



# Self-Service Cafeterias in Japan

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Table of Contents

## Self-Service Cafeterias in Japan - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Value-led formats withstand inflation as chains and new entrants broaden the offer

#### INDUSTRY PERFORMANCE

Affordable udon brands drive growth amid rising costs

Discount campaigns power growth for udon chains

From breakfast to dinner: Ikea reinvents value for busy consumers

#### WHAT'S NEXT?

Affordable dining and solo-friendly formats will drive future demand

Profitability questions put mobile ordering under review

Small steps towards sustainability gain momentum

#### COMPETITIVE LANDSCAPE

Toridoll maintains leadership with family-friendly offers and customer perks

Ikea Japan captures growth with affordable morning menus

Independents struggle as rising costs widen the gap

#### CATEGORY DATA

Table 1 - Self-Service Cafeterias: Units/Outlets 2020-2025

Table 2 - Sales in Self-Service Cafeterias: Number of Transactions 2020-2025

Table 3 - Sales in Self-Service Cafeterias: Foodservice Value 2020-2025

Table 4 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2020-2025

Table 5 - Sales in Self-Service Cafeterias: % Transaction Growth 2020-2025

Table 6 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2020-2025

Table 7 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2021-2025

Table 8 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2022-2025

Table 9 - Forecast Self-Service Cafeterias: Units/Outlets 2025-2030

Table 10 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2025-2030

Table 11 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2025-2030

Table 12 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2025-2030

Table 13 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2025-2030

Table 14 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2025-2030

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## [Consumer Foodservice in Japan - Industry Overview](#)

### EXECUTIVE SUMMARY

Further growth propelled by tourism and price hikes

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Inflation meets inbound tourism to boost value sales in 2025

Food delivery faces post-pandemic slump and fierce price wars

Fostering loyalty through mobile rewards and milestone ceremonies

#### WHAT'S NEXT?

From izakaya decline to experiential dining

Labour shortages make automation essential

Balancing sustainability and satisfaction

## COMPETITIVE LANDSCAPE

From coffee pioneer to tea trendsetter: 7-Eleven reinvents the counter

Gong Cha marks a decade with bold redesign

Price strategies and value deals keep Japan's diners coming back

## CHANNELS

Independents fight rising costs with digital tools and smart solutions

Non-alcoholic innovation reshapes Japan's bar scene

## MARKET DATA

Table 15 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 16 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 17 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 18 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 19 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 20 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 21 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 22 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 23 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 24 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 25 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 26 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 27 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

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## SOURCES

Summary 1 - Research Sources

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