

Japanese/Western-Type Confectionery and Sweets Market in Japan: Key Research Findings 2015

◆ **Research Outline**

Yano Research Institute has conducted a study on the domestic Japanese/Western-type confectionery and sweets market with the following conditions:

1. Research period: From September to December, 2015
2. Research targets: Manufacturers, wholesalers of the confectionery and sweets industry, department stores, commercial facilities in the building of railroad stations, and etc.
3. Research methodologies: Face-to-face interviews by the expert researchers, mail-in questionnaire, surveys via telephone, and literature search

What is the Japanese/Western-Type Confectionery and Sweets Market?

The Japanese/Western-type confectionery and sweets market in this research indicates the market consisted of the following four categories: 1) Japanese-type confectioneries/sweets classified into fresh, soft (semi-baked), dry, and fully-baked; 2) Western-type confectioneries/sweets classified into fresh, semi-baked, and fully-baked; 3) Desserts including yogurt, pudding, jelly, and other desserts packaged in cups; and 4) Ice creams including various ice creams and iced confectioneries.

◆ **Key Findings**

■ **Prospects of Japanese/Western-Type Confectionery and Sweets Market Size for FY2015 Rises by 1.1% from Previous Fiscal Year to 2,163.4 Billion Yen**

The Japanese/Western-type confectionery and sweets market in FY2014 showed relatively stable growth, minimizing the negative influences of consumption tax increase and product price rise. The tax increase affected limitedly to the first half of the fiscal year, so that most of the market players found that the market have recovered by the latter half of the year. Since the sales performance at many enterprises have been exceeding the preceding fiscal year, the market size for FY2015 is expected to rise by 1.1% on year-over-year basis to attain 2,163.4 billion yen.

■ **CVS and Mail Order Business Continues Expansion**

In the composition ratio of the domestic sales of Japanese/Western-type confectioneries and sweets market by channel in FY2014, mass merchandisers occupied 35.7%, followed by convenience stores (CVS) accounting for 22.4%, and department stores 18.9%. When compared with the results of FY2013, CVS has made a remarkable growth, expanding by 3.8%, and mail order services gained by 3.1%. The market size of “other channels”, which includes airports, grew by impressive 4.1%, stemming from increase of inbound tourism demands (consumption by the foreign visitors to Japan) that have contributed in the favorable sales at airports.

■ **The Entire Market Driven by Growth of Yogurt and Ice Cream Markets**

Despite contribution of supporting the entire market by the yogurt sector that continued expansion and by the ice cream sector that exceeded the previous-year market size, growing thriftiness in consumer sentiment after the consumption tax increase has brought about shift of consumer demands in daily sweets from purchasing expensive Gâteau at classy patisseries to more affordable products at mass merchandizers or CVS, which led the western-type confectionery and sweets market to fall short of expansion.

◆ **Report format :**

Published report: “Confectionery Industry: Sweets and Desserts 2015-2016”

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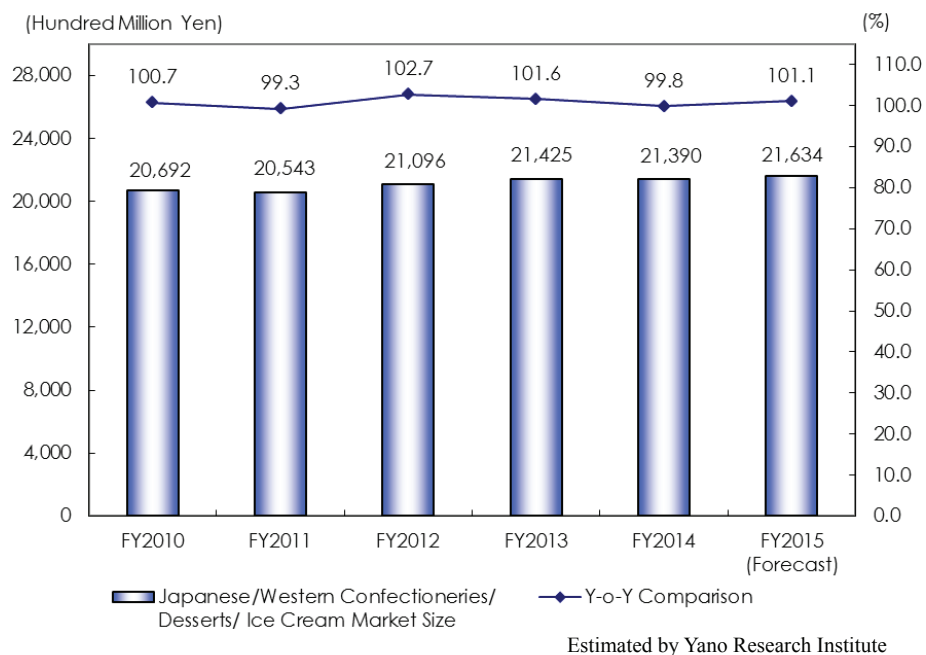
Language: Japanese

