



Euromonitor
International

Snacks in Japan

July 2026

Table of Contents

EXECUTIVE SUMMARY

2026 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Snacks

INDUSTRY PERFORMANCE

Familymart Drives Demand for Visible Value through Volume-Led Promotions

Chart 2 - Familymart Boosts Value Perception with +45% Volume Campaign

Meiji Leverages Co-Creation to Blend Nostalgia with Novelty

Chart 3 - Meiji Transforms Its Super Cup Ice Cream into Gummies

Familymart Challenges Shrinkflation with Anniversary Offer

Chart 4 - Value Sales 2021-2031

Chart 5 - Value Sales by Category 2026

WHAT'S NEXT?

Meiji and Familymart Blend Trust with Value-Focused Innovation

Chart 6 - Forecast Value Sales 2021-2031

Chart 7 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Lotte and Calbee Sustain Lead with Brand Trust and Value

Chart 8 - Analyst Insight for Snacks

Chart 9 - Company Shares 2026

Chart 10 - Brand Shares 2026

CHANNELS

Supermarkets Capture Price-Driven Shoppers

E-Commerce Expansion Lags as Shoppers Favour In-Store Purchasing

Chart 11 - Retail Channels 2021-2026

PRODUCTS

Familymart Responds to Price Pressures with Quantity-Led Value

Meiji Transforms Trusted Brands with Consumer-Led Co-Creation

Lotte and Calbee Sustain Leadership through Adaptive Portfolios

ECONOMIC CONTEXT

Chart 12 - Economic Context for Snacks

Chart 13 - Real Gdp Growth 2021-2031

Chart 14 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 15 - Consumer Context for Snacks

Chart 16 - Population 2021-2031

Chart 17 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

2026 DEVELOPMENTS

Chocolate Confectionery Summary

KEY INDUSTRY TRENDS

Chart 18 - Key Industry Trends for Chocolate Confectionery

INDUSTRY PERFORMANCE

Lotte Defends Share by Shrinking Pack Sizes and Innovating Flavours

Chart 19 - Rising Prices Haven'T Slowed Demand for Luxury Chocolates

Meiji Captures Tourist Demand with Year-Round Matcha Innovation

Chart 20 - Meiji Makes Matcha Chocolates Year-Round to Capture Tourist Sales

Premiumisation Sustains Mass Brands Amid Affordability Pressures

Chart 21 - Value Sales 2021-2031

Chart 22 - Volume Sales 2021-2031

Chart 23 - Value Sales by Category 2026

WHAT'S NEXT?

Manufacturers Shrink Formats and Elevate Storytelling to Defend Value

Imports and Adjacent Snacks Erode Share as Domestic Innovation Lags

Chart 24 - Forecast Value Sales 2021-2031

Chart 25 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Meiji and Lotte Defend Leadership with Trusted Brands and Targeted Innovation

Chart 26 - Analyst Insight for Chocolate Confectionery

Chart 27 - Company Shares 2026

Chart 28 - Brand Shares 2026

CHANNELS

Grocery Retailers Dominate Due to Price Sensitivity among Consumers

E-Commerce Gains Momentum as Shoppers Seek Convenience and Value

Health and Beauty Specialists and E-Commerce Reshape Retail Landscape with Value Focus

Chart 29 - Retail Channels 2021-2026

PRODUCTS

Lotte and Meiji Adapt Product Design to Balance Value and Indulgence

Premium Ghana and Meiji Expand Their Reach through Targeted Innovation

Legacy Brands Defend Share as Affordable Indulgence Bridges Everyday and Premium

ECONOMIC CONTEXT

Chart 30 - Economic Context for Chocolate Confectionery

Chart 31 - Real Gdp Growth 2021-2031

Chart 32 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 33 - Consumer Context for Chocolate Confectionery

Chart 34 - Population 2021-2031

Chart 35 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

[Gum in Japan](#)

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Gum Summary

KEY INDUSTRY TRENDS

Chart 36 - Key Industry Trends for Gum

INDUSTRY PERFORMANCE

Chewing Gum Leads Sales as Overall Volume Declines

Chart 37 - Clorets Big Fruit Taps Demand for Larger, Flavour-Packed Gum

Clorets Leverages Sensory Refreshment to Regain Consumer Attention

Chart 38 - Value Sales 2021-2031

Chart 39 - Volume Sales 2021-2031

Chart 40 - Value Sales by Category 2026

WHAT'S NEXT?

