1	1.6	1992	1	1.6	2016	1	1.6
1970	1	1.6	1993	2	3.3	2017	2	3.3
1973	2	3.3	1995	1	1.6	2018	3	5.0

*Table 31 Foundation year count*

<b>CAE</b>	<b>n</b>	<b>%</b>	<b>CAE</b>	<b>n</b>	<b>%</b>	<b>CAE</b>	<b>n</b>	<b>%</b>
01210	1	1.7	13930	1	1.7	29320	1	1.7
01500	1	1.7	14132	1	1.7	32300	1	1.7
03246	1	1.7	14140	1	1.7	44474	1	1.7
10130	1	1.7	14390	2	3.3	46190	1	1.7
10391	1	1.7	15120	1	1.7	46213	1	1.7
10395	1	1.7	15201	4	6.7	46332	1	1.7
10412	1	1.7	16230	1	1.7	46341	2	3.3
10840	1	1.7	16295	1	1.7	46421	2	3.3
10893	1	1.7	20411	1	1.7	46422	1	1.7
11012	1	1.7	20420	1	1.7	46493	2	3.3
11013	1	1.7	20510	1	1.7	46494	1	1.7
11021	5	8.3	23412	1	1.7	47721	1	1.7
13101	1	1.7	23413	1	1.7	47910	1	1.7
13201	1	1.7	25620	1	1.7	71220	1	1.7
13202	1	1.7	25710	1	1.7	72190	1	1.7
13302	1	1.7	27400	1	1.7			
13920	1	1.7	28930	1	1.7			

*Table 32 Respondent's CAE count*

<b>+</b>	<b>%</b>	<b>CAE 5</b>	<b>N</b>	<b>Designation</b>
10	10.0	10130	1	Production of meat and poultry meat products



		10391	1	Congelação de frutos e de produtos hortícolas
		10395	1	Other processing and preserving of fruit and vegetables
		10412	1	Manufacture of oils
		10840	1	Manufacture of condiments and seasonings
		10893	1	Manufacture of other food products n.e.c.
11	11.7	11012	1	Manufacture of other non-distilled fermented beverages
		11013	1	Manufacture of liquors and of other distilled beverages
		11021	5	Manufacture of common wines and liquors
13	10.0	13101	1	Preparation and spinning of textile fibres of cotton type
		13201	1	Weaving of yarn of the cotton type
		13202	1	Weaving of yarn of the wool type
		13302	1	Finishing of textiles: printing
		13920	1	Manufacture of woven textile articles, except apparel
		13930	1	Manufacture of tapestry and carpets
46	18.3	46341	2	Wholesale trade of alcoholic beverages
		46421	2	Wholesale trade of clothing and accessories
		46493	2	Wholesale trade of toys, games and sports goods
		46190	1	Wholesale trade agents involved in the sale of a variety of goods
		46213	1	Wholesale trade of cork
		46332	1	Wholesale trade of olive oil, edible oils and fats
		46422	1	Wholesale trade of footwear
		46494	1	Wholesale of other household goods, n.e.

*Table 33 Top 4 two-digit level CAE*

Minimum	1	Mean	53.6
Maximum	200	1 <sup>st</sup> Quartile	7.3
Std. Deviation	59.2	Median	22.5
Coeff. of Variation (%)	110.4	3 <sup>rd</sup> Quartile	88.0
Skewness	1.2		

*Table 34 Descriptive statistics for company size*

Minimum	€10,000	Mean	€5,694,147
Maximum	€43,000,000	1 <sup>st</sup> Quartile	€707,884
Std. Deviation	7221862	Median	€3,000,001
Coeff. of Variation (%)	126.8	3 <sup>rd</sup> Quartile	€9,000,000
Skewness	2.7		

*Table 35 Descriptive statistics for 3-year average turnover*

Minimum	2.6	Mean	65.8
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Maximum	100.0	1 <sup>st</sup> Quartile	42.5
Std. Deviation	30.2	Median	75.0
Coeff. of Variation (%)	45.9	3 <sup>rd</sup> Quartile	94.5
Skewness	-0.7		

*Table 36 Descriptive statistics for 3-year export average export weight*

Minimum	0.0	Mean	6.8
Maximum	100.0	1 <sup>st</sup> Quartile	0.5
Std. Deviation	0.16	Median	1.8
Coeff. of Variation (%)	2.4	3 <sup>rd</sup> Quartile	5.0
Skewness	4.1		

*Table 37 Descriptive statistics for 3-year export weight to Japan*

<b>Year</b>	<b>n</b>	<b>%</b>	<b>Year</b>	<b>n</b>	<b>%</b>	<b>Year</b>	<b>n</b>	<b>%</b>
1932	1	1.7	1995	2	3.3	2012	2	3.3
1970	2	3.3	1996	1	1.7	2013	1	1.7
1975	1	1.7	1997	1	1.7	2014	2	3.3
1977	1	1.7	1998	3	5.0	2015	1	1.7
1980	4	6.7	1999	3	5.0	2016	1	1.7
1984	1	1.7	2000	3	5.0	2017	2	3.3
1985	1	1.7	2001	2	3.3	2018	2	3.3
1986	6	10.0	2006	1	1.7	2019	1	1.7
1989	2	3.3	2008	4	6.7	Missing	1	1.7
1990	1	1.7	2009	1	1.7	Total	60	100.0
1992	1	1.7	2010	2	3.3			
1994	2	3.3	2011	1	1.7			

*Table 38 Year of first internationalization*

<b>Country</b>	<b>n</b>	<b>%</b>	<b>Country</b>	<b>n</b>	<b>%</b>
Spain	14	23.3	Japan	1	1.7
France	7	11.7	The Netherlands	1	1.7
USA	7	11.7	Italy	1	1.7
Germany	6	10.0	Denmark	1	1.7
United Kingdom	6	10.0	Sweden	1	1.7
Canada	4	6.7	Venezuela	1	1.7
Angola	2	3.3	Australia	1	1.7

Norway	2	3.3	Missing	3	5.0
Brazil	2	3.3	Total	60	100.0

*Table 39 First country of internationalization list*

Countries	n	%	Countries	n	%	Countries	n	%
0	1	1.7	13	1	1.7	38	1	1.7
2	1	1.7	15	6	10.0	40	3	5.0
3	1	1.7	16	1	1.7	44	1	1.7
4	3	5.0	19	1	1.7	47	1	1.7
5	3	5.0	22	2	3.3	50	2	3.3
6	3	5.0	25	2	3.3	55	2	3.3
8	2	3.3	27	1	1.7	57	1	1.7
10	6	10.0	30	6	10.0	65	2	3.3
11	2	3.3	33	1	1.7	Total	60	100.0
12	2	3.3	35	2	3.3			

*Table 40 Presence in foreign countries count*

Minimum	0	Mean	22.7
Maximum	65	1 <sup>st</sup> Quartile	10
Std. Deviation	17.4	Median	15
Coeff. of Variation (%)	76.7	3 <sup>rd</sup> Quartile	34.5
Skewness	0.8		

*Table 41 Descriptive statistics of the number of countries*

Year	n	%	Year	n	%	Year	n	%
1975	1	1.7	2006	1	1.7	2015	4	6.7
1980	1	1.7	2007	2	3.3	2016	6	10.0
1986	1	1.7	2008	1	1.7	2017	2	3.3
1992	1	1.7	2009	3	5.0	2018	3	5.0
1994	1	1.7	2010	3	5.0	2019	8	13.3
1999	1	1.7	2011	3	5.0	2020	4	6.7

2000	3	5.0	2012	3	5.0	Missing	2	3.3
2002	1	1.7	2013	1	1.7	Total	60	100.0
2005	2	3.3	2014	2	3.3			

*Table 42 Year of internationalization to Japan*

	n	%
Exports	55	91.7
Contractual Agreements	2	3.3
Other	2	3.3
Missing	1	1.7
Total	60	100.0

*Table 43 Entry method to Japan answers*

	n	%
Order received	33	22.0
Purchasing power	28	18.7
Market size	21	14.0
Export-oriented company	18	12.0
Prestige/notoriety	17	11.3
Country' economic and political stability	13	8.7
Domestic market is too small	5	3.3
Access to technology	4	2.7
Test markets for other demanding markets	4	2.7
Other	4	2.7
Previous experience	3	2.0
Total	150	100.0

*Table 44 Internationalization to Japan motives answers*

	n	%
Local distributor	29	37.7
Direct	25	32.5

Agent	16	20.8
Other	4	5.2
E-commerce	3	3.9
Total	77	100.0

*Table 45 Distribution method to Japan*

	n	%
Occasionally	24	40.0
Regularly	36	60.0
Total	60	100.0

*Table 46 Export regularity to Japan answers*

	n	%
Demanding	19	31.7
Very demanding	18	30.0
Neutral	17	28.3
Not demanding	4	6.7
Little demanding	2	3.3
Total	60	100.0

*Table 47 Effort perception answers*

	n	%
Does not know	26	43.3
No change	20	33.3
Big support	9	15.0
Small support	5	8.3
Total	60	100.0

*Table 48 Evaluation of the EPA answers*

	n	%
China	27	19.7
South Korea	24	17.5
Hong Kong (China)	22	16.1
Taiwan (Republic of China)	22	16.1
Does not export to any other Asian market	17	12.4
Macao (China)	16	11.7
Other	8	5.8
North Korea	1	0.7
Total	137	100.0

*Table 49 Exports to other Asian markets answers*

	n	%
None	27	37.5
South Korea	21	29.2
Taiwan (Republic of China)	9	12.5
Hong Kong (China)	7	9.7
China	5	6.9
Does not know	2	2.8
Macao (China)	1	1.4
Total	72	100.0

*Table 50 Similar markets to Japan answers*

#	Added barrier	Barrier from List
1	Insufficient knowledge of the "real" Japan	Barrier 1
2	Necessary constant brand adaptation	Barrier 7
3	Small tolerance to occasional defects or errors	Barrier 8
4	Difficulty in finding specialized distributors	Barrier 13
5	Shipping costs	Barrier 15
6	Lack of governmental investment in the brand Portugal	Barrier 17
7	Time difference	Barrier 19
8	Shipping time	
9	Competition	Barrier 23

10	Visa issues	Barrier 24
11	Issues in dealing with Japanese people	Barrier 25
12	Follow-up	
13	Cultural differences	Barrier 26
14	Linguistic barrier	
15	Sanitary issues	Barrier 27
16	Import quotas	
17	Regulation	
18	No competition culture	Barrier 13
19	Transportation	Additional barrier

*Table 51 Additional barriers list*

	<b>n</b>	<b>%</b>
Networking	20	30.8
Access to information	18	27.7
Participate in Business Missions	13	20.0
Other	8	12.3
Access to finance	6	9.2
<b>Total</b>	<b>65</b>	<b>100.0</b>

*Table 52 Institutional support answers*

Item	Cor.	Item	Cor.	Item	Cor.	Item	Cor.
1	0.562	8	0.443	15	0.272	22	0.590
2	0.683	9	0.588	16	0.628	23	0.425
3	0.601	10	0.723	17	0.559	24	0.569
4	0.596	11	0.590	18	0.687	25	0.649
5	0.387	12	0.766	19	0.495	26	0.598
6	0.569	13	0.509	20	0.371	27	0.653
7	0.518	14	0.570	21	0.596	28	0.463

*Table 53 Corrected item-total correlations*

Measures	Value
Cronbach's alpha	
Part 1 (14 items)	0.901
Part 2 (14 items)	0.880
Correlation between forms	0.720
Average item-total correlation	0.565
Average inter-item correlation	0.335
Guttman split-half coefficient	0.837
Spearman-Brown coefficient	0.837

