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# How have retailers led the HMR industry in Japan and UK?

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## Abstract

**Purpose:** This study is aiming at providing researchers and practitioners with new insights to analyse how retailers have made a contribution to the growth of HMR market in Japan and UK. **Research design:** The second section will look at the definition of HMR, and then, introduce each county's case, while analysing how retailers have developed the HMR market and illustrating some implications. Finally, the authors will draw a conclusion. **Results:** Retailers have established the retailer brand development department with the sophisticated retail information system which has made a considerable contribution to the growth of the HMR market. Also, it enables retailers to accumulate retail knowledge associated with ready-to-eat meals and train top-level experts, whilst helping them to build the trustworthy supply chain relationships by sharing the POS data with food manufacturers. Consequently, the cooperation with food manufacturers has enhanced in the HMR market in both Japan and UK, on the basis of sophisticated delivery system as well as the concept of innovation into the HMR sector. **Conclusions:** Retailers have to benchmark Japanese and British retailers' Knowledge to grow ready meal market in Korea and invest their marketing resources in developing various HMR foods, on the basis of innovative thinking.

**Keywords :** HMR, Retailers, Comparison, Japan, UK.

**JEL Classification Code**: D22, L88, L81, M16, M30

## 1. Introduction

Due to a variety of the reasons like busy lifestyle, changes in customer preferences and family, an increase in the disposable income, and the spread of convenient domestic appliances, the global ready meal market size has continuously grown, according to the report published by the Grand View Research in 2020. Without doubt, this kind of food consumption trend has been witnessed in the South Korea. In a food industry, thus, a prepared meal market has attracted many academicians' interest.

Amongst the existing literature associated with home meal replacement (HMR), a large number of researchers have paid their attention to the food purchase behaviour of consumers (e.g. Ahlgren, Gustafsson, & Hall, 2005; Vlachos & Georgantzis, 2016; Park & Jang, 2018; Chaitra & Kerur, 2018). With the growth of the HMR market, researchers are more likely to focus on investigating how customers respond to ready-to-eat meals. In addition, many academicians have tried to explore the reasons why the HMR sector has grown from a customer's point of view, even though retailers have invested a huge amount of resources in developing HMR product categories. It can be, therefore, said that the efforts of retailers to pioneer the new demand in the food market might be neglected by the academic world.

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Consequently, it would be difficult to find out the articles concerned about how much retailers have made a significant contribution to the growth of the HMR industry. In other words, it is necessary to look at how retail giants play a role in the HMR market development.

This study is, thus, aiming at providing researchers and practitioners with new insights to analyse how retailers have made a contribution to the growth of HMR market by comparing their roles in Japan and UK. By examining the above countries, moreover, authors will provide some implications for researchers, policy makers and retailers in Korea. The next section will look at the definition of HMR, and then, introduce each county's case on the basis of the existing literature, while analysing how retailers have developed the HMR market and illustrating some implications. Based on the comparison analysis, finally, the authors will draw a conclusion.

## 2. Definition of HMR

Before starting to investigate how retailers have boosted the prepared meal market, it is necessary to examine how each country define HMR. Depending on the characteristics of eating culture or life style, it is expected that each country should differently define its concept. Nevertheless, many academicians and retailers tend to interchangeably use the terms such as HMR, prepared meal, ready-to-eat meal, ready meals, ready-to-cook meal, ready-cooked meals and so on (e.g. Larson, 1998, Morris, 1998). As an example, the British retailers like Tesco, Asda and Sainsbury's have used the term, ready meals, rather than HMR.

Moreover, it is natural that retailers differently classify HMR product categories to improve management effectiveness, considering retail environmental context as well as the consumption culture of HMR foods.

In an effort to make authors' viewpoint clear when using the terms, therefore, it is important to look at the definition of HMR. Even though the terms are similar to each other, it can be said that their meanings are slightly different. Based on the historical background which the terms have been appeared in market, also, the authors will review its definitions.

### 2.1. Definition

Surprisingly, it is not easy to find the exact definition of the term, HMR developed by academicians over the world. Rather than defining HMR foods, however, the Japanese government has categorized eating activities into three groups (Ministry of Agriculture, Forestry and Fisheries, 2021), together with Japan Ready-made Meal Association. Depending on the place where foods are consumed, the first group is to eat at home after customers cook with raw materials for themselves, whilst the second one is to eat foods outside the home. The last option is to eat after purchasing the foods cooked outside the home, regardless of eating places. According to the Japanese government, consequently, HMR is able to be defined as the food consumed through the last option. Also, there was a similar case that meal types were categorised by the three groups like food event, structured event and meal snack (Douglas & Nicod, 1974). Amongst those kinds, HMR is regarded as a part of a structured event, a social occasion organized by rules prescribing sequence of action, time and place.

Based on the above classifications, it is estimated that HMR foods are not cooked by customers at home, and furthermore, have nothing to do with the consumption place. Given the two elements, the consumption characteristics of HMR foods are differentiated from the activity eating at restaurant and cooking foods with raw materials at home.

More interestingly, nevertheless, it is difficult to clearly differentiate HMR foods from other foods, in terms of technological or kitchen processing, as pointed by Costa, Dekker, Beumer, Rombouts and Jongen (2001). In order to define HMR, many researchers have considered many concepts like readiness, convenience, time-saving for consumption and preservation. In spite of such an effort to clarify the definition of HMR over the world, it is difficult to select the right definition. It should be, thus, noted here that defining HMR is a difficult and extremely complicated task. What is important is that HMR is a part of meal solutions (Costa et al., 2001).

