



Passport

Gum in Japan

Euromonitor International

July 2021

This sample report is for illustration
purposes only.

Some content and data have been
changed.

To purchase a full version, please visit

www.euromonitor.com

LIST OF CONTENTS AND TABLES

Gum in Japan - Category Analysis.....	1
KEY DATA FINDINGS	1
2021 DEVELOPMENTS.....	1
Remote working continues to limit demand for gum in 2021	1
Lotte A leading innovator when it comes to fortified/functional gum	1
Mondelez Japan focuses on the promotion activities than product innovations	2
PROSPECTS AND OPPORTUNITIES	2
Functionality will remain key to innovation with Lotte at the centre.....	2
Manufacturers turning their attention to other areas of snacks.....	2
Attention turns to packaging as players look to drive sales of gum.....	3
CATEGORY DATA	3
Table 1 Sales of Gum by Category: Volume 2016-2021	3
Table 2 Sales of Gum by Category: Value 2016-2021	3
Table 3 Sales of Gum by Category: % Volume Growth 2016-2021	3
Table 4 Sales of Gum by Category: % Value Growth 2016-2021	4
Table 5 Sales of Gum by Flavour: Rankings 2016-2021	4
Table 6 NBO Company Shares of Gum: % Value 2017-2021	4
Table 7 LBN Brand Shares of Gum: % Value 2018-2021	4
Table 8 Distribution of Gum by Format: % Value 2016-2021	5
Table 9 Forecast Sales of Gum by Category: Volume 2021-2026.....	6
Table 10 Forecast Sales of Gum by Category: Value 2021-2026.....	6
Table 11 Forecast Sales of Gum by Category: % Volume Growth 2021-2026.....	6
Table 12 Forecast Sales of Gum by Category: % Value Growth 2021-2026	6
Snacks in Japan - Industry Overview.....	7
EXECUTIVE SUMMARY.....	7
Snacks in 2021: The big picture.....	7
Key trends in 2021.....	7
Competitive landscape	7
Channel developments	8
What next for snacks?	8
Chart 1 Snacks Value Sales Growth Scenarios: 2019-2026	8
Chart 2 Snacks Impact of Drivers on Value Sales: 2019-2026.....	9
MARKET DATA	9
Table 13 Sales of Snacks by Category: Volume 2016-2021	9
Table 14 Sales of Snacks by Category: Value 2016-2021	9
Table 15 Sales of Snacks by Category: % Volume Growth 2016-2021	10
Table 16 Sales of Snacks by Category: % Value Growth 2016-2021	10
Table 17 NBO Company Shares of Snacks: % Value 2017-2021	10
Table 18 LBN Brand Shares of Snacks: % Value 2018-2021.....	11
Table 19 Penetration of Private Label by Category: % Value 2016-2021	11
Table 20 Distribution of Snacks by Format: % Value 2016-2021.....	11
Table 21 Forecast Sales of Snacks by Category: Volume 2021-2026.....	12
Table 22 Forecast Sales of Snacks by Category: Value 2021-2026.....	12
Table 23 Forecast Sales of Snacks by Category: % Volume Growth 2021-2026.....	13
Table 24 Forecast Sales of Snacks by Category: % Value Growth 2021-2026.....	13

