



Retail E-Commerce in Japan

February 2024

Table of Contents

Retail E-Commerce in Japan - Category analysis

KEY DATA FINDINGS

2023 DEVELOPMENTS

E-commerce growth slows after its peak during COVID-19
New regulation on stealth marketing (Endorsements and Testimonials in Advertising)
Grocery players accelerate their e-commerce offerings

PROSPECTS AND OPPORTUNITIES

Delivery fees and last-mile delivery concern consumers
Marketplace ecosystems set to develop and intensify the competition
Digital inclusivity and safety will be areas of focus for an ageing society

CHANNEL DATA

Table 1 - Retail E-Commerce by Channel and Category: Value 2018-2023
Table 2 - Retail E-Commerce by Channel and Category: % Value Growth 2018-2023
Table 3 - Retail E-Commerce GBO Company Shares: % Value 2019-2023
Table 4 - Retail E-Commerce GBN Brand Shares: % Value 2020-2023
Table 5 - Forecast Retail E-Commerce by Channel and Category: Value 2023-2028
Table 6 - Forecast Retail E-Commerce by Channel and Category: % Value Growth 2023-2028

Retail in Japan - Industry Overview

EXECUTIVE SUMMARY

Retail in 2023: The big picture
Private label development key for retailers to stay competitive
New regulation on stealth marketing (Endorsements and Testimonials in Advertising) impacts e-commerce and direct selling
What next for retail?

OPERATING ENVIRONMENT

Informal retail
Opening hours for physical retail
Summary 1 - Standard Opening Hours by Channel Type 2023
Seasonality
Hatsu Uri ("First Sales") at New Year
Valentine's Day
White Day
Mother's Day
Father's Day
Summer bargains
Halloween
Black Friday and Cyber Monday
Christmas and year-end bargains

MARKET DATA

Table 7 - Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2018-2023
Table 8 - Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2018-2023
Table 9 - Sales in Retail Offline by Channel: Value 2018-2023
Table 10 - Sales in Retail Offline by Channel: % Value Growth 2018-2023
Table 11 - Retail Offline Outlets by Channel: Units 2018-2023
Table 12 - Retail Offline Outlets by Channel: % Unit Growth 2018-2023
Table 13 - Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023
Table 14 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 15 - Sales in Grocery Retailers by Channel: Value 2018-2023
Table 16 - Sales in Grocery Retailers by Channel: % Value Growth 2018-2023
Table 17 - Grocery Retailers Outlets by Channel: Units 2018-2023
Table 18 - Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023
Table 19 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023
Table 20 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023
Table 21 - Sales in Non-Grocery Retailers by Channel: Value 2018-2023
Table 22 - Sales in Non-Grocery Retailers by Channel: % Value Growth 2018-2023
Table 23 - Non-Grocery Retailers Outlets by Channel: Units 2018-2023
Table 24 - Non-Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023
Table 25 - Retail GBO Company Shares: % Value 2019-2023
Table 26 - Retail GBN Brand Shares: % Value 2020-2023
Table 27 - Retail Offline GBO Company Shares: % Value 2019-2023
Table 28 - Retail Offline GBN Brand Shares: % Value 2020-2023
Table 29 - Retail Offline LBN Brand Shares: Outlets 2020-2023
Table 30 - Retail E-Commerce GBO Company Shares: % Value 2019-2023
Table 31 - Retail E-Commerce GBN Brand Shares: % Value 2020-2023
Table 32 - Grocery Retailers GBO Company Shares: % Value 2019-2023
Table 33 - Grocery Retailers GBN Brand Shares: % Value 2020-2023
Table 34 - Grocery Retailers LBN Brand Shares: Outlets 2020-2023
Table 35 - Grocery Retailers LBN Brand Shares: Selling Space 2020-2023
Table 36 - Non-Grocery Retailers GBO Company Shares: % Value 2019-2023
Table 37 - Non-Grocery Retailers GBN Brand Shares: % Value 2020-2023
Table 38 - Non-Grocery Retailers LBN Brand Shares: Outlets 2020-2023
Table 39 - Non-Grocery Retailers LBN Brand Shares: Selling Space 2020-2023
Table 40 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2023-2028
Table 41 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2023-2028
Table 42 - Forecast Sales in Retail Offline by Channel: Value 2023-2028
Table 43 - Forecast Sales in Retail Offline by Channel: % Value Growth 2023-2028
Table 44 - Forecast Retail Offline Outlets by Channel: Units 2023-2028
Table 45 - Forecast Retail Offline Outlets by Channel: % Unit Growth 2023-2028
Table 46 - Forecast Sales in Retail E-Commerce by Channel: Value 2023-2028
Table 47 - Forecast Sales in Retail E-Commerce by Channel: % Value Growth 2023-2028
Table 48 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028
Table 49 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028
Table 50 - Forecast Sales in Grocery Retailers by Channel: Value 2023-2028
Table 51 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2023-2028
Table 52 - Forecast Grocery Retailers Outlets by Channel: Units 2023-2028
Table 53 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028
Table 54 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028
Table 55 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028
Table 56 - Forecast Sales in Non-Grocery Retailers by Channel: Value 2023-2028
Table 57 - Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2023-2028
Table 58 - Forecast Non-Grocery Retailers Outlets by Channel: Units 2023-2028
Table 59 - Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028

DISCLAIMER

SOURCES

Summary 2 - Research Sources

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/retail-e-commerce-in-japan/report.