



**Euromonitor
International**

Sweet Spreads in Japan

November 2025

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Sweet Spreads in Japan - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Currency fluctuations push up import prices

INDUSTRY PERFORMANCE

Sharp price surge hits imported goods against weak yen

Honey leads growth and jam sees further price rises

WHAT'S NEXT?

Innovative flavours continue to gain traction

Products with no added sugar reshape jam in Japan

Demand for convenience and 'time performance'

COMPETITIVE LANDSCAPE

Pastries rivalry intensifies amid market shifts

Players invest in innovation as competition heats up

CHANNELS

Japanese shoppers stick to store-based retail for sweet spreads

E-commerce rises but growth remains limited

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Cooking Ingredients and Meals in Japan - Industry Overview

EXECUTIVE SUMMARY

Consumers cut back due to inflationary pressures

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INDUSTRY PERFORMANCE

Unit price hikes push value sales in 2025

Convenience demand intensifies, shaping innovation

Surging costs in rice result in consumer shift towards alternatives, impacting preferences in ingredients

WHAT'S NEXT?

Continued shift away from rice and towards alternative staples

Anticipated rising demand for ingredients suited to pasta and flour-based meals

COMPETITIVE LANDSCAPE

Domestic players dominate a highly fragmented landscape

Leading companies maintain stronghold through rapid response to evolving demand

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Convenience stores sees expansion as hybrid work models gain ground

Drugstores invest in broadening offer while e-commerce rises slowly

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