

Japan Meat Substitutes Market Size, Share and Outlook - Growth Analysis Report and Forecast Trends (2026-2035)

Market Report | 2026-03-17 | 101 pages | EMR Inc.

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Report description:

The Japan meat substitutes market was valued at USD 473.72 Million in 2025 . The market is expected to grow at a CAGR of 6.10% during the forecast period of 2026-2035 to reach a value of USD 856.40 Million by 2035 . The market growth is significantly influenced by consumers increasingly adopting plant-based proteins that replicate the taste, texture, and convenience of conventional meat.

Key Market Trends and Insights

- By source, pea is expected to grow at a CAGR of 6.7% over the forecast period.
- By distribution channel, the food service category is projected to witness a CAGR of 6.5% over the forecast period.

Market Size & Forecast

- Market Size in 2025: USD 473.72 Million
- Projected Market Size in 2035: USD 856.40 Million
- CAGR from 2026 to 2035: 6.10%

The growing flexitarian eating trends and the growing demand for functional and clean-labeled proteins are driving the growth of the Japan meat substitutes market. The low-cholesterol, high-fiber alternatives linked to the wellness trends are becoming a priority for consumers, whereas manufacturers are trying to develop versatile protein forms that could fit the traditional cuisine. Sustainability objectives and carbon reduction promises are also influencing food producers to incorporate plant-based inputs in the mainstream product portfolios.

Ready-to-cook items such as nuggets and cutlets are gaining widespread popularity, as they are well-suited for both household

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consumption and foodservice menus across the country. The Japan meat substitutes market players are thus expanding product lines to include locally developed brands to suit the local preferences. This is because the increasing availability of imported plant-based meat products is expanding category presence in the supermarkets and online shopping platforms, allowing consumers to sample other proteins without having to make major shifts in their diet. This is rapidly expanding mainstream acceptance and augmenting competitive pressures in the sector. For instance, in July 2023, Itochu Corporation started wholesale selling plant-based chicken nuggets, cutlets, and bite-sized portions of the Field Good brand, developed by the Thailand-based Charoen Pokphand Group, throughout the entire country.

Japan Meat Substitutes Market Report Summary

Description

Value

Base Year

USD Million

2025

Historical Period

USD Million

2019-2025

Forecast Period

USD Million

2026-2035

Market Size 2025

USD Million

473.72

Market Size 2035

USD Million

856.40

CAGR 2019-2025

Percentage

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%

CAGR 2026-2035

Percentage

6.10%

CAGR 2026-2035 - Market by Source

Pea

6.7%

CAGR 2026-2035 - Market by Distribution Channel

Food Service

6.5%

Key Trends and Recent Developments

December 2025 - IntegriCulture Introduced 'Cellag' Open Brand in Japan

The Tokyo-based IntegriCulture Inc. launched Cellag, an open brand designed to commercially produce cellular agriculture products in foods, and materials. The initiative is expected to foster the growth of the Japanese alternative protein ecosystem by building a common platform through which innovations in the field can be cultivated and adopted by the industry, further contributing to the development of new markets.

August 2025 - Next Meats Accelerated Soy-Based Expansion Across Hospitality Chains

Next Meats Co., Ltd. expanded its vegan deli menu to ten products, in partnership with Mama Foods Co., Ltd. The program also enhanced foodservice and commercial presence, as hotels and ryokans catering to inbound tourists become nationwide roll-out participants, which has a direct impact on the increasing volume of the soy-based meat category in the Japan meat substitutes market.

February 2025 - Yukiguni Maitake Launched 'Mushroom Meat' in Japan

Yukiguni Maitake Co., Ltd., located in Niigata, introduced a new line of products called Mushroom Meat (Kinoko no Oniku) produced mostly out of its own brand, Yukiguni Maitake Kiwami. The products, which exploit the texture of maitake fiber to produce a mouthfeel that resembles meat, were introduced to the domestic market through supermarket and internet platforms. They sold out within seven days of launch, demonstrating the high level of consumer interest in the Japanese mushroom-based alternative protein industry.

August 2024 - Fujiya Unveiled Sorghum-Based Plant Meat Brand 'Nikugoe' in Japan

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Fujiya announced the debut of the sorghum-based plant meat brand Nakugoe, which consists of Hamburg Steak and Meat Super Gyoza, in Japan. To support the continued expansion of the Japan meat substitutes market, incorporating domestically sourced grains and familiar product formats can enhance consumer trial and accelerate category penetration.

Expansion into Plant-Based Seafood Alternatives

The Japan meat substitutes market is shifting its focus to seafood alternatives, which is a reflection of the traditional high seafood consumption of the country, as well as increasing sustainability concerns. Firms are using plant fibers, soy derivatives, and other traditional ingredients to recreate the texture, flake structure, and visual appeal of tuna for sushi and foodservice purposes. This diversification increases category depth and facilitates consumer acceptance beyond terrestrial meat alternatives. In June 2024, Nippon Ham Co., Ltd. disclosed a plant-based tuna product made for Japan's foodservice sector.

