

Medical Meal Service/Therapeutic Meal Delivery Service Market in Japan: Key Research Findings 2015

◆ Research Outline

Yano Research Institute has conducted a study on the domestic medical meal service/therapeutic meal delivery service market with the following conditions:

1. Research period: April to June, 2015
2. Research target: Medical meal/therapeutic meal service providers, hospitals, other related organizations, and supervisory authorities
3. Research methodologies: Face-to-face interviews by the specialized researchers, surveys via telephone/mail-in questionnaire, and literature research

<What are the Medical Meal Services/Therapeutic Meal Delivery Services?>

The medical meal services in this research indicate those meal services considered and prepared for hospitals (the meals for inpatients and hospital personnel) and for long-term care facilities or facilities for the elderly (i.e., the meals for the elderly admitted to the facilities and for facility personnel) by the contract or non-contract service providers.

The therapeutic meal delivery services in this research indicate the meal services prepared and delivered on a regular basis to the homes of the elderly, the disabled, and home-care patients (or potential patients) of diabetes, liver disorder and other diseases, by the contract or non-contract service providers.

The services in the market include those budgeted and conducted by the local governments and paid partly or wholly by the users.

◆ Key Findings

■ Size of Medical Meal Service/Therapeutic Meal Delivery Service Market in FY2014 Slightly Rose from Previous Year to Attain 2,133.7 Billion Yen

The total market size of medical meal services (hospital meals, meals for long-term care facilities) and therapeutic meal delivery services (healthy and therapeutic meals for home-care patients) in FY2014 was 2,133.7 billion yen, 101.2% of the size in the previous fiscal year, based on the sales of meal services sold by the final meal service price. The decrement of hospital meal service sales have been covered by the increased sales of meal services for long-term care facilities and therapeutic meal delivery services, slightly exceeding the market size of the preceding year as a whole

■ Stable Market Expected for Meal Services for Long-term Care Facilities and Therapeutic Meal Delivery Services

The market size in FY2014 by category is as follows: the market size of the hospital meal services attained 1,197.1 billion yen, 99.4% on Y-o-Y basis, the meal services for long-term care facilities 831.6 billion yen, 103.0%, and therapeutic meal delivery services 105.0 billion yen, 108.2%.

Since Japan is facing the super-aging society, both the number of long-term care facilities (facilities for the elderly) and the population of the seniors are likely to increase significantly, boosting the market for the future.

◆ **Report format:**

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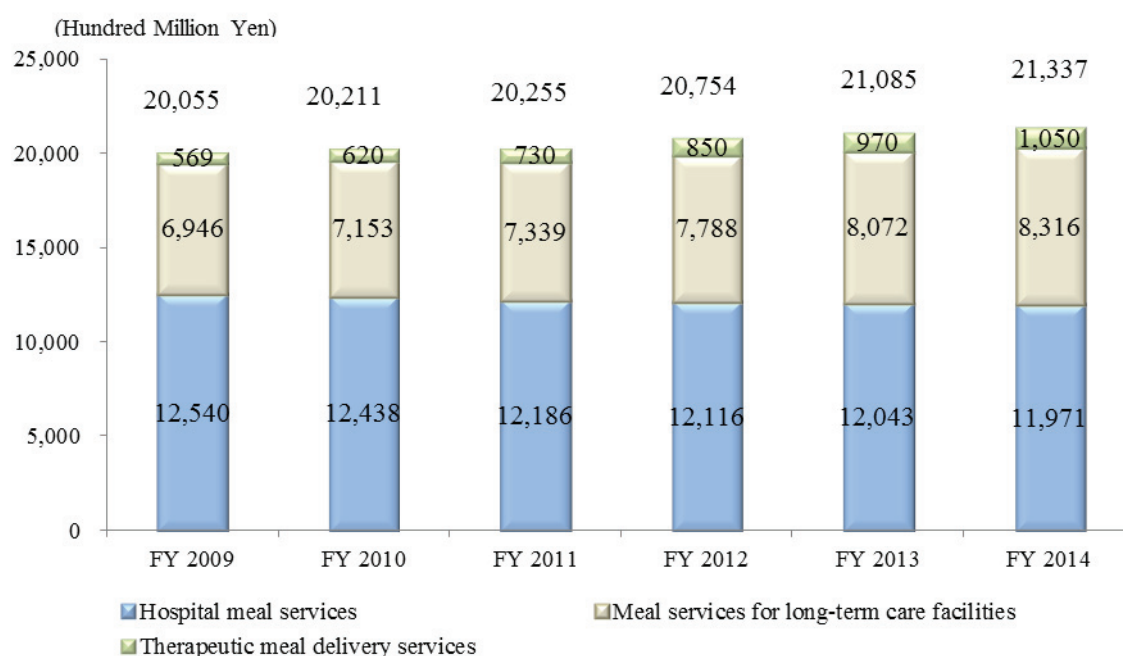
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■ **Figure 1: Transition of Size of Medical Meal Service/Therapeutic Meal Delivery Service Market**



Notes:

1. The market size is based on the sales of meal services sold by the final meal service price.