By reviewing the previous research, thus, the authors define HMR as the meal solution that is cooked outside the home and consumed as the main course of a home-made main meal, regardless of place and time, on the basis of the research conducted by Costa et al. (2001).

### 2.2. Classification of HMR foods

In order to improve retail productivity in terms of managing product assortments, how to classify the HMR food category is regarded as one of the most important issues, from a retailer's point of view. Concerned about product classification, retailers have to take into account product shelf life, preservation methods, buying organization, buyer's responsibility and expertise, product adjacency etc. As pointed out by Axelson and Brinberg (1989) who food classification influence food perception as well as food selection from the customer's perspective, furthermore, it is expected that the classification of HMR foods has an impact on the improvement of sales revenue. Even though customers purchase pizza, they differently perceive food quality, according to storage techniques. In other words, rather than frozen foods, they tend to believe that chilled foods are much better for their health, except for some HMR foods like pizza.

First of all, how to keep products in stores significantly influences the classification of HMR foods. Depending on keeping techniques as well as temperature, basically speaking, retailers categorise them into the three groups like shelf-stable foods or ambient foods, chilled foods and frozen foods. When it comes to the product classification of the HMR foods, most retailers tend to adopt such a way. As evidence, according to the report published by Canadean in 2017, a lunch box category consists of ambient meal kits, chilled meal kits and frozen meal kits. When designing a store layout, also, retailers have a tendency to allocate store spaces, depending product storage methods. Not surprisingly, this kind of product classification has been witnessed when shopping online.

Although some researchers have paid considerable attention to the classification system of HMR foods (e.g. Costa et al., 2001), what is important is that HMR foods should be categorised from the retailer's viewpoint. In an attempt to classify ready-to-eat meals, Costa et al. (2001) proposed the following criteria: technological viewpoint, the behavioural perspective of customers and convenience-based classification. Given that the HMR sector has been led by retail giants in Japan, UK, France and Germany, it would be useful to adopt a retailer's viewpoint in practice, regarding HMR food classifications.

To sum up, the authors will simply categorise HMR products into the three groups: ambient foods, chilled foods and frozen foods. Likewise, it should be kept in mind that some retailers in some countries do not treat ambient foods as the HMR food. It is, thus, difficult to find out such a case, when shopping online. Rather than HMR foods, those foods tend to be regarded as a finished food.

## 2.3. Characteristics of HMR foods

Amongst a huge number of food categories, prepared meal markets have been particularly grown by multiple retailers (Senker, 1988). In order to clearly understand the reasons why retailers are able to lead the ready-to-eat meal markets, therefore, it is necessary to investigate what kind of characteristics the HMR foods have.

Before starting to illustrate how retailers have pioneered the HMR industry, and further, made a significant effort to enlarge its demands in markets, the authors will examine the characteristics of prepared meals. At the same time, we are able to understand the reasons why food manufacturers are behind large retailers in the HMR sector.

As one of the representative characteristics of ready-to-eat meals, they are highly perishable. In terms of preserving those foods, retailers need much more sophisticated technology to keep its freshness to prevent food deterioration. Because of easy perishability, the HMR foods relatively require very short distribution channels, compared with finished food categories. Owing to easy food decaying, food poisoning cases frequently used to be occurred in the past. It is, thus, not easy to develop and distribute ready-to-eat meals in markets.

Secondly, the HMR foods are characterized by a very limited shelf life. As soon as the HMR foods are produced, its shelf life start to run out. Together with perishability, this element requires HMR firms to develop new innovative skills to deal with ready-to-eat meals. Due to short shelf life, it is natural that HMR companies should be faced with the difficulty managing stock levels from a factory to retail shops. If HMR manufacturers or retailers are poor at stock management, they have to make unsold prepared meals throw out at the end of the day, and further, should put up with financial loss.

Thirdly, compared with processed foods such as milk, bread, cooking oil, confectionery and noodles, HMR foods need more retailers' efforts than manufacturers' ones, in terms of keeping food safety and serving customers. Needless to say, it is frequently witnessed that store staff have to heat the ready-to-eat meals like the meal kits selected by customers in a convenience store and hand out them. When heating meal kits, how to deal with them significantly influences food taste. In other words, retailers have to pay considerable attention or effort to selling the HMR foods and serving customers. In a case of finished goods, the selling activities of retailers are relatively simple, whilst prepared meals request retailers to allocate more resources such as labour force and time to manage them.

Fourthly, HMR foods are not able to be returned to manufacturers. Even though manufacturers allow retailers to return unsold HMR foods, returned products cannot be sold in stores. It means that unsold prepared meals must be treated as food waste. As soon as HMR foods are distributed to retail stores, thus, what retailers have to do is to sell them out or throw unsold foods away as food waste. With the increasing interest in an environmental issue, likewise, it should be noted that retailers have to try to reduce food waste. At the same time, when throwing unsold HMR foods away, retailers or food manufacturers have to separate food containers from foods, that is to say, it is time consuming.

Based on the above analysis, it is evident that retailers are able to better manage the characteristics of prepared meals than manufacturers. From producing to selling ready meals, it should be mentioned that how to manage perishability and shelf life has made retailers play an important roles in the HMR industry.

## 3. Japan

Since one of economic newspapers started to use the term, Nakasyoku which means HMR foods, Japan has continuously experienced the growth of prepared meal market. Before 1980s, it would be difficult to find a kind of ready meals in Japan. With the changing social and economic environment, a large number of ready-to-eat meals have appeared and been developed by retailers and manufacturers.

