

Breads and Rolls Market in Japan: Key Research Findings 2017

◆ **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, 2017
2. Research targets: Manufacturers and wholesalers of bread, rolls and sandwiches, and major 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 procured from external bread makers. General supermarkets, food-exclusive supermarkets, and co-op stores are included.
- **Groceries:** Retailers that sell breads and rolls supplied from leading bread makers.
- **School Cafeterias:** Breads and rolls delivered at school cafeterias.
- **Others:** Other channels include café & bakeries, restaurants/hotels, diners, meal services to companies, and online stores.

◆ **Key Findings**

■ **Size of Domestic Breads and Rolls Market in FY2015 Achieved 1,509.7 Billion Yen, 102.8% on Y-o-Y Bases**

The domestic breads and rolls market in FY2015 attained 1,509.7 billion yen, 102.8% of the size of the previous fiscal year, based on the shipment value at manufacturers. The market in FY2015 was led by so-called “premium” Pullman and sandwich loaves made and baked using special ingredients and particular methods, and also led by megahit Pullman loaves from large bread makers. The market also showed favorable sales in sweet buns, savory & deli rolls, and sandwiches. The domestic breads and rolls market is likely to keep rising slightly. Therefore, the market size for FY 2016 is projected to be 101.8% of the size of the previous fiscal year to attain 1,537.1 billion yen, and for FY2017 to be 101.1% to achieve 1,553.7 billion yen.

■ **While Market Continues Being Led by Pullman and Sandwich Loaves, Savory & Deli Rolls Expanding Market by Growing Demand for Eating Immediately after Purchase**

When looking at the breads and rolls market in FY2015 by product type, Pullman and sandwich loaves have continued increased their market share. The domestic bread and roll market has been led by those relatively-expensive premium sandwich or Pullman loaves made from special ingredients and particular methods and also by megahit Pullman loaves from large bread makers.

Savory & deli rolls have also expanded their market share because they met the increasing consumer needs to eat immediately after the purchase of the food. Sandwiches, too, have increased the market share for two years in a row, as the management of the leading convenience stores has enhanced the development and the sales of sandwiches.

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

When viewed from the size of the domestic bread and rolls market by retail channel, mass merchandisers occupy 32.7% of the market share by channel with 493.1 billion yen in shipment value, followed by convenience stores accounting for 27.8% with 419.1 billion yen in shipment value, which indicate that more than 60% of the market is dominated by mass merchandisers and convenience stores.

◆ **Report format :**

Published report: “Bread and Roll Market 2017”

Issued on: March 31, 2017

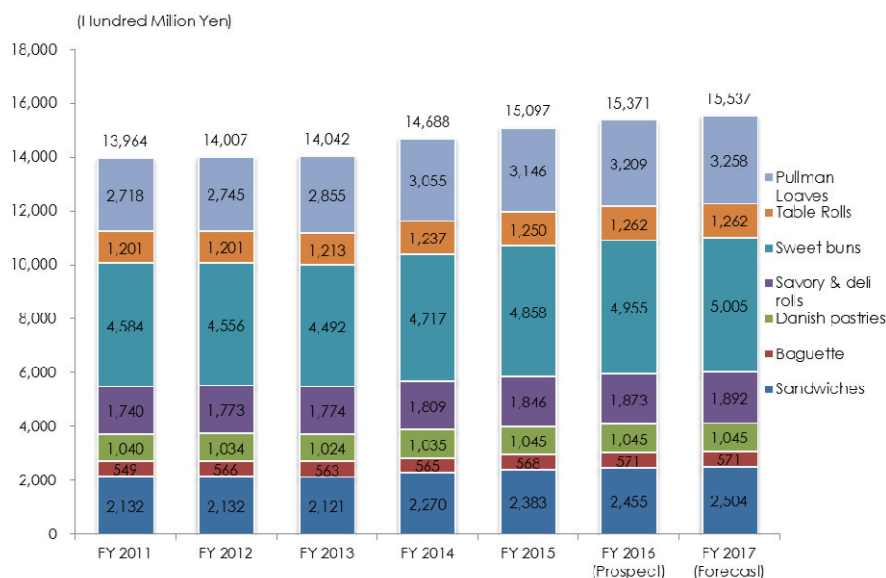
Language: Japanese

Format: 520 pages in A4 format

Price: 120,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

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

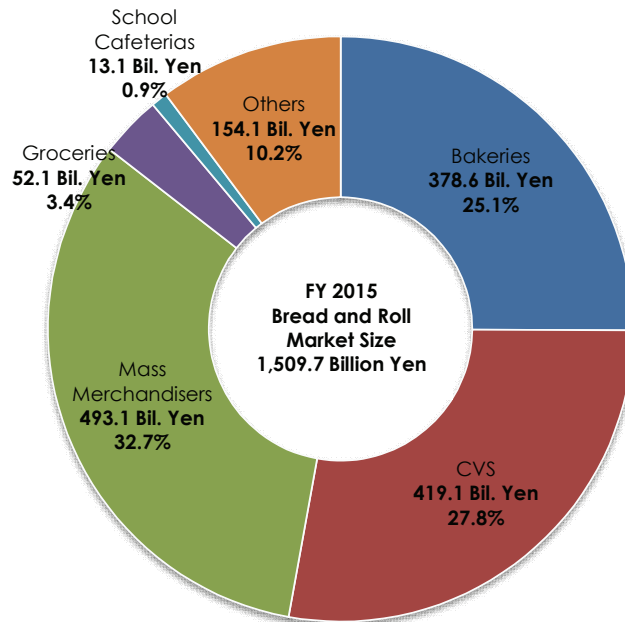


Survey by Yano Research Institute

Notes:

1. The market size is based on the shipment value 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 in FY2015 by Retail Channel**



Survey by Yano Research Institute

Notes:

4. The market size is based on the shipment value 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 procured from external bread makers. General supermarkets, food-exclusive supermarkets, and co-op stores are included. 3) Groceries: Retailers that sell breads and rolls supplied from leading bread makers. 4) School Cafeterias: Breads and rolls delivered at school cafeterias. 5) Others: Other channels include café & bakeries, restaurants/hotels, diners, meal services to companies, and online stores.
7. The numerical values are rounded, so that some totals and ratios in the figure may not match.