*Table 54 Reliability measures*

Item	KMO	Item	KMO	Item	KMO	Item	KMO
1	0.788	8	0.725	15	0.572	22	0.649
2	0.697	9	0.800	16	0.833	23	0.641
3	0.661	10	0.894	17	0.826	24	0.715
4	0.599	11	0.808	18	0.858	25	0.744
5	0.742	12	0.901	19	0.804	26	0.684
6	0.871	13	0.736	20	0.734	27	0.840
7	0.679	14	0.797	21	0.771	28	0.575

*Table 55 Kaiser-Meyer-Olkin measure of sampling adequacy*

Factor	Eigenvalue	% Variance	Cumulative %	Factor	Eigenvalue	% Variance	Cumulative %
1	10.375	37.052	37.052	15	0.402	1.434	92.454
2	2.431	8.684	45.736	16	0.337	1.205	93.659
3	2.272	8.113	53.849	17	0.300	1.073	94.732
4	1.922	6.865	60.714	18	0.253	0.905	95.637
5	1.391	4.969	65.683	19	0.199	0.711	96.348
6	1.284	4.584	70.268	20	0.191	0.684	97.032
7	1.136	4.056	74.324	21	0.162	0.580	97.611
8	0.968	3.457	77.782	22	0.149	0.531	98.142
9	0.875	3.127	80.908	23	0.127	0.454	98.596
10	0.730	2.608	83.516	24	0.113	0.404	99.000
11	0.611	2.182	85.697	25	0.102	0.366	99.366



12	0.540	1.929	87.627	26	0.075	0.267	99.633
13	0.500	1.785	89.412	27	0.070	0.250	99.883
14	0.450	1.608	91.020	28	0.033	0.117	100.000

*Table 56 Eigenvalues and explained variance*

Item	Fact 1	Fact 2	Fact 3	Fact 4	Fact 5	Fact 6	Fact 7	Com.
1	<b>0.774</b>	-0.033	0.28	0.237	0.025	0.232	-0.067	0.794
2	<b>0.72</b>	0.062	0.353	0.229	0.221	0.281	-0.13	0.844
13	<b>0.748</b>	0.307	0.183	-0.106	0.024	0.173	0.033	0.73
14	<b>0.69</b>	-0.039	0.069	0.341	0.149	0.085	0.302	0.719
17	<b>0.483</b>	0.22	-0.007	0.406	0.478	-0.14	0.14	0.714
7	0.087	<b>0.813</b>	0.015	0.196	0.065	0.216	0.121	0.773
8	0.075	<b>0.929</b>	0.147	0.079	-0.023	0.096	-0.01	0.906
9	0.108	<b>0.683</b>	0.193	0.471	-0.042	0.07	0.193	0.782
21	0.284	0.282	<b>0.706</b>	-0.081	0.061	0.131	0.283	0.767
22	0.321	0.099	<b>0.605</b>	0.418	0.286	-0.226	0.076	0.792
23	0.127	-0.046	<b>0.706</b>	0.345	-0.158	0.095	0.085	0.677
25	0.133	0.13	<b>0.687</b>	0.178	0.178	0.463	-0.012	0.784
26	0.254	0.249	<b>0.603</b>	-0.18	0.32	0.179	0.249	0.72
11	0.312	0.251	0.096	<b>0.753</b>	0.038	0.163	-0.024	0.766
12	0.285	0.263	0.185	<b>0.541</b>	0.176	0.463	0.201	0.764
18	0.073	0.397	0.134	<b>0.564</b>	0.505	0.225	0.01	0.805
27	-0.009	0.219	0.396	<b>0.549</b>	0.192	0.455	-0.012	0.75
15	-0.076	-0.033	0.12	-0.074	<b>0.815</b>	-0.003	0.128	0.707
16	0.345	0.126	0.09	0.248	<b>0.641</b>	0.16	0.153	0.664
19	0.213	-0.098	0.293	-0.087	<b>0.432</b>	0.392	0.29	0.573
28	0.123	-0.01	-0.016	0.176	<b>0.844</b>	0.152	0.089	0.789
3	0.15	0.144	0.286	0.221	0.044	<b>0.702</b>	0.118	0.683
4	0.307	0.293	-0.016	0.038	0.108	<b>0.721</b>	0.253	0.777
10	0.257	0.31	0.108	0.464	0.182	<b>0.533</b>	0.148	0.728
5	0.059	0.264	0.015	-0.06	0.114	0.14	<b>0.774</b>	0.709
6	0.036	0.496	0.048	0.099	0.249	0.219	<b>0.612</b>	0.744
20	-0.027	-0.096	0.26	0.113	0.125	0.049	<b>0.818</b>	0.778
24	0.162	-0.095	0.374	0.317	0.147	0.332	<b>0.404</b>	0.571

Eigenv.	10.375	2.431	2.272	1.922	1.391	1.284	1.136
% var.	37.052	8.684	8.113	6.865	4.969	4.584	4.056

*Table 57 Factor loadings*

Subscale	Little/Not important		Somewhat important		Important		Quite important		Very important	
	n	%	n	%	n	%	n	%	n	%
1	53	15.1	53	15.1	78	22.3	83	23.7	83	23.7
2	39	19.4	52	25.9	36	17.9	37	18.4	37	18.4
3	63	18.5	43	12.6	92	27.1	71	20.9	71	20.9
4	54	19.0	55	19.4	67	23.6	54	19.0	54	19.0
5	42	15.9	50	18.9	68	25.8	52	19.7	52	19.7
6	40	20.3	44	22.3	55	27.9	29	14.7	29	14.7
7	98	37.0	61	23.0	54	20.4	26	9.8	26	9.8
Scale	389	20.5	358	18.8	450	23.7	352	18.5	352	18.5

*Table 58 Subscale distribution*

## Annex C: Questionnaire



# Inquérito

## Perceção das Barreiras à Exportação para o Japão

O presente inquérito insere-se no desenvolvimento da dissertação de Mestrado em Economia e Gestão Internacional, da Faculdade de Economia da Universidade do Porto, com o título *The Internationalization of Portuguese SMEs to Japan: a Focus on Export Barriers*.

Com o fim de avaliar a perceção das barreiras à exportação para o Japão, a colaboração da sua empresa é de extrema importância para o desenvolvimento de conhecimento nesta área. Solicita-se, assim, que a pessoa com mais experiência na área da exportação para o Japão seja a respondente.

Todos os dados recolhidos são para uso exclusivo deste estudo e não serão partilhados com terceiros. Nenhuma informação que identifique a sua empresa e/ou respondente será incluída no estudo final. Alternativamente, este inquérito pode ser também acedido via *online*.

O preenchimento deste inquérito tem uma duração aproximada de 13 minutos.

Agradecendo antecipadamente a atenção disponibilizada, para qualquer questão por favor envie *e-mail* para [up200807340@edu.fep.up.pt](mailto:up200807340@edu.fep.up.pt).

Roberto Martins - Mestrando em Economia e Gestão Internacional

**Orientação:** Prof.<sup>a</sup> Dr.<sup>a</sup> Ana Paula Africano Silva [apa@fep.up.pt](mailto:apa@fep.up.pt)

## Parte 1 – Dados sobre a empresa

Nota: questões marcadas com \* são de resposta obrigatória.

Ano da fundação da empresa: \*

Código CAE: \*

Tamanho da empresa (n.º total de colaboradores): \*

Detém capital estrangeiro? \*

Qual a % de capital estrangeiro na empresa?

Valor de vendas anuais (média dos últimos 3 anos): \*

% das vendas em mercados externos (média dos últimos 3 anos): \*

% das vendas no mercado japonês (média dos últimos 3 anos): \*

## Parte 2 – Experiência internacional

Nota: questões marcadas com \* são de resposta obrigatória.

Ano da primeira internacionalização: \*

Método de entrada no 1.º mercado estrangeiro: \*  
(Por favor selecione só uma opção)

- Exportações
- Acordos contratuais
- Joint-Venture*
- Investimento Direto Estrangeiro
- Outro: \_\_\_\_\_

Primeiro país para onde se internacionalizou: \*

N.º total de países onde está presente atualmente: \*

Tem departamento/gestor(a) dedicado a mercados externos? \*

- Sim
- Não

Colaboradores com qualificações relacionadas com o Japão: \*  
(Por favor selecione todas as que se aplicam. Caso tenha um colaborador de nacionalidade japonesa, pode ignorar as restantes)

- Não
- Colaborador de nacionalidade japonesa
- Trabalhou no Japão
- Curso superior numa área relacionada com o Japão
- Domínio da língua japonesa
- Outro: \_\_\_\_\_

## Parte 3 – Internacionalização para o Japão

Nota: questões marcadas com \* são de resposta obrigatória.

Ano da entrada no mercado japonês: \*

Modo de entrada: \*

(Por favor seleccione só uma opção)

- Exportações
- Acordos contratuais
- Joint-Venture*
- Investimento Direto Estrangeiro
- Outro: \_\_\_\_\_

Motivos para a internacionalização para o Japão: \*

(Por favor seleccione todas as que se aplicam)

- Tamanho do mercado
- Poder de compra dos consumidores japoneses
- Estabilidade do país
- Experiência anterior
- Encomenda recebida
- Prestígio/notoriedade
- Acesso a tecnologia
- Mercado de teste para outros mercados exigentes
- Mercado português é demasiado pequeno
- Empresa orientada para exportação
- Outro: \_\_\_\_\_

Modo de distribuição: \*

(Por favor seleccione todas as que se aplicam)

- Empresa distribuidora local
- Direto
- Agente
- E-commerce* (venda online)
- Outro: \_\_\_\_\_

Exporta regularmente para o Japão? \*

- Ocasionalmente (com interrupções)
- Regularmente (exporta todos os anos)

Comparativamente com outros mercados, qual o nível de esforço necessário para vender no Japão? \*

POUCO esforço  1     2     3     4     5 MUITO esforço

Como é que o Acordo de Parceria Económica entre a UE e o Japão beneficia a sua empresa: \*

(Por favor seleccione só uma opção)

- Muito:** o acordo abriu novas oportunidades
- Pouco:** o acordo precisa de mais medidas benéficas para a nossa indústria
- Igual:** o acordo não trouxe quaisquer mudanças para as nossas operações
- Não sabe:** ainda não temos conhecimento suficiente sobre o assunto

Para além do Japão, exporta para outros países vizinhos do Japão? \*

(Por favor seleccione todas as que se aplicam)

- Não exporto para mais nenhum país asiático
- China
- Hong Kong (China)
- Macau (China)
- Taiwan
- Coreia do Norte
- Coreia do Sul
- Outro: \_\_\_\_\_

Dos mercados onde está presente, por favor indique qual é o mais parecido com o Japão? \*

(Por favor seleccione todas as que se aplicam)

- Nenhum
- China
- Hong Kong (China)
- Macau (China)
- Taiwan
- Coreia do Norte
- Coreia do Sul
- Outro: \_\_\_\_\_

## Parte 4 – Barreiras à exportação

Aqui estão em análise as barreiras internas (dificuldades específicas à empresa), e as barreiras externas (dificuldades fora do controlo da empresa) que a empresa enfrenta ao lidar com o mercado do Japão. Em cada questão sinalize o nível de importância que se aplica à sua empresa.

Nota: todas as questões nesta parte são de resposta obrigatória (\*).

