

Japanese/Western-Style Confectioneries and Sweets Market in Japan: Key Research Findings 2016

◆ Research Outline

Yano Research Institute has conducted a study on the domestic Japanese/Western-style confectioneries and sweets market with the following conditions:

1. Research period: From September to December, 2016
2. Research targets: Manufacturers, wholesalers of the confectioneries and sweets industry, department stores, commercial facilities in the building of railroad stations, and etc.
3. Research methodologies: Face-to-face interviews by the expert researchers, mail-in questionnaire, surveys via telephone, and literature search

What is the Japanese/Western-Style Confectioneries and Sweets Market?

The Japanese/Western-style confectioneries and sweets market in this research indicates the market consisted of the following four categories: 1) Japanese-style confectioneries/sweets that are fresh, soft (semi-baked), dry, or fully-baked; 2) Western-style confectioneries/sweets that are fresh, semi-baked, or fully-baked; 3) Desserts including yogurt, pudding, jelly, and other desserts packaged in cups; and 4) Ice creams including various types of ice creams, flavored ice, and iced confectioneries. The market size is calculated based on the shipment values at manufacturers.

◆ Key Findings

- **Whereas FY2015 Japanese/Western-Style Confectioneries and Sweets Market Attained 2,221.6 Billion Yen, Up by 3.9% on Y-o-Y Basis, FY2016 Projected to Achieve 2,265.5 Billion Yen, Up by 2.0%**

Size of the Japanese/Western-style confectioneries and sweets market in FY2015 grew by 3.9% from the previous fiscal year to achieve 2,221.6 billion yen, based on the shipment value at manufacturers. The entire market has been boosted by yogurt and ice cream, together with contribution by both Japanese and Western-style confectioneries. Although the market environment seems to be severe in FY2016, the favorable sales of desserts and the stable sales at CVS are likely to raise the market by 2.0% from the previous fiscal year.

- **Component Ratio of General Channels Increases**

With regard to the component ratio of the Japanese/Western-style confectioneries and sweets market by channel in FY2015, mass merchandisers/supermarkets occupied 36.1%, followed by convenience stores (CVS) accounting for 23.2%, and department stores 18.2%. As the entire market has been expanding, all the channels except for specialty stores/street-front stores have grown. Especially, the general channels, including mass merchandisers, super markets, and CVS, has expanded its market share.

■ **The Japanese Confectioneries and Sweets Expanded for First Time in 7 Years**

While the tendency of the markets of yogurt and ice cream leading the market has not changed for the past several years, the market of Japanese-style confectioneries, which had been on the decline since FY2009, showed a slight increase for the first time in seven years, boosted by expansion of the Japanese confectioneries retail market developed at supermarkets and CVS, where consumers daily buy Japanese confectioneries and sweets.

◆ **Report format :**

Published report: “Confectionery Industry: Sweets and Desserts 2016-2017”

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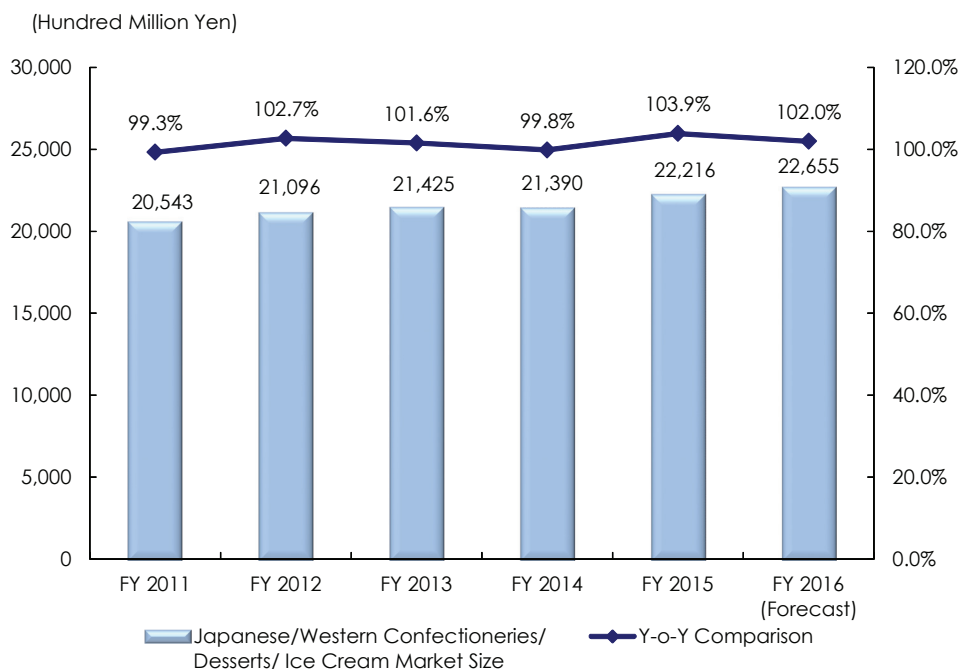
Language: Japanese

Format: 673 pages in A4 format

Price: 115,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

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■ **Figure 1: Transition of Size of Japanese/Western Confectioneries and Sweets Market**

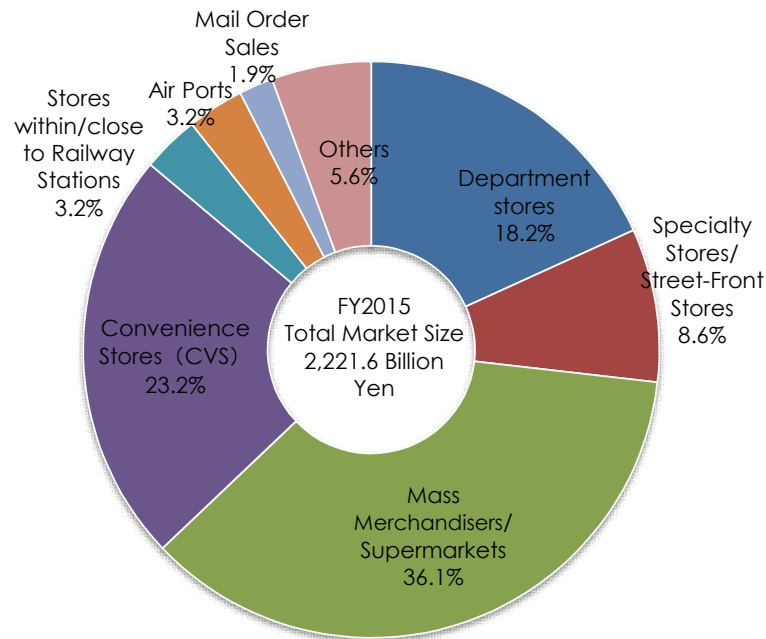


Estimated by Yano Research Institute

Notes:

1. The market size is based on the shipment values at manufacturers.
2. The ice cream market size until FY2015 included in this report is quoted from the figures in Japan Ice Cream Association, and the market size of FY2016 is estimated by Yano Research Institute.

■ **Figure 2: FY2015 Component Ratio of Japanese/Western-Style Confectioneries and Sweets Market by Channel**



Notes:

3. The market size is based on the shipment values at manufacturers.
4. Sales channels in this research are defined as follows: “Specialty Stores/Street-Front Stores” indicate those specialty stores within shopping malls and street-front stores; “Stores within/close to Railway Stations” indicate those stores within the commercial facilities inside the stations or within shopping malls operated by railway station companies; “Others” include the corporate demand and also those stores located at service/parking areas on a highway.