Unlike other advanced countries such as UK, Germany and France, the Japanese HMR market mainly consists of rice-based foods like lunch boxes and dishes served to go with rice. Considering that Japanese customers consume rice as the key meal everyday, it is expected that the HMR food category used rice as the major material should be popular and has continuously grown.

In parallel with the growth of ready meals market, the Japanese government realised that its market size should be continuously enlarged and customers should increase its consumption. In the end, the government stated to provide the data related to the prepared meal market for retailers as well as HMR manufacturers from the early 2000s. On the other hand, to support HMR-related firms, the Japan Ready-made Meal Association (JRMA) has been established in 1979 (JRMA, 2021). As a representative institute in the HMR sector, this association has developed various services for its members, tried to persuade a government to introduce favourable laws to HMR producers and made a contribution to the growth of the ready meal market.

### 3.1. Ready meals market size

According to the data reported by Euromonitor International in 2018, Japan has been regarded as one of advanced countries leading the HMR industry over the world. Compared with the past when the HMR market was led by USA and European countries, Asian nations have started to achieve remarkable performance in the world prepared meal market. Although there are different statistic data associated with the Japanese ready meals market size, what is apparent is that Japan is one of the countries who have led the Asian prepared meal market. In terms of sale revenue, the Japanese prepared meal market was valued at 95.6 billion dollars in 2019 (JRMA, 2021). It means that the growth rate of the ready meal market went up 2 % from 2017 and 27.3 % from 2009. Amongst Japanese food sectors, the HMR industry or Souzai in Japanese has recorded the highest growth rate, although the growth scale of its market size has shown about 2.6 billion dollars from 2017 to 2019 (JRMA, 2021). Similarly, it is witnessed that the prepared meal market has experienced steady increase in annual sales.

Furthermore, the HMR market share increased to 14.2 % in 2018 from 12.7 % in 2007 ( JRMA, 2021), even though it is difficult to examine the market share-related data of the 1980s. In contrast, the proportion of the Japanese customers who cook with raw materials at home slightly decreased to 19.35 % in 2018 from 19.9 % in 2007 (JRMA, 2021).

Based on the market analysis results conducted by JRMA, in terms of the market growth rate, the HMR market went up by 28.9 % from 2007 to 2018, whilst the whole food market size increased by 14.86 % (JRMA, 2021). In spite of the effect of decreasing birthrate and aging population, the increasing number of dual-income families and single households is expected to be a key factor for the market growth (Yano Research Institute, 2017).

In the same vein, it is investigated that the customer preference for the HMR foods has been improved, whilst negative perception has been mitigated, according to JRMA (2021). It can, therefore, be said that the Japanese ready meal market will be grown in the future.

### 3.2. HMR food classifications

Given that the HMR foods are rooted in Japanese home-style cuisine, the authors will consider Japanese eating culture. Basically, some HMR product categories like salad, pasta, pizza and sandwiches are not traditional foods. Nonetheless, salads and sandwiches are a part of popular ready meals in Japan (JRMA, 2021). According to JRMA (2021), prepared meals are categorised by the following four groups: rice-based meal kits, cooked noodles such as spaghetti and roasted noodle, cooked breads like sandwiches and dishes.

As mentioned earlier, most retailers highlight keeping techniques when classifying the HMR food categories over the world. Rather than grouping the HMR foods by how to keep foods, nevertheless, together with the Japanese government, JRMA tends to think the major materials like rice, breads, noodles and dishes more important. In particular, it is necessary to distinguish general dishes from packaged ones, because Japanese customers are still favourable to unwrapped dishes. When it comes to the market share of dishes, the former accounted for more than 35 % of the HMR foods, whilst the latter is with about 7 % in 2018. It should be, however, noted that the packaged dishes accounted for 7.9 % 2019, that is to say, its market share has steadily grown.

On the other hand, Japanese retailers have differently classified the prepared meals, based on the degree of product adjacency and food preservation methods. As an example, Daie who operates supermarkets across a country has categorized them into Souzai or lunch boxes including Sushi, breads and frozen HMR foods, according to Daienetsuper in 2021. In contrast, Seven-Eleven Japan who has led a convenience retail market has broken the ready meals down into more than 10 categories, based on popular food types (Seven-Eleven, 2021). As a result of investigating the HMR product classifications operated by many Japanese retailers, it is found that JRMA tends to consider a HMR manufacturer's perspective, whilst retailers have focused on customers shopping patterns, in terms of classifying the ready-to-eat meals. In other words, retailers have adopted a customer-oriented classification system.

Given the above results, it is not easy to develop the product classification of the HMR foods. Nevertheless, the Japanese HMR industry has been led by large multiple retailers. It is, thus, very important to explore how retailers have made a contribution to the growth of the HMR market.

### 3.3. Distribution channels

When analysing how the Japanese HMR market has grown until now, it is inevitable to look at the roles of distribution channels. In a word, without such large retailers in Japan, the ready-to-eat meal market should be in its infant stage. First of all, the authors mention what kind of distribution channels is in Japan. Including online shopping channels, the researchers will refer to the six channels such as specialty shops, department stores, discount stores or hypermarket stores, supermarkets and convenience stores, as categorised by JRMA.