### Barreiras internas

1. A dificuldade em obter informação relevante para analisar o mercado japonês é uma barreira... \*

POUCO importante     1     2     3     4     5    MUITO importante

2. A dificuldade em identificar oportunidades de negócio no Japão é uma barreira... \*

POUCO importante     1     2     3     4     5    MUITO importante

3. A falta de tempo para lidar com o mercado japonês é uma barreira... \*

POUCO importante     1     2     3     4     5    MUITO importante

4. A escassez de recursos humanos qualificados para lidar com o mercado japonês é uma barreira... \*

POUCO importante     1     2     3     4     5    MUITO importante

5. A nossa capacidade de produção para responder à procura no mercado japonês é uma barreira... \*

POUCO importante     1     2     3     4     5    MUITO importante

6. A nossa capacidade financeira para apoiar o esforço de exportação para o Japão é uma barreira... \*

POUCO importante     1     2     3     4     5    MUITO importante

7. A adaptação/desenvolvimento de produtos para o mercado japonês é uma barreira... \*

POUCO importante     1     2     3     4     5    MUITO importante

8. Responder às especificações técnicas, de qualidade, e padrões exigidos japoneses é uma barreira... \*

POUCO importante     1     2     3     4     5    MUITO importante

9. Responder às especificações de embalagem e rotulagem japoneses é uma barreira... \*

POUCO importante     1     2     3     4     5    MUITO importante

10. Providenciar serviços de pós-venda e/ou técnico no Japão é uma barreira... \*

POUCO importante     1     2     3     4     5    MUITO importante

11. Oferecer produtos com uma relação preço-qualidade no Japão é uma barreira... \*

POUCO importante     1     2     3     4     5    MUITO importante

12. O sistema complexo de distribuição japonês é uma barreira... \*

POUCO importante     1     2     3     4     5    MUITO importante

13. A dificuldade em estabelecer uma parceria/representação no Japão é uma barreira... \*

POUCO importante     1     2     3     4     5    MUITO importante

14. A dificuldade em manter o controlo sobre a nossa representação/imagem no Japão é uma barreira... \*

POUCO importante     1     2     3     4     5    MUITO importante

15. O custo excessivo de transporte/seguro para o Japão é uma barreira... \*

POUCO importante     1     2     3     4     5    MUITO importante

16. Ajustar atividades promocionais de exportação para o Japão apresenta-se como uma barreira... \*

POUCO importante     1     2     3     4     5    MUITO importante

## Barreiras externas

17. A falta de assistência/incentivos do governo português para atividades de exportação para o Japão é uma barreira... \*

POUCO importante     1     2     3     4     5    MUITO importante

18. Os procedimentos complexos para a exportação para o Japão são uma barreira... \*

POUCO importante	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5	MUITO importante
------------------	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	------------------

19. A dificuldade em comunicar diretamente com clientes japoneses, face à diferença horária (8 a 9 horas) e a distância geográfica, é uma barreira... \*

POUCO importante	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5	MUITO importante
------------------	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	------------------

20. A dificuldade em receber pagamentos do Japão é uma barreira... \*

POUCO importante	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5	MUITO importante
------------------	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	------------------

21. A compreensão das atitudes e hábitos dos consumidores japoneses é uma barreira... \*

POUCO importante	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5	MUITO importante
------------------	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	------------------

22. O desconhecimento dos nossos produtos pelos consumidores japoneses é uma barreira... \*

POUCO importante	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5	MUITO importante
------------------	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	------------------

23. O nível de concorrência que enfrentamos no mercado japonês é uma barreira... \*

POUCO importante	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5	MUITO importante
------------------	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	------------------

24. As condições político-económicas no Japão são uma barreira... \*

POUCO importante	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5	MUITO importante
------------------	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	------------------

25. As práticas e cultura de negócio diferentes no Japão são uma barreira... \*

POUCO importante	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5	MUITO importante
------------------	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	------------------

26. As diferenças na comunicação verbal (idioma) e não verbal (cultura) são uma barreira... \*

POUCO importante	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5	MUITO importante
------------------	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	------------------

27. As normas e regulamentos específicos do mercado japonês são uma barreira... \*

POUCO importante	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5	MUITO importante
------------------	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	------------------

28. Os custos aduaneiros são uma barreira... \*

POUCO importante	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5	MUITO importante
------------------	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	------------------

## Outras barreiras

Nesta secção pode indicar outras barreiras que queira sugerir.

Nota: esta parte contém somente uma pergunta de resposta obrigatória (\*).

Outra barreira (1/3):



Outra barreira (2/3):

Outra barreira (3/3):

Da lista das barreiras, incluindo as indicadas por si, por favor escreva, por ordem de importância decrescente, quais as barreiras mais relevantes para si quando exporta/vende para o Japão. \*  
(Por favor seleccione todas as que se aplicam)

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

## Parte 5 – Apoios institucionais

Nota: questões marcadas com \* são de resposta obrigatória.

Recorre a apoios externos (Aicep, CCILJ, etc.)? \*

<input type="checkbox"/> Sim
<input type="checkbox"/> Não

Quais as razões?

(Por favor seleccione todas as que se aplicam. Caso tenha um colaborador de nacionalidade japonesa, pode ignorar as restantes)

<input type="checkbox"/> Obter informação privilegiada
<input type="checkbox"/> Obter recursos financeiros
<input type="checkbox"/> Participar em missões empresariais
<input type="checkbox"/> Aumentar rede de contactos
<input type="checkbox"/> Outro: _____

## Parte 6 – Agradecimento e contacto

Nota: questões marcadas com \* são de resposta obrigatória.

Muito obrigado pela sua disponibilidade para responder a este inquérito.

O envio deste questionário pode ser feito para o endereço do Remetente, através do preenchimento do formulário online, ou enviando as respostas para [up200807340@edu.fep.up.pt](mailto:up200807340@edu.fep.up.pt).

Caso deseje ser contactado para qualquer informação que queira partilhar, expor dúvidas e/ou comentários, entre outros, por favor preencha esta última secção.

Por favor indique se gostaria de ser contactado: \*

<input type="checkbox"/> Não
<input type="checkbox"/> Comentar questionário
<input type="checkbox"/> Receber resultados após defesa da tese
<input type="checkbox"/> Outro: _____

Para que possa ser contactado, por favor deixe os seus dados:

<input type="checkbox"/> Nome: _____
<input type="checkbox"/> Cargo: _____
<input type="checkbox"/> N.º de telefone: _____
<input type="checkbox"/> E-mail: _____
<input type="checkbox"/> Outro: _____



Este questionário e documento explicativo podem ser acedidos *online*, através dos códigos QR acima.

## Annex D: Supporting document

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### Lista das Barreiras

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#	Barreira
1	Obter informação relevante para analisar o mercado japonês.
2	Identificar oportunidades de negócio no Japão.
3	Tempo para gerir o mercado japonês.
4	Recursos Humanos com qualificações para lidar com o mercado japonês.
5	Capacidade de produção da empresa para responder à procura externa.
6	Capacidade financeira para suportar os custos para exportar para o Japão.
7	Adaptação/desenvolvimento de produtos para o mercado japonês.
8	Responder às especificações técnicas, de qualidade, e padrões exigidos.
9	Responder às especificações de embalagem e rotulagem.
10	Providenciar serviços de pós-venda e/ou técnico.
11	Oferecer produtos com uma relação preço-qualidade competitiva.
12	Complexidade do sistema de distribuição japonês.
13	Dificuldade em estabelecer uma parceria/representação no Japão.
14	Dificuldade em manter controlo sobre a representação/imagem no Japão.
15	Custo excessivo de transporte/seguro.
16	Ajustar atividades promocionais de exportação para o Japão.
17	A falta de assistência/incentivos do governo português.
18	Procedimentos complexos para a exportação para o Japão.
19	Comunicar diretamente com clientes japoneses.
20	Receber pagamentos do Japão.
21	Compreensão das atitudes e hábitos dos consumidores japoneses.
22	Desconhecimento dos produtos portugueses pelos japoneses.
23	Concorrência muito forte no mercado japonês.
24	Condições político-económicas no Japão.
25	Práticas e cultura de negócio diferentes do Japão.
26	Diferenças na comunicação verbal (idioma) e não verbal (cultura).
27	Normas e regulamentos específicos do mercado japonês.
28	Custos aduaneiros altos.

---

### Explicação das Barreiras

#### Barreiras Internas

##### *01. Dificuldade em obter informação relevante para analisar o mercado japonês.*

Obter informação sobre o mercado-alvo pode ser uma barreira caso seja difícil. Por exemplo, obter informações sobre Espanha é mais fácil do que sobre o Japão, por várias razões: proximidade geográfica, cultural, linguística, entre outros.

*02. Dificuldade em identificar oportunidades de negócio no Japão.*

O não conhecimento do mercado, dos canais de distribuição, do tecido empresarial, a falta de parcerias no mercado, podem ser barreiras para identificar oportunidades de negócio.

*03. Limitações no tempo para gerir o mercado japonês.*

As exigências do mercado doméstico e/ou outros mercados estrangeiros, podem levar a uma escassez de tempo para se dedicar ao Japão. As exigências do mercado japonês também podem exigir mais tempo por parte da gestão. Esta barreira é mais significativa em empresas pequenas, com recursos (humanos e financeiros) limitados para responder a oportunidades de negócio no Japão.

*04. Falta de recursos humanos com qualificações para lidar com o mercado japonês.*

A falta de pessoas com conhecimento sobre o mercado japonês apresenta-se como uma barreira. Por exemplo, não ter acesso a alguém que conheça a língua significa estar dependente de um intérprete externo, aumentando assim o custo de trabalhar com o Japão. A economia, a cultura de negócios, o sistema legal, entre outros, implica recursos humanos especializados nestas áreas.

*05. Capacidade de produção da empresa para responder à procura externa.*

Poderá ser uma barreira significativa em empresas que reagem a pedidos vindos do Japão. Não tendo capacidade produtiva instalada para responder à procura do mercado japonês pode levar a uma perda de negócio para concorrentes já preparados para responder às exigências do mercado japonês.

*06. Capacidade financeira para suportar os custos para exportar para o Japão.*

O custo para vender no Japão inclui a adaptação dos produtos para o mercado, a contratação de recursos humanos qualificados, a contratação de empresas externas para ajudar na exportação, os custos de transporte, custos aduaneiros, entre outros. A distância geográfica e diferenças culturais podem acarretar um esforço maior, do que, por exemplo, exportar para Espanha que é um mercado culturalmente e geograficamente mais próximo.

*07. Adaptação/desenvolvimento de produtos para o mercado japonês.*

De forma a ir ao encontro das regulações e/ou gostos dos consumidores japoneses, adaptações à oferta podem ser necessárias, o que acarretará novos custos, entre outros.

*08. Responder às especificações técnicas, de qualidade, e padrões exigidos.*

O consumidor japonês tem gostos diferentes do português e padrões de exigência diferentes. É sabido que os japoneses dão valor ao pós-venda. Adicionalmente, produtos que cumprem as regras em Portugal poderão não cumprir as regras do mercado japonês. Esta adaptação pode trazer custos altos e ser uma barreira significativa para as empresas que não estão preparadas.

*09. Responder às especificações de embalagem e rotulagem.*

Os produtos no Japão têm que estar em japonês, mesmo que isso passe por um autocolante. A embalagem de certos produtos também requer uma adaptação, o que significa um esforço extra na venda do produto. Vários estudos indicam que o consumidor japonês valoriza a apresentação dos produtos vendidos, acrescentando um custo no desenvolvimento e produção das embalagens.

*10. Providenciar serviços de pós-venda e/ou técnico.*

Providenciar serviços pós-venda e/ou técnico requer um investimento extra, quer seja através de uma filial dedicada para este propósito, ou na formação de uma equipa japonesa que possa dar resposta a estes pedidos. Usualmente esta necessidade está mais ligada a sectores que vendem tecnologias mais complexas. Face a esta necessidade, a incapacidade de dar resposta apresenta-se como uma barreira significativa.

