

## **Ready-to-Eat Food/HMR Market in Japan: Key Research Findings 2017**

### ◆ **Research Outline**

**Yano Research Institute has conducted a study on the domestic ready-to-eat food or home meal replacement (HMR) market with the following conditions:**

1. Research period: April to July, 2017
2. Research target: Ready-to-eat food market players, and other related companies
3. Research methodologies: Face-to-face interviews, telephone/email surveys, and literature research

#### **<What is the Ready-to-Eat Food/HMR Market?>**

The ready-to-eat food or HMR (home meal replacement) market in this research refers to cooked or prepared food and delicatessen meals of Japanese/Western/Chinese tastes, cooked rice (including Bento), Bento-style meals, all kinds of sandwiches, fast food, cooked noodles and etc, which are provided by delicatessen stores, convenience stores, mass merchandisers, department stores, co-op, meal delivery service providers (office bento-style meal deliveries and home meal delivery services), fast food stores and etc. Note that frozen/chilled/retort foods and processed food to be cooked with microwave oven, and pouch-packed delis are not included.

### ◆ **Key Findings**

#### ■ **Ready-to-Eat Food/HMR Market in FY2016 Attained 8,575.8 Billion Yen, 101.3% on Y-o-Y Basis**

The ready-to-eat food or home meal replacement market in FY2016 reached 8,575.8 billion yen, 101.3% of the size of the previous fiscal year, based on the retail prices. Since delis and ready-to-eat food have played the role of supplementing in the daily meals, the market maintains positive growth since FY2012.

#### ■ **Convenience Stores Recorded Favorable Sales among Other Sales Channels**

The ready-to-eat food or home meal replacement market at daily-use sales channels, i.e., convenience stores, mass-merchandisers, and delicatessen showed favorable sales in FY2016. Among them, convenience stores were most successful, expanding in-store cooked foods to enhance ready-to-eat food fresh from the kitchen, providing coffee at counters to acquire new customers, placing products at counters to encourage the customers to add more things to shop, and expanding the stores by providing a dining place within a store.

#### ■ **Ready-to-Eat Food/HMR Market in FY2017 Projected to Stably Grow, 101.1% on Y-o-Y Basis to Attain 8,671.9 Billion Yen**

The ready-to-eat food or home meal replacement market for FY2017 is projected to attain stable growth at 8,671.9 billion yen, 101.1% of the size of the previous fiscal year. In spite of the influence of decreasing birthrate and aging population in the long run, increasing number of single or double-income households is likely to raise the demand of time-reduced cooking at home and to expand the habit of eating individually. These factors are likely to help increase the opportunity of using ready-to-eat food or home meal replacement for the future.

◆ **Report Format:**

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Format: 487 pages in A4 format

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

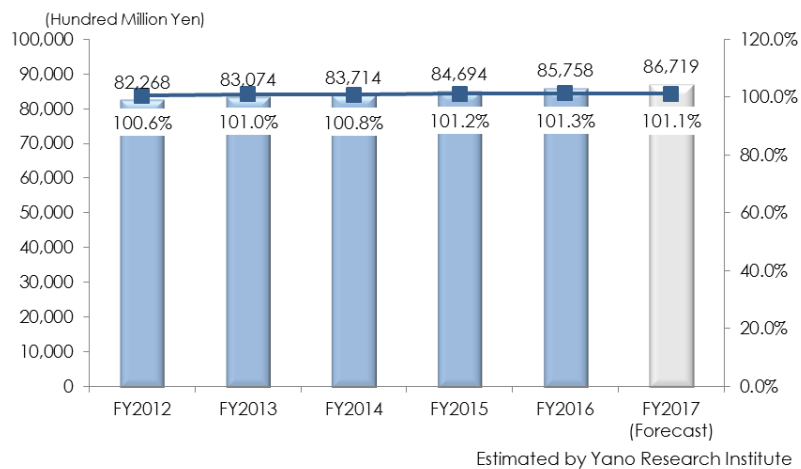
**Contacts:** Public Relations

**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)

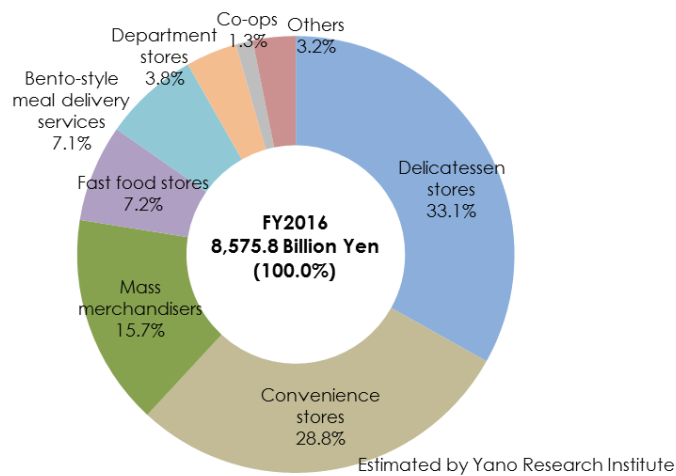
■ **Figure 1: Transition of Size of Ready-to-Eat Food/Home Meal Replacement Market**



Notes:

1. The figures are based on the retail prices.

■ **Figure 2: FY2016 Component Ratio of Sales Channels in Ready-to-Eat Food/Home Meal Replacement Market**



Notes:

2. The market size is based on the retail prices.
3. “Others” include those ready-to-eat-meals that were cooked at theme parks, public transportation, and hotels. Note that no food and drinks within the facilities included.