Unfortunately, however, it is hard to collect the information concerned about the sales performance sold by only online shopping retailers. Basically, the HMR sales revenue generated by the retail giants who operate online shopping system is included to the following table 1. As seen in the table 1, convenience stores dominated the prepared meal market in 2019, that is, its market share was 32.6 %. Except for specialty shops operated by self-employed small business owners, it can be said that large retailers have grabbed market power in the HMR industry. Likewise, what is important is that the market share of specialty retailers and department stores decreased slightly, whilst discount stores, supermarkets and CVS have shown its increase.

**Table 1:** Component ratio of distribution channels in HMR market (Billion JP￥)

| Year | | S/S | Department | D/S | Supermarket | CVS | Total |
|---|---|---|---|---|---|---|---|
| 2018 | Sales | 2,954 | 360 | 948 | 2,682 | 3,074 | 10,251 |
| | Share(%) | 28.8 | 3.5 | 9.2 | 26.2 | 32.3 | 100 |
| 2019 | Sales | 2,896 | 356 | 964 | 2,741 | 3,363 | 10,320 |
| | Share(%) | 28.1 | 3.4 | 9.3 | 26.6 | 32.6 | 100 |
| Growth rate(%) | | -2.0 | -1.0 | 1.7 | 2.2 | 1.7 | 0.7 |

*. S/S: Specialty shops, D/S: Discount stores, CVS: Convenience stores
Source: adapted from JRMA(2018, 2019)

Given the above sales performance, Japanese retailers have played a very important role in expanding a prepared meal market. It is, therefore, necessary to look at how retailers are able to achieve such a result.

### 3.4. Retailer's competitiveness

Compared to ready meal producers, Japanese retailers have enjoyed many advantages in the HMR sector, considering the characteristics of prepared meals. In order to survive in a highly competitive and rapidly evolving retail market, generally speaking, they have to develop ready-to-eat meal categories to attract new customers or improve sales performances as an innovative retail knowledge. In fact, there is a limitation to compete with their rivals with the general product ranges provided by suppliers or manufacturers.

Based on a variety of advantages like the ability to collect customer-related information as well as the sophisticated retail information system, thus, retailers have led the ready meal market.

#### 3.4.1. Establishment of retailer brand development organisation

In order to beat competitors in a market, retailers had to cut regular prices, requiring suppliers to low product cost. As one of the most important competitiveness, they were more likely to highlight the lowest price to attract customer attention and ultimately new consumers. Owing to price war, however, what is important is that their profit structure became worse and worse. Under the pressure of price reduction, how to improve financial performance was one of the core issues from a retailer's point of view (e.g. Simmons & Meredith, 1983; McGoldrick, 1984; Hoch, 1996; Narasimhan & Wilcox, 1998; Ailawadi & Harlam, 2004).

To avoid price war, consequently, retailers started to introduce their own brand products. At the early stage, however, retailers did not have any retail knowhow to develop their own retailer brand products, as pointed out by Laaksonen and Reynolds (1994). Even though retailers established a particular team to develop retailer brand products within an organization, it was very difficult to develop some product categories required sophisticated product knowledge as a retailer brand, because of lack of retail knowhow.

Over time, the department of retailer brand development has accumulated the retail knowledge concerned about its own product development and challenged to introduce innovative product categories like the HMR foods (Wileman & Jary, 1997). What is interesting is, however, that the market share of retailer brands is not higher, except for the HMR food categories. Generally speaking, unlike other advanced countries like UK, Franc, Germany and USA, Japan has shown the lower market share of retailer brands, even though many retail giants have established the development department for their brand at the early stage (Yahagi, 2014). In terms of retailer brand penetration, the global average was estimated from 22 % to 24 %, whilst Japan forecasted less than 10 % (PwC, 2011).

Surprisingly, the top three convenience stores, Family Mart, Lawson and Seven-Eleven Japan combined for 90 % of the prepared meal market in 2018 (JRMA, 2019), have established their own department to introduce retailer brand products, and further, made significant efforts to develop premium HMR foods, together with other retailers like Aeon. As pointed by Nagai (2017), Seven-Eleven has invested a lot of marketing resources in improving the attractiveness of product assortment by building a retailer brand development organisation. In addition, Aeon has operated the subsidiary company dedicated to its own brand product development and built Research Institute for Quality Living Co.,Ltd to manage product quality (Osaki, 2014).

As seen in the table 1, it can be said that Japanese retailers have pioneered and led the HMR sector by establishing a particular department to develop their own brand foods.

#### 3.4.2. Collection of customer-related information

First of all, it is very important to gather customer-related information before launching the ready meals. Without right market information, it is difficult to develop right HMR foods being able to satisfy customers. Accordingly, the success of the prepared meals should depend on the ability to collect market information in real time. Basically speaking, rather than food manufacturers, retailers are on the better position to get customer information, without doubt.

In terms of managing the HMR food production as well as selling stages, also, it should be noted that retailers are better than manufacturers, because they are closer to final users to collect the HMR market information. In other words, retailers are easily able to get the information concerned about the HMR consumption trend in real time, thanks to the sophisticated retail information system, that is, POS system. Furthermore, it is easy to reflect them on the development process of the HMR foods (Cho, 2001). For example, retailers can use collected data to decide whether they develop foods as a ready meal or not.

Based on the information gathered through retail information system, retailers can manage the whole process of bring the ready-to-eat meals to their shop floors. In terms of product development competitiveness, it is evident that Japanese retailers have comparative advantages over HMR food producers with an information system. As for food manufacturers, likewise, what is important is that information collection and analysis process require a huge amount of time and cost. To gather customer information, however, retailers can take advantage of their retail information system, that is, save their time and cost. From a retailer's point of view, consequently, this advantage can be regarded as one of the product development competitiveness, compared to food manufacturers.