*11. Oferecer produtos com uma relação preço-qualidade competitiva.*

O posicionamento da relação preço-qualidade do produto no mercado japonês dependerá do sucesso dos concorrentes. Alguns produtos posicionam-se a um preço mais elevado, para responder aos custos da exportação, mas não conseguem atingir o público-alvo. A análise desta relação ditará a perceção desta barreira como muito importante ou pouco importante.

*12. Complexidade do sistema de distribuição japonês.*

O sistema de distribuição japonês é considerado muito complexo e ineficiente, devido à sua estrutura multicamada que inclui vários distribuidores e retalhistas antes de o produto chegar ao consumidor final. Adicionalmente, os canais de distribuição são muito fechados, sendo difícil encontrar uma parceria para distribuir o produto ao preço desejável. Esta barreira, contudo, poderá ser menos relevante para as empresas que exportam para importadores que já têm as suas cadeias de distribuição estabelecidas, ou diretamente através da Internet.

*13. Dificuldade em estabelecer uma parceria/representação no Japão.*

A existência de grupos económicos (conhecidos como *keiretsu*) – com relações estreitas entre os vários agentes ao longo da cadeia de distribuição – faz com que seja difícil estabelecer uma relação comercial para a distribuição dos produtos exportados para o mercado japonês. O não conhecimento da oferta portuguesa, a dificuldade na comunicação, a concorrência, entre outros, aumenta a importância desta barreira.

*14. Dificuldade em manter controle sobre a representação/imagem no Japão.*

A distância, a cultura de negócios diferentes, a compreensão da oferta portuguesa, o esforço financeiro necessário, a contratação de recursos humanos no Japão para representar os produtos portugueses, entre outros, pode levar a discrepâncias entre aquilo que é desejado e aquilo que é transmitido. Alguns estudos apontam para divergências nas práticas de gestão europeias com as japonesas, que leva a que a cultura e imagem não sejam compreendidas pelos japoneses.

*15. Custo excessivo de transporte/seguro.*

Perante a distância do mercado japonês para o português, os custos de transporte e de seguro podem ser um entrave para poder exportar a um preço competitivo.

*16. Ajustar atividades promocionais de exportação para o Japão.*

Exportar para o Japão implica dar a conhecer a oferta portuguesa e encontrar, educar, e estabelecer parcerias com japoneses. Todas estas ações implicam um investimento extra (financeiro, humano, temporal) que poderá não ser suportável por algumas empresas.

### **Barreiras Externas**

*17. A falta de assistência/incentivos do governo português.*

Perante as exigências financeiras e as oportunidades de negócio apresentadas na terceira maior economia do mundo, a falta de incentivos governamentais que ajudem as PME a ultrapassar as várias barreiras do mercado japonês, podem levar a que empresas concorrentes de outros países agarrem essas oportunidades.

*18. Procedimentos complexos para a exportação para o Japão.*

A burocracia para a exportação para o Japão pode ser vista como uma barreira importante. Quanto mais complexos forem os procedimentos, mais importante esta barreira poderá ser. Procedimentos complexos irão exigir mais energia (conhecimento técnico, recursos financeiros, tempo, etc.) para se conseguir dar resposta ao exigido.

*19. Dificuldades em comunicar diretamente com clientes japoneses.*

Esta barreira refere-se às diferenças culturais, maneiras diferentes de fazer negócio, à diferença horária, à distância geográfica, que dificultam o encontro presencial, entre outros.

*20. Dificuldade em receber pagamentos do Japão.*

Relacionada com o método escolhido entre as partes que poderá ser desvantajoso para o exportador.

*21. Problemas na compreensão das atitudes e hábitos diferentes dos consumidores japoneses.*

Caso a compreensão do comportamento dos consumidores japoneses seja difícil, esta barreira será muito importante. Por exemplo, a maioria das habitações dos japoneses são pequenas, pelo que a comercialização de produtos muito grandes não será bem-recebida.

*22. Desconhecimento dos produtos portugueses pelos japoneses.*

O não conhecimento dos produtos portugueses pelos japoneses faz com que haja alguma desconfiança. Isto implica que os produtos se promovam, passando uma imagem de confiança – não só do produto, mas também da empresa que vende –, dando a conhecer a história do produto e a sua funcionalidade. Por exemplo, enquanto que em Portugal se consome os vinhos pelas regiões, no Japão essas regiões não são conhecidas, logo o valor é desconhecido também.

*23. Concorrência muito forte no mercado japonês.*

O mercado japonês é altamente competitivo e apresenta várias barreiras não-tarifárias. O excesso de competição, quer por empresas japonesas, quer por concorrentes estrangeiros, dificultam o sucesso português no Japão.

#### *24. Condições político-económicas no Japão.*

O Japão tem a maior dívida pública no mundo, a população mais idosa do mundo, um sistema burocrático ultrapassado cuja reforma requererá um novo contrato social. Por exemplo, de acordo com dados da *The Economist* (2021<sup>14</sup>), quase 40% da força de trabalho japonesa tem contratos de trabalho precários. Procura-se investigar se há algumas condições político-económicas que afetam a atividade das empresas portuguesas no Japão.

#### *25. Práticas e cultura de negócio diferentes do Japão.*

A incompreensão da cultura de negócios japonesa pode levar a oportunidades perdidas. Por exemplo, é sabido que os japoneses demoram muito tempo a tomar uma decisão.

#### *26. Diferenças na comunicação verbal (idioma) e não verbal (cultura).*

A não compreensão da língua japonesa e dos aspetos culturais que influenciam a maneira de comunicar dos japoneses podem ser uma barreira muito importante. Por exemplo, durante uma negociação os japoneses poderão dizer várias vezes “sim”, mas esse “sim” significa simplesmente que estão a acompanhar o raciocínio e não uma concordância com o que está a ser dito. Conhecimento da língua japonesa é necessário, uma vez que o Japão tem um baixo nível de domínio da língua inglesa.

#### *27. Normas e regulamentos específicos do mercado japonês.*

Sistemas legais de países diferentes implicam regras e normas diferentes que podem ser consideradas demasiado excessivas, ou até desnecessárias. Normas e regulamentos excessivos são postos em prática para dificultar a concorrência estrangeira. Mesmo com a entrada do Acordo de Parceria Económica União Europeia-Japão, vários entraves permanecem, com o Japão a não aceitar alguns regulamentos europeias ou internacionais.

#### *28. Custos aduaneiros altos.*

Algumas empresas poderão ter dificuldade em suportar os custos aduaneiros.

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<sup>14</sup> O artigo *How Japan's stakeholder capitalism is changing* pode ser consultado em <https://www.economist.com/business/2021/03/18/how-japans-stakeholder-capitalism-is-changing>

## **Annex E: Interviews**

### **Aicep interview**

On March 29th, I gathered with Aicep's Delegation in Tokyo's Director Mr. Miguel Malheiro Garcia, where, for over an hour, Mr. Garcia kindly conversed with me about Japan. The interview took place in Aicep's Delegation Office in Tokyo, and was held in Portuguese.

### **Para começar, gostaria de lhe perguntar, em geral, quais as oportunidades que o Japão pode oferecer às empresas portuguesas?**

**Miguel Malheiro Garcia** – As oportunidades no Japão para as empresas portuguesas variam de sector para sector. Atualmente, com o Acordo de Parceria Económica (APE) entre a UE e o Japão<sup>15</sup>, novas oportunidades abriram-se principalmente para a indústria alimentar, nomeadamente nos sectores dos vinhos e queijos. Esta indústria terá uma regressão progressiva das taxas aduaneiras durante os próximos anos até à total implementação do Acordo. Apesar da oferta portuguesa ser um bocado limitada, há bons produtos com potencial. Por outro lado, é preciso ter em atenção que alguns produtos poderão não ir ao encontro do gosto do consumidor japonês, como, por exemplo, queijos com um sabor mais forte.

Outro produto com potencial é o azeite, mas o seu posicionamento terá de ser melhor trabalhado, provavelmente virado para um segmento com um poder de compra mais elevado. Esse trabalho requereria uma concertação entre os produtores de azeite nacionais, até porque estes são de uma dimensão pequena. No Japão, 60% do azeite importado é de origem espanhola. Parte dessas importações é a granel, com algumas empresas a engarrafarem o azeite com marca japonesa. De qualquer forma, há um segmento pequeno. Por exemplo, os italianos têm cerca de 30% de quota de mercado, sobrando cerca de 10% para outros países. Tendo isto em conta, os produtores nacionais que queiram singrar no mercado japonês terão que delinear uma boa estratégia, e apostar na qualidade.

Para além destes produtos, gostaria de apontar também as conservas com um potencial de venda no Japão. Nos últimos anos, a indústria das conservas tem-se vindo a modernizar, apostando não só na qualidade do produto, mas também na apresentação, algo muito valorizado no mercado japonês. Por apresentação refiro-me ao *design* das latas e embalagem, e ao empacotamento. Por exemplo, recentemente participei na Foodex<sup>16</sup> e encontrei lá uma empresa que importa conservas do Algarve, e vende em *department stores*<sup>17</sup> e outras lojas com bastante qualidade.

Infelizmente, olhando para o volume e valores das exportações, as trocas comerciais com o Japão ainda são de uma dimensão pequena. Apesar disso, para muitas empresas esta é uma forma de diversificar mercados. Vender no Japão pode ser visto como uma vantagem, pois este é um mercado extremamente rigoroso e com um padrão de exigência alto que depois poderá preparar melhor estas empresas para outros mercados com níveis de exigência também altos. A verdade é que, se estas empresas conseguirem entrar no mercado japonês e estabelecer uma boa relação com um parceiro japonês, mais oportunidades poderão surgir.

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<sup>15</sup> Council Decision (EU) 2018/1907 of 20 December 2018 on the conclusion of the Agreement between the European Union and Japan for an Economic Partnership.

<sup>16</sup> Foodex Japan 2021 took place on March 9-12, 2021, in Tokyo.

<sup>17</sup> Department stores are also referred as *hyakukaten* in Japanese, or *depaato*, from English.



### **Diria que para entrar no mercado a empresa portuguesa não consegue sozinha, teria que ser sempre com um parceiro local?**

**Miguel Malheiro Garcia** – No caso das exportações, o parceiro tem que ser um importador. No entanto, a questão que se coloca, em termos da estratégia das empresas – e virando para o facto de algumas não estarem preparadas para o mercado Japonês –, estas têm que fazer um investimento no mercado. O que acontece é que algumas empresas são pequenas e não têm músculo financeiro para fazer esse investimento. Mesmo no sector dos vinhos, há muitas empresas que querem exportar, mas falta-lhes este investimento. Por exemplo, pessoalmente eu creio que um dos problemas da estratégia da Viniportugal<sup>18</sup> é que há muito esforço de *pushing* e pouco esforço de *pulling*. O que eu quero dizer com isto é que há muitas empresas que exportam, preocupando-se somente em encontrar um importador; uma vez arranjado um importador, estas empresas, no entanto, ignoram que os vinhos portugueses não são, geralmente, conhecidos no Japão, e não investem em educar o consumidor japonês ao longo da cadeia de distribuição, tais como junto de *sommeliers*. Esta falha leva a que depois não consigam exportar mais, porque o interesse – por falta de conhecimento – não existe.

Certamente que estas empresas com pouca capacidade financeira devem ter sucesso noutros mercados, mas no Japão é necessário investir para desenvolver a marca junto dos consumidores japoneses para que estas empresas possam crescer cá. Sem este tipo de promoção, será muito difícil crescer no Japão.

