

## **Long-Term Care Meal Market: Key Research Findings 2016**

### ◆ **Research Outline**

**Yano Research Institute has conducted a study on the domestic long-term care meals market with the following conditions:**

1. Research period: July to September, 2016
2. Research target: Providers of food services and food home delivery services, and processed foods manufacturers
3. Research methodologies: Face-to-face interviews by the expert researchers, surveys via telephone, and literature research

#### **<What are Long-Term Care Meals?>**

Long-term care meals in this research are those foods supposed to be consumed by the elderly and those who have acquired Certification of Needed Support or Certification of Needed Long-Term Care, which include processed foods used at home, and cooked foods/meals (including bento) fed at or delivered to long-term care facilities and hospitals provided by food service providers or food home delivery service providers.

#### **<What is the Long-Term Care Meal Market?>**

The long-term care meal market in this research indicates the market of long-term care meals (in the form of cooked foods/meals and processed foods), including dysphagia foods, swallowing difficulty foods, high density liquid diet, and nutritional supplementary foods used by some elderly who need long-term care and cannot eat general foods because of oral disease, swallowing difficulty, cerebral hypofunction, and etc.

Note that processed foods and cooked foods/meals (such as bento or foods by food services) for healthy elderly, or those therapeutic diet (cooked/processed foods) e.g. protein-restricted diet, energy-controlled meals, and etc. are not included in the market size.

### ◆ **Key Findings**

#### ■ **Market Size of Processed-Food-Type Long-Term Care Meals in FY2015 Attained 99.1 Billion Yen, and Cooked-Foods/Meals Type Achieved 494.2 Billion Yen**

The long-term care meal market has continue being on the rise due to the aging society. Because of the advanced medical technologies and medicines, Japan has built a longevity society. However, longevity is not necessarily achieved by healthy people, but also by increasing number of those who need long term care or those elderly who cannot take general meals because of oral disease, swallowing difficulty, cerebral hypofunction, and etc. These factors have increased the ratio of long-term care meals within the cooked foods/meals or processed foods served at or delivered to long-term care facilities, hospitals and etc.

The domestic long-term care meal market size in FY2015 in the form of processed foods (based on the shipment value at manufacturers) attained 99.1 billion yen, 103.7% of that of the previous fiscal year, and the market in the form of cooked foods/meals (based on the sales from end users) achieved 494.2 billion yen, 101.6% of the size of the preceding fiscal year.

■ **Among Long-Term Care Meals, Largest Ratio of Cooked Foods/Meals Occupied by Those at Long-Term Care Facilities, While Largest Ratio of Processed Foods Occupied by High Density Liquid Diet**

When looking at the details of the long-term care meal market in FY2015, the meals cooked at long-term care facilities occupied the largest share of the market of long-term care meals in the form of cooked foods/meals, followed by food services provided at hospitals. On the other hand, high density liquid diet occupied the largest share of the market in the form of processed foods, followed by dysphagia foods.

◆ **Report Format:**

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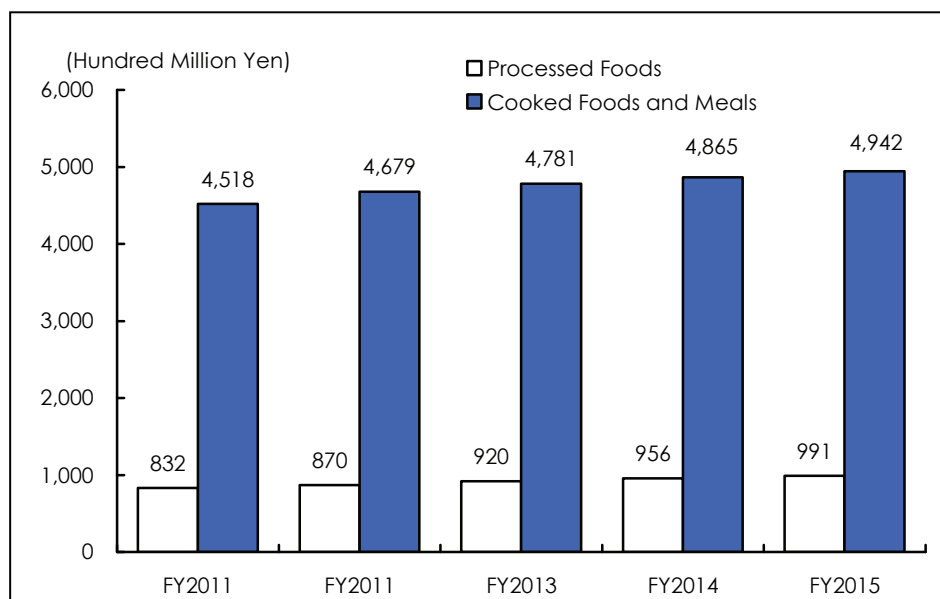
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■ **Figure 1: Transition of Long-Term Care Meals Market Size**



Estimated by Yano Research Institute

Notes:

1. The market of long-term meals in the form of processed foods is based on the shipment value at manufacturers and long-term meals in the form of cooked foods/meals or bento provided by food service or food home delivery service providers is based on the service price for end users.
2. The long-term care meal market in this research indicates the market of long-term care meals (in the form of cooked foods/meals and processed foods), including dysphagia foods, swallowing difficulty foods, high density liquid diet, and nutritional supplementary foods used by some elderly who need long-term care and cannot eat general foods because of oral disease, swallowing difficulty, cerebral hypofunction, and etc.

Note that processed foods and cooked foods/meals (such as bento or foods by food services) for healthy elderly, or those therapeutic diet (cooked/processed foods) e.g. protein-restricted diet, energy-controlled meals, and etc. are not included in the market size.