Similarly, retailers can quickly respond to changing customer shopping patterns. After introduced ready meals to retail outlets, it is easy to monitor how customer attitudes towards their HMR foods are changing, and further, to upgrade or clear out the existing prepared meals with relative ease.

### 3.4.3. POS system

As pointed by Deie and Kotani (1997), by establishing a sophisticated information system, retailers have achieved remarkable business expansion. Needless to say, many researchers argue that Japanese retailers have continuously allocated an amount of marketing resources into the maintenance and upgrade process of POS system (e.g. Yahagi, 1996; Okamoto, 1998; Murakami, 1998). It can be, therefore, said that such an effort has made a significant contribution to the growth of retailers.

Through the introduction of POS system, retailers are able to improve their profit structure, buying power and sales performance (Murakami, 1998). Likewise, it was witnessed that market power was shifted from suppliers or manufacturers to retailers in Japan, whilst retailers have accumulated the retail knowledge to manage product assortment (Yahagi, 1996). Compare with the past when retailers used to rely on a supplier's suggestion, when deciding product ranges, they can reflect changing customer attitudes in real time (Yahagi, 1996).

Given the characteristics of the HMR foods like short shelf life, how to manage stocks in retail outlets has become one of the most important issues from a manufacture's and retailer's point of view. After introducing a POS system, retailers started to have confidence in managing any product category, regardless of the sell/by/date or use/buy/date, including the prepared meals. In parallel with the accumulation of retailer brand development skills, they realized that they had to complement product assortments to differentiate themselves from competitors, avoiding price war with national brand products. To sum up, the POS system has stimulated retailers to innovate their product management know-how (e.g. Murakami, 1998).

In a word, without investing on developing such an information system, retailers could not lead the HMR market and achieve such a tremendous growth.

### 3.4.4. Collaboration with food manufacturers

Even though retailers have grabbed the market power in a ready meal sector, it is very interesting to look at the relationship between food manufacturers or suppliers and retailers. As a common feature in this industry, surprisingly, Japanese retailers do not directly produce any prepared meals for themselves. To my knowledge, despite the fact that they have their own distribution channels to sell ready meals, there is no their own food factory. Nevertheless, it should be noted that the HMR sector is perceived as a part of a retailer's business areas by market players. Although retailers can improve profit structure by directly producing ready-to-eat meals, in fact, it is difficult to find out such a case in the HMR industry.

It is, thus, necessary to investigate how retailers provide the HMR products for their store. Furthermore, the authors will explore how retailers have kept the good working relationship with food producers.

Rather than directly manufacturing ready meals, retailers are more likely to outsource its production process to food makers (Okamoto, 1998), whilst avoiding direct investment in building food factories. With the collected information associated with customer shopping behaviours, they have built the total plan to develop prepared meals, search for a suitable manufacturer, and then, start to discuss from the decision of its plan to production (Murakami, 1998). What is evident is that retailers have made an effort to remove the conflicts with suppliers. By promoting business alliances between both sides, manufacturers are able to focus on producing the ready-to-eat meals, whilst retailers can allocate their marketing resources into the plan of the HMR food development as well as selling function.

In the same vein, it is witnessed that retailers have shared the information collected by POS system in real time and met manufacturers regularly or irregularly, in order to keep the good working relationship (Okamoto, 1998; Yahagi, 2018). Even though manufacturers are led by retailers, it is apparent that both sides try to cooperate with each other. This kind of cooperation system tends to make a contribution to the growth of the prepared meal market.

### 3.4.5. Delivery system

As noted earlier, given that the HMR foods have a short shelf life, whether manufacturers or retailers can quickly deliver them to shop floors or not is regarded as one of the successful elements in the prepared meal market. Likewise, launch boxes have a very short shelf life of a few hours. In order to get over the limited shelf life, therefore, who has established better delivery network is a part of competitive advantages. Without reducing the time length from production to customers, a lot of the HMR foods left in stores should be returned to manufacturers or thrown away. As a result, such a problem should discourage food manufacturers to enter into the HMR industry. Accordingly, how to quickly deliver ready meals to retail shops can significantly influence the growth of the HMR sector.

It is, thus, interesting to investigate how retailers have built a distribution network, including storage facilities and transportation systems. As one of the representative examples, many retail academicians and practitioners have paid their attention to the Seven-Eleven Japan (e.g. Shiozawa,1988; Kunimoto, 1997; Ohno, 2015).

Thanks to a sophisticated retail information system, regardless of retail formats, retailers started to open their shops across the country. With the increasing number of new stores, they needed to restructure the existing delivery network or system. In an effort to overcome the effectiveness and efficiencies of stock management, they have regionally built many distribution centres. First of all, whether retailers can improve delivery efficiencies or not is closely related to survival in a fierce competition. On the assumption that Japanese retailers have established a good delivery system to beat competitors, as a result, it is evident that such an effort has made an important role in growing the Japanese HMR market (Ohno, 2015). In a word, the well-structured delivery system has made a significant contribution to getting over the characteristics of ready meals. It has, furthermore, become apparent that a well-structured delivery system should contribute to the growth of a ready-to-eat market.

## 4. UK

As the reasons why the HMR sector has been growing in the UK, the researchers argued that there are the increasing number of dual-income family and single generation, the penetration of frozen and refrigerator, aging population, the perceived convenience, value for money and so on (e.g. Mahon, Cowan, & McCarthy, 2006).