DISCLAIMER 13

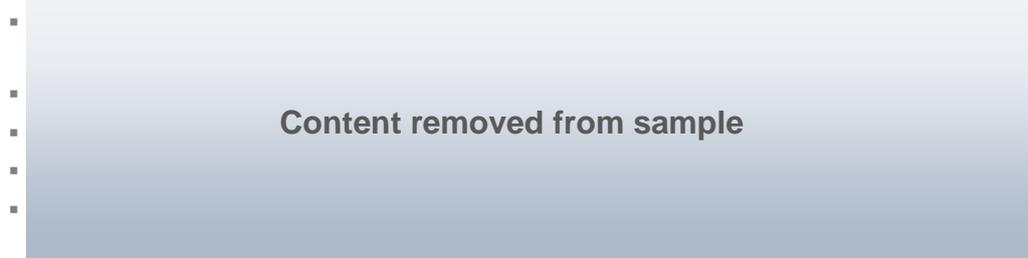
SOURCES..... 13

 Summary 1 Research Sources 13

GUM IN JAPAN - CATEGORY ANALYSIS

KEY DATA FINDINGS

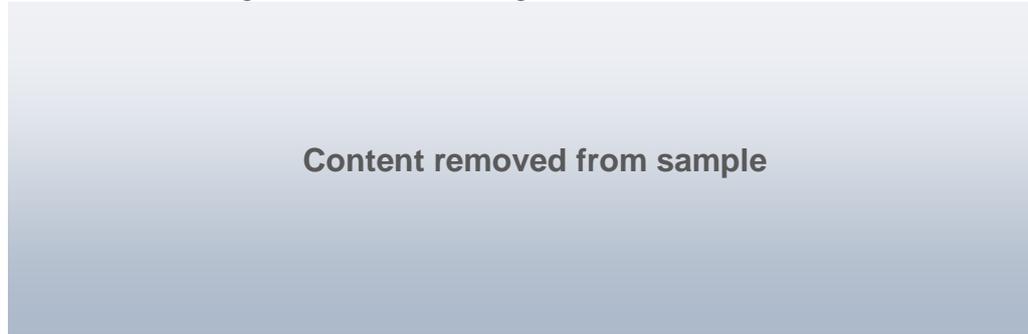
- Slow recovery expected in 2021 as consumers continue to work from home



2021 DEVELOPMENTS

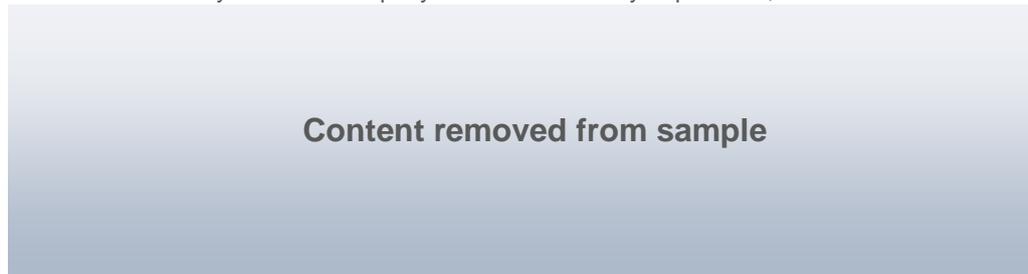
Remote working continues to limit demand for gum in 2021

Gum continues to suffer from the long-term decline in smokers, who are a key target audience for gum, and tough competition from other snacks such as mints and pastilles, gums, jellies and chews. These challenges combined with the large number of consumers who continue...



Lotte A leading innovator when it comes to fortified/functional gum

Lotte is a leading innovator in gum in Japan, which is one of the reasons behind its dominance. Not only does the company offer a wide variety of products, but it is also keen on...



Mondelez Japan focuses on the promotion activities than product innovations

Mondelez Japan offers the long-selling Clorets and Recaldent brands in Japan.

Content removed from sample

PROSPECTS AND OPPORTUNITIES

Functionality will remain key to innovation with Lotte at the centre

Bubble gum and chewing gum both recorded a sharp decline in sales in 2020 due to home seclusion. The recovery of gum in 2021 has been limited by a second wave of COVID-19 and...

Content removed from sample

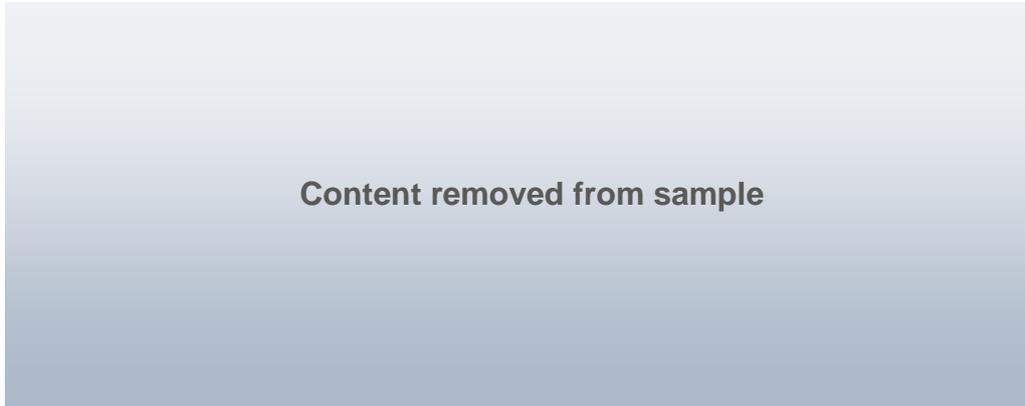
Manufacturers turning their attention to other areas of snacks

Away from functional gum, innovation in gum is showing signs of slowing down in Japan.