### **Que tipo de ações promocionais são realizadas no Japão?**

**Miguel Malheiro Garcia** – Continuando no sector dos vinhos, a Viniportugal, por exemplo, vem regularmente – pelo menos uma vez por ano –, ao Japão. As suas acções principais passam por fazer provas de vinhos com *sommeliers* e importadores, e oferecer um seminário para dar a conhecer melhor os vinhos que promovem. Às vezes o público geral também pode participar. Os vinhos verdes também vêm anualmente ao Japão e têm tido resultados, muito porque o produto se adapta bem à gastronomia japonesa e ao gosto dos consumidores japoneses.

Mas para além destes, há muitos outros vinhos que já têm uma presença no mercado. Basta ir a provas de vinhos organizadas por associações japonesas e lá já se encontram vários vinhos portugueses. Muitos deles eu nem conhecia, e vê-se a presença de produtores relativamente pequenos, de vinho biológico, entre outros.

Contudo, num mercado como o japonês, fazer uma ação promocional por ano não é suficiente. Sem mais investimento neste tipo de promoções, é difícil ganhar um lugar no mercado japonês. Por exemplo, há muitos países que têm um instituto do vinho só a trabalhar no Japão. A Alemanha é exemplo disso com uma presença permanente no mercado japonês, investindo na promoção e educação dos seus vinhos junto dos compradores<sup>19</sup>. Portugal tem que seguir a mesma via porque alguns dos importadores japoneses precisavam de alguma formação no produto português em causa: deviam ir a Portugal, ver, perceber, aprender

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<sup>18</sup> According to the official website (<https://www.viniportugal.pt/AboutUs> accessed on April 14, 2021) "ViniPortugal is the Interprofessional Association of the Portuguese Wine Industry [...]. It is the managing entity for the brand Wines of Portugal."

<sup>19</sup> Wines of Germany has an office in Shibuya, Tokyo (<https://www.winesofgermany.jp/> accessed on April 14, 2021).

sobre a história, para assim ficarem convencidos em vender o produto. Precisam de entender bem o produto que têm para vender no mercado japonês. Por outro lado, os produtores portugueses também precisam de vir ao Japão para entenderem o mercado. Mas para isso precisam de ser mais apoiados, porque o mercado é longe, e o investimento necessário é grande. Isso vê-se com muitos produtores a virem ao Japão duas ou três vezes por ano, revelando um investimento feito por eles.

### **Qual seria a vantagem competitiva das empresas portuguesas no Japão?**

**Miguel Malheiro Garcia** – Depende do sector.

### **Que vantagens as empresas podem tirar da relação histórica que Portugal tem com o Japão?**

**Miguel Malheiro Garcia** – Toda gente fala sobre a parte histórica dos portugueses terem sido os primeiros europeus a ter contacto com os Japoneses. No entanto, olhando para as exportações, toda gente exporta mais do que nós. Nós não nos devemos deixar ficar pela componente histórica. Devíamos sim dar a conhecer o Portugal moderno ao Japão e assim capitalizar com isso.

Num passado recente, competir pelo preço nas áreas do calçado e dos têxteis-vestuário podia fazer sentido, mas hoje em dia o Japão pode comprar muito mais barato noutros países da região, tais como no Vietname ou no Camboja. Mas olhando para uma relação preço-qualidade para produtos com uma qualidade mais elevada, Portugal pode ter uma vantagem. No entanto, não há marca.

A questão da marca significa que os produtos poderão ser vendidos com valor acrescentado. Muitas das vezes o que é exportado para o Japão é para ser vendido como marca japonesa, e não como marca portuguesa. Desenvolver uma marca revela-se, assim, como o passo mais difícil. Mas sem a marca, a empresa não conseguirá adicionar mais valor acrescentado. É importante trabalhar nisso, porque há oferta, há exportações para cá. Por exemplo, a APICCAPS<sup>20</sup> faz um trabalho extraordinário, bem como a Selectiva Moda<sup>21</sup>, e o Guimarães Fashion Show. Nós também trabalhamos para promover os produtos portugueses, levando compradores e jornalistas a Portugal, mas seria fulcral impor uma marca, para evitar dar o valor acrescentado a outro. O que acontece atualmente no Japão é que várias marcas estrangeiras têm lojas próprias, e isso vê-se, por exemplo, em marcas de calçado espanholas. Talvez as empresas portuguesas se devessem organizar e ter um espaço comum onde promovem o calçado português. É preciso que as marcas portuguesas dêem o próximo passo, pois a qualidade no calçado já é boa e a um bom preço, mas falta o valor da marca que é desconhecido pelo consumidor japonês.

### **A aceitação de produtos a um preço mais baixo, mas mantendo um nível de qualidade razoável, tem vindo a crescer no Japão. Como se pode tirar vantagem disso?**

**Miguel Malheiro Garcia** – Pegando no exemplo dos vinhos: no Japão, houve várias fases

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<sup>20</sup> APICCAPS (*Associação Portuguesa Indústria Calçado Componentes Artigos Pele Sucedâneos*) is a Portuguese Footwear, Components, Leather Goods Manufacturers' Association.

<sup>21</sup> Selectiva Moda (ASM) is an association created 28 years ago to enhance Portuguese textiles, in an international context.

no crescimento do mercado dos vinhos. A primeira fase de crescimento foi o do vinho barato. Hoje em dia é possível encontrar vinhos bons até 500 ienes<sup>22</sup> e começa a haver uma forte competição neste segmento. Claro que dependerá sempre onde o vinho é vendido; por exemplo, nas lojas de conveniência e supermercados mais baratos, ou até nas *discount stores*, a competição é feita ao nível do preço. Mas fora isso, hoje em dia consegue-se ter um vinho decente sem ser muito caro. Tal como referido no azeite, no Japão, muitos dos vinhos de marca japonesa são vinhos a granel importados de outros países, que depois é produzido e engarrafado para marca japonesa. Daí se explica alguns volumes muito elevados de alguns países que exportam vinho para o Japão.

O caso do Chile é exemplo disso. Com o Acordo Chile-Japão<sup>23</sup>, as tarifas foram sendo gradualmente eliminadas, e hoje, em termos de volume, é o maior exportador de vinho. Mas se olharmos em termos de valor, os vinhos franceses têm 43% da quota de mercado. Apesar da imagem de marca já estar estabelecida junto do consumidor japonês, os vinhos franceses estão posicionados em vários segmentos, tendo vindo a perder alguma quota de mercado para o Chile, Espanha, e até EUA nos segmentos mais baixos. Por outro lado, o Chile está a reformular a imagem da marca para um segmento mais alto, mas está com dificuldade por já estar associado à imagem de vinho barato.

**Face à capacidade de produção dos produtores portugueses, talvez a estratégia passe por apostar num segmento com um poder de compra mais elevado.**

**Miguel Malheiro Garcia** – Isso ou no médio. Por exemplo, a Nova Zelândia segue uma estratégia no segmento médio. Há uma oferta de bons vinhos, apesar de seguirem também uma estratégia de venda de castas internacionais mais consumidas pelos consumidores. Há países onde as pessoas consomem vinho por região, mas no Japão as pessoas consomem por casta. E isso apresenta-se como um desafio para os produtos portugueses porque irá requerer mais educação junto do consumidor, nomeadamente quanto às regiões portuguesas. Para além disso, a maior parte dos vinhos portugueses são *blending*, de castas que os japoneses não conhecem. Há muito trabalho a fazer.

**Agora com o Acordo e com a inclusão de 9 indicações geográficas portuguesas, se não houver educação não interessa se é do Douro ou do Alentejo, porque não conhecem.**

**Miguel Malheiro Garcia** – Mesmo em termos dos vinhos espanhóis no Japão, nalguns casos é mais fácil, enquanto que noutros é mais difícil. Mesmo os espanhóis têm alguma dificuldade em comunicar o valor dos seus vinhos, porque fazem *blending* dos vinhos, e os japoneses não conhecem as regiões.

**Além dos sectores referidos, vê algum nicho a crescer?**

**Miguel Malheiro Garcia** – Começamos a ter alguma procura para o estabelecimento de parcerias na indústria farmacêutica. Estas parcerias são entre empresas pequenas, ou até *start-ups* de Portugal, com grandes empresas japonesas. Algumas empresas japonesas têm interesse em investir em empresas que já estão numa fase avançada no desenvolvimento de algum

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<sup>22</sup> 500 yen is 3,87 euros.

<sup>23</sup> The Japan-Chile Economic Partnership Agreement has been in effect since 2007.

novo medicamento, por exemplo, investindo na fase dos testes clínicos, que é uma fase que requer um investimento grande. Se tiver sucesso compram e depois investem no *marketing*, e é uma forma destas empresas de reduzirem o risco. Do nosso lado, temos visto um crescimento e trabalhado na captação do investimento para este tipo de empresas. Temos visto um crescimento nesta área.

Para Portugal, muito trabalho a fazer passa pelo investimento direto estrangeiro (IDE). Muitas vezes o IDE é feito na base de parceria ou aquisição, porque preferem ir para um lugar onde as coisas já estão estabelecidas. Muitas empresas japonesas dão muita importância à minimização do risco, preferindo investir com capital em empresas já estabelecidas, que já têm uma base de clientes, e depois ir adaptando ao modelo deles.

A *Japan Overseas Investment* (JOI) tem dois artigos sobre duas empresas portuguesas, nomeadamente a Veniam e a DefinedCrowd<sup>24</sup>. A Veniam, por exemplo, trabalha com a Denso, o maior fornecedor automóvel japonês. Mas para além destas posso apontar a Vision-Box<sup>25</sup> e a Outsystems<sup>26</sup>. Começa-se a ver uma expansão por parte de empresas de cariz mais tecnológico no mercado japonês, com o objetivo de abrir um escritório, captar quota de mercado, ou porque já tinham alguma parceria com uma empresa japonesa que leva naturalmente a esta expansão.

Parte desta expansão para o mercado japonês deve-se a uma mudança no tecido empresarial japonês. No passado, os recursos necessários para o crescimento das empresas japonesas eram facilmente encontrados no país, mas hoje em dia começa a haver uma procura por outros recursos, nomeadamente de tecnologia, noutras empresas, mais propriamente em *start-ups*. Exemplo disso é o sector automóvel que se está a adaptar à inclusão de tecnologia nos carros, porque as empresas não têm essas competências.

Outra tendência que tem vindo a crescer é o de estabelecimento de parcerias para mercados terceiros. Um exemplo disso é o que várias empresas alemãs têm feito, onde fazem parcerias com empresas japonesas para entrarem em mercados terceiros, ou seja, outros além do Japão e, neste caso, da Alemanha. Essa parceria inicial e todo o processo que envolve, leva a que um entendimento seja estabelecido entre as partes que leva a um aumento mútuo de confiança e potencialmente à expansão para o Japão.

**A parte da confiança é um dos aspetos mencionados na literatura. Diria que as empresas portuguesas falham por não estabelecerem uma relação de confiança com os parceiros japoneses?**

**Miguel Malheiro Garcia** – Isto tem a ver com tempo, porque o processo de decisão é diferente no Japão. Ou seja, no Japão, o processo de decisão parte de baixo para cima, isto quer dizer que há várias pessoas envolvidas no processo de decisão, onde têm que estar todos de acordo, e isso leva tempo. A razão disso prende-se com a avaliação do risco, algo que a gestão japonesa procura evitar ao máximo. O tempo que leva a tomar uma decisão é, por isso, maior. Apesar do processo de decisão ser demorado, o processo de implementação é

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<sup>24</sup> According to DefinedCrowd's website ([www.definedcrowd.com](http://www.definedcrowd.com) accessed on April 14, 2021), the company has an office in Tokyo.

