

MARKET INNOVATION OVERVIEW

CATEGORY: Side Dishes | **COUNTRY:** Japan

Este documento foi elaborado no âmbito do projeto PortugalFoods Qualifica, com o objetivo de criar informação de alto valor acrescentado para as PME e restantes entidades do setor agroalimentar nacional, para que estas se possam posicionar estrategicamente no contexto do mercado global.

A informação contida neste documento provém do Observatório da PortugalFoods que, com recurso à plataforma Mintel, permite contribuir para a qualificação e sensibilização do setor agroalimentar, tanto ao nível do conhecimento sobre novos produtos e técnicas de produção, como ao nível do acompanhamento da evolução tecnológica e da evolução das preferências do consumidor.

A Mintel cataloga mais de 38 000 novos lançamentos de produto por mês, provenientes dos 86 mercados que monitoriza, analisando e categorizando todos os seus atributos, tais como os ingredientes, posicionamento e comunicação ao consumidor.

O Observatório da PortugalFoods constitui-se assim como uma ferramenta de grande importância para alicerçar o conhecimento das empresas do Setor Agroalimentar.

A REGIONAL INTRODUCTION: SIDE DISHES IN ASIA PACIFIC

Make noodles more intriguing: Instant noodles with vibrant colours, tempting aromas and unique flavours can help to deliver new and memorable experiences for APAC consumers, and generate "like-worthy" social media posts.

Explore a variety of textures: Innovating around different textures can help instant noodle brands to better compete with fresh noodle manufacturers.

Rice needs a health-halo: Although rice is a staple in many Asian markets, consumers are still very conscious of their carbohydrate intake. Experimentation around healthy added ingredients and a focus on nutrient density may help to accelerate category growth.



SIDE DISHES IN JAPAN

Market Overview

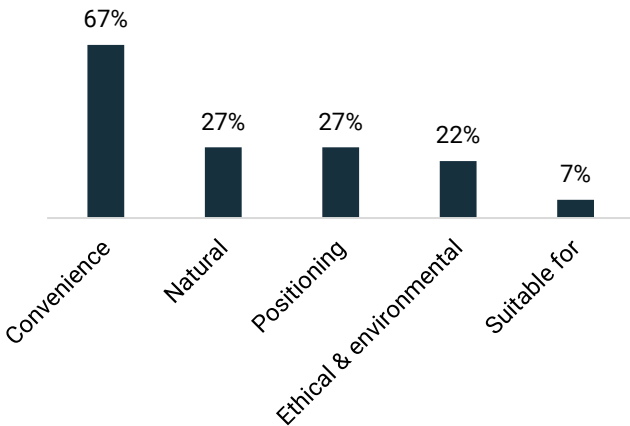
The Japanese side dishes sector is expected to grow from €19.4 billion in 2019 to €25.7 billion by 2024, at a CAGR of 5.8%. In volume terms, the sector is expected to grow from 5.26 billion kg in 2019 to 5.98 billion kg by 2024, registering a CAGR of 2.6%.

Per capita consumption of side dishes in Japan stood at 41.8kg in 2019 and is expected to grow and reach 48.6kg by 2024. Per capita expenditure in Japan stood at €154.6 in 2019 and is expected to reach €209.0 by 2024. (GlobalData, 2021)

New Product Development Analysis

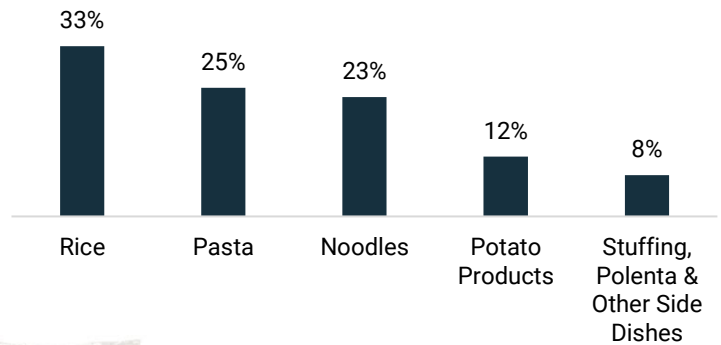
1% of food products launched in Japan between July 2019 and June 2020 were Side Dishes.

