

Breads and Rolls Market in Japan: Key Research Findings 2015

◆ Research Outline

Yano Research Institute has conducted a study on the domestic breads and rolls market with the following conditions:

1. Research period: From January to March, 2015
2. Research targets: Manufacturers, wholesalers of bread, rolls and sandwiches, and leading bakeries
3. Research methodologies: Face-to-face interviews by the expert researchers, survey via telephone/online, and literature research

What are Retail Channels for Breads and Rolls Market?

The retail channels in this research are defined as follows:

- Bakeries: Retailers and retail chain stores that sell breads and rolls baked within that store. Those in-store bakeries within supermarkets and department stores are included.
- Mass Merchandisers: Stores that sell breads and rolls bought from external bread makers. General supermarkets, food-exclusive supermarkets, and co-op stores are included.
- Groceries: Retailers that sell breads and rolls from leading bread makers.
- School Lunches: Breads and rolls delivered at school lunches.
- Others: Other channels including restaurants and hotels.

◆ Key Findings

■ Size of Domestic Breads and Rolls Market in FY2013 Achieved 1,404.2 Billion Yen, 100.2% on Y-o-Y Bases

The domestic breads and rolls market in FY2013 attained 1,404.2 billion yen, 100.2% of the size in the previous fiscal year, based on the shipment values at manufacturers. The market in FY2013 was led by so-called “premium” sandwich loaves (or Pullman loaves) made and baked using special ingredients and particular methods. The market also showed favorable sales in table and savory rolls, exceeding the sales in the preceding fiscal year, respectively. The domestic breads and rolls market is likely to rise slightly from flat level in the short term view. Therefore, the market size for FY 2014 is projected to be 100.4% of the size of the previous fiscal year to attain 1,410.5 billion yen, and for FY2015 to be 100.5% to achieve 1,417.9 billion yen.

■ Table Breads and Rolls Occupy Almost 30% Among All Breads and Rolls Types, Sales of Savory Deli Rolls in Good Shape

When looking at the breads and rolls market in FY2013 by product type, those that are tend to be consumed within one of three meals a day, such as table rolls, savory breads, and deli rolls, have grown to reach almost 30% of the market share. On the other hand, relatively-expensive premium sandwich loaves or Pullman loaves made and baked using special ingredients and particular method led the entire market. Among various savory breads and rolls, deli rolls baked with various types of delis inside or on top of the dough, have gradually and stably increased the sales during a long period of time, backed by consumers at CVS and bakeries.

■ **Mass Merchandisers and CVS Occupy Close to 60% of Entire Retail Channels for Breads and Rolls Market**

The shipment value of breads and rolls market via mass merchandisers reached 460.8 billion yen, 32.8% of the market share by channel. The market size via convenience stores slightly increased to 370.9 billion yen, accounting for 26.4%.