Content removed from sample

Attention turns to packaging as players look to drive sales of gum

While Lotte and Mondelez continue to focus on launching innovative functional products, innovation in gum from other manufacturers is expected to be centred on...



CATEGORY DATA

Table 1 Sales of Gum by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Bubble Gum	Data removed from sample					
Chewing Gum						
Gum						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Gum by Category: Value 2016-2021

JPY billion	2016	2017	2018	2019	2020	2021
Bubble Gum	Data removed from sample					
Chewing Gum						
Gum						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Gum by Category: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Bubble Gum	Data removed from sample		
Chewing Gum			
Gum			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Gum by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Bubble Gum	Data removed from sample		
Chewing Gum			
Gum			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Gum by Flavour: Rankings 2016-2021

ranking	2016	2017	2018	2019	2020	2021
Mint	Data removed from sample					
Fruit						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

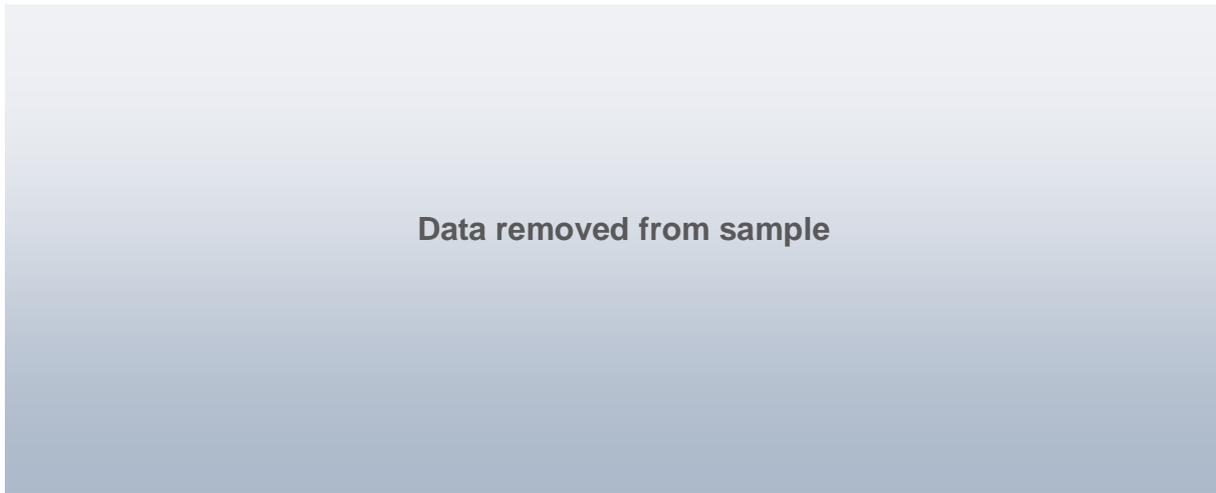
Table 6 NBO Company Shares of Gum: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
	Data removed from sample				

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 LBN Brand Shares of Gum: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
		Data removed from sample			



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Distribution of Gum by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
-- Other Foods Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Forecast Sales of Gum by Category: Volume 2021-2026

'000 tonnes

	2021	2022	2023	2024	2025	2026
Bubble Gum Chewing Gum Gum	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Sales of Gum by Category: Value 2021-2026

JPY billion

	2021	2022	2023	2024	2025	2026
Bubble Gum Chewing Gum Gum	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales of Gum by Category: % Volume Growth 2021-2026

% volume growth

	2021/22	2021-26 CAGR	2021/26 Total
Bubble Gum Chewing Gum Gum	Data removed from sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 12 Forecast Sales of Gum by Category: % Value Growth 2021-2026

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Bubble Gum Chewing Gum Gum	Data removed from sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

SNACKS IN JAPAN - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Snacks in 2021: The big picture

In 2021, Japan continues to suffer from the impact of COVID-19 with large prefectures...