<sup>25</sup> According to Vision-Box's website ([www.vision-box.com](http://www.vision-box.com) accessed on April 14, 2021), the company has an office in Tokyo.

<sup>26</sup> According to Outsystem's website ([www.outsystems.com](http://www.outsystems.com) accessed on April 14, 2021), the company has an office in Tokyo.

depois muito mais rápido.

Muitas vezes as empresas portuguesas vivem pressionadas pelo curto prazo. No Japão dá-se relevância à confiança e ao entendimento. Talvez porque Portugal e o Japão são duas culturas muito diferentes, e com geografias muito distantes, haja esta discrepância. Se uma empresa está pressionada pelo curto prazo – e é legítimo face à dimensão e tamanho da tesouraria –, num processo que é de médio prazo, a abordagem é “vamos tentar”, mas é preciso ter preparação. Por exemplo, numa primeira fase seria ideal enviar os materiais em japonês, porque esta é a melhor forma de meter o pé na porta. Mesmo vindo em inglês, a parte japonesa até pode ler, mas não tem o mesmo impacto se viesse já em japonês. Por causa disso, poderá não haver resposta. A diferença horária e a diferença geográfica também dificultam o acompanhamento dos processos. Da nossa parte, nós ajudamos, fazendo contactos com as empresas para agendar reuniões, por exemplo. Mas tem que ser um processo que tem que estar muito bem pensado desde o início, ou seja, como fazer o primeiro contacto, quais e como enviar os materiais, como fazer o acompanhamento, etc. Porque os japoneses estão sempre a testar o comprometimento da empresa com quem querem fazer uma parceria. O tempo também é um teste. As coisas levam tempo.

#### **Poderá desenvolver um pouco mais sobre os erros cometidos pelas empresas portuguesas na sua abordagem ao mercado japonês?**

**Miguel Malheiro Garcia** – Se o trabalho não é bem feito desde o princípio, nem há hipótese de passar à fase seguinte. É preciso ter em conta que o Japão é a terceira maior economia do mundo e estão constantemente a ser bombardeados por propostas de todo o lado. Há muitas empresas que se preparam bem, fazem o trabalho de casa, arranjam alguém local que trabalhe com a empresa para depois fazer o porta-a-porta. Há várias formas de fazer isso, mas tudo isso envolve dinheiro e conhecimento da realidade japonesa. E esta é uma parte importante. É preciso ter em atenção a estas diferenças culturais.

#### **Falando sobre os aspetos socioculturais, de que forma estes constituem uma barreira para as empresas portuguesas, tais como a língua, os costumes, o nível de desconfiança perante o desconhecido...**

**Miguel Malheiro Garcia** – A língua é um problema, até porque o nível de inglês dos japoneses no geral é baixo. É preciso perceber as questões de como é feito o processo de decisão do lado japonês que, como referi, é demorado. O estabelecimento da confiança é informal, ou seja, é mais pessoal, sendo necessário socializar com o parceiro japonês. É preciso se mostrar que se é fiável e credível. Estas coisas não podem falhar.

#### **Diria que as empresas deviam apostar em criar uma imagem de confiança?**

**Miguel Malheiro Garcia** – O estabelecimento de confiança com um parceiro japonês é essencial. Para se confiar é preciso se ser credível, e isso é um processo que implica investimento numa relação. O problema em relação a Portugal é que a imagem que há no Japão está ultrapassada em muitos casos. Por causa disso, não se chega cá e tem-se logo uma aceitação por parte dos japoneses, porque não há uma imagem de Portugal, nem boa nem má. Dito isto, há um caminho a percorrer para se criar essa imagem de confiança. É um processo que implica entender a dimensão cultural que influencia tudo o resto e, especialmente para algumas PME, há uma dificuldade em compreender a importância desta

dimensão. Claro está que essa dificuldade poderá advir dos poucos recursos disponíveis e pela pressão de apresentar resultados no curto prazo.

Há empresas, no entanto, que mostram que isso não é impossível, como, por exemplo, a Cutipol, que é famosa junto dos consumidores japoneses.

**Algumas das marcas portuguesas que os japoneses conhecem muitas vezes é propagada pelo boca-a-boca, através de publicações em *blogs* e redes sociais. Como poderão as empresas espalhar mais a sua imagem junto dos consumidores japoneses?**

**Miguel Malheiro Garcia** – Aqui teria que haver uma campanha de imagem recorrendo a só algumas empresas e bater nisso, trabalhar no *media*. Por vezes, há programas de televisão japoneses para os quais nós não contribuimos nada; tudo é feito pelos japoneses que dão, assim, a conhecer as marcas portuguesas. Por isso, era preciso trabalhar mais o mercado, para mostrar Portugal. Há dois anos reabriram uma delegação do Turismo de Portugal em Tóquio, e tem estado a correr bem, com cerca de cem mil japoneses a visitarem Portugal, não só em turismo, mas também em viagens de negócio. Esta exposição a Portugal faz com que haja uma abertura de espírito para quem decide o que captar para o mercado japonês.

**Nos contactos recebidos pela Aicep, na sua perspetiva, quais as diferenças reveladas entre aquilo que é expectável pelas empresas portuguesas sobre o Japão e a realidade?**

**Miguel Malheiro Garcia** – Eu creio que, essencialmente, as empresas têm uma expectativa de concretizar uma venda rapidamente e de que será fácil entrar no mercado.

Numa primeira fase, a expectativa é que vai ser fácil. As empresas apresentam umas brochuras, umas tabelas com preços, e esperam que haja um negócio. Claro que a receção variará de sector para sector.

Na Aicep nós recebemos maioritariamente do sector alimentar, mas depois há outras áreas, que sai deste grupo. Não é impossível, mas requer um trabalho entre a empresa e nós, que leva mais tempo. Algumas empresas aguentam isso, mas há outras, como referi anteriormente, que estão muito pressionadas. Dou-lhe um exemplo de um contacto de uma empresa que comercializa aparelhos de purificação de ar (*air cleaning*). Esta empresa já estava a trabalhar com uma plataforma que testa novos produtos para o mercado japonês, e nós acabamos por conseguir uma empresa interessada em estabelecer uma parceria. No entanto, tudo isto demorou o seu tempo. Com outra empresa, nós trabalhamos durante 7 meses, onde os contactos e acompanhamentos foram feitos, etc., e também acabamos por arranjar um importador para essa empresa. No fim, foi um sucesso, mas demorou 7 meses. Por isso, as empresas precisam de compreender que isto demora algum tempo. Do nosso lado, nós tentamos ver qual o melhor caminho para que no fim haja negócio. Por exemplo, poderá já haver uma presença japonesa em Portugal, e as empresas nacionais podem começar o processo com essa empresa. Esse contacto “em casa” facilita mais, pois já há uma ponte entre os dois países que poderá minimizar as dificuldades. Às vezes isto resulta: começando na Europa para se chegar ao Japão.

**Por último, desde a implementação do APE, o que mudou?**

**Miguel Malheiro Garcia** – Para Portugal, na indústria alimentar, com a eliminação de

algumas tarifas, o APE trouxe melhorias. O Acordo inclui a proteção de zonas geográficas e a eliminação gradual de tarifas em vários sectores. Apesar disso, continua a haver algumas áreas onde os japoneses têm uma lista grande de exceções. As empresas antes de decidirem exportar, apesar do Acordo, têm de se preparar muito bem, para evitar problemas. Um dos sectores onde era esperada uma evolução com a entrada do Acordo era o dos vinhos, mas com o Covid-19, essa evolução não correspondeu ao que era esperado.

É preciso ter em atenção que, as tarifas serão eliminadas ao longo de um período de 15 anos. Por isso, numa primeira fase, o investimento burocrático necessário para exportar para o Japão ainda não compensa. É preciso perceber bem as regras, como todo o processo funciona, etc. e, por isso, apesar do Acordo ter trazido uma melhoria no comércio, ainda está aquém do potencial. As PME provavelmente irão aguardar até que se chegue ao ponto em que compensa.

O Acordo também está aberto à inclusão de outros indicadores geográficos protegidos. Portugal parte com duas proteções, nomeadamente no Queijo de S. Roque, e na Pêra Rocha do Oeste, e, do lado dos vinhos, com 9 regiões. Há espaço para incluir mais indicadores geográficos, mas isso só acontecerá se Portugal for mais agressivo nas negociações entre os vários parceiros europeu. A inclusão de mais indicadores geográficos fará com que Portugal consiga mais credibilidade, crie uma boa imagem e, assim, venda produtos com mais valor acrescentado.

### **ViniPortugal interview**

On 2 July 2021, I gathered via Microsoft Teams with ViniPortugal's Marketing Director Ms. Sónia Vieira, and Market Manager Ms. Andrea Guimarães to listen to ViniPortugal's views on Japan. The meeting was held in Portuguese for around 45 minutes.

### **Qual a missão da ViniPortugal para ajudar as empresas portuguesas a exportar para o Japão?**

**Sónia Vieira** – Antes de mais, deixe-me referir que, relativamente às barreiras enfrentadas pelos produtores de vinho portugueses no Japão, a informação que vamos transmitir aqui é somente a nossa limitada perceção nessa área, acumulada através de conversas que vamos tendo com os exportadores, uma vez que a nossa experiência com a exportação é restrita a um momento do ano em que nós vendemos vinhos para o mercado.

A nossa missão para o Japão – que é igual a todos os mercados para onde trabalhamos –, é criar ações muito específicas de educação e formação. Como noutros mercados mais longínquos, onde não temos um espaço de prateleira significativo, essas ações são feitas principalmente junto de *sommeliers*, que acabam por ser os nossos melhores aliados no Japão. Para isso, estabelecemos, há vários anos, uma relação muito forte com a ASI (Association de la Sommellerie Internationale) e com a JSA (Japan Sommelier Association), porque sabemos que, investindo nos futuros *sommeliers* que trabalham nos hotéis de cinco estrelas e/ou nos melhores restaurantes, teremos mais oportunidades de entrar no mercado e ampliar a nossa oferta. Assim, todos os anos fazemos uma prova, onde cerca de 40 produtores de vinho portugueses estão presentes, dando a conhecer os seus vinhos. A oferta nesta prova posiciona-se no segmento médio-alto. Esta é uma prova muito procurada, contando também com a participação de três ou quatro importadores japoneses de vinhos portugueses.

### **Quais são os fatores que ditam o sucesso o vinho português no Japão.**

**Sónia Vieira** – Para se trabalhar com o Japão eu creio que é fundamental ter em mente o seguinte: não existe lugar ao improvisado. É, por isso, essencial ter uma atitude assertiva nas relações comerciais que se criam no Japão. A razão deve-se pelos Japoneses poderem ser “desconfiados” quando não conhecem ou lidam com alguém que não é assertivo e transparente. Por isso é muito difícil se criar uma relação, mas, quando se consegue criar uma relação, seguindo estes princípios mencionados, ela é “eterna”. Dessa forma, é importante que os produtores portugueses que querem exportar para o Japão sejam sempre assertivos, pois, caso contrário, os elos dessa relação poderão enfraquecer. Isto é algo que transmitimos constantemente aos produtores: perante os parceiros japoneses tem que se ser assertivo e pontual. Por exemplo, nas nossas ações, nós temos de garantir que os vinhos estão 30 dias antes desalfandegados e isso não pode falhar. Até porque os japoneses não entenderiam tal falha, porque eles não falham: se um japonês disser que dia X o vinho estará desalfandegado a hora Y, o desalfandegamento acontecerá no dia X à hora Y. Portanto, eu resumiria dizendo que o grande desafio para os produtores portugueses é a resiliência. Tem que se ser muito resiliente para se conseguir entrar no mercado, mas quando se entra, se formos assertivos, nada falha, e o mercado cresce.

