



**Euromonitor
International**

Baked Goods in Japan

December 2025

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Baked Goods in Japan - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

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

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Health and beauty specialists sees growth as wellness trends deepen

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Staple Foods in Japan - Industry Overview

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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

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