Content removed from sample

Key trends in 2021

Sweet biscuits gained traction as a result of COVID-19, with the key customer...

Content removed from sample

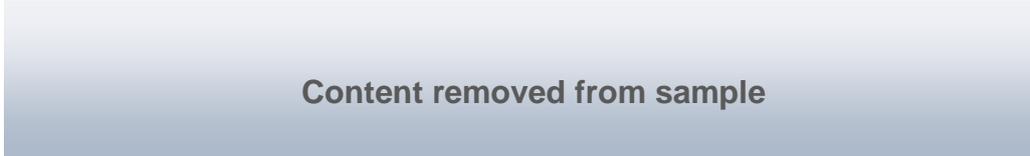
Competitive landscape

Lotte continues to be the number one player snacks in 2021, built on its leadership in confectionery and ice cream and frozen desserts. The company continues to be a major...

Content removed from sample

Channel developments

Foodservice outlets have faced significant challenges in Japan as a result of COVID-19.



What next for snacks?

After Nestlé Japan became the first major snacks manufacturer in Japan to change from...

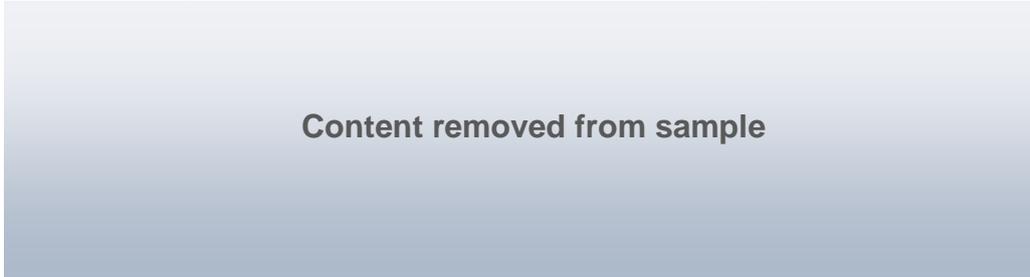


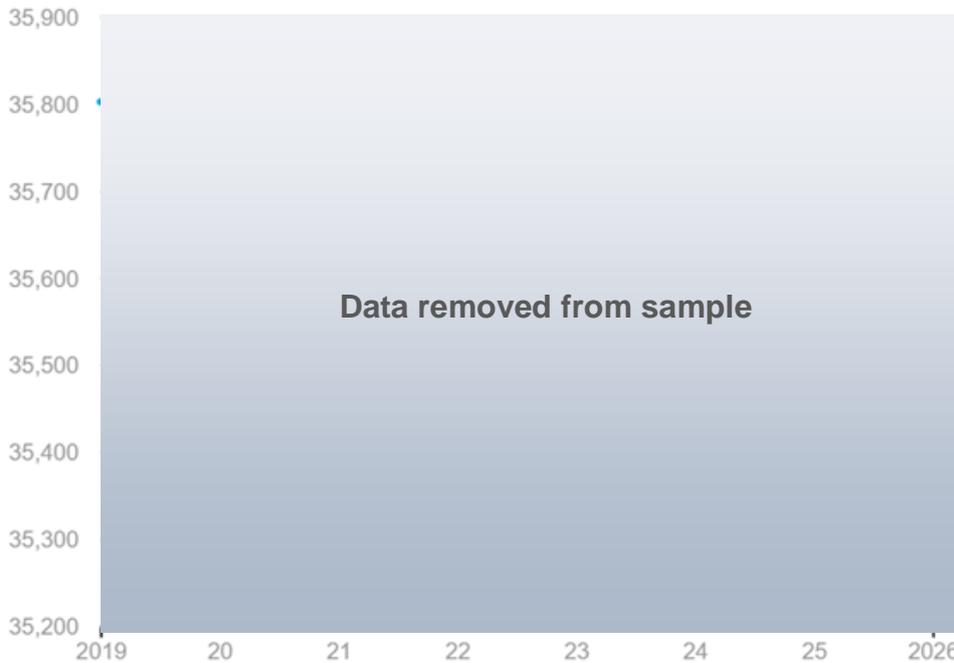
Chart 1 Snacks Value Sales Growth Scenarios: 2019-2026