Upgradation of Domestic Plant-Based Beef Products

Repeat purchases in the Japan meat substitutes market are supported by the continuous refinement of the sensory aspects and formulation upgrades. Both startups and established players are working on soy-based alternatives to enhance juiciness, mouthfeel, and cooking adaptability for grilling, stir-frying, and simmering applications. Such improvements are closing the gap in taste and texture between conventional meat and their alternatives, thus reinforcing consumer loyalty. For instance, in December 2024, NEXT MEATS Co., Ltd. unveiled NEXT Beef 1.0, an improved soy-based beef alternative that can be used in a wide variety of culinary applications.

Integration into Convenience Retail Channels

Convenience stores have become key to making plant-based eating a regular habit in the cities of Japan. The availability of ready-to-eat meals in this format makes them more accessible, triggers impulse buying, and suits the style of quick consumption, whereas the distribution of chains across the nation raises the visibility of the products and facilitates trial. Expanding through this retail channel is important in order to boost the mainstream adoption of such diets outside the niche health segments. For instance, in December 2024, FamilyMart Co., Ltd. announced that it had extended its Blue Green product range to include soy-based keema curry and bibimbap that were available throughout Japan.

Strategic Ingredient Partnerships Accelerating Market Development

By concentrating on the commercialization of ingredients and the quicker development of new applications, international alliances are helping Japan create a next-generation protein ecosystem. Connections between foreign pioneers and well-established local distributors in the Japan meat substitutes market lead to a better understanding of regulations, greater supply chain efficiency, and access to highly developed food manufacturing networks. These types of partnerships enable the combination of clean label changes with product innovations that deliver new functionalities. For instance, in September 2025, Leaft Foods partnered with Lacto Japan Co., Ltd. to introduce leaf-based Rubisco protein across multiple sectors in Japan, including plant-based products, bakery applications, and sports nutrition.

Expansion of Plant-Based Ingredient Solutions into Food Manufacturing Channels

Product innovation is gradually expanding beyond retail to include food manufacturing and broader culinary applications. Plant-based mince forms offer a possibility for being incorporated in ready meals, institutional catering, and restaurant menus, thus pushing the commercialization at a large scale and enhancing the cost efficiencies. Ingredient-level solutions also facilitate supply chain adoption by providing standardized inputs for factories and commercial kitchens. For instance, in January 2026, Green Culture Co., Ltd. unveiled Green Meat Plain, a plant-based mince specially designed for the manufacturing and foodservice

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channels in Japan.

Japan Meat Substitutes Industry Segmentation

The EMR's report titled "Japan Meat Substitutes Market Report and Forecast 2026-2035" offers a detailed analysis of the market based on the following segments:

Market Breakup by Source

- Soy
- Wheat
- Pea
- Others

Key Insight: The Japan meat substitutes market scope comprises soy, wheat, pea, and so on, with each segment's growth being fueled by formulation innovation and consumer positioning. Soy continues to lead the market, due to the portfolio growth by companies like NH Foods Ltd. and Tofumeat Corp. The demand for wheat protein is still high as it offers fibrous texture in processed versions, and pea protein is growing in popularity because of the allergen-friendly claims. The other segment with products derived from mushrooms is growing with the efforts of Green Culture Co., Ltd., further diversifying ingredients.

Market Breakup by Distribution Channel

- Retail
- Food Service

Key Insight: The product sales in the Japan meat substitutes market are driven through retail and food service, both of which are important to commercialization. Listings and the strategy of retail expansion by supermarkets and hypermarkets by organizations like AEON Co., Ltd. reinforce retail expansion. Restaurant and hospitality partnerships are increasing the overall food service adoption with brands like The Vegetarian Butcher and Next Meats Co., Ltd. taking the lead. Collectively, these channels contribute to improved accessibility, consumer trial, and repeat purchases throughout Japan.

Japan Meat Substitutes Market Share

By source, soy continues to gain traction with ongoing innovation in soy-based formats, driving product differentiation

The Japan meat substitutes market observes strong demand for soy-based meat alternatives owing to the continuous product innovation that is improving consumer engagement with convenient, health-oriented, and value-added formats. Manufacturers are more oriented towards organic certification, clean-label positioning, and unique product shapes to reinforce retail differentiation and attract health-conscious consumers. These innovations enhance shelf competitions and extend the range of uses in domestic cooking. For instance, in January 2023, Japan Keystone introduced SoyJOCK organic TVP strips in the shape of chicken wings, produced with the use of USDA-certified organic, non-GMO soybeans, further supporting the growth trend in this particular category.