◆ **Report format :**

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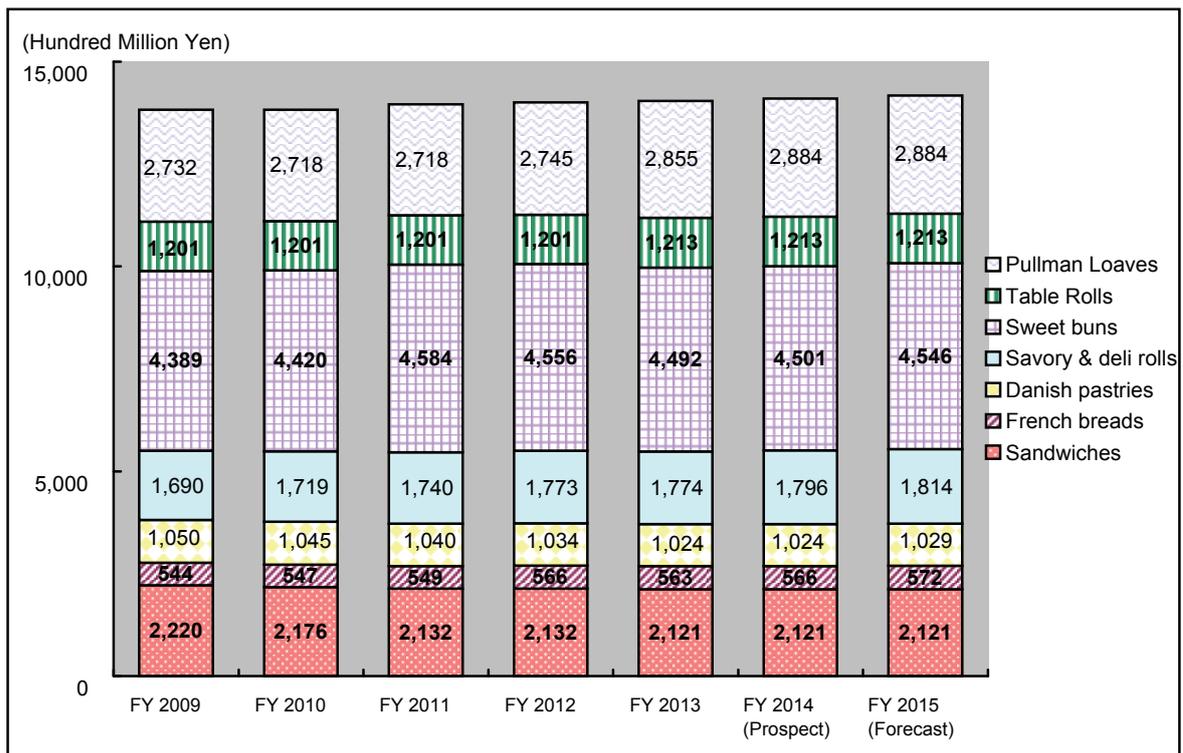
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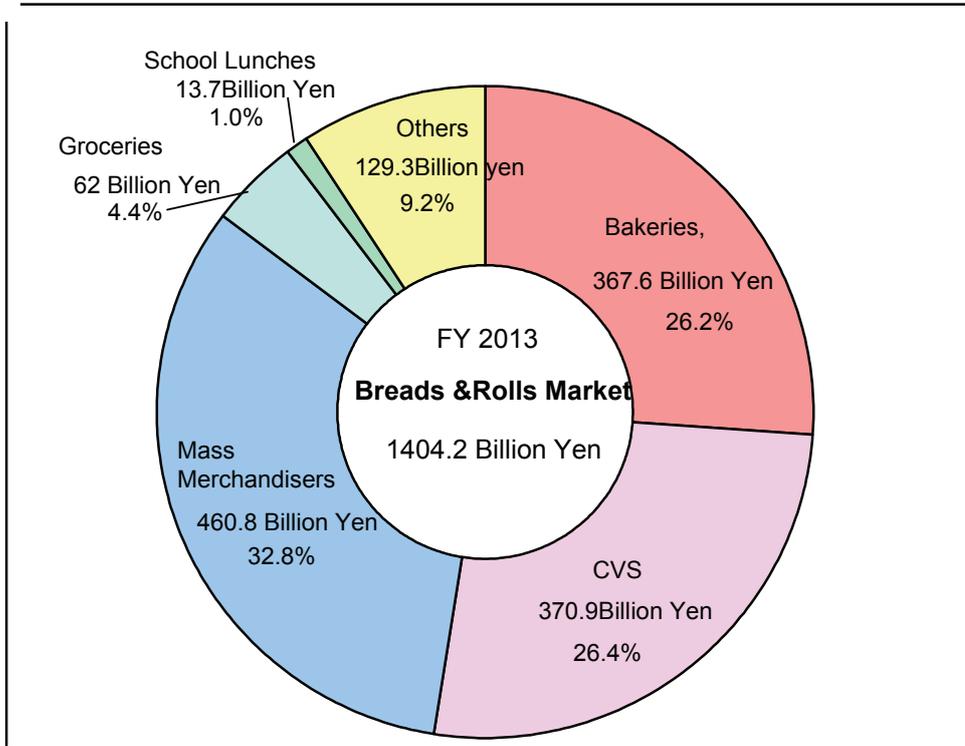
■ **Figure 1: Transition and Forecast of Breads and Rolls Market Size**



Notes:

1. The figures are based on the shipment values at manufacturers.
2. Breads and rolls include those that use frozen bread dough.
3. The numerical values are rounded, so that some totals in the figure may not match.

■ **Figure 2: Size of Breads and Rolls Market by Retail Channel**



Notes:

4. The figures are based on shipment values at manufacturers.
5. Breads and rolls include those that use frozen bread dough.
6. The retail channels in this research are defined as follows: 1) Bakeries: Retailers and retail chain stores that sell breads and rolls baked within that store. Those in-store bakeries within supermarkets and department stores are included. 2) Mass Merchandisers: Stores that sell breads and rolls bought from external bread makers. General supermarkets, food-exclusive supermarkets, and co-op stores are included. 3) Groceries: Retailers that sell breads and rolls from leading bread makers. 4) School Lunches: Breads and rolls delivered at school lunches. 5) Others: Other channels include restaurants and hotels.