



**Euromonitor
International**

Staple Foods in Japan

December 2025

Table of Contents

Staple Foods in Japan

EXECUTIVE SUMMARY

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Sharp price increases fuel category volatility in 2025
Convenience factor remains important to busy consumers
Post-pandemic interest in health and wellbeing remains high

WHAT'S NEXT?

Shrinking population expected to lead to volume decline
Current value growth will remain largely driven by high prices
Convenience factor will continue to shape category fortunes

COMPETITIVE LANDSCAPE

Yamazaki Baking retains the lead in a highly fragmented industry
Second-ranked player gains ground in 2025

CHANNELS

Supermarkets remains the leading distribution channel in Japan
Health and beauty specialists and e-commerce are gaining popularity

MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2020-2025
Table 2 - Sales of Staple Foods by Category: Value 2020-2025
Table 3 - Sales of Staple Foods by Category: % Volume Growth 2020-2025
Table 4 - Sales of Staple Foods by Category: % Value Growth 2020-2025
Table 5 - NBO Company Shares of Staple Foods: % Value 2021-2025
Table 6 - LBN Brand Shares of Staple Foods: % Value 2022-2025
Table 7 - Penetration of Private Label by Category: % Value 2020-2025
Table 8 - Distribution of Staple Foods by Format: % Value 2020-2025
Table 9 - Forecast Sales of Staple Foods by Category: Volume 2025-2030
Table 10 - Forecast Sales of Staple Foods by Category: Value 2025-2030
Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030
Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baked Goods in Japan

KEY DATA FINDINGS

2025 DEVELOPMENTS

Current value growth thanks to ongoing inflation

INDUSTRY PERFORMANCE

Domestic wheat in demand as costs rise
Dessert pies and tarts benefits from high prices and indulgence trend

WHAT'S NEXT?

Provenance set to remain in the spotlight
Focus on wellbeing likely to deepen in the years ahead
Baked goods expansion to continue through innovation and convenience trend

COMPETITIVE LANDSCAPE

Innovation through indulgence and seasonal rotation
Private label benefits from price rises as consumers tighten their belts

CHANNELS

Convenience stores leads distribution as local consumers splash out on indulgent baked goods
Health and beauty specialists sees growth as wellness trends deepen

CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2020-2025
Table 14 - Sales of Baked Goods by Category: Value 2020-2025
Table 15 - Sales of Baked Goods by Category: % Volume Growth 2020-2025
Table 16 - Sales of Baked Goods by Category: % Value Growth 2020-2025
Table 17 - Sales of Pastries by Type: % Value 2020-2025
Table 18 - NBO Company Shares of Baked Goods: % Value 2021-2025
Table 19 - LBN Brand Shares of Baked Goods: % Value 2022-2025
Table 20 - Distribution of Baked Goods by Format: % Value 2020-2025
Table 21 - Forecast Sales of Baked Goods by Category: Volume 2025-2030
Table 22 - Forecast Sales of Baked Goods by Category: Value 2025-2030
Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2025-2030
Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2025-2030

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[Breakfast Cereals in Japan](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Breakfast cereals sees growth across all metrics in 2025

INDUSTRY PERFORMANCE

Breakfast cereals perform well as time-saving meal solutions
Hot cereals slumps as consumers seek ease and convenience of preparation
Affordability and healthy profile allow breakfast cereals to remain popular post-pandemic

WHAT'S NEXT?

