

Small Local Grocers in Japan

February 2024

Table of Contents

KEY DATA FINDINGS

2023 DEVELOPMENTS

Closure of outlets in Shotengai is a major issue
Strong demand for authentic products helps drive sales
Affordable indulgences and heightened health awareness

PROSPECTS AND OPPORTUNITIES

Urban/rural inequality in shopping opportunities likely to continue
Tough competition in grocery retailing set to continue
New concepts and niches anticipated to be seen in small local grocers

CHANNEL DATA

Table 1 - Small Local Grocers: Value Sales, Outlets and Selling Space 2018-2023
Table 2 - Small Local Grocers: Value Sales, Outlets and Selling Space: % Growth 2018-2023
Table 3 - Small Local Grocers GBO Company Shares: % Value 2019-2023
Table 4 - Small Local Grocers GBN Brand Shares: % Value 2020-2023
Table 5 - Small Local Grocers LBN Brand Shares: Outlets 2020-2023
Table 6 - Small Local Grocers LBN Brand Shares: Selling Space 2020-2023
Table 7 - Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space 2023-2028
Table 8 - Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Retail in Japan - Industry Overview

EXECUTIVE SUMMARY

Retail in 2023: The big picture
Private label development key for retailers to stay competitive
New regulation on stealth marketing (Endorsements and Testimonials in Advertising) impacts e-commerce and direct selling
What next for retail?

OPERATING ENVIRONMENT

Informal retail
Opening hours for physical retail
Summary 1 - Standard Opening Hours by Channel Type 2023
Seasonality
Hatsu Uri ("First Sales") at New Year
Valentine's Day
White Day
Mother's Day
Father's Day
Summer bargains
Halloween
Black Friday and Cyber Monday
Christmas and year-end bargains

MARKET DATA

Table 9 - Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2018-2023
Table 10 - Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2018-2023
Table 11 - Sales in Retail Offline by Channel: Value 2018-2023
Table 12 - Sales in Retail Offline by Channel: % Value Growth 2018-2023
Table 13 - Retail Offline Outlets by Channel: Units 2018-2023
Table 14 - Retail Offline Outlets by Channel: % Unit Growth 2018-2023

Table 15 - Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023

Table 16 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 17 - Sales in Grocery Retailers by Channel: Value 2018-2023

Table 18 - Sales in Grocery Retailers by Channel: % Value Growth 2018-2023

Table 19 - Grocery Retailers Outlets by Channel: Units 2018-2023

Table 20 - Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023

Table 21 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023

Table 22 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 23 - Sales in Non-Grocery Retailers by Channel: Value 2018-2023

Table 24 - Sales in Non-Grocery Retailers by Channel: % Value Growth 2018-2023

Table 25 - Non-Grocery Retailers Outlets by Channel: Units 2018-2023

Table 26 - Non-Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023

Table 27 - Retail GBO Company Shares: % Value 2019-2023

Table 28 - Retail GBN Brand Shares: % Value 2020-2023

Table 29 - Retail Offline GBO Company Shares: % Value 2019-2023

Table 30 - Retail Offline GBN Brand Shares: % Value 2020-2023

Table 31 - Retail Offline LBN Brand Shares: Outlets 2020-2023

Table 32 - Retail E-Commerce GBO Company Shares: % Value 2019-2023

Table 33 - Retail E-Commerce GBN Brand Shares: % Value 2020-2023

Table 34 - Grocery Retailers GBO Company Shares: % Value 2019-2023

Table 35 - Grocery Retailers GBN Brand Shares: % Value 2020-2023

Table 36 - Grocery Retailers LBN Brand Shares: Outlets 2020-2023

Table 37 - Grocery Retailers LBN Brand Shares: Selling Space 2020-2023

Table 38 - Non-Grocery Retailers GBO Company Shares: % Value 2019-2023

Table 39 - Non-Grocery Retailers GBN Brand Shares: % Value 2020-2023

Table 40 - Non-Grocery Retailers LBN Brand Shares: Outlets 2020-2023

Table 41 - Non-Grocery Retailers LBN Brand Shares: Selling Space 2020-2023

Table 42 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2023-2028

Table 43 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2023-2028

Table 44 - Forecast Sales in Retail Offline by Channel: Value 2023-2028

Table 45 - Forecast Sales in Retail Offline by Channel: % Value Growth 2023-2028

Table 46 - Forecast Retail Offline Outlets by Channel: Units 2023-2028

Table 47 - Forecast Retail Offline Outlets by Channel: % Unit Growth 2023-2028

Table 48 - Forecast Sales in Retail E-Commerce by Channel: Value 2023-2028

Table 49 - Forecast Sales in Retail E-Commerce by Channel: % Value Growth 2023-2028

Table 50 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 51 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 52 - Forecast Sales in Grocery Retailers by Channel: Value 2023-2028

Table 53 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2023-2028

Table 54 - Forecast Grocery Retailers Outlets by Channel: Units 2023-2028

Table 55 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028

Table 56 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 57 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 58 - Forecast Sales in Non-Grocery Retailers by Channel: Value 2023-2028

Table 59 - Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2023-2028

Table 60 - Forecast Non-Grocery Retailers Outlets by Channel: Units 2023-2028

Table 61 - Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028

DISCLAIMER

SOURCES

Summary 2 - Research Sources

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/small-local-grocers-in-japan/report.