

## Medical Meal Service/Therapeutic Meal Delivery Service Market in Japan: Key Research Findings 2017

### ◆ 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, 2017
2. Research target: Medical/therapeutic meal service providers, hospitals, special elderly nursing homes, long-term care facilities, and other related organizations
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. Non-contract service providers are those under direct management of the enterprises that run the facilities.

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 public auxiliary services budgeted and conducted by the local governments and paid partly by the individual users, and those services paid wholly by the individual users.

### ◆ Key Findings

#### ■ Size of Medical Meal Service/Therapeutic Meal Delivery Service Market in FY2016 Slightly Rose to 101.3% on Y-o-Y Basis to Attain 2,201.1 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 FY2016 was 2,201.1 billion yen, 101.3% of the size in the previous fiscal year, based on the sales of meal services sold by the final meal service price. Because of continuous decrement of domestic numbers of hospitals and hospital beds, the market of hospital meals are likely to decline for the future.

#### ■ Led by Meal Services for Long-Term-Care Facilities and Therapeutic Meal Delivery Services, Entire Market Expected to Continue Being Stable

When looking at the domestic medical meal service/therapeutic meal delivery service market size in FY2016 by category, the market size of the hospital meal services attained 1,177.6 billion yen, 99.3% on Y-o-Y basis, the meal services for long-term care facilities 904.5 billion yen, 103.4%, and therapeutic meal delivery services 119.0 billion yen, 106.3%. Since Japan is facing a super-aging society, increasing number of long-term care facilities and expanding

population of the seniors staying home are likely to boost the markets of meal services for long-term care facilities and of therapeutic meal delivery services.

◆ **Report format:**

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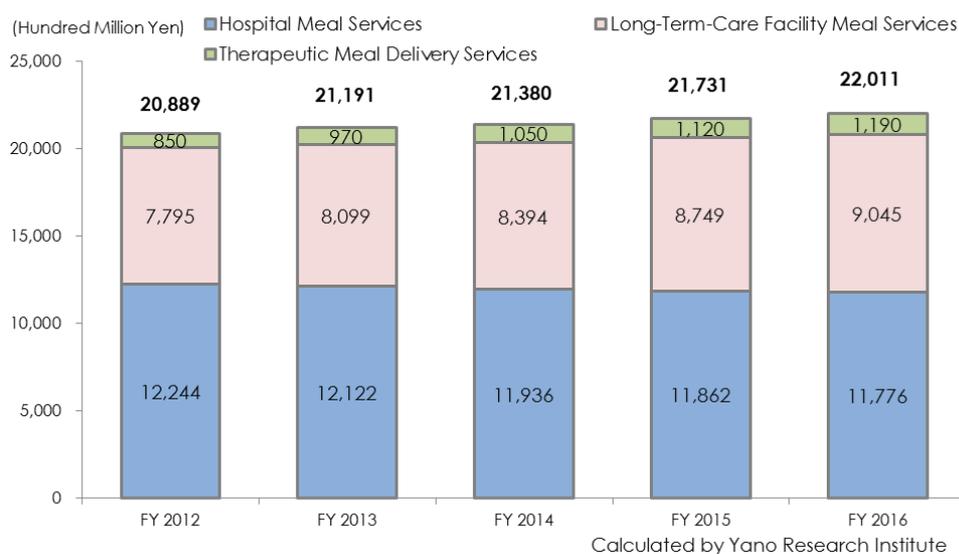
**Contacts:** Public Relations

**Yano Research Institute Ltd. (URL: <http://www.yanoresearch.com>)**

Phone: +81-3-5371-6912

E-mail: [press@yano.co.jp](mailto:press@yano.co.jp)

■ **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.
2. 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 service providers. Non-contract service providers are those under direct management of the enterprises that run the facilities.
3. The therapeutic meal delivery services (home healthcare meals) in this research indicate the meal services prepared and delivered on a regular basis to the homes of the elderly and/or patients of diseases. The services in the market include those public auxiliary services budgeted and conducted by the local governments and paid partly by the individual users, and those services paid wholly by the individual users.