

Mail-Order Food Business Market in Japan: Key Research Findings 2015

◆ Research Outline

Yano Research Institute has conducted a study on the domestic mail-order food business market for enterprises with the following conditions:

1. Research period: From June to August, 2015
2. Research target: mail-order business, mail-order food business, food companies, co-op stores, natural food deliveries, online supermarkets, direct sales from manufacturers, and wholesalers
3. Research methodologies: Questionnaire by the expert researchers, surveys via telephone/email, and literature research

<What is the Mail-Order Food Business Market?>

The mail-order food business market in this research targets the following categories: 1) Shopping site (Orders from Catalogues), 2) Co-op stores, 3) Natural food deliveries, 4) Online supermarket, 5) Deliveries by convenience stores, and 6) Direct sales from food manufacturers. The products handled in the market are as follows: Fresh foods (sea food, meats, vegetables & fruits), rice, beverages (mineral waters included, but no products of water home delivery), liquors, sweets and confectionaries, health foods, and other processed foods. No everyday sundries are included.

◆ Key Findings

■ **Mail-Order Food Business Market Size in FY2014 Projected to attain 3,177.2 Billion Yen, 104.8% of Previous Fiscal Year**

Size of the mail-order food business market in FY2014 is projected to reach 3,177.2 billion yen, 104.8% of that in the preceding fiscal year, based on the retail price. FY2014 saw a last-minute surge in demand just before the consumption tax increase in April 2014. Although the surge turned into a downturn soon after the consumption tax was increased, favorable sales continued in the market, especially at leading shopping websites.

■ **Enhancement in Handling Foods at Leading Shopping Sites Contributed to Market Expansion**

In the recent years, leading shopping websites that mainly handle internet mail orders are expanding their business, closing in on co-op stores that occupy the largest share of the mail-order food business market by channel. As the market expands, increasing number of companies has been entering the market by directly selling products from food manufacturers. The mail-order food business market as a whole is basically on the rise, influenced by the enhancement of treating more foods by the leading shopping sites.

■ **Size of Mail-Order Food Business Market for FY2019 Estimated to Achieve 3,753.9 Billion Yen, 118.2% of Size of FY2014**

The mail-order food business market is likely to grow by annual 3 to 4% during the next several years, attaining 3,753.9 billion yen by FY2019, 118.2% of the size in FY2014, based on the retail price. Especially, the strength earned by enhanced food business at shopping sites is likely to continue for the time being, which may outperform the co-op stores to drag down their position as the largest market share holders to the second place in around FY2017.

◆ **Report format:**

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

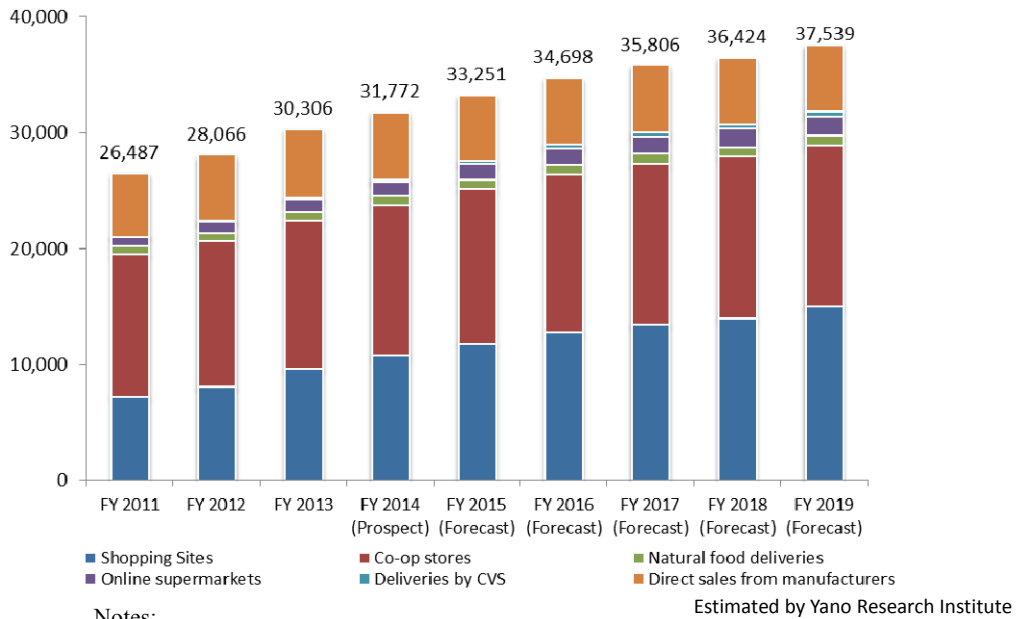
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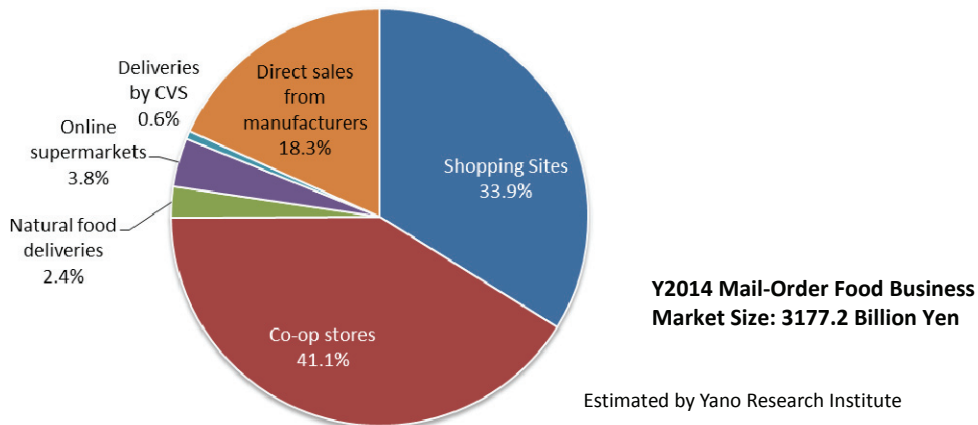
■ **Figure 1: Transition and Forecast of Mail-Order Food Business Market Size**



Notes:

1. The market size is calculated based on the retail price.
2. The figures for FY2014 are prospect, and the figures for FY2015 and beyond are forecast.

■ **Figure 2: Mail-Order Food Business Market Share by Channel (FY2014Prospect)**



Notes:

3. The market size is calculated based on the retail price.
4. The figures for FY2014 are prospect.