**Andrea Guimarães** – Aproveito para complementar que aquilo que os japoneses procuram é alguma particularidade, ou seja, coisas que são quase únicas, ou diferenciadoras no mercado. Essa é uma das razões também porque os vinhos de gama superior têm mais facilidade em



entrar no mercado japonês. Ou seja, há muitos produtores que têm coisas diferentes e únicas e que mais rapidamente conseguem cativar um importador, ou um *sommerliet* japonês. Para se perceber isto, é necessário que os produtores estudem o mercado, incluindo a cultura japonesa para melhor saberem o que podem apresentar no mercado.

**Que pontos são essenciais para se evitar falhas, ou diminuir as barreiras do mercado japonês? Por exemplo, alguns produtores poderão apresentar os materiais em inglês quando deviam estar em japonês.**

**Sónia Vieira** – Para além dessa falha – e do que já foi mencionado acerca da assertividade e pontualidade –, para se evitar quaisquer erros, é importante não abordar o mercado sem antes o estudar sob uma perspectiva cultural. Eu tive várias reuniões no Japão com importadores, e, ao contrário do que acontece noutros países, muitas vezes saímos da reunião sem ter a certeza se vamos fazer negócio ou não. Eu descreveria as reuniões como interações sem emoção, ou seja, a abordagem negocial é muito pragmática e linear, sem uma oscilação de comportamento ao longo da interação. Por isso, considero que o Japão é um mercado onde se tem que ter muito cuidado com a abordagem, incluindo a nossa própria postura corporal, e a forma como se apresenta a informação. Evidentemente que uma boa prática seria ter a informação em japonês, até porque os japoneses não sentem qualquer obrigação em comunicar em inglês, mesmo num ambiente de negócios internacionais. Este ponto torna o estabelecimento de parcerias mais difícil, porque vários importadores não falam inglês.

Em suma, para se evitar quaisquer falhas, é essencial estudar a cultura que levará a uma melhor compreensão da atitude dos japoneses com quem se está a negociar. Conhecendo um pouco sobre a maneira de pensar e da postura dos japoneses levará a que, por exemplo, numa reunião os produtores saibam posicionar os seus vinhos da melhor maneira. E claro, é preciso preparar o portefólio, de preferência em japonês.

Os japoneses gostam de receber informação bem detalhada. Não querem coisas superficiais. Eles querem detalhes técnicos e explicações sobre as castas, sobre o porquê da cor do vinho, entre outras informações. Por seu lado, os produtores têm que saber contar bem a história sobre o seu produto, e transmitir aqueles pontos que serão valorizados pelos japoneses. Esse produto será mais valioso se estiver alicerçado numa história e cultura únicas, e, acima de tudo, seja bem comunicado. Da nossa parte, nós fazemos um trabalho nas redes sociais de comunicação tendo em conta os mercados para os quais direcionamos essa mensagem. Por exemplo, se no Brasil é relevante eu mostrar o estilo de vinho que combina bem com uma pizza a um domingo à noite, essa mesma mensagem não teria muita relevância no Japão. Os produtores ao abordarem o mercado precisam de ter isto em conta para que possam ser bem-recebidos. Todo este trabalho requer paciência.

**A necessidade de se ser paciente tem a ver também com o esforço financeiro que o mercado exige?**

**Sónia Vieira** – Exportar para mercados longínquos exige um esforço financeiro adicional. Tal como noutros mercados, as garrafas não se venderão sozinhas. Para além de encontrar um importador, é preciso visitar o mercado, acompanhar as vendas, entre outros. Porque o mercado é longínquo e requer um esforço financeiro, nós temos uma abordagem de oportunidade. O que quero dizer com isto é que, quando fazemos uma prova no Japão, aproveitamos e fazemos também um seminário; ou, se tivermos planeado duas provas,

fazemos na mesma altura, de modo a mitigar os custos que um mercado tão longínquo acarreta. Os produtores portugueses têm consciência que têm que ter os ovos em várias cestas, mas não podem ir a todas.

**Perante a presença de uma oferta de vinhos por parte de países como a Espanha, França, Itália, entre outros, mais forte, como é que os produtores portugueses se vão diferenciar de modo a aumentar quota de mercado?**

**Sónia Vieira** – O alicerce da nossa vantagem competitiva, para além de outros atributos, são as nossas castas. Somos um país pequeno, com uma grande diversidade climática, de paisagens, de solos, entre outros, que nos distingue dos demais. Claro que os franceses, por exemplo, também têm, mas nós temos castas que não se encontram em mais nenhuma parte do mundo: encruzado, бага... Assim, as nossas castas serão o nosso elemento diferenciador. Essa é a razão pela qual o nosso alvo principal é os *sommeliers*. Os *sommeliers* querem surpreender os seus clientes com algo novo e diferente, e a escolha é Portugal. Dar a conhecer a nossa oferta é um trabalho com vários anos, fruto de sementes que vamos espalhando para ganhar visibilidade.

A Itália, por exemplo, associa os seus vinhos à sua gastronomia. Essa é uma estratégia que é suportada pelo facto de ter restaurantes italianos espalhados por todo o mundo, o que leva a que toda gente conheça. No entanto, nós não temos essa vantagem. O nosso caminho tem sido de transmitir a mensagem de que existe um vinho português para qualquer parte da gastronomia. O que queremos dizer com isto é que, como a nossa diversidade é tão grande, há um vinho que se adapta a qualquer gastronomia, seja ela brasileira ou japonesa. Para além disso, a visibilidade dos vinhos portugueses tem vindo a crescer. Por exemplo, a ProWein todos os anos faz um inquérito junto de compradores de 45 nacionalidades, onde é perguntado quais vinhos quer ver no seu portefólio, até final de 2023, e Portugal aparece em primeiro lugar. Isto é muito interessante, pois sinaliza claramente o crescente interesse de compradores internacionais em ter os nossos vinhos.

**Qual a perceção por parte da ViniPortugal na dificuldade no estabelecimento de parcerias no Japão?**

**Sónia Vieira** – Não temos muita experiência nessa área, mas temos a perceção de que os importadores japoneses não partilham muita informação entre si. Noutros mercados alguns produtores têm como estratégia ter várias marcas distribuídas por vários importadores, mas isto no Japão é complexo e pode ser arriscado. Como referido anteriormente, o importador japonês quer uma relação de lealdade a 100%.

**Andrea Guimarães** – Em relação à distribuição, os produtores não sentem tanto isso, porque o caminho é feito entre produtor e importador, ou seja, o importador é quem faz o acompanhamento da distribuição no mercado. Não tenho conhecimento de algum produtor que vá direto à distribuição. O caminho é produtor, importador, e este último faz a distribuição no mercado.

**Uma vez que os produtores não têm controlo sobre a distribuição, de que forma eles controlam a sua imagem no mercado?**

**Sónia Vieira** – No Japão os próprios importadores são exigentes com o seu parceiro, ou seja, o produtor português, solicitando várias informações sobre os produtos que importam.

Para se aumentar a troca de informação há uma grande interação: os produtores convidam os importadores a Portugal para conhecerem a origem e história, sessões de formação são realizadas, há um acompanhamento constante das equipas de vendas, entre outros. Ou seja, há uma relação bem dinâmica, até porque o importador tem todo o interesse em conhecer bem o produto para que o consiga vender. Esse trabalho de acompanhamento às vendas é fundamental, e o Japão não é exceção. Pode ser um bocado mais difícil por causa das dificuldades de comunicação, mas é feito.

Da nossa parte, a forma como operarmos no mercado é também através de um parceiro. O nosso parceiro no mercado japonês é muito influente junto dos importadores, organizando jantares regularmente, e outras ações de educação para dar a conhecer a oferta portuguesa. Isto é importante, porque o nosso vinho tem que ser explicado: nós temos castas diferentes, e uma tradição antiga – que vem do Vinho do Porto –, em que fazemos vinhos de lote, de *blending*. Por isso, temos que transmitir a quem vai consumir o nosso vinho a mestria que é misturar várias castas num copo e tirar o melhor de cada uma delas. No Japão, o importador Kinoshita, que tem um portefólio invejável de vinhos portugueses *premium*, pode ser considerado, de facto um embaixador dos vinhos portugueses no Japão. E a razão disso é porque conhecem o vinho. O vendedor da Kinoshita, antes de ir vender o vinho português sabe tudo sobre o vinho que procura vender. É uma diferença muito grande. Isto vai ao encontro do que comecei por referir nesta entrevista: assertividade e paciência; assertividade em fornecer prontamente todas as informações necessárias, e paciência para que o estudo seja feito. Tudo isto para se evitar chegar a uma situação de improvisação à última da hora que será mal visto pelo parceiro japonês. A cultura de desenrasque portuguesa não é bem aceite no Japão. As coisas têm que ser bem estudadas, preparadas e acompanhadas.

**Por último, que tipo de ações se prevê para o futuro de modo a aumentar a quota de mercado?**

**Sónia Vieira** – O Japão ainda é um mercado pequeno, para aquilo que é o nosso volume, mas temos como objetivo continuar a investir na educação junto dos *sommeliers*, com uma prova anual em Tóquio, bem como mantendo reuniões regulares com importadores. A partir de Portugal, mantemos as redes sociais ativas, onde publicamos vários conteúdos, tais como vídeos com *sommeliers* a falar sobre os vinhos portugueses, entre outros. Não temos em vista abrir algum escritório no mercado, mas mantemos uma relação constante com um parceiro local, que implementa a nossa estratégia para o mercado, para além de contarmos com o apoio da Aicep. Para além do que fazemos para aumentar a visibilidade dos vinhos portugueses no Japão, sabemos que a Vinhos Verdes também têm ações de promoção, bem como o Vinha da Madeira que investe unilateralmente. Tudo isto somado contribui para o crescimento da presença e conhecimento por parte dos consumidores japoneses da nossa oferta, apesar de termos consciência de que é ainda pouco. No entanto, o crescimento no mercado japonês nos últimos anos tem sido gradual, e, prevemos que, apesar de uma quebra por causa do Covid-19, o mercado continuará a crescer consistentemente.

## Annex F: Export Barriers Analysis

Here the aim is to report the perception that respondents have on the importance of each export barrier. After adding up the answers that selected the 3 highest levels of importance – “Important”, “Quite important”, and “Very important” – the overall level of importance is given, according to the following criteria:

- from 0% to 30% the level of importance of the barrier is considered to be “Very Low”;
- from 30% to 40% the barrier is considered to have “Low” importance;
- between 40% and 50%, the barrier is considered to have “Moderately low” importance;
- between 50% and 60%, the barrier is considered to be “Moderately” important;
- between 60% and 70% the barrier is considered to be “Moderately high”;
- between 70% and 80%, it is considered to be of “High” importance;
- finally, above 80%, the barrier is considered to be “Very high”.

