

***Medical Meal Service and Meal Home Delivery Service in Japan:
Key Research Findings 2011***

➡ **Research Outline**

Yano Research Institute has conducted a study on the medical meal service and meal home delivery service market in Japan with following conditions.

1. Research period: April to July 2011
2. Research targets: Medical meal service and meal home delivery service companies, hospitals, special elderly nursing homes, geriatric health services facilities, related organizations, etc.
3. Research methodologies: Face-to-face interviews, telephone and email surveys, literature research

DEFINITION of Medical Meal Service and Meal Home Delivery Service

Medical meal service in this research refers to hospital meal service (for inpatients and hospital staffs) and elderly nursing facility meal service (for elderly residents and nursing staffs), and it includes contract business and non-contract business. Meal home delivery service refers to regular meal delivery service to elderly people, disabled people and patients (or pre-disease groups) of diabetes or hepatic diseases, etc. at home, and it includes both partial municipal subsidy cases and all user private payment cases.

➡ **Key Findings**

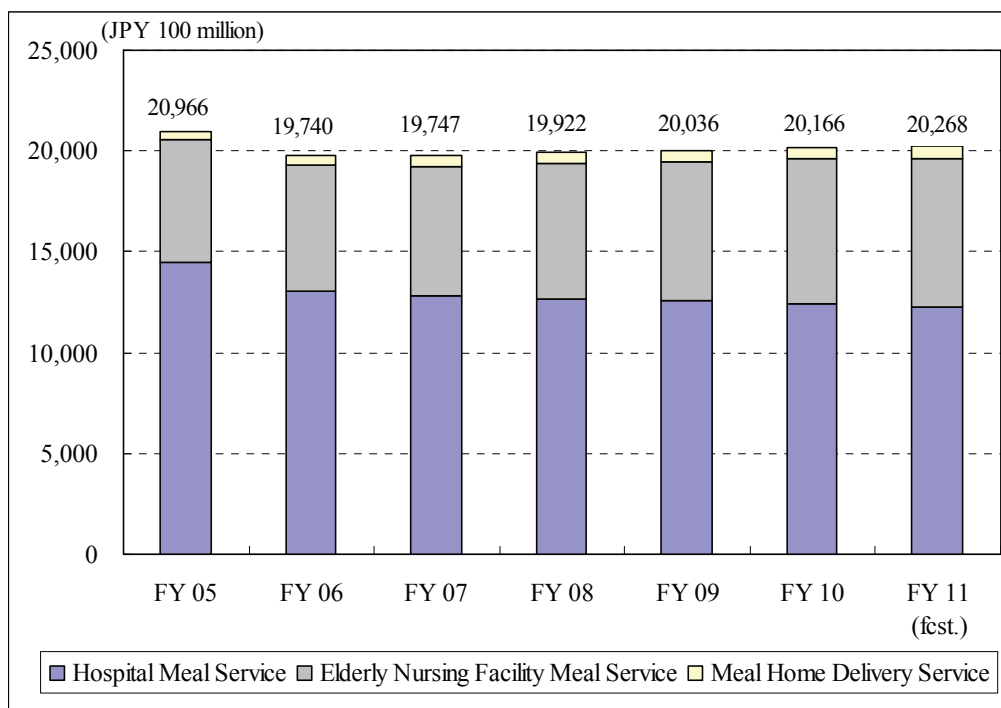
- ◆ **The FY 2010 market size of medical meal service and meal home delivery service is JPY 2,016.6 billion. Caring for meals is important in considering QOL of inpatients and nursing facility residents.**

The market size of medical meal service and meal home delivery service in fiscal 2010 is estimated at 2,016.6 billion yen. Although the medical meal service market (hospital meal service and elderly nursing facility meal service) has continued to expand, hospital meal service shows a slight declining trend due to the decrease in the number of hospitals. On the other hand, the market size of elderly nursing facility meal service is growing due to the new establishments of facilities. The medical meal service had been said to be “too early timing, cold, bad tasting.” However, it has been able to come to offer tasty meals at suitable temperature at appropriate timing along with the progress in outsourcing and the additional insurance premium points for suitable temperature and appropriate timing of patient meals. This kind of caring for meals is important in considering the quality of life of inpatients and nursing facility residents.

- ◆ **Growth of elderly nursing facility meal service is prominent.**

Comparing the fiscal 2005 market size and the fiscal 2010 market size of medical meal service and meal home delivery service by category, the elderly nursing facility meal service sector is strikingly growing. The ratio of meal home delivery service sector is only 2.9 percent in the fiscal 2010, however, more growth is expected in relation to the shift to home nursing care from medical facility service.

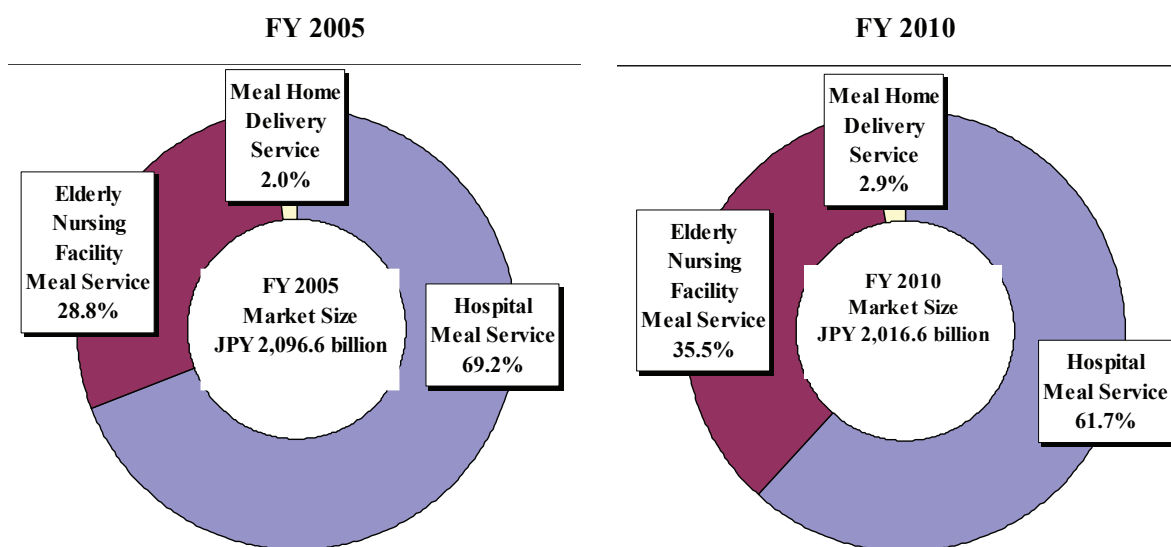
[Market Size of Medical Meal Service and Meal Home Delivery Service]



Estimated by Yano Research Institute Ltd.

Note: Based on the value of end price of meal service.

[Breakdown of Medical Meal Service and Meal Home Delivery Service Market]



Estimated by Yano Research Institute Ltd.

Note: Based on the value of end price of meal service.

➡ Report format:

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