

## **Food Delivery Service Market: Key Research Findings 2013**

### ◆ **Research Outline**

**Yano Research Institute has conducted a study the food delivery service market with the following conditions:**

1. Research period: March to June, 2013
2. Research target: Meals/deli delivery service providers, fast food companies, restaurant chain companies, convenience stores, co-op, mass merchants, dairy products manufacturers, food delivery support service providers, and other related companies and organizations
3. Research methodologies: Face-to-face interviews by the specialized researchers, surveys via telephone/email, and literature research

#### **What is Food Delivery Service Market?**

The food delivery service market in this research indicates the following ten categories of delivery services: 1) Meals, 2) Delis, 3) Pizza, 4) Sushi, 5) Meals from restaurant/fast food chains, 6) milk, 7) Co-op, 8) Online supermarket, 9) Convenience store meal deliveries, 10) Natural food. Note that all the above-mentioned delivery services are only food delivery services and that they exclude delivery of commodities and sundries.

### ◆ **Key Findings**

#### ■ **Food Delivery Service Market in FY2012 Attained 1,807.8 Billion Yen, 103.9% of Previous Year**

Size of the food delivery service market in FY2012 was 1,807.8 billion yen, 103.9% of that in the previous year. The growth stems mainly from the following reasons: Increase of population of the elderly, shorter cooking hours required at households due to establishment of more women participating in society, tendency to dine separately within a family because of diversified lifestyle, domestic economic downturn that made people to be hesitant about dining outside, and stronger demand for cooking and dining at home. The rising tendency of the market is likely to continue for the time being.

#### ■ **Meals Delivery Services and Online Supermarket Contribute in Market Expansion**

In addition to rising number of users for meal delivery services for the elderly, the number of registered members of online supermarket has also increased due to more stores handling delivery orders from the websites. These markets contributed in expansion of the entire food delivery market.

■ **Food Delivery Service Market in FY2017 Estimated to Achieve 2,204.5 Billion Yen, 121.9% of Size in FY2012**

Size of the food delivery service market in FY2013 is estimated to achieve 1,881.6 billion yen, 104.1% of the year before, and to reach 2,204.5 billion yen in FY2017, 121.9% of the size in FY2012.

The market is required to align with IT systems in order to deliver efficient services and good selection of foods and meals, enabling the market to respond to increasing demands from the society and diversifying consumer demands.

◆ **Report format:**

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Price: 110,250 yen (5,250 yen of consumption tax shall be charged for the sales in Japan.)

