



Consumer Foodservice in Japan

March 2026

Table of Contents

Consumer Foodservice in Japan

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

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 8 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 9 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 10 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 11 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in Japan

KEY DATA FINDINGS

2025 DEVELOPMENTS

Cafés lead recovery as structural shifts constrain bars and pubs

INDUSTRY PERFORMANCE

Bars and pubs struggle to recover

Balancing inflation and loyalty in specialist coffee and tea shops
Tea-based menus help cafés tackle rising costs of coffee beans

WHAT'S NEXT?

Lifestyle shifts and price pressures challenge izakaya recovery
Takeaway formats gain momentum
Non-alcoholic drinks signal a new era for Japanese bars and pubs

COMPETITIVE LANDSCAPE

Starbucks expands beyond coffee to maintain leadership
Gong Cha marks a decade, fostering tea culture
Independent cafés and bars struggle amid rising costs

CATEGORY DATA

Table 14 - Cafés/Bars by Category: Units/Outlets 2020-2025
Table 15 - Sales in Cafés/Bars by Category: Number of Transactions 2020-2025
Table 16 - Sales in Cafés/Bars by Category: Foodservice Value 2020-2025
Table 17 - Cafés/Bars by Category: % Units/Outlets Growth 2020-2025
Table 18 - Sales in Cafés/Bars by Category: % Transaction Growth 2020-2025
Table 19 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2020-2025
Table 20 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2021-2025
Table 21 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2022-2025
Table 22 - Forecast Cafés/Bars by Category: Units/Outlets 2025-2030
Table 23 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2025-2030
Table 24 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2025-2030
Table 25 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2025-2030
Table 26 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2025-2030
Table 27 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

[Full-Service Restaurants in Japan](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Inbound demand and value tactics support growth despite rising operating costs

INDUSTRY PERFORMANCE

Price hikes and tourism power full-service restaurant growth
Saizeriya wins over cost-conscious diners by holding prices steady
Breakfast menus emerge as new battleground for chains

WHAT'S NEXT?

Single-person households and tourists will continue fuel growth of breakfast menus
Price wars and new players reshape food delivery
Robots and digital tools tackle labour shortages in foodservice

COMPETITIVE LANDSCAPE

Skylark secures leadership with value menus and family focus
Affordable sushi and café concept propel Hamazushi's growth
Rising costs and labour shortages threaten small operators

CATEGORY DATA

Table 28 - Full-Service Restaurants by Category: Units/Outlets 2020-2025

- Table 29 - Sales in Full-Service Restaurants by Category: Number of Transactions 2020-2025
- Table 30 - Sales in Full-Service Restaurants by Category: Foodservice Value 2020-2025
- Table 31 - Full-Service Restaurants by Category: % Units/Outlets Growth 2020-2025
- Table 32 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2020-2025
- Table 33 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2020-2025
- Table 34 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2025
- Table 35 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2022-2025
- Table 36 - Forecast Full-Service Restaurants by Category: Units/Outlets 2025-2030
- Table 37 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2025-2030
- Table 38 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2025-2030
- Table 39 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2025-2030
- Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2025-2030
- Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

Limited-Service Restaurants in Japan

KEY DATA FINDINGS

2025 DEVELOPMENTS

Value-led formats benefit from inbound demand and careful pricing

INDUSTRY PERFORMANCE

Affordable menus and social media drive growth of limited-service restaurants

Premium menus for inbound tourists and price strategies for domestic customers shape beef bowl chains

Balancing upward and downward pricing to win customers

WHAT'S NEXT?

Adapting to demographic shifts

Convenience stores race to win in quick commerce

Eco-friendly initiatives gain momentum

COMPETITIVE LANDSCAPE

7-Eleven to reinforce leadership with fresh and premium offerings

Watami bets big on subway with fresh farm food and fusion menus

Morning demand fuels growth

CATEGORY DATA

- Table 42 - Limited-Service Restaurants by Category: Units/Outlets 2020-2025
- Table 43 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2020-2025
- Table 44 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2020-2025
- Table 45 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2020-2025
- Table 46 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2020-2025
- Table 47 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2020-2025
- Table 48 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2025
- Table 49 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2022-2025
- Table 50 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2025-2030
- Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2025-2030
- Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2025-2030
- Table 53 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2025-2030
- Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2025-2030
- Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

[Self-Service Cafeterias in Japan](#)

