

Ready-to-Eat Food Market in Japan: Key Research Findings 2011

◆ Research Outline

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

1. Research period: April to June, 2011
2. Research target: Ready-to-eat food market players, and other related companies
3. Research methodologies: Face-to-face interviews, telephone/email surveys, questionnaire surveys to consumers, and literature research

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

Ready-to-eat food or home meal replacement market in this research refers to prepared and cooked food and/or delicatessen meals of Japanese/Western/Chinese tastes, cooked rice, Bento-style food, savory and sweet cooked bread/rolls, fast food, cooked noodles and etc, which are provided by delicatessen stores, convenience stores, mass retailers, department stores, consumer cooperatives, feeding services, fast food stores and etc.

◆ Key Findings

■ HMR Market in 2010 marked 8,256.5 billion yen, 100.3% of the Previous Year

Home meal replacement (HMR) market or ready-to-eat food market was calculated to be 8,256.5 billion yen in 2010, 100.3% of the previous year. HMR market had boosted along with some changes in the Japanese life style; fewer children, aging society, increase of nuclear family, and more women playing important roles in the society. The market, however is now suffering from its sluggish growth, and is facing difficulty in enjoying the stable growth like it did in the past. It is because of the prolonged recession which is causing consumers' minds towards saving money and reducing their purchasing activities in volume and amount. Nevertheless, the outlook of the HMR market in 2011 is predicted to remain the same level as the previous year, the state of which is referred to as "steady undertone", whereas all dining-out service industries are in predicament.

■ Fast food stores are sustaining its steady growth

The largest share of HMR market among the sales channels is occupied by delicatessen stores (32.7%). While other channels are struggling to grow, fast food stores are sustaining their steadiness and are currently drawing attention due to their indication of full-scale attempt towards home delivery services, though in a pilot process, aiming to capture the needs from increasing numbers of families who dine at home rather than dine out.

◆ **Report format:**

Published report: "Ready-to-eat Food Market 2011"

Issued on: June 30, 2011

Language: Japanese

Format: 488 pages in A4 format

Price: 115,500 yen (5,500 yen of consumption tax shall be charged for the sales in Japan.)

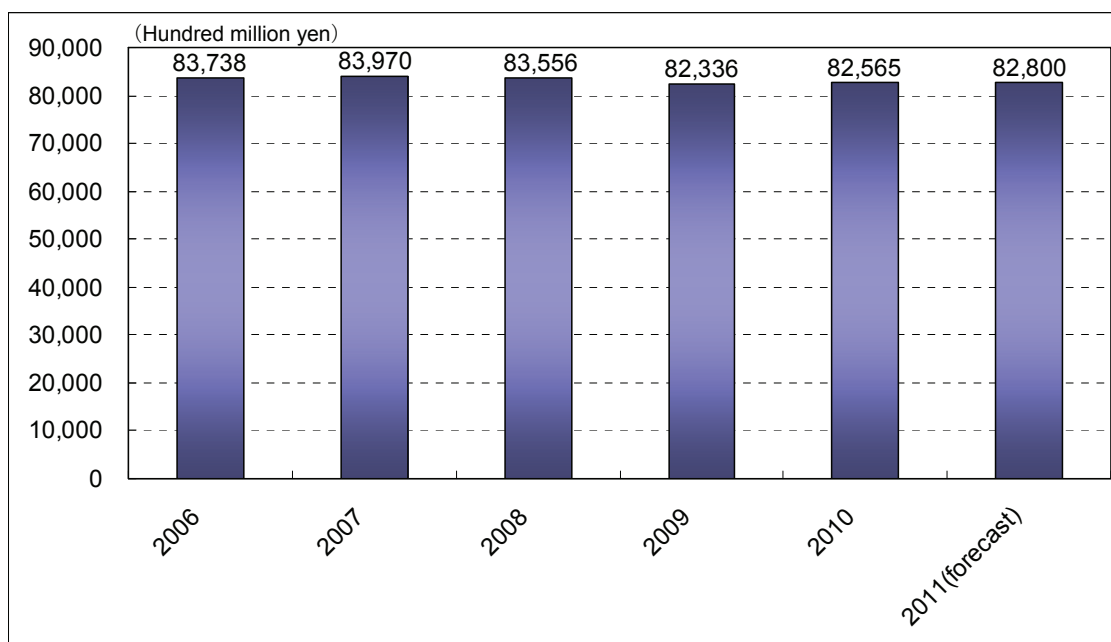
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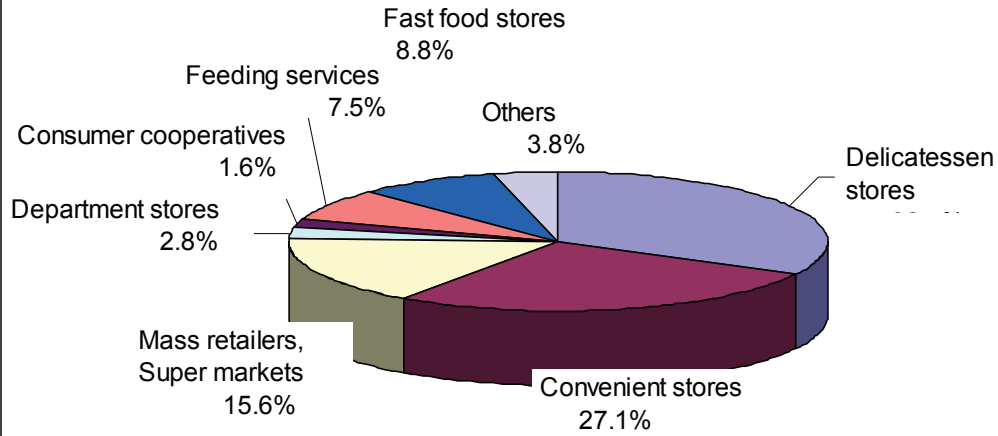
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	2006	2007	2008	2009	2010	2011(forecast)
HMR market size	83,738	83,970	83,556	82,336	82,565	82,800
(hundred million yen)		100.3%	99.5%	98.5%	100.3%	100.3%



Home meal replacement market share by channel



FY 2010
Home meal replacement market size
8,256.5 billion yen

What do you have in your mind recently, when you buy home meal replacement food?

