

Ready-to-Eat Foods Market in Japan: Key Research Findings 2014

◆ **Research Outline**

Yano Research Institute has conducted a study on the ready-to-eat foods or home meal replacement (HMR) market with the following conditions:

1. Research period: November 2013 to May 2014
2. Research target: Ready-to-eat food market players, and other related companies
3. Research methodologies: Face-to-face interviews, telephone/email surveys, and literature research

<What is the Ready-to-Eat Foods/HMR Market?>

The ready-to-eat foods or home meal replacement market in this research refers to cooked or prepared foods and delicatessen meals of Japanese/Western/Chinese tastes, cooked rice, Bento-style meals, savory and sweet bread/rolls, fast foods, cooked noodles and etc, which are provided by delicatessen stores, convenience stores, mass retailers, department stores, consumer cooperatives, feeding services, fast food stores and etc. Note that frozen/chilled/retort foods and processed foods to be cooked with microwave oven are not included.

◆ **Key Findings**

■ **Ready-to-Eat Foods/HMR Market in 2012 Attained 8,227.8 Billion Yen, 100.6% of the Previous Year**

The ready-to-eat foods or home meal replacement market for FY2012 reached 8,227.8 billion yen on Y-o-Y basis, based on the retail prices. Although the market once slowed down due to the prolonged domestic recession, it has become stable again since FY2010.

■ **Convenience Stores Marking Favorable Sales among Various Rivals**

The convenience stores, among various sales channels of the market, showed favorable sales in FY2012, whereas the department stores reduced the sales. Such trends partly attribute to higher quality in the ready-to-eat foods and meals provided by convenience stores and mass merchandisers, making it difficult for department stores to differentiate themselves in the product quality from other sales channels.

■ **Further Growth Projected for Ready-to-Eat Foods/HMR Market**

In the society of decreasing birthrate and aging population, it is considered that the foods-related markets in Japan shrink in the long terms, but that the ready-to-eat foods market expands as single or double-income households increase in Japan, because these households have less opportunities to cook at home, so that they are expected to use ready-to-eat meals with high frequency. The ready-to-eat foods or home meal replacement market for FY2013 is likely to attain 8,279.6 billion yen or 100.6% of the size of the previous year, which is projected to grow further in FY2014 to 8,321.3 billion yen or 100.5% of the size of the year before.

◆ **Report format:**

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Price: 110,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

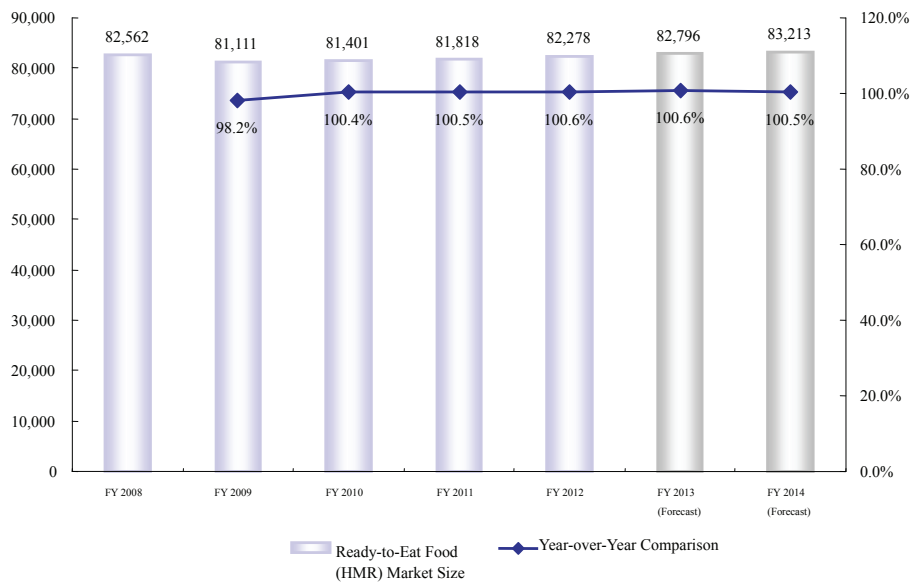
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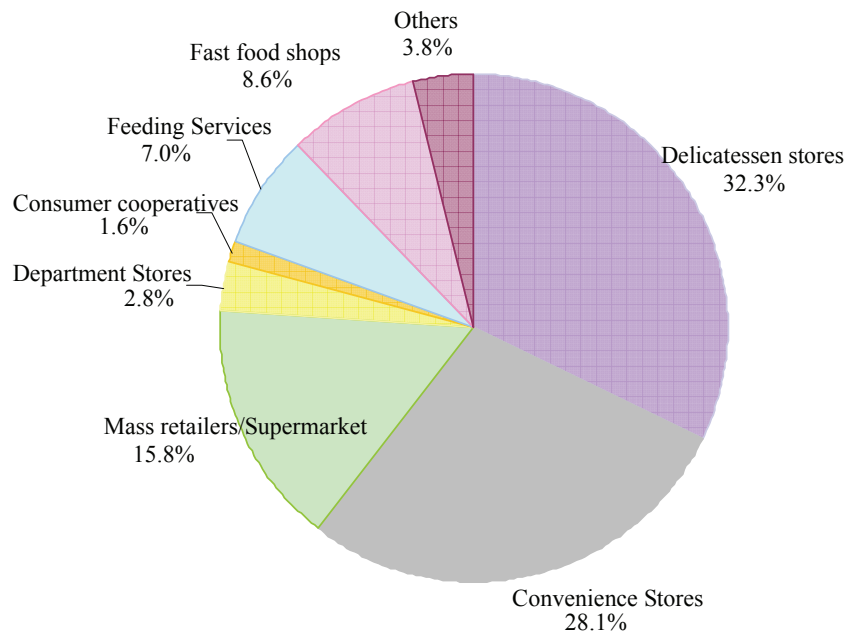
■ **Figure 1: Transition of Size of Ready-to-Eat Foods/Home Meal Replacement Market**



Notes:

1. The figures are based on the retail prices.

■ **Figure 2: FY2012 Component Ratio of Sales Channels in Ready-to-Eat Foods/Home Meal Replacement Market**



Notes:

2. The figures are based on the retail prices.
3. "Others" include those ready-to-eat-meals that were cooked at theme parks, public transportation, and hotels. Note that no food and drinks within the facilities included.