

Japan Foodservice - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Japan Foodservice Market size is estimated at 262.50 billion USD in 2024, and is expected to reach 421.02 billion USD by 2029, growing at a CAGR of 9.91% during the forecast period (2024-2029).

Quick service restaurants held the major share in the market due to the constant launch of new products

- The Japanese foodservice market is known for its diverse range of dining options, from traditional Japanese cuisine to international cuisine. Japan has the world's highest number of Michelin-starred restaurants, with Tokyo alone boasting over 200 Michelin-starred restaurants. This recognition is a testament to the quality and attention to detail in food preparation and presentation in Japanese cuisine. Japan has some of the strictest food safety standards, and the government regularly inspects food establishments to ensure compliance. This emphasis on food safety indicates the importance placed on quality and the use of high-quality ingredients in Japanese cuisine.

- Quick service restaurants in Japan are highly popular due to the country's busy lifestyle and the need for quick and convenient meals. Many QSR chains in Japan specialize in fast food, such as burgers, fried chicken, and noodles. Some popular quick service restaurants in Japan include McDonald's, KFC, MOS Burger, Lotteria, Freshness Burger, and Yoshinoya. QSRs are constantly involved in the launch of new products, and hence, have the largest share, and they are anticipated to register a CAGR of 8.99% during the forecast period.

- The demand for cloud kitchens in Japan has also attracted significant investment from domestic and international companies. For example, COOKPAD Inc., a Japanese recipe-sharing and food delivery platform, invested in several cloud kitchen companies, including Kitchen Base and Z Holdings Corporation (formerly Yahoo Japan). In 2022, Singapore-based cloud kitchen operator, Smart City Kitchens, announced plans to expand to Japan with a new facility in Tokyo.

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Japan Foodservice Market Trends

Full service restaurants in Japan benefit from an aging population and growing tourism

- FSR held the second-highest share in the market, at 38%, in 2022. Japan has an aging population, and many elderly people prefer full service restaurants because they offer a more comfortable and relaxing dining experience. As of 2021, the elderly population in Japan was approximately 36.1 million, representing around 28.5% of the total population. With the growth of tourism in Japan, many visitors are seeking out local cuisines as part of their travel experience. Full service restaurants that offer regional and local dishes are better positioned to attract these customers and provide them with a taste of the local culture.
- Cloud kitchen is the fastest-growing foodservice type, and the segment is projected to register a CAGR of 9.20% during the forecast period. The pandemic accelerated an already-established trend of cloud kitchens. The necessity of conserving money caused the migration to cloud kitchens as the restaurants closed. Some business owners only set up cloud kitchens, others switch, and some run hybrid business models. Cloud kitchens service their consumers exclusively through technology. Thus, clever promotions and top-notch customer support help the cloud kitchen market expand.
- Japan is a popular tourist destination, and QSR provides an easy option for visitors who may be unfamiliar with the local cuisine or looking for a quick meal before sightseeing. As of 2021, Japan saw a total of 1.97 million international visitors. The top QSR chains in Japan were McDonald's, MOS Burger, and KFC, with 2,900, 1,480, and 1,350, respectively, as of 2022.

The popularity of fast food drives menu expansion at QSR chains in Japan, with dishes like burgers, pizzas, and yakitori gaining demand

- In Japan, the average orders were highest among FSRs in 2022 compared to other foodservice types, with a price of USD 20.3. The demand for FSR in the country is driven by Asian cuisine, which accounted for a significant contribution to the foodservice market and is expected to increase due to the increase in tourism and exploration of the local Asian cuisine. Some of the popular full service restaurants include Sushi Sho, Shiseido Parlour, Ponchi-ken, Seirinkan, Les Chanterelles, Ise Sueyoshi, Tenoshimam, Nanzenji Hyotei, and Natives Restaurant & Patio. Popular dishes offered in FSR cuisines are ramen, bento, tempura, and sushi, priced at USD 9.5, USD 6.7, USD 6.8, and USD 4.9 per 300 g, respectively.
- The popularity of fast food in recent years has led QSR chains to expand their menu selections. Top QSR chains in the country are McDonald's, Domino's, and KFC, with 2,932, 957, and 865 outlets, respectively. Popular growing fast foods include burgers, pizzas, and Yakitori in QSRs. The burger and pizza dishes are priced at USD 4.2 and 9 per 300 g in the country.
- The cloud kitchen segment in Japan is expanding due to increasing e-commerce penetration and subsequent demand for food delivery services such as Uber Eats, Door Dash, Fine Dine, and Demae-can, especially post-pandemic. Thus, popular restaurants are shifting to the cloud kitchen model. For instance, the Japanese beef-bowl chain, Yoshinoya, opened a dark kitchen in Tokyo's Setagaya-ku in 2020. Similarly, the Japanese curry chain Coco's Ichibanya shifted to a delivery-only kitchen service. Popular dishes offered by cloud kitchens in Japan are sushi and bento, which were priced at an average of USD 5.3 per 300 g.

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Japan Foodservice Industry Overview

The Japan Foodservice Market is fragmented, with the top five companies occupying 4.89%. The major players in this market are McDonald's Corporation, Seven & I Holdings Co. Ltd, Skylark Holdings Co. Ltd, Yoshinoya Holdings Co. Ltd and Yum! Brands Inc. (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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