



# Processed Fruit and Vegetables in Japan

December 2025

Table of Contents

## Processed Fruit and Vegetables in Japan - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Modest growth for processed fruit and vegetables in 2025 amid high inflation

#### INDUSTRY PERFORMANCE

Frozen fruits and vegetables are in demand as fresh fruits and vegetables experience supply issues

Acia bowls drive demand for frozen fruit

#### WHAT'S NEXT?

Fractionation in the price of fresh food will encourage a shift to frozen options

Processed beans as meal toppers set to remain on-trend

Mottainai concept set to attract consumer attention

#### COMPETITIVE LANDSCAPE

Hagoromo Foods Corp leads a fragmented category

Private label gains share rapidly as prices rise

#### CHANNELS

Health and beauty specialists benefit from an increasing variety

E-commerce continues its upward trajectory, albeit from a relatively low base

#### CATEGORY DATA

Table 1 - Sales of Processed Fruit and Vegetables by Category: Volume 2020-2025

Table 2 - Sales of Processed Fruit and Vegetables by Category: Value 2020-2025

Table 3 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2020-2025

Table 4 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2020-2025

Table 5 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2020-2025

Table 6 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2021-2025

Table 7 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2022-2025

Table 8 - Distribution of Processed Fruit and Vegetables by Format: % Value 2020-2025

Table 9 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2025-2030

Table 10 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2025-2030

Table 11 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2025-2030

#### COUNTRY REPORTS DISCLAIMER

## Staple Foods in Japan - Industry Overview

### EXECUTIVE SUMMARY

#### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

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

## CHANNELS

Supermarkets remains the leading distribution channel in Japan

Health and beauty specialists and e-commerce are gaining popularity

## MARKET DATA

Table 13 - Sales of Staple Foods by Category: Volume 2020-2025

Table 14 - Sales of Staple Foods by Category: Value 2020-2025

Table 15 - Sales of Staple Foods by Category: % Volume Growth 2020-2025

Table 16 - Sales of Staple Foods by Category: % Value Growth 2020-2025

Table 17 - NBO Company Shares of Staple Foods: % Value 2021-2025

Table 18 - LBN Brand Shares of Staple Foods: % Value 2022-2025

Table 19 - Penetration of Private Label by Category: % Value 2020-2025

Table 20 - Distribution of Staple Foods by Format: % Value 2020-2025

Table 21 - Forecast Sales of Staple Foods by Category: Volume 2025-2030

Table 22 - Forecast Sales of Staple Foods by Category: Value 2025-2030

Table 23 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

Table 24 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

## SOURCES

Summary 1 - Research Sources

### 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/processed-fruit-and-vegetables-in-japan/report](http://www.euromonitor.com/processed-fruit-and-vegetables-in-japan/report).