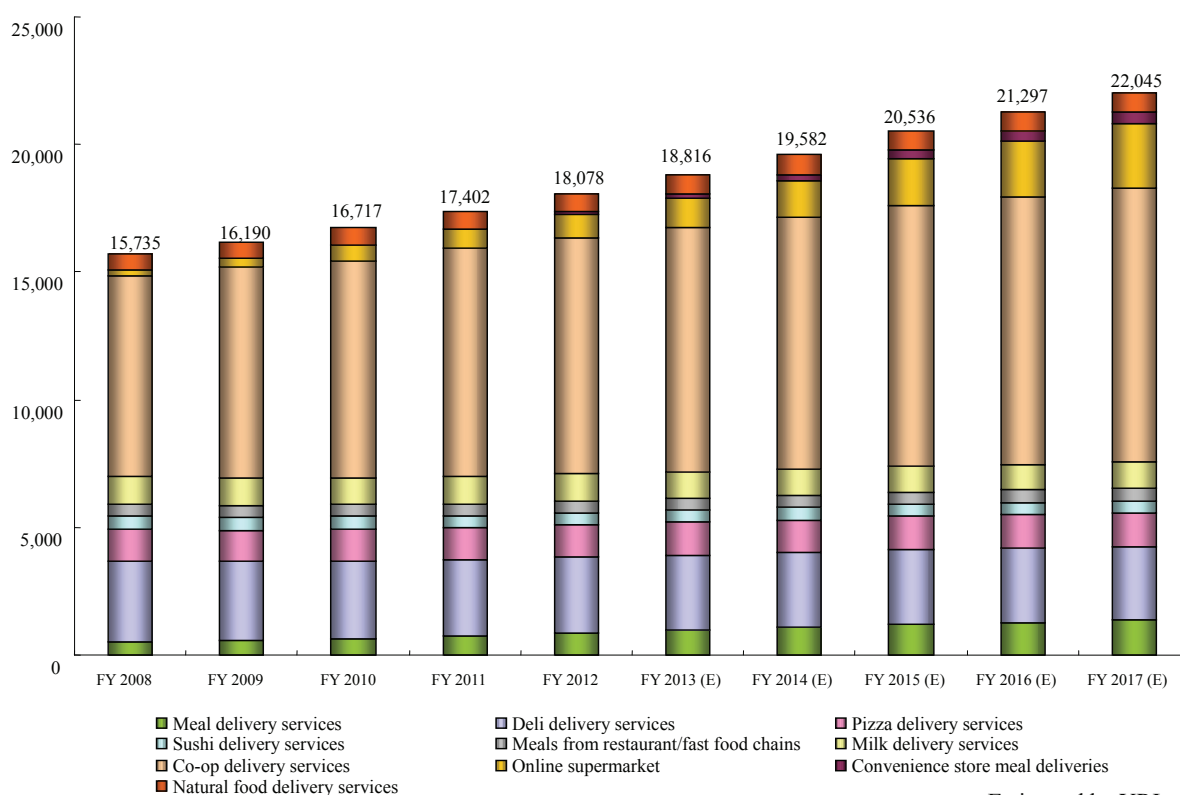
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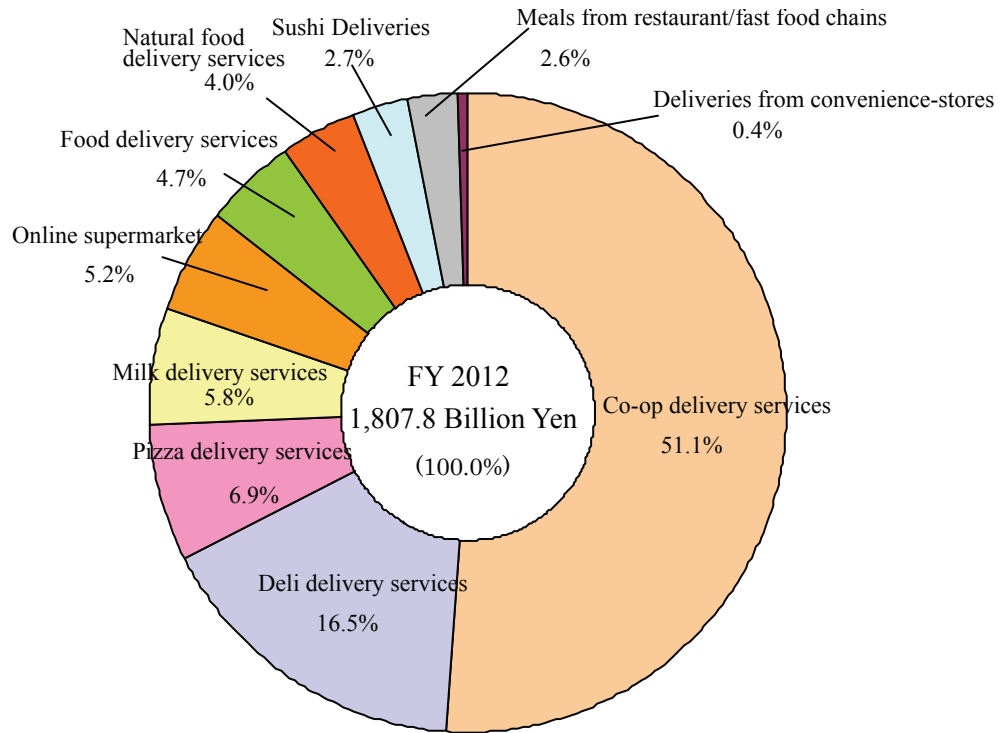
■ **Figure1: Transition and Estimated Size of Food Delivery Service Market**



Notes:

1. The figures are based on the sales from the businesses.
2. (E) indicates estimated figures.

■ **Figure 2: Composition Ratio of Food Delivery Service Market in FY2012**



Notes:

3. The figures are based on the sales from the businesses.

Estimated by YRI