Meanwhile, the wheat category is picking up considerable momentum within the Japan meat substitutes market dynamics. The use of technology to develop proteins found in wheat is enhancing the commercialization of alternative meat inputs by reducing the cost of production by a significant margin and enhancing scalability. Precision bioprocessing, mechanization, and optimization of ingredient methods are beginning to be adopted by companies to enable better protein yield and economic feasibility. The

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developments reinforce the role of wheat germs as an efficient substrate in synthetic and hybrid protein systems, especially lab-grown applications. For instance, in October 2023, Hitachi Zosen stated that they plan to commercialize a synthetic protein created with NUProtein, using modified wheat germ and automated solution-processing machines to reduce about 90% of the cost of production.

By distribution channel, the food service channel shows robust growth as premium foodservice adoption drives category upscaling

The food service distribution channel is becoming important for generating revenue in the Japan meat substitutes market by promoting plant-based products into high-end restaurants, enhancing consumer perception and trial. For instance, in July 2023, Dr. FOODS Inc., in collaboration with subsidiary Next Meats Co., Ltd., increased its vegan foie gras and caviar offerings into 28 wedding halls and hotel restaurants managed by Nihon Ceremony Co., Ltd. This institutional adoption improves brand prestige, promotes high-volume servings, and premiumization in the Japanese market.

On the other hand, the retail distribution channel considerably drives the overall Japan meat substitutes market value, with the plant-based firms reinforcing their collaboration with large-format modern trade retailers to amplify the visibility and quantity of sales. Membership warehouse clubs and supermarkets are increasingly serving as primary launch platforms for premium, clean-label meat alternatives, supported by in-store promotions and sampling campaigns to drive consumer trial. NEXT MEATS followed with the launch of its soy-based Next Short Rib 2.1 in all Costco stores in Japan in March 2023 to support store-led growth strategies.

Competitive Landscape

The Japan meat substitutes market players are focusing on incessant product innovation and localization to enhance consumer acceptance. Firms are creating soy- and wheat-based variations that match the Japanese food formats like yakiniku, karaage, and ready-to-eat meals. The major investments in research and development are enhancing texture, taste fidelity, and nutrition, and positioning clean-label, non-GMO, and additive-free products to accelerate brand trust among flexitarian and health-conscious consumers.

Simultaneously, Japan meat substitute companies are diversifying distribution by means of contemporary retail outlets, electronic commerce, and foodservice arrangements to make access and awareness more accessible. Trial and repeat purchases are encouraged with strategic placements with supermarkets and warehouse clubs, in-store sampling events, and limited-edition releases. Moreover, several businesses are considering international growth and increasing production volume in order to enhance cost-effectiveness and expand the competitive landscape of the market.

Next Meats Co., Ltd.

Next Meats Co., Ltd. is a food-tech company that makes plant-based meat alternatives based on Japanese cuisine and was established in 2017 with its headquarters in Tokyo, Japan. The company also focuses on research, development, and commercialization of soy-based products such as yakiniku-style products both in the domestic and international markets.

Tastable Co., Ltd.

Tastable Co., Ltd., a Japan-based company that was established in 2016, focuses on the development of innovative plant-based and alternative protein solutions in the country. The company focuses on designing products, optimizing flavors, and manufacturing that can be scaled to facilitate retail and foodservice distribution in the Japan meat substitutes market.

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NH Foods Ltd.

NH Foods Ltd. is a diversified food processing company based in Osaka, Japan, which was established in 1942 and operates in the fresh meats, processed food, and alternative protein segments. The company uses its vast network of distribution and research and development to extend its operations to the plant-based segment.

Sproutx Inc.

Sproutx Inc. was established in 2017 and is based in Tokyo, Japan, and is a startup venture that specializes in next-generation innovations in plant-based and cell-based foods. The company is investing in product development, strategic collaborations, and technology-based solutions that can help it sustain protein progress, thereby accelerating the Japan meat substitutes market growth.

Other key players in the market are?Green Culture Co., Ltd,?The Vegetarian Butcher Japan Inc,?Tofumeat Corp. among others.

Key Highlights of the Japan Meat Substitutes Market Report

- Historical performance and accurate forecasts through 2035 where the data has been well analyzed, and precise projections of volume and value growth are made.
- News about product innovations and technological breakthroughs, including new developments, reformulations, and advances in soy, pea, mushroom, and cultivated proteins.
- The competitive landscape of the major domestic and international producers, such as strategies, collaborations, and investments, as well as market positioning, is profiled in depth.
- Regional analysis of the location with newer demand hubs, breakdowns by major prefectures, retail penetration rates, and foodservice uptake patterns.
- Investment-oriented perspective, based on data, with evaluation of capital inflows, growth strategies, research and development, and strategic growth prospects.

Why Choose Expert Market Research?

- Reliable information supported by extensive primary research and validation at the industry level.
- Practical information aimed at expansion, product development, and entry strategies.
- Product-specific and region-wise analysis with specific and executable intelligence

Call to Action

Explore the latest trends shaping the Japan meat substitutes market 2026-2035 with our in-depth report. Gain strategic insights, future forecasts, and key market developments that can help you stay competitive. Download a free sample report or contact our team for customized consultation on Japan meat substitutes market trends 2026 .

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