Since M&S launched the first ready meal which was ‘Chicken Kive’ in 1979 (M&S, 2021), the British food market structure has changed. As an innovative food market, in other words, the ready-to-eat meal market has interestingly appeared by the department store who is M&S. The UK has, moreover, one of the most dynamic ready meal markets in Europe. When it comes to the prepared meal market size, similarly, it is worth about 14.3 billion dollars in 2021 (Statista, 2021). With respect to the cuisine types being sold in the British HMR market, on the other hand, there are many different country-of-origins such as Italian, English, Indian, French, Chinese, Spanish, Mexican and the like.

What is important is, however, that the British ready meal market has been led by retail giants like Tesco, Asda, Sainsbury’s, and all the rest of it with their retailer brands accounting for more than 90 % of the HMR foods in the UK (Key Note, 2013). In addition, retailers have introduced differentiated retailer brand strategies, on the basis of quality as well as price levels (Laaksonen & Reynolds, 1994). As pointed by Laaksonen and Reynolds (1994), most retailers have categorized their retailer brands into economy, standard and premium or luxury brand.

It is, therefore, meaningful to explore how the British retailers have pioneered and maintained the HMR industry.

### 4.1. Ready meal market size

As noted by the Institute of Grocery Distribution who is a market research agency, the convenience food market has grown as one of the key parts of the UK’s food sector and was worth about 30 billion dollars in 2001. After M&S introduced the first HMR food, the Britain ready meal market achieved the rapid growth, as pointed by Jabs and Devine (2006) and Olsen, Prebensen, and Larsen (2009) who stressed that the sales revenue and variation of the HMR foods would continue to grow in the convenience food market.

Similarly, DEFRA (Department for Environment Food and Rural Affairs) announced that around 10 % 0f the total daily energy intake of the British customers came from the ready meals consumed out-of-home, and then, an additional 4 % was from the convenience food eaten at home in 2012. The consumption of ready meals has become more common across the country and made a contribution to household spending on purchasing foods.

On the other hand, there is a growing concern about purchasing the HMR foods in terms of nutritional quality as well as health issues, as researched by Remnant and Adams (2015). What is apparent is, accordingly, that this kind of customer awareness has become one of the barriers to grow a prepared meal market. As evidence, customers are more likely to believe that the HMR foods tend to contain higher levels of saturated fat, compared to the foods prepared at home (Celnik, Gillespie, & Lean, 2012). In the same vein, it should be noted that the HMR market decreased about 5 % in 2013, due to horse meat scandal.

According to the market research agency who is Statista (2021), nevertheless, the recent growth rate of the prepared meal market would be annually estimated by 0.43 % from 2021 to 2025. In addition, the ready-to-eat meal market size will be valued at about 14.3 billion dollars in 2021 (Statista, 2021) and the variety of prepared meal products have continuously been enlarged.

## 4.2. HMR food classifications

Before starting to classify ready meals into several groups, it is necessary to look at the terms associated with the HMR foods. With regard to the terminology which means the HMR foods, academicians and practitioners tend to interchangeably use the following words: a convenience food, ready meals, prepared meals, ready-made meals, take-away cooked meals, ready-to-eat meals, open-ready meals, and the like. Although there are many different terms, what is important is that all of them mean the HMR foods.

Unlike Japan which the prepared meals has classified, depending on the characteristics of raw materials mainly used, the UK has focused on how much convenient prepared meals are, when eating them. Basically speaking, it is witnessed that technological classification or how ready meals ae processed is used to categorise the HMR foods, but it is difficult to clearly distinguish meal solutions from other foods (Costa et al., 2001). As highlighted by the research conducted by Meiselmann (2000), it can be said that classifying the ready-to-eat meals is one of the extremely intricate jobs. Even though researchers suggest many criteria such as the levels of core materials, conservation methods, nutrition levels, food containers and to classify ready meals, it is difficult to find out definite guidelines. Likewise, there is no classification guideline proposed by the British government.

Retailers are, nevertheless, likely to categorise the HMR foods into three groups such as the preserved/prepared ready meals being kept outside a refrigerator, chilled ones and frozen ones in practice. Unlike Japan, there is no a particular association managing the HMR food manufacturers. It is, therefore, not easy to classify ready-to-eat meals.

## 4.3. Distribution channels

In terms of the growth of the HMR industry, it is very important to illustrate the roles of distribution channels. Like other advanced countries, there are various retail formats such as department store, supermarket, convenience store, discount store or hypermarket, traditional market, drug store, specialty stores and e-retail shops, to distribute prepared meals in the UK. Unfortunately, however, to my knowledge, it is difficult to collect the data surveyed the market share of ready-made meals, according to retail formats.

As noted earlier, large retailers have made a considerable contribution to the development of the HMR foods. In terms of the market share of ready meals, multiple retailers have accounted for more than 90 % with their own brands, as examined by the Key Note (2013). It means that food manufacturers are behind retailers in the ready meal market.

According to Senker (1986), retailers started to introduce innovative food categories as their retailer brand products during the 1980s. In parallel with the improvement of the retail knowledge associated with retailer brand development, together with the increasing buying power, some retailers innovated food products and production processes, whilst others merely outsourced the development process of retailer brand products to food manufacturers (Senker, 1988). Through the report published by Eating Better (2020), the authors found that the number of the prepared meal products distributed in the British market was more than 2,404 SKUs and sold by large retailers like Tesco, Sainsbury's, ASDA, Morrison and etc.