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 56 - Self-Service Cafeterias: Units/Outlets 2020-2025

Table 57 - Sales in Self-Service Cafeterias: Number of Transactions 2020-2025

Table 58 - Sales in Self-Service Cafeterias: Foodservice Value 2020-2025

Table 59 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2020-2025

Table 60 - Sales in Self-Service Cafeterias: % Transaction Growth 2020-2025

Table 61 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2020-2025

Table 62 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2021-2025

Table 63 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2022-2025

Table 64 - Forecast Self-Service Cafeterias: Units/Outlets 2025-2030

Table 65 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2025-2030

Table 66 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2025-2030

Table 67 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2025-2030

Table 68 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2025-2030

Table 69 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2025-2030

DISCLAIMER

[Street Stalls/Kiosks in Japan](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Street food demand lifts stalls/kiosks as office routines normalise

INDUSTRY PERFORMANCE

Food trucks thrive amid changing work patterns and tourism

Mellow elevates food trucks with awards and stadium expansion

Food trucks boost growth through events

WHAT'S NEXT?

Authentic local flavours drive inbound demand
Mobile kitchens deliver hope during emergencies
Food trucks bridge gaps in ageing rural communities

COMPETITIVE LANDSCAPE

Flexibility and sustainability drive success for food trucks

CATEGORY DATA

Table 70 - Street Stalls/Kiosks: Units/Outlets 2020-2025
Table 71 - Sales in Street Stalls/Kiosks: Number of Transactions 2020-2025
Table 72 - Sales in Street Stalls/Kiosks: Foodservice Value 2020-2025
Table 73 - Street Stalls/Kiosks: % Units/Outlets Growth 2020-2025
Table 74 - Sales in Street Stalls/Kiosks: % Transaction Growth 2020-2025
Table 75 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2020-2025
Table 76 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2021-2025
Table 77 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2022-2025
Table 78 - Forecast Street Stalls/Kiosks: Units/Outlets 2025-2030
Table 79 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2025-2030
Table 80 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2025-2030
Table 81 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2025-2030
Table 82 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2025-2030
Table 83 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2025-2030

DISCLAIMER

Consumer Foodservice By Location in Japan

KEY DATA FINDINGS

2025 DEVELOPMENTS

Location shifts favour retail complexes as operators optimise standalone footprints

INDUSTRY PERFORMANCE

Food courts evolve into experiential dining destinations
Experiential dining and iconic Japanese cuisine attract global travellers
High-rent challenges drive lean store strategies in city centres

WHAT'S NEXT?

Experience-driven foodservice leads the future of retail complexes
Standing bars and neo-kakuuchi reshape compact dining trend
Labour shortage drives digital transformation

COMPETITIVE LANDSCAPE

Convenience and cultural appeal support non-standalone success
Leading standalone chains expand with roadside convenience

CATEGORY DATA

Table 84 - Consumer Foodservice by Location: Units/Outlets 2020-2025
Table 85 - Sales in Consumer Foodservice by Location: Number of Transactions 2020-2025
Table 86 - Sales in Consumer Foodservice by Location: Foodservice Value 2020-2025
Table 87 - Consumer Foodservice by Location: % Units/Outlets Growth 2020-2025
Table 88 - Sales in Consumer Foodservice by Location: % Transaction Growth 2020-2025
Table 89 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2020-2025
Table 90 - Consumer Foodservice Through Standalone: Units/Outlets 2020-2025

Table 91 - Sales in Consumer Foodservice Through Standalone: Number of Transactions 2020-2025

Table 92 - Sales in Consumer Foodservice Through Standalone: Foodservice Value 2020-2025

Table 93 - Consumer Foodservice Through Standalone: % Units/Outlets Growth 2020-2025

Table 94 - Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2020-2025

Table 95 - Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2020-2025

Table 96 - Consumer Foodservice Through Leisure: Units/Outlets 2020-2025

Table 97 - Sales in Consumer Foodservice Through Leisure: Number of Transactions 2020-2025

Table 98 - Sales in Consumer Foodservice Through Leisure: Foodservice Value 2020-2025

Table 99 - Consumer Foodservice Through Leisure: % Units/Outlets Growth 2020-2025

Table 100 - Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2020-2025

Table 101 - Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2020-2025

Table 102 - Consumer Foodservice Through Retail: Units/Outlets 2020-2025

Table 103 - Sales in Consumer Foodservice Through Retail: Number of Transactions 2020-2025

