



**Euromonitor
International**

Hot Drinks in Japan

November 2025

Table of Contents

EXECUTIVE SUMMARY

Price increases drive retail value growth and volume decline

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Retail value growth along with volume decline as costs and prices rise

Constant rises in coffee prices leads to frustrated consumers and declining volumes

The narrowing premiumisation window

Wellness in a chaotic world

WHAT'S NEXT?

Continued value growth expected as functional products highlight health benefits

Catering to the ageing population will be crucial

COMPETITIVE LANDSCAPE

Nestlé Japan maintains its lead through constant product development

Kataoka Bussan sees dynamism thanks to its functional variant

CHANNELS

Supermarkets remains the leading channel for sales of hot drinks

Convenience and subscriptions drive continued growth for retail e-commerce

Foodservice volumes continue to rebound

MARKET DATA

Table 1 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025

Table 2 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025

Table 3 - Retail Sales of Hot Drinks by Category: Volume 2020-2025

Table 4 - Retail Sales of Hot Drinks by Category: Value 2020-2025

Table 5 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 6 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025

Table 7 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025

Table 8 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 9 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025

Table 10 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025

Table 11 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025

Table 12 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025

Table 13 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025

Table 14 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025

Table 15 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025

Table 16 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030

Table 17 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030

Table 18 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030

Table 19 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030

Table 20 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 21 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030

Table 22 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030

Table 23 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 24 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030

Table 25 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Coffee in Japan](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Significant price rises drive volume decline but value growth

INDUSTRY PERFORMANCE

Price rises drive dynamic retail value growth but strong volume decline

Instant standard coffee drives value growth, as it sees the strongest price rises

WHAT'S NEXT?

Continued but more moderate rises in prices and volume declines

Adapting coffee products for Japan's ageing population

Navigating health trends in coffee

COMPETITIVE LANDSCAPE

Innovations from Nestlé, such as caffeine reduction and sustainability efforts

UCC Ueshima Coffee also makes significant strides

CHANNELS

Supermarkets leads the way in coffee distribution

Retail e-commerce maintains its rising trend thanks to new online services

CATEGORY DATA

Table 26 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 27 - Retail Sales of Coffee by Category: Value 2020-2025

Table 28 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 29 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 30 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025

Table 31 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 32 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 33 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 34 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 35 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 36 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Tea in Japan](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Although retail volumes continue to decline, value sales rebound to growth

INDUSTRY PERFORMANCE

Return to growth, although green tea fails to rebound

Fruit/herbal tea sees the strongest increase due to wide product range

WHAT'S NEXT?

Value growth anticipated, but shifts expected in consumption and product formats

Continued renaissance for tea in the foodservice channel

Rising health awareness set to boost demand for non-caffeinated and functional tea

COMPETITIVE LANDSCAPE

Leading player ITO EN adapts to climate change with the launch of cold brew tea

Second-placed Mitsui Norin expands its product range

CHANNELS

Supermarkets maintains its lead, but consumers value the convenience of retail e-commerce

Foodservice sees notable development due to changing trends

CATEGORY DATA

Table 37 - Retail Sales of Tea by Category: Volume 2020-2025

Table 38 - Retail Sales of Tea by Category: Value 2020-2025

Table 39 - Retail Sales of Tea by Category: % Volume Growth 2020-2025

Table 40 - Retail Sales of Tea by Category: % Value Growth 2020-2025

Table 41 - NBO Company Shares of Tea: % Retail Value 2021-2025

Table 42 - LBN Brand Shares of Tea: % Retail Value 2022-2025

Table 43 - Forecast Retail Sales of Tea by Category: Volume 2025-2030

Table 44 - Forecast Retail Sales of Tea by Category: Value 2025-2030

Table 45 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030

Table 46 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Other Hot Drinks in Japan](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Functional products and products targeting adults drive growth

INDUSTRY PERFORMANCE

Cocoa products surge in popularity: Meeting health demands drives growth

Malt-based hot drinks maintains a significant volume decline, but sales remain high

WHAT'S NEXT?

Cocoa craze and functional benefits to drive growth in other hot drinks in Japan

Adapting to Japan's declining birth rate: A shift in strategy

Nutritional supplementation likely to be a growing focus

COMPETITIVE LANDSCAPE

Kataoka Bussan Co sees success with gut health product promoting year-round consumption

Morinaga & Co appeals to adults with the launch of a less sweet variant

Milo increases the iron content in its Milo for Adults to attract adults, especially women

CHANNELS

Supermarkets extends its lead, as one-stop-shopping remains popular

Dynamism for retail e-commerce as consumers look for the best prices

CATEGORY DATA

Table 47 - Retail Sales of Other Hot Drinks by Category: Volume 2020-2025

Table 48 - Retail Sales of Other Hot Drinks by Category: Value 2020-2025

Table 49 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2020-2025

Table 50 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2020-2025

Table 51 - NBO Company Shares of Other Hot Drinks: % Retail Value 2021-2025

Table 52 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2022-2025

Table 53 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2025-2030

Table 54 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2025-2030

Table 55 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2025-2030

Table 56 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

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/hot-drinks-in-japan/report.