By contrast, there is a need to investigate retailing structure to know how retailers have led a ready meal market. Surprisingly, the top four retailers have accounted for more than 67.6 % of the British grocery market in 2021 (Kantar Worldpanel, 2018), unlike Japan. Given that the British retailers have actively introduced a retailer brand program, it can be expected that their higher market share has a direct impact on the growth of a prepared meal market in the UK. On the other hand, this kind of market situation should discourage manufacturers to join the HMR sector, due to the retail giant's market power.

With the increasing retail concentration, it has become apparent that the degree of the HMR market size as well as the introduction of new innovative prepared meal types relies on a retailer's effort. Moreover, the authors can argue that the British HMR market has been grown by retailers, without doubt.

## 4.4. Retailer's competitiveness

As mentioned earlier, the ready meal market in the UK has been pioneered and led by retailers. In a word, it can be said that retailers have better competitiveness than general food manufacturers in the HMR industry. Compared to manufacturers, thus, it is worthwhile investigating what kinds of strength retailers have in a ready-made meal market.

As part of efforts to lead a prepared meal market, retailers have shown various business activities. In fact, at the early stage when introduced retailer brand programs within their organization, they were not able to develop premium own brands, because of lack of retail know-how. Over time, however, they started to have a confidence in introducing innovative product categories like ready meals, as pointed by Laaksonen and Reynolds (1994). Even though retailers started to develop their own brands to avoid the price war between competitors (Mills, 1995; Narasimhan & Wilcox, 1998; Baltas, 1999), it can be expected that their product development ability is more than expected in recent. Furthermore, retailers are better than manufacturers in a particular food category like a ready meals.

### 4.4.1. Accumulated retail knowledge to develop retailer brand

When it comes to retailer brand introduction, the United Kingdom has relatively got long history, unlike Japan. As evidence, London-based Sainsbury's launched the first-ever retailer brand product in 1882, whilst Tesco UK introduced Tesco tea as the first own brand product in 1924. Indeed, the British retailers have had a long history, in terms of developing their own brands. With the accumulated retail know-how, accordingly, they have expanded their retailer brand program from price-focused food categories into quality-oriented or innovative ones requiring sophisticated quality management skills over time. Of course, they have established the department of retailer brand development within a firm (Senker, 1986; Hughes & Merton, 1996; Fernie, 1997).

As stressed by Fernie (1997), retailers are able to manage the whole development process of their own brand products with internal hygiene and product development departments. Surprisingly, however, retailers do not operate any food factory to directly produce retailer brand products (Senker, 1986). It means that retailers do not make an effort to have any production capacity of their own brands. On the other hand, they outsource the production of retailer brands to food producers, completely cooperating with them.

At the early stage, owing to the lack of development skills, retailers were more likely to focus on developing frequently purchased product categories with a low price as a retailer brand, rather than innovative products. Over time, however, they started to have confidence in introducing new innovative product categories like prepared meals as retail brands with accumulated retail know-how (e.g. Senker, 1986; Whitehead & Nicholson, 2001; Dawson, 2013). At the same time, retailers started to decide the design and composition of their own brand products and make an effect on the food choice process of customers (Dawson, 2013). They have, furthermore, stimulated the growth of such a category and influenced customer attitudes, perceptions and choice in those categories (Aertsens, Mondelaers, & Van Huylenbroeck, 2009).

To sum up, the confidence that retailers are able to develop any product category as a retailer brand, has resulted in pioneering new food categories, and further, leading the HMR industry. Without the accumulation of retailer brand development technology, it should be noted that the ready meal market cannot achieve such a growth in the UK.

### 4.4.2. Sophisticated retail information system

As one of the reasons why manufacturers lost their market power in the grocery channels, the authors suggest that retailers have invested a huge amount of resources in establishing an information network system. Together with the long history associated with retailer brand development, the British retailers started to lead the grocery market, thanks to the introduction of information communications technologies (Cox, Mowatt, & Prevezer, 2002). Likewise, the development of information technology promoted the power shift from suppliers or manufacturers to retailers (e.g. Messinger & Narasimhan, 1995).

As soon as retailers collect a variety of data through information system, they use them to improve trading conditions as well as to develop retailer brand products. The British retailers have, furthermore, made an effort to their position in the market, relative to their suppliers including manufacturers (Cox et al., 2002). Compared to the past when a retail information system was quite simple, that is, developed for product management, retailers started to add some functions like customer relationship management concept to the existing POS system. The introduction of loyalty scheme program is regarded as one of the best examples.

Surprisingly, before adopting a loyalty scheme, Tesco was lagging behind Sainsbury's. After developing 'club card', however, Tesco UK became the world largest and successful retailer (Humby, Hunt, & Phillips, 2003). It is, furthermore, stressed that retailers are able to produce differentiated products reflecting customer needs, by establishing information system managing relationship with customers, as noted by Day and Wensly (1983).

As a result, by developing sophisticated information technology, the British retailers have got the opportunities to introduce new innovative product categories as their own brands, decreasing the degree of failure risks like deadstock, poor sales performance and clearance. In a word, the investment in retail information system has resulted in pioneering and leading the HMR sector in the UK.

On the basis of the development of information technology, in the same vein, retailers have innovatively upgraded a variety of managerial capabilities such as packaging technology, material technology, food processing technology, branding, supplier management and the forth (Dawson, 2013). It can, thus, be said that those capabilities have made a considerable contribution to the growth of the HMR market.

