



Passport

Tea in Japan

Euromonitor International

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This sample report is for illustration
purposes only.

Some content and data have been
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TEA IN JAPAN - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

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Struggles for leaf tea, while new product development continues for tea bags

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Coffee chains are increasing outlets focusing on tea

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PROSPECTS AND OPPORTUNITIES

Added-value, especially in terms of health, will be the main focus of new product development

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New consumption occasions will be explored to stimulate growth for tea

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Foodservice volumes will struggle, yet afternoon tea likely to become more popular

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CATEGORY DATA

Table 1 Retail Sales of Tea by Category: Volume 2018-2023

Tonnes

2018 2019 2020 2021 2022 2023

- Loose Black Tea
- Tea Bags Black
Black Tea
Fruit/Herbal Tea
Green Tea
Instant Tea
Other Tea
Tea

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Retail Sales of Tea by Category: Value 2018-2023

JPY billion

	2018	2019	2020	2021	2022	2023
- Loose Black Tea	Data removed from sample					
- Tea Bags Black						
Black Tea						
Fruit/Herbal Tea						
Green Tea						
Instant Tea						
Other Tea						
Tea						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Retail Sales of Tea by Category: % Volume Growth 2018-2023

% volume growth

	2022/23	2018-23 CAGR	2018/23 Total
- Loose Black Tea	Data removed from sample		
- Tea Bags Black			
Black Tea			
Fruit/Herbal Tea			
Green Tea			
Instant Tea			
Other Tea			
Tea			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Retail Sales of Tea by Category: % Value Growth 2018-2023

% current value growth

	2022/23	2018-23 CAGR	2018/23 Total
- Loose Black Tea	Data removed from sample		
- Tea Bags Black			
Black Tea			
Fruit/Herbal Tea			
Green Tea			
Instant Tea			
Other Tea			
Tea			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 NBO Company Shares of Tea: % Retail Value 2019-2023

% retail value rsp

Company	2019	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Tea: % Retail Value 2020-2023

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Forecast Retail Sales of Tea by Category: Volume 2023-2028

Tonnes	2023	2024	2025	2026	2027	2028
- Loose Black Tea	Data removed from sample					
- Tea Bags Black						
Black Tea						
Fruit/Herbal Tea						
Green Tea						
Instant Tea						
Other Tea						
Tea						
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources					

Table 8 Forecast Retail Sales of Tea by Category: Value 2023-2028

JPY billion	2023	2024	2025	2026	2027	2028
- Loose Black Tea	Data removed from sample					
- Tea Bags Black						
Black Tea						
Fruit/Herbal Tea						
Green Tea						
Instant Tea						
Other Tea						
Tea						
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources					

Table 9 Forecast Retail Sales of Tea by Category: % Volume Growth 2023-2028

% volume growth	2023/24	2023-28 CAGR	2023/28 Total
- Loose Black Tea	Data removed from sample		
- Tea Bags Black			
Black Tea			
Fruit/Herbal Tea			
Green Tea			
Instant Tea			
Other Tea			
Tea			
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources		

Table 10 Forecast Retail Sales of Tea by Category: % Value Growth 2023-2028

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
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- Loose Black Tea
- Tea Bags Black
Black Tea
Fruit/Herbal Tea
Green Tea
Instant Tea
Other Tea
Tea

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews,
trade source

HOT DRINKS IN JAPAN - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

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2023 key trends

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Competitive landscape

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Retailing developments

During the pandemic there was higher volume and value demand for hot drinks in

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Foodservice vs retail split

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What next for hot drinks?

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MARKET DATA

Table 11 Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2018-2023

% volume analysis

	2018	2019	2020	2021	2022	2023
Retail	Data removed from sample					
Foodservice						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2018-2023

% volume growth

	2022/23	2018-23 CAGR	2018/23 Total
Retail	Data removed from sample		
Foodservice			
Total			