Top 5 Claim Categories in Side Dishes product launches, Jul19-Jun20



The 'Convenience' claim category was at the top by a big lead, mainly due to the 'Microwaveable' claim, which featured in a share of almost 40% of products. 'GMO Free' was the most used claim in the 'Natural' category and the 'Premium' claim pushed the 'Positioning' category.

Top 5 Sub-Categories in Side Dishes product launches, Jul19-Jun20



A third of the side dishes launched in Japan's retail market happened in the 'Rice' sub-category. The 'Pasta' and the 'Noodles' sub-categories followed closely by each other.



This microwaveable product retails in a 150g pack which serves one.



These noodles are made with non-glutinous rice flour and GMO-free corn and potato starch.



This premium chewy pasta is now rolled up in nests and is ready in three minutes.



THE JAPANESE CONSUMER

What best describes your consumption of products containing carbohydrates? (2018)

I am actively trying to reduce consumption of this

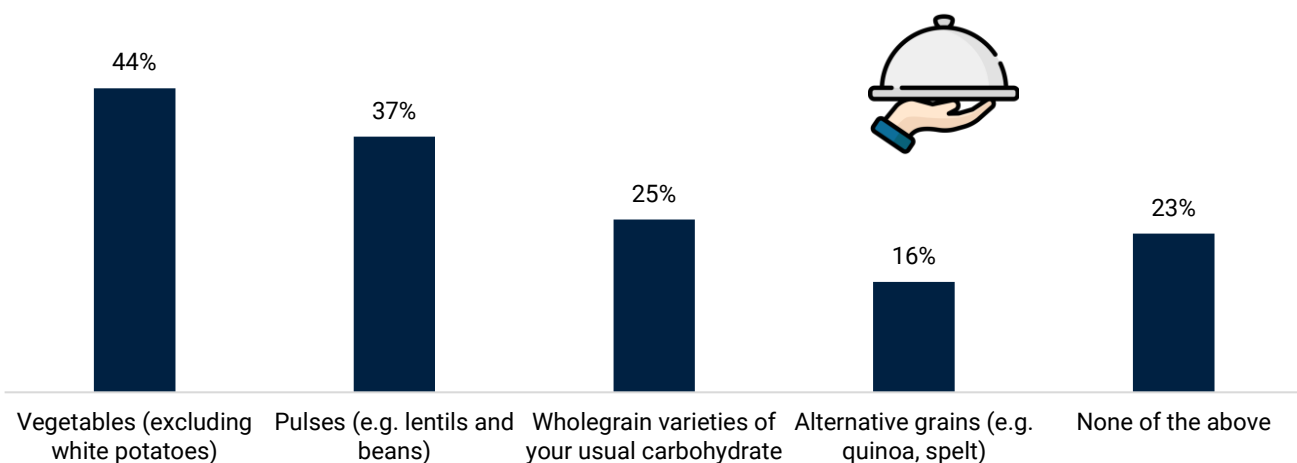
25%



53%

I consume this in moderation

Which of the following are you, or would you consider, choosing as an alternative to traditional carbohydrates? (2017)



(GlobalData, 2021)

A GLOBAL LOOK INTO THE FUTURE

Expand convenience through frozen: Products like Nestlé’s Wildscape are poised to transform the frozen aisle, giving consumers a reason to see frozen products as high quality and full of flavor. Frozen pasta, rice and even noodles will offer consumers even more convenience as they put together easy yet delicious meals.

Discover the next quinoa: Quinoa is still increasing around the world, but barley, millet and African grains like fonio are likely to expand in the coming years as consumers continue their appreciation of whole and ancient grains. In addition, new breeds like riceberry will deliver more nutrients to tomorrow’s consumers.

Instant noodles explore the world: In Asia, appreciation for instant noodle flavors varies quite drastically from country to country, and locally inspired flavors will answer consumers’ desire for flavor exploration. In the West, ramen’s popularity will prime consumers for an exploration of more regional Asian noodle dishes.

Para mais informações acerca do Observatório da PortugalFoods, por favor contactar

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