1. **Limited information to locate/analyse the Japanese market:** “Important” is the most frequent response (17 companies or 28.3%), followed by “Quite important” (15 companies or 25%), “Somewhat important” (11 companies or 18.3%), “Not/Little important” (9 companies or 15%) and “Very important” (8 companies or 13.3%). Therefore, the importance of this barrier is moderately high (“Important”, “Quite important” and “Very important” together represent 66.7% of companies);
2. **Identify business opportunities in Japan:** “Quite important” is the most frequent response (19 companies or 31.7%), followed by “Important” (18 companies or 30%), “Not/Little important” (9 companies or 15%), “Somewhat important” (8 companies or 13.3%) and “Very important” (6 companies or 10%). Therefore, the importance of this barrier is high (“Important”, “Quite important” and “Very important” together represent 71.7% of companies);
3. **Lack of managerial time to deal with the Japanese market:** “Important” is the most frequent response (21 companies or 35%), followed by “Somewhat important” (13 companies or 21.7%), “Not/Little important” (12 companies, or 20%), “Quite important” (11 companies or 18.3%) and “Very important” (3 companies or 5%). This barrier importance is, therefore, moderate, with “Important”, “Quite Important” and “Very important” together accounting to 58.3%.
4. **Insufficient quantity of and/or untrained personnel for working with the Japanese market:** “Important” is the most frequent response (22 companies or 36.7%), followed by “Somewhat Important” (15 companies or 25%), “Not/Little important” (13 companies or 21.7%), “Very Important” (6 companies or 10%), and “Quite Important” (4 companies or 6.7%). Together, “Important”, “Quite Important”, and “Very important”, represent 53.3% of the responses, making the importance of this barrier as moderate;
5. **Lack of excess production capacity for exports to Japan:** “Not/Little Important” was the most frequent response (23 companies or 38.3%), followed by “Important” (17 companies or 28.3%), “Somewhat important” (13 companies or 21.7%), and “Quite important” (7 companies or 11.7%). No respondent selected “Very important”.

Therefore, the importance of this barrier is moderately low or low in importance (“Important” and “Quite Important” together represent only 40%);

6. **Shortage of working capital to finance exports to Japan:** “Not/Little Important” was the most frequent response (21 companies or 35%), followed by “Somewhat Important” (18 companies or 30%), and “Important” (12 companies or 20%). “Quite important” was responded by 9 companies (15%), and “Very important” was not selected by any company. Therefore, the importance of this barrier is of low importance (“Important”, and “Quite Important” together represent only 35%);
7. **Developing new products for the Japanese market:** “Somewhat Important” and “Important” were the most frequent responses (17 companies for each, or 28.3% each), followed by “Not/Little Important” (12 companies, or 20%). “Quite Important” was chosen by 8 companies (13.3%), followed by “Very Important” (6 companies or 10%). Therefore, the importance of this barrier is moderate (“Important, “Quite Important”, and “Very Important” together represent 51.7%);
8. **Meeting the Japanese export product quality, standards, specifications:** “Somewhat Important” was the most frequent choice (17 companies or 28.3%), followed by “Quite Important” (16 companies or 26.7%), “Not/Little Important” (12 companies or 20%), “Important” (8 companies or 13.3%), and “Very Important” (7 companies or 11.7%). “Important”, “Quite Important”, and “Very Important” together account up to 51.7%, making this barrier a moderately important one;
9. **Meeting export packaging and labelling requirements:** “Somewhat Important” was the most frequent choice (18 companies or 30%), followed by “Not/Little Important” (15 companies or 25%), “Quite Important” (13 companies or 21.7%), “Important” (11 companies, or 18.3%) and “Very Important” (3 companies, or 5%). Together, “Important”, “Quite Important”, and “Very Important” represent 45% of the choices, therefore this barrier is of moderately low importance;
10. **Offering technical/after-sales service in Japan:** “Somewhat Important” was the most frequent response (16 companies, or 26.7%). This response was followed by “Not/Little Important” (15 companies, or 25%), “Quite Important” (14 companies, or 23.3%), and “Important” (12 companies, or 20%). Only 3 companies (5%) considered this barrier to be “Very Important”. Together, “Important”, “Quite Important”, and “Very Important” add up to 48.3% of the responses, making this barrier moderately low in importance;
11. **Offering products with a competitive price-quality relation:** “Important” was the most frequent response (17 companies, or 28.3%), followed by “Quite Important” (15 companies, or 25%), and “Somewhat Important” (13 companies, or 21.7%). 12 companies (20%) responded this barrier to be “Not/Little Important”, and only 3 (5%) indicated this barrier to be “Very Important”. Together, “Important”, “Quite Important”, and “Very Important” represent 58.3% of the answers, making this barrier a moderately important barrier;
12. **Complexity of the Japanese distribution system:** “Important” was the most frequent response (17 companies, or 28.3%), followed by “Not/Little Important” (16 companies, or 26.7%), “Somewhat Important” (13 companies, or 21.7%), and “Quite Important” (11 companies, or 18.3%). Only 3 companies (5%) chose “Very Important”. Together, “Important”, “Quite Important”, and “Very Important” account to 51.7% of the choices, making this barrier moderately important;

13. **Difficulty in establishing a partnership/representation in Japan:** “Quite Important” was the most frequent response (19 companies, or 31.7%), followed by “Important” and “Not/Little Important” (13 companies or 21.7% each). “Somewhat Important” was selected by 8 companies (13.3%), and 7 companies (11.7%) saw this barrier as “Very Important”. Together, “Important”, “Quite Important” and “Very Important” represent 65% of the answers, therefore, this barrier is considered a moderately high important one;
14. **Difficulty in maintaining control over representation/image in Japan:** “Important” and “Somewhat Important” were the most frequent responses (both with 17 companies, or 28.3%). “Not/Little Important” was selected by 12 companies (20%), followed by “Quite Important” (11 companies, or 18.3%), and “Very Important” (3 companies, or 5%). “Important”, “Quite Important”, and “Very Important” together account for 51.7% of the choices, making this barrier moderately important;
15. **Excessive transportation/insurance costs:** “Quite Important” was the most frequent response (13 companies, or 23.3%), followed by “Very Important” and “Important” (both with 13 companies, or 15%). “Not/Little Important” was selected by 11 companies (18.3%), and “Somewhat Important” by 9 companies (15%). Together, “Important”, “Quite Important”, and “Very Important account to 66.7% of the choices, making this barrier a moderately high important barrier;
16. **Adjusting export promotional activities to Japan:** “Important” was the most frequent response (19 companies, or 31.7%), followed by “Quite Important” (18 companies, 30%). “Not/Little Important” and “Somewhat Important” both saw 10 companies (16.7% each) selecting these levels of importance. This barrier was only perceived by 3 companies (5%) as “Very Important”. Together, “Important”, “Quite Important”, and “Very Important account to 66.7% of the choices, making this barrier a moderately high important barrier;
17. **Lack of home government assistance/incentives for export activities:** “Quite Important” was the most frequent response (19 companies, or 31.7%), followed by “Important” (13 companies, or 21.7%). 10 companies (16.7%) perceived this barrier as “Not/Little Important”, followed by “Somewhat Important” and “Very Important” (each with 9 companies, or 15% each). Together, “Important”, “Quite Important”, and “Very Important account to 68.3% of the choices, making this barrier a moderately high important barrier;
18. **Complex export procedures for Japan:** “Important” was the most frequent response (17 companies, or 28.3%), followed by “Quite Important” (16 companies, or 26.7%), “Not/Little Important” (13 companies, or 21.7%), “Somewhat Important” (12 companies, or 20%), and “Very Important” (2 companies, or 3.3%). “Important”, “Quite Important” and “Very Important” together represent 58.3% of the choices, making this barrier moderately important;
19. **Difficulties in directly communicating with Japanese customers, due to time difference (8~9 hours) and geographical distance:** “Important” was the most frequent response (21 companies, or 35%), followed by “Somewhat Important” (16 companies, or 26.7%), and “Not/Little Important” (12 companies, or 20%). “Quite Important” was indicated by 6 companies (10%), and “Very Important” by 5 companies

(8.3%). Therefore, “Important”, “Quite Important”, and “Very Important”, amount to 53.3% of the selections making this barrier a moderate one;

- 20. Difficulty in collection of payment from Japan:** “Not/Little Important” was the most frequent response (35 companies, or 58%), followed “Somewhat Important” (13 companies, or 21.7%). “Important” (8 companies, or 13.3%), “Quite Important” (3 companies, 5%), and “Very Important” (1 company, or 1.7%), account only for 20% of the responses, therefore this barrier is perceived with very low importance;
- 21. Understanding the different customer habits and attitudes of the Japanese:** “Important” was the most frequent response (19 companies, or 31.7%). The second most selected options was “Not/Little Important” (12 companies, or 20%), followed by “Quite Important” (11 companies, or 18.3%), “Somewhat Important” (10 companies, or 16.7%), and finally “Very Important” (8 companies, or 13.3%). Together, “Important”, “Quite Important”, and “Very Important”, represent 63.3% of the selections, making this barrier moderately high important;
- 22. Low awareness by Japanese consumers of the Portuguese offer:** “Quite Important” was the most frequent response (17 companies, or 28.3%), followed by “Important” (13 companies, or 21.7%). “Very Important” and “Not/Little Important” were indicated by 11 companies (18.3%), each, and “Somewhat Important” by 8 companies (13.3%). Together, “Important”, “Quite Important” and “Very Important” account to 68.3% of the answers, therefore this barrier is perceived as moderately high importance by the respondents;
- 23. Keen competition in the Japanese market:** “Important” was the most frequent response (18 companies, or 30%), followed by “Quite Important” (17 companies, or 28.3%). “Not/Little Important” was the third most frequent choice (10 companies, or 16.7%), followed by “Somewhat Important” (9 companies, or 15%), and “Very Important” (6 companies, or 10%). “Important”, “Quite Important”, and “Very Important” together account to 68.3%, therefore this barrier is perceived as moderately high importance by the respondents;
- 24. Political and economic conditions in Japan:** “Not/Little Important” was the most frequent response (19 companies, or 31.7%), followed by “Somewhat Important” and “Important” (17 companies each, or 28.3% each). 7 companies (11.7%) perceived the political and economic condition in Japan as a “Quite Important”, and no respondents perceived this barrier as “Very Important”. Together, “Important”, and “Quite Important” represent only 40% of the answers, making this barrier of low or moderately low importance;
- 25. Japanese business culture and practices:** “Important” was the most frequent response (23 companies, or 38.3%), followed by “Not/Little Important” (16 companies, or 26.7%), and “Quite Important” (14 companies, or 23.3%). “Somewhat Important” was indicated by 5 companies (8.3%) and “Very Important” by 2 respondents (3.3%). Therefore, 65% of the respondents (“Important”, “Quite Important”, and “Very Important”) considered this barrier to be moderately high important;
- 26. Differences in verbal (language) and non-verbal (culture) communication:** “Important” was the most frequent response (19 companies, or 31.7%), followed by “Not/Little Important” (14 companies, or 23.3%), “Quite Important” (12 companies, or 20%), “Somewhat Important” (11 companies, or 18.3%), and “Very Important” (4

companies, or 6.7%). Together, “Important”, “Quite Important”, and “Very Important” amount to 58.3% of the answers, making this barrier’s importance as moderate;

- 27. Specific Japanese market norms and regulations:** “Somewhat Important” was the most frequent response (17 companies, or 28.3%), followed by “Important” (16 companies, or 26.7%), “Not/Little Important” (13 companies, or 21.7%), “Quite Important” (12 companies, or 20%), and “Very Important” (2 companies, or 3.3%). “Important”, “Quite Important”, and “Very Important” together represent 50% of the answers, therefore this barrier is perceived as moderate or moderately low important;
- 28. High cost of customs:** “Important” and “Somewhat Important” were the most frequent values (15 companies each, or 25% each). “Quite Important” was selected by 14 companies (23.3%), followed by “Not/Little Important” (9 companies (15%), and “Very Important” (7 companies, or 11.7%). Together, “Important, “Quite Important”, and “Very Important” represent 60% of the answers making this barrier moderately or moderately high important.