



# RTD Tea in Japan

November 2025

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## RTD Tea in Japan - Category analysis

### KEY DATA FINDINGS

#### 2025 PERFORMANCE

Price rises push consumers away from RTD tea

#### INDUSTRY PERFORMANCE

RTD tea sales dip as consumers switch to homemade brews

Consumers continue to favour reduced sugar still RTD tea

#### WHAT'S NEXT?

RTD tea faces headwinds as costs rise and consumers brew at home

RTD tea market heats up with café-inspired fruit blends

Evolving health benefits in Japan's RTD green tea market

#### COMPETITIVE LANDSCAPE

ITO EN and Asahi lead innovations aimed at revitalising the RTD tea market

Asahi finds success with revamped product line

#### CHANNELS

Supermarkets lead distribution despite losing share due to rising prices

Label-less products helping to push sales online

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## Soft Drinks in Japan - Industry Overview

### EXECUTIVE SUMMARY

Rising prices put pressure on volume sales in 2025

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Price rises lead to a decline in off-trade volume sales of soft drinks in 2025

Functional soft drinks gain prominence

Innovation has become faster, riskier, and more culturally embedded

#### WHAT'S NEXT?

Shrinking population likely to limit opportunities for volume growth

Healthy and natural products likely to attract more interest moving forward  
Vending evolving as it looks to meet the needs of modern consumers

## COMPETITIVE LANDSCAPE

Coca-Cola and Suntory continue to invest in product development and innovation  
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## CHANNELS

Label-less products gain traction as online sales rise  
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