Table 104 - Sales in Consumer Foodservice Through Retail: Foodservice Value 2020-2025

Table 105 - Consumer Foodservice Through Retail: % Units/Outlets Growth 2020-2025

Table 106 - Sales in Consumer Foodservice Through Retail: % Transaction Growth 2020-2025

Table 107 - Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2020-2025

Table 108 - Consumer Foodservice Through Lodging: Units/Outlets 2020-2025

Table 109 - Sales in Consumer Foodservice Through Lodging: Number of Transactions 2020-2025

Table 110 - Sales in Consumer Foodservice Through Lodging: Foodservice Value 2020-2025

Table 111 - Consumer Foodservice Through Lodging: % Units/Outlets Growth 2020-2025

Table 112 - Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2020-2025

Table 113 - Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2020-2025

Table 114 - Consumer Foodservice Through Travel: Units/Outlets 2020-2025

Table 115 - Sales in Consumer Foodservice Through Travel: Number of Transactions 2020-2025

Table 116 - Sales in Consumer Foodservice Through Travel: Foodservice Value 2020-2025

Table 117 - Consumer Foodservice Through Travel: % Units/Outlets Growth 2020-2025

Table 118 - Sales in Consumer Foodservice Through Travel: % Transaction Growth 2020-2025

Table 119 - Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2020-2025

Table 120 - Forecast Consumer Foodservice by Location: Units/Outlets 2025-2030

Table 121 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2025-2030

Table 122 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2025-2030

Table 123 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2025-2030

Table 124 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2025-2030

Table 125 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2025-2030

Table 126 - Forecast Consumer Foodservice Through Standalone: Units/Outlets 2025-2030

Table 127 - Forecast Sales in Consumer Foodservice Through Standalone: Number of Transactions 2025-2030

Table 128 - Forecast Sales in Consumer Foodservice Through Standalone: Foodservice Value 2025-2030

Table 129 - Forecast Consumer Foodservice Through Standalone: % Units/Outlets Growth 2025-2030

Table 130 - Forecast Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2025-2030

Table 131 - Forecast Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2025-2030

Table 132 - Forecast Consumer Foodservice Through Leisure: Units/Outlets 2025-2030

Table 133 - Forecast Sales in Consumer Foodservice Through Leisure: Number of Transactions 2025-2030

Table 134 - Forecast Sales in Consumer Foodservice Through Leisure: Foodservice Value 2025-2030

Table 135 - Forecast Consumer Foodservice Through Leisure: % Units/Outlets Growth 2025-2030

Table 136 - Forecast Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2025-2030

Table 137 - Forecast Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2025-2030

Table 138 - Forecast Consumer Foodservice Through Retail: Units/Outlets 2025-2030

Table 139 - Forecast Sales in Consumer Foodservice Through Retail: Number of Transactions 2025-2030

Table 140 - Forecast Sales in Consumer Foodservice Through Retail: Foodservice Value 2025-2030

Table 141 - Forecast Consumer Foodservice Through Retail: % Units/Outlets Growth 2025-2030

Table 142 - Forecast Sales in Consumer Foodservice Through Retail: % Transaction Growth 2025-2030

Table 143 - Forecast Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2025-2030
Table 144 - Forecast Consumer Foodservice Through Lodging: Units/Outlets 2025-2030
Table 145 - Forecast Sales in Consumer Foodservice Through Lodging: Number of Transactions 2025-2030
Table 146 - Forecast Sales in Consumer Foodservice Through Lodging: Foodservice Value 2025-2030
Table 147 - Forecast Consumer Foodservice Through Lodging: % Units/Outlets Growth 2025-2030
Table 148 - Forecast Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2025-2030
Table 149 - Forecast Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2025-2030
Table 150 - Forecast Consumer Foodservice Through Travel: Units/Outlets 2025-2030
Table 151 - Forecast Sales in Consumer Foodservice Through Travel: Number of Transactions 2025-2030
Table 152 - Forecast Sales in Consumer Foodservice Through Travel: Foodservice Value 2025-2030
Table 153 - Forecast Consumer Foodservice Through Travel: % Units/Outlets Growth 2025-2030
Table 154 - Forecast Sales in Consumer Foodservice Through Travel: % Transaction Growth 2025-2030
Table 155 - Forecast Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2025-2030

DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/consumer-foodservice-in-japan/report.