Breakfast cereals set to maintain momentum in the years ahead
Popularity may extend beyond traditional consumption occasions
Grains will remain in the spotlight

COMPETITIVE LANDSCAPE

Competition driven by premiumisation and functional innovation
Nissin Cisco augments its share by tapping into demand for functionality

CHANNELS

Supermarkets remains the leading distribution channel for breakfast cereals in 2025
Health and beauty specialists benefit from channel expansion

CATEGORY DATA

Table 25 - Sales of Breakfast Cereals by Category: Volume 2020-2025

Table 26 - Sales of Breakfast Cereals by Category: Value 2020-2025

Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2020-2025

Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2020-2025

Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2021-2025

Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2022-2025

Table 31 - Distribution of Breakfast Cereals by Format: % Value 2020-2025

Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2025-2030

Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2025-2030

Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2025-2030

Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Processed Fruit and Vegetables in Japan

KEY DATA FINDINGS

2025 DEVELOPMENTS

Modest growth for processed fruit and vegetables in 2025 amid high inflation

INDUSTRY PERFORMANCE

Frozen fruits and vegetables are in demand as fresh fruits and vegetables experience supply issues

Acia bowls drive demand for frozen fruit

WHAT'S NEXT?

Fractionation in the price of fresh food will encourage a shift to frozen options

Processed beans as meal toppers set to remain on-trend

Mottainai concept set to attract consumer attention

COMPETITIVE LANDSCAPE

Hagoromo Foods Corp leads a fragmented category

Private label gains share rapidly as prices rise

CHANNELS

Health and beauty specialists benefit from an increasing variety

E-commerce continues its upward trajectory, albeit from a relatively low base

CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2020-2025

Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2020-2025

Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2020-2025

Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2020-2025

Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2020-2025

Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2021-2025

Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2022-2025

Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2020-2025

Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2025-2030

Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2025-2030

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2025-2030

Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Processed Meat, Seafood and Alternatives To Meat in Japan

KEY DATA FINDINGS

2025 DEVELOPMENTS

Marginal growth for processed meat, seafood and alternatives to meat in 2025

INDUSTRY PERFORMANCE

Salad chicken fuels processed meat, seafood and alternatives to meat sales in Japan

Fish and seafood remain key ingredients in many popular Japanese dishes

WHAT'S NEXT?

Price increase set to hamper processed fish sales in the years ahead

Healthy, high-quality protein offers strong growth potential

Meat substitutes set to struggle as the boom slows down

COMPETITIVE LANDSCAPE

Itoham Foods continues to lead processed meat, seafood and alternatives to meat in Japan

NH Foods holds second place, but private label gains ground as consumers tighten their belts

CHANNELS

Store-based retailers continue to dominate the distribution landscape

E-commerce slowly gains ground from a low base

CATEGORY DATA

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2020-2025

Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2020-2025

Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2020-2025

Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2025

Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2022-2025

Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2020-2025

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2025-2030

Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2025-2030

COUNTRY REPORTS DISCLAIMER

[Rice, Pasta and Noodles in Japan](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Surge in current value growth reflects soaring prices

INDUSTRY PERFORMANCE

Rice prices double due to poor harvests and high production costs

Pasta benefits from soaring rice prices, with increased consumption

WHAT'S NEXT?

Further challenges ahead for Japan's staple grain

Convenience factor will remain a key driver of innovation

Korean instant noodles brands set to see expansion

COMPETITIVE LANDSCAPE

JA group leads a fragmented and challenged category in 2025

Private label is the main beneficiary of rising prices

CHANNELS

Supermarkets continues to lead distribution in 2025

E-commerce continues to gain ground, but brick-and-mortar retailers remain the preferred choice

CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2020-2025

Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2020-2025

Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2020-2025

Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2020-2025

Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2020-2025

Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2021-2025

Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2022-2025

Table 69 - NBO Company Shares of Rice: % Value 2021-2025

Table 70 - LBN Brand Shares of Rice: % Value 2022-2025

Table 71 - NBO Company Shares of Pasta: % Value 2021-2025

Table 72 - LBN Brand Shares of Pasta: % Value 2022-2025

Table 73 - NBO Company Shares of Noodles: % Value 2021-2025

Table 74 - LBN Brand Shares of Noodles: % Value 2022-2025

Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2020-2025

Table 76 - Distribution of Rice by Format: % Value 2020-2025

Table 77 - Distribution of Pasta by Format: % Value 2020-2025

Table 78 - Distribution of Noodles by Format: % Value 2020-2025

Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2025-2030

Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2025-2030

Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2025-2030

Table 82 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2025-2030

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