#### 4.4.3. Cooperation with food manufacturers

Historically, retailers used to experience serious conflicts with their suppliers in the past, before introducing the concept of chain store management system. In fact, a retailer's power was weak in vertical relationships with their suppliers. With the increasing number of new stores, however, it should be noted that they tended to abuse their buying power to generate more profits. Likewise, the unfair trading provoked by retailers became an important social issue and promoted the roles of The Office of Fair Trading.

By contrast, when discussing the relationship between retailers and manufacturers or suppliers in recent, many authors highlight that cooperation is the best way to protect their business interests in a fierce completion, rather than conflicts (e.g. Hughes & Merton, 1996; Shaw & Gibbs, 1996; White, 2000).

It is, thus, necessary to look at how retailers do to maintain or form the good working relationship with suppliers. In order to establish trustworthy relationships with suppliers, it is witnessed that retailers regard the business activities concerned about relationship marketing as long-term investment, from a strategic standpoint (White, 2000). According to the research conducted by Senker (1988) and Cox et al. (2002), innovative retailers have maintained closer relationships with their suppliers by extending an internal retailer brand development department. In a word, from a development plan stage to selling one, the British retailers have perfectly collaborated with food manufacturers.

More surprisingly, Tesco UK does not invest in building a food factory to directly produce its own brand products, and further, take part in the merger and acquisition of food companies, in an attempt to protect manufacturers. As part of efforts to maintain good working relationships with suppliers, this kind of business activities is able to be regarded as a guarantee for manufacturers. In other words, it means that retailers do not invade a manufacturer's business area. At the same time, retailers have invested their resources in building supply chain relationships to protect their business interests (White, 2000).

Thanks to the well-established supply chain relationships, it is possible that retailers take a risk in introducing innovative food categories as their own brands. To sum up, they have led the HMR industry in the British marketplace.

#### 4.4.4. Innovation in retail

In terms of the long-term survival strategy, it should be noted that food retailers have to continuously innovate their working process to improve retail productivity. What is important is that the above competitive advantages are related to each other and further, are gained through innovation. As evidence, the retailers who are interested in food innovation have established large food technology department with a firm's organization (Omar, 1995). This kind of business mind has resulted in the introduction of innovative product assortments like a ready-to-eat meal category (Burt & Davies, 2010).

Furthermore, it has become apparent that retailers have paid considerable attention to the development of novel technology to introduce new product categories, as pointed by Omar (1995). Generally speaking, however, according to the research conducted by Esbjerg, Burt, Pearse, and Glanz-Chanos (2016) who had an interview with the practitioners working in the retailing sector, retailers are far less likely to lead the food market with novel technology. Nevertheless, Esbjerg et al. (2016) found that the introduction of a new category assortment was based on the retailer's understanding of customer needs and the internal rigorous decision making process. As pointed by Esbjerg et al. (2016), retailers tend to be risk averse to avoid damaging their brand reputation and establish the formal process to minimize both risk and brand failure. They have, however, shown different attitudes towards the introduction of prepared meal categories in terms of customer benefits to meet consumer desires.

When it comes to the enhancement of product ranges to satisfy customer needs, it can be said that the British retailers have actively developed ready-to-eat meal foods as a new product assortment, based on the concept of innovation.

## 5. Conclusions and managerial implications

By investigating how retailers have introduced and maintained ready-to-eat meal categories in Japan and UK, this study sends the key messages to academicians, policy makers and retailers in the South Korea. As a result of both case analysis, it is evident that the HMR market has been grown and enlarged by retailers with the control of shelf space and a variety of ready meals, rather than food manufacturers. Without such a retailer's role in a prepared meal market, the ready-to-eat market could not have attracted researchers' interest and achieved such a marker size.

Given the characteristics of the HMR foods, in addition, it is not easy for food producers to pioneer and lead a ready-to-eat meal market in practice. First of all, whether who is much more closer to customers or not is regarded as one of the important elements to succeed in a prepared meal market. Compared to the past when retailers used to rely on suppliers to provide products for stores, that is, a simple trading-based buying function, they have established the specific department to develop the HMR foods within a firm with a sophisticated retail information system in recent. The establishment of retailer brand development department within organization has made a considerable contribution to the growth of a ready meal market, accumulating retail knowledge associated with ready-to-eat meals and training top-level experts.

As demonstrated by both cases, commonly, the establishment of POS system enables retailers to collect customer-related information like customer needs or customer desires, whilst stimulating them to introduce new innovative product categories as their own brand products. Based on the information system, it has become apparent that retailers started to have confidence in developing the HMR foods, despite failure risk. Furthermore, by sharing the data provided by the POS system with suppliers, they have built the trustworthy supply chain relationships, not invading each other's business areas. Consequently, it is frequently witnessed that the cooperation with food manufacturers has relatively enhanced in the ready meal market in both Japan and UK.

Likewise, retailers have organized delivery system to overcome limited use-by-date and actively introduced the concept of innovation into the HMR sector.

To sum up, thanks to such a retailer's efforts, the HMR market in Japan and UK has been maintained and enlarged. In a word, retailers have played a very important role in the growth of the HMR industry.

Accordingly, if retailers want to improve their profit structure and increase sales performance in Korea, they have to benchmark foreign retailers' retail know-how in Japan and UK. Furthermore, they have to invest their marketing resources in developing various ready meal categories, on the basis of innovative thinking. On the other hand, it would be expected that the Korean HMR market will not grow without active retailers' efforts.

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