Lotte and Mondelez Pivot to Health Benefits and Targeted Innovation

Functional Claims and Nostalgia-Led Launches Reshape Consumer Engagement

Chart 41 - Forecast Value Sales 2021-2031

Chart 42 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Lotte Leverages Health Positioning to Reinforce Leadership

Chart 43 - Analyst Insight for Gum

Chart 44 - Company Shares 2026

Chart 45 - Brand Shares 2026

CHANNELS

Supermarkets Outpace Convenience Stores by Leveraging Price Advantage

E-Commerce Grows Steadily as Physical Retail Retains Dominance

Chart 46 - Retail Channels 2021-2026

PRODUCTS

Clorets Drives Consumer Trial with Large-Format Gum Innovation

Lotte and Mondelez Reinforce Leadership through Targeted Strategies

ECONOMIC CONTEXT

Chart 47 - Economic Context for Gum

Chart 48 - Real Gdp Growth 2021-2031

Chart 49 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 50 - Consumer Context for Gum

Chart 51 - Population 2021-2031

Chart 52 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

[Sugar Confectionery in Japan](#)

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Sugar Confectionery Summary

KEY INDUSTRY TRENDS

Chart 53 - Key Industry Trends for Sugar Confectionery

INDUSTRY PERFORMANCE

Lotte Drives Adult Engagement through Fruit-Focused Hard Gummies

Chart 54 - Lotte Targets Adults with Fruit-Flavoured Hard Gummies

Mints Record Dynamic Growth in a Mature Market

Medicated Confectionery Records Value Gains

Chart 55 - Value Sales 2021-2031

Chart 56 - Volume Sales 2021-2031

Chart 57 - Value Sales by Category 2026

WHAT'S NEXT?

Bandai Namco Reinvents Gummies to Capture Playful Family Moments

Kanro and Morinaga Drive Digital Buzz with Functional Launches

Chart 58 - Forecast Value Sales 2021-2031

Chart 59 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Morinaga and Kanro Strengthen Leadership through Flavour and Texture Innovation

Chart 60 - Analyst Insight for Sugar Confectionery

Chart 61 - Company Shares 2026

Chart 62 - Brand Shares 2026

CHANNELS

Supermarkets Win Shoppers with Price Advantage and Reach

E-Commerce Expands as Physical Stores Face Limits

Supermarkets Shape Retail Trends through Pricing

Chart 63 - Retail Channels 2021-2026

PRODUCTS

Lotte Expands Hard Gummies with Adult-Focused Fruit Launches

Kazitte! Intensifies Competition and Drives Cross-Generational Snacking

ECONOMIC CONTEXT

Chart 64 - Economic Context for Sugar Confectionery

Chart 65 - Real Gdp Growth 2021-2031

Chart 66 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 67 - Consumer Context for Sugar Confectionery

Chart 68 - Population 2021-2031

Chart 69 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

[Ice Cream in Japan](#)

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Ice Cream Summary

KEY INDUSTRY TRENDS

Chart 70 - Key Industry Trends for Ice Cream

INDUSTRY PERFORMANCE

Gari Gari Kun Leverages Value Perception to Outpace Rivals in Challenging Conditions

Chart 71 - Gari Gari Kun Leads with Low Prices and Playful Appeal

Impulse Ice Cream Sustains Lead as Take-Home Formats Gain Momentum

Morinaga Milk Reinvents Indoor Indulgence as At-Home Consumption Reshapes Demand

Chart 72 - Mow Elevates Indoor Treats with Rich Flavours

Chart 73 - Value Sales 2021-2031

Chart 74 - Volume Sales 2021-2031

Chart 75 - Value Sales by Category 2026

WHAT'S NEXT?

Akagi Nyugyo and Morinaga Drive Premiumisation as Volume Declines

Morinaga and Akagi Nyugyo Balance Indulgence with Functionality to Unlock New Demand

Chart 76 - Forecast Value Sales 2021-2031

Chart 77 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Lotte Energises Demand with New Brand and Strategic Campaigns

Chart 78 - Analyst Insight for Ice Cream

Chart 79 - Company Shares 2026

Chart 80 - Brand Shares 2026

CHANNELS

Supermarkets Maintain Price Edge as Convenience Stores Gain Ground

E-Commerce Expands, but Physical Retail Retains Shopper Loyalty

Chart 81 - Retail Channels 2021-2026

PRODUCTS

Akagi Nyugyo and Morinaga Build Trust and Value through Product Innovation

Morinaga Milk Translates Dessert Trends into Premium, Indoor-Focused Experiences

Lotte Energises Demand through Collaboration and Portfolio Expansion

ECONOMIC CONTEXT

Chart 82 - Economic Context for Ice Cream

Chart 83 - Real Gdp Growth 2021-2031

Chart 84 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 85 - Consumer Context for Ice Cream