Retail Value Sales, Real, US\$ mn, 2019 - 2026

2021 Constant Prices, 2021 Fixed Year Exchange Rate

Snacks - Japan

Passport Baseline C19 Pessimistic1



Source: Euromonitor International Industry Forecast Model
 Note: C19 Pessimistic 1 represents a modelled scenario with an estimated probability of 25-35% over a 1-year horizon, factoring in macro drivers including GDP, stock prices, business and consumer confidence rates alongside infection rates, supply chain and labour supply disruption rates

Chart 2 Snacks Impact of Drivers on Value Sales: 2019-2026

Retail Value Sales, Real US\$ mn 2019 - 2026
 2021 Constant Prices, 2021 Fixed Year Exchange Rate



Source: Euromonitor International Industry Forecast Model
 Note: The above chart shows the growth decomposition split by macro drivers such as GDP per capita and population alongside soft drivers listed as having a positive (+) or negative (-) impact on the total growth rate

MARKET DATA

Table 13 Sales of Snacks by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Confectionery	Data removed from sample					
Ice Cream and Frozen						
Desserts						
Savoury Snacks						
Sweet Biscuits, Snack						
Bars and Fruit Snacks						
Snacks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Sales of Snacks by Category: Value 2016-2021

JPY billion	2016	2017	2018	2019	2020	2021
Confectionery	Data removed from sample					
Ice Cream and Frozen						

Desserts
 Savoury Snacks
 Sweet Biscuits, Snack
 Bars and Fruit Snacks
 Snacks

Data removed from sample

Table 15 Sales of Snacks by Category: % Volume Growth 2016-2021

% volume growth

	2020/21	2016-21 CAGR	2016/21 Total
--	---------	--------------	---------------

Confectionery
 Ice Cream and Frozen Desserts
 Savoury Snacks
 Sweet Biscuits, Snack Bars and Fruit
 Snacks
 Snacks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Sales of Snacks by Category: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
--	---------	--------------	---------------

Confectionery
 Ice Cream and Frozen Desserts
 Savoury Snacks
 Sweet Biscuits, Snack Bars and Fruit
 Snacks
 Snacks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 NBO Company Shares of Snacks: % Value 2017-2021

% retail value rsp

Company	2017	2018	2019	2020	2021
---------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 LBN Brand Shares of Snacks: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Penetration of Private Label by Category: % Value 2016-2021

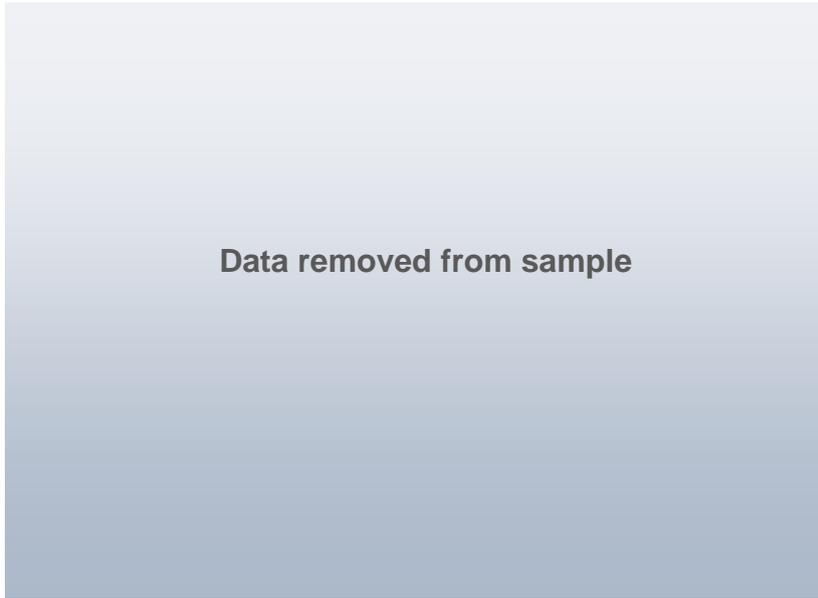
% retail value rsp	2016	2017	2018	2019	2020	2021
Confectionery	Data removed from sample					
Ice Cream and Frozen Desserts						
Snacks						
Savoury Snacks						
Sweet Biscuits, Snack Bars and Fruit Snacks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 Distribution of Snacks by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						

- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Food/drink/tobacco specialists
- Independent Small Grocers
- Other Grocery Retailers
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Other Foods Non-Grocery Specialists
- Mixed Retailers
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 21 Forecast Sales of Snacks by Category: Volume 2021-2026

'000 tonnes

	2021	2022	2023	2024	2025	2026
Confectionery	Data removed from sample					
Ice Cream and Frozen Desserts						
Savoury Snacks						
Sweet Biscuits, Snack Bars and Fruit Snacks						
Snacks						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Snacks by Category: Value 2021-2026

JPY billion

	2021	2022	2023	2024	2025	2026
Confectionery	Data removed from sample					
Ice Cream and Frozen Desserts						
Savoury Snacks						
Sweet Biscuits, Snack Bars and Fruit Snacks						
Snacks						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Sales of Snacks by Category: % Volume Growth 2021-2026

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Confectionery	Data removed from sample		
Ice Cream and Frozen Desserts			
Savoury Snacks			
Sweet Biscuits, Snack Bars and Fruit Snacks			
Snacks			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 24 Forecast Sales of Snacks by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Confectionery	Data removed from sample		
Ice Cream and Frozen Desserts			
Savoury Snacks			
Sweet Biscuits, Snack Bars and Fruit Snacks			
Snacks			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER

Forecast and scenario closing date: 14 June 2021

Report closing date: 5 July 2021

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2021 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

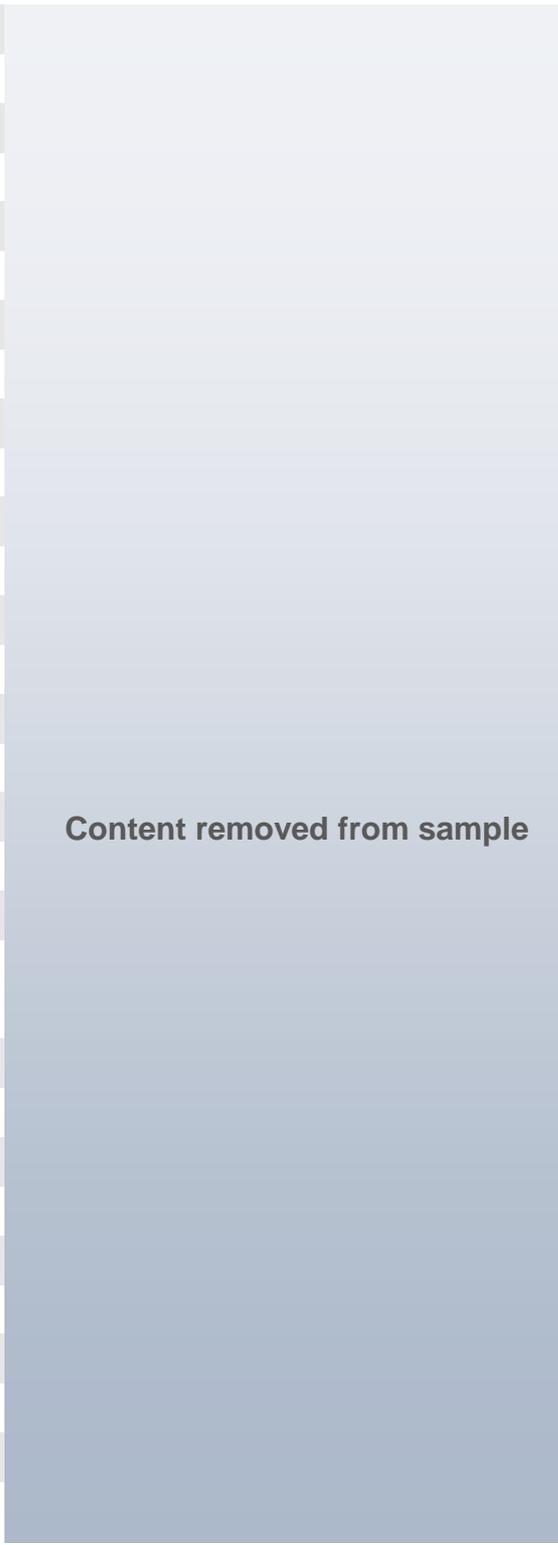
Sources used during research include the following:

Summary 1 Research Sources

Official Sources

Trade Associations

Content removed from sample



Content removed from sample

Trade Press

Source: Euromonitor International