



Processed Meat, Seafood and Alternatives To Meat in Japan

December 2025

KEY DATA FINDINGS

2025 DEVELOPMENTS

Marginal growth for processed meat, seafood and alternatives to meat in 2025

INDUSTRY PERFORMANCE

Salad chicken fuels processed meat, seafood and alternatives to meat sales in Japan

Fish and seafood remain key ingredients in many popular Japanese dishes

WHAT'S NEXT?

Price increase set to hamper processed fish sales in the years ahead

Healthy, high-quality protein offers strong growth potential

Meat substitutes set to struggle as the boom slows down

COMPETITIVE LANDSCAPE

Itoham Foods continues to lead processed meat, seafood and alternatives to meat in Japan

NH Foods holds second place, but private label gains ground as consumers tighten their belts

CHANNELS

Store-based retailers continue to dominate the distribution landscape

E-commerce slowly gains ground from a low base

CATEGORY DATA

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

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[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

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