

Commercial Foods Market in Japan: Key Research Findings 2017

◆ Research Outline

Yano Research Institute has conducted a study on the domestic commercial foods market with the following conditions:

1. Research period: From May to July, 2017
2. Research target: Food makers, commercial foods wholesalers, food service providers, hotels, and etc.
3. Research methodologies: Surveys via telephone by the expert researchers and questionnaire to businesses

What are commercial foods?

Commercial foods in this research indicate processed foods, liquors and other beverages that food makers and suppliers sell to food service providers, ready-to-eat food companies, meal service providers and other processed food enterprises. Note that non-processed or primary-processed fresh foods (vegetables, meats, and fishes), food improvers, and additives are not included.

◆ Key Findings

■ **Commercial Foods Market in FY2016 Rose by 1.1% to Attain 3,834.2 Billion Yen With Stable Food Service/ Ready-to-Eat Food Markets On the Rise**

The domestic commercial foods market in FY2016 attained 3,834.2 billion yen, a rise by 1.1% from the previous fiscal year, based on the shipment value at manufacturers. Stable demands in the markets of food services and ready-to-eat foods have led the entire market to exceed the previous-year results also in FY2016.

■ **Many Commercial Foods Makers Responded Having Satisfactory Reactions When Selling Labor Saving Products**

Results of questionnaire relating with the research conducted to the commercial foods makers indicated that 68.8% of such makers (i.e., 11 out of 16 enterprises) have sold labor-saving products aiming to simplify the processes, shorten the time, and to save labor. Out of these 11 enterprises, 90.9% of them (i.e., 10 enterprises) responded that they had a certain level of satisfactory reactions when selling such products. Therefore, the demand of commercial foods for coping with labor shortage is likely to expand for the future.

■ **Commercial Foods Market for FY2020 Projected to Expand to 3,950.8 Billion Yen**

The demand of commercial foods aiming to save labor is likely to continue growing for the future, because labor shortage stemming from falling birth rate and aging population has been the challenge for the demanders of commercial foods. The market size of commercial foods in FY2020, the year when Tokyo Olympic/Paralympic Games are to be held, is projected to attain 3,950.8 billion yen, based on the shipment value at manufacturers.

◆ **Report Format:**

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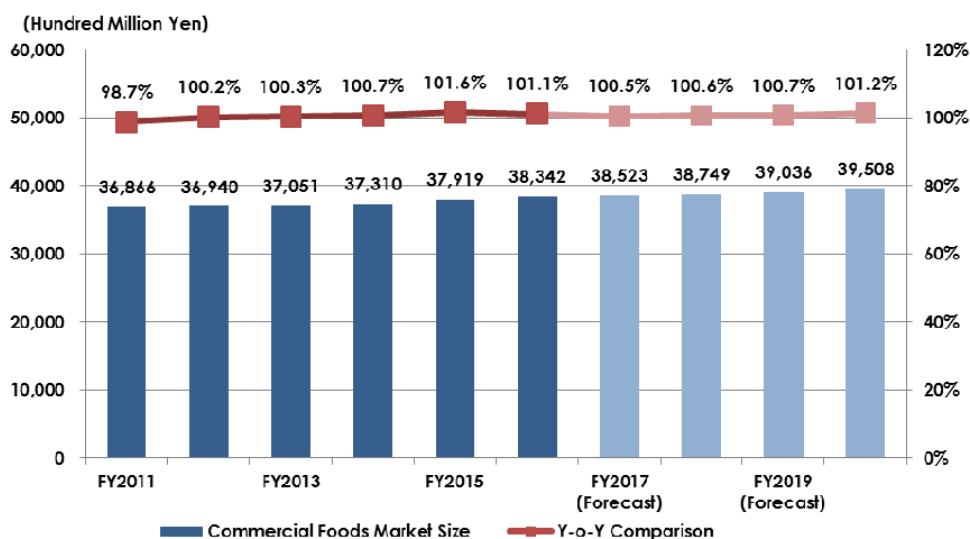
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■ **Figure 1: Transition and Forecast of Commercial Foods Market Size**



Estimated by Yano Research Institute

Notes:

- The figures are based on the shipment value at food makers.
- Commercial foods in this research indicate processed foods, liquors and other beverages that food makers and suppliers sell to food service providers, ready-to-eat food companies, meal service providers and other processed food enterprises. Note that non-processed or primary-processed fresh foods (vegetables, meats, and fishes), food improvers, and additives are not included.

■ **Figure 2: Whether or Not Commercial Foods Makers Sell Labor Saving Products**

Items	Response Rate (N=16)
Yes	68.8%
No	31.3%

Created by Yano Research Institute

Notes:

- Research period: June, 2017; Researched to: 16 foods makers that produce domestic commercial products; Research methodology: Questionnaire via telephone, single response allowed.

■ **Figure 3: Reaction of Users regarding Labor Saving Products**

Items	Response Rate (N=11)
Weak reactions are found from users when selling labor-saving products.	0.0%
Somewhat satisfactory reactions are found when selling labor-saving products.	36.4%
Strong, favorable responses are found when selling labor-saving products.	45.5%
Sales have grown as far as to enhance the production system.	9.1%
Other responses	9.1%

Created by Yano Research Institute

Notes:

- Research period: June, 2017; Researched to: 11 enterprises that responded having labor saving products out of 16 foods makers that produce domestic commercial foods; Research methodology: Questionnaire via telephone, single response allowed.

■ **Figure 4: Status of Labor Shortage at Local Cooking Sites, Stores/Restaurants/Hotels Where Cooked/Processed Foods are Provided**

Items	Response Rate (N=25)
Labor shortage is not yet the problem.	16.0%
Feel a shortage of labor a little, but not the level for the business to be disturbed.	44.0%
Labor shortage is in the level where business operations are sometimes disturbed.	44.0%
Labor shortage has grown to a serious level to reconsider business hours.	12.0%
Labor shortage has grown to a serious level to reconsider days off.	0.0%
Other responses	4.0%

Created by Yano Research Institute

Notes:

- Research period: June, 2017; Researched to: 25 domestic food service providers and hotels; Research methodology: Questionnaire via telephone, multiple responses allowed.

■ **Figure 5: Future Intention of How to Save Labor at Cooking Sites, Stores/Restaurants/Hotels Where Cooked/Processed Foods are Provided**

Items	Response Rate (N=25)
Would like to take measures by using commercial foods that have already been fully or half-cooked, or already cut appropriately.	64.0%
Would like to process/cook foods more intensively at an in-house central kitchen.	28.0%
Would like to take measures by adding/updating kitchen goods/facilities at local cooking sites.	16.0%
Would like to take measures by adding/updating goods/facilities at the central kitchen.	16.0%
Because all the conceivable labor-saving measures have been taken, no other measures are currently planned.	8.0%
Other responses	16.0%

Created by Yano Research Institute

Notes:

- Research period: June, 2017; Researched to: 25 domestic food service providers and hotels; Research methodology: Questionnaire via telephone, multiple responses allowed.