



Staple Foods in Japan

December 2025

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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

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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
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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

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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

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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

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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

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[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

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