Format: 670 pages in A4 format

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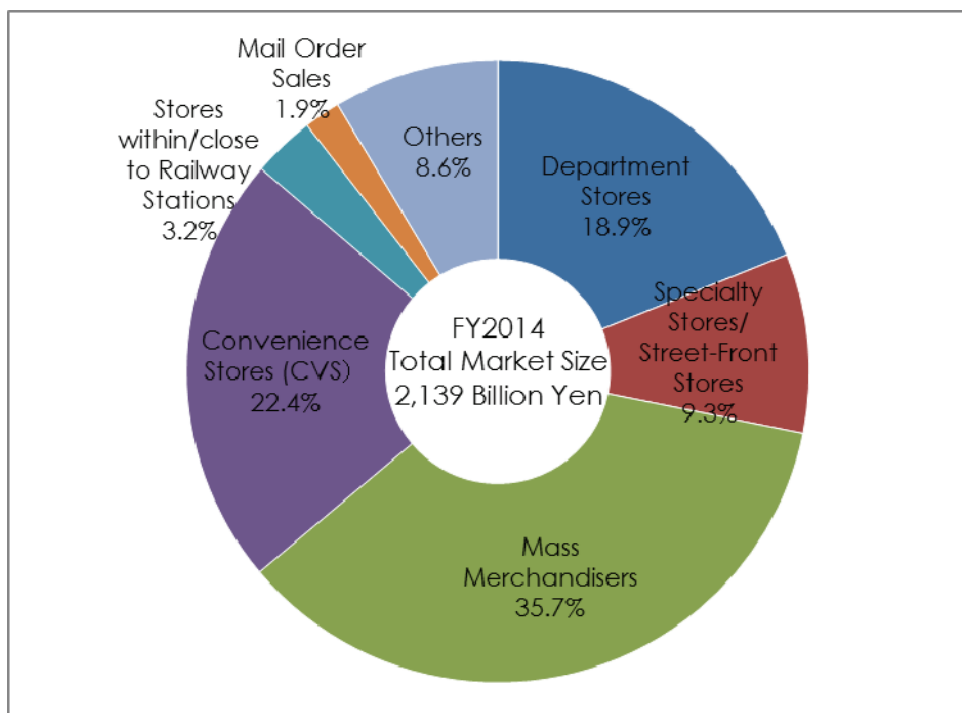
■ **Figure 1: Transition of Size of Japanese/Western Confectioneries Market**



Notes:

1. The market size is based on the shipment values at manufacturers.
2. The ice cream market size until FY2014 included in this report is extracted from the figures announced in Japan Ice Cream Association, and that of FY2015 is estimated by Yano Research Institute.

■ **Figure 2: Transition of Size of Japanese/Western Confectioneries Market by Channel**



Estimated by Yano Research Institute

Notes:

3. The market size is based on the shipment values at manufacturers.
4. Sales channels in this research are defined as follows: “Specialty Stores/Street-Front Stores” indicate those specialty stores within shopping malls and street-front stores; “Mass Merchandisers” indicate large supermarkets that specially handles foods; “Stores within/close to Railway Stations” indicate those stores within the commercial facilities inside the stations or within shopping malls operated by railway station companies; “Others” include those specialty stores located in airports, service/parking areas on a highway, and home delivery services such as Co-op.