Chart 86 - Population 2021-2031

Chart 87 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

[Savoury Snacks in Japan](#)

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Savoury Snacks Summary

KEY INDUSTRY TRENDS

Chart 88 - Key Industry Trends for Savoury Snacks

INDUSTRY PERFORMANCE

Chip Star Expands Meal Occasions and Sets New Standards for Fan-Driven Innovation

Yamazaki Biscuit Leverages Fan Engagement and Format Agility to Outpace Rivals

Calbee and Kameda Seika Redefine Trusted Favourites

Chart 89 - Value Sales 2021-2031

Chart 90 - Volume Sales 2021-2031

Chart 91 - Value Sales by Category 2026

WHAT'S NEXT?

Calbee Adjusts Sourcing and Packaging to Stabilise Costs and Maintain Shelf Appeal

Kameda Seika and Calbee Prioritise Precision Innovation to Drive Consumer Engagement

Consumer Co-Creation and Supply Chain Agility Reshape Business Strategies

Chart 92 - Forecast Value Sales 2021-2031

Chart 93 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Calbee and Kameda Seika Deepen Leadership through Portfolio Breadth

Chart 94 - Analyst Insight for Savoury Snacks

Chart 95 - Company Shares 2026

Chart 96 - Brand Shares 2026

CHANNELS

Supermarkets Leverage Pricing Power to Outpace Convenience Stores

E-Commerce Expands Slowly as Shoppers Favour In-Person Food Purchases

Chart 97 - Retail Channels 2021-2026

PRODUCTS

Chip Star Broadens Meal Occasions by Positioning Itself as a More Filling Snack

Calbee and Kameda Seika Drive Novelty through Collaborative Flavour Swaps

Flexible Sourcing and Targeted Innovation Reshape Competitive Strategies

ECONOMIC CONTEXT

Chart 98 - Economic Context for Savoury Snacks

Chart 99 - Real Gdp Growth 2021-2031

Chart 100 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 101 - Consumer Context for Savoury Snacks

Chart 102 - Population 2021-2031

Chart 103 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

[Sweet Biscuits, Snack Bars and Fruit Snacks in Japan](#)

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Sweet Biscuits, Snack Bars and Fruit Snacks Summary

KEY INDUSTRY TRENDS

Chart 104 - Key Industry Trends for Sweet Biscuits, Snack Bars and Fruit Snacks

INDUSTRY PERFORMANCE

Fujiya and Bourbon Respond to Evolving Snacking Habits and Loyalty

Chart 105 - Morning Ma'am Cookies Are Repositioned as a Quick, Nutritious Breakfast

Fujiya Targets Functional Breakfast, While Bourbon Leverages Nostalgia

Chart 106 - Bourbon Revives Lubera Brand to Capture Demand for Familiar Favourites

Affordable Biscuits and Functional Bars Reshape Consumer Choices

Chart 107 - Value Sales 2021-2031

Chart 108 - Volume Sales 2021-2031

Chart 109 - Value Sales by Category 2026

WHAT'S NEXT?

Inbound Tourism and Exports Drive New Product Strategies

Legacy Brands Harness Social Media to Capture New Audiences

Packaging Resilience and Supply Chain Adaptation Shape Competitive Advantage

Chart 110 - Forecast Value Sales 2021-2031

Chart 111 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Pocky Renews Flavours and Calorie Mate Targets Students to Sustain Growth

Chart 112 - Analyst Insight for Sweet Biscuits, Snack Bars and Fruit Snacks

Chart 113 - Company Shares 2026

Chart 114 - Brand Shares 2026

CHANNELS

Supermarkets Lead Sales as Convenience Stores Face Pricing Headwinds

E-Commerce Rises Gradually as Physical Shops Retain Shopper Loyalty

Chart 115 - Retail Channels 2021-2026

PRODUCTS

Fujiya and Bourbon Redefine Snacking with Health Consciousness and Nostalgia

Legacy Brands Unlock Growth through Social Media Reinvention

Packaging Challenges Force Manufacturers to Simplify and Adapt

ECONOMIC CONTEXT

Chart 116 - Economic Context for Sweet Biscuits, Snack Bars and Fruit Snacks

Chart 117 - Real Gdp Growth 2021-2031

Chart 118 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 119 - Consumer Context for Sweet Biscuits, Snack Bars and Fruit Snacks

Chart 120 - Population 2021-2031

Chart 121 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.

- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/snacks-in-japan/report.