



**Euromonitor
International**

Coffee in Japan

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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

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Hot Drinks in Japan - Industry Overview

EXECUTIVE SUMMARY

Price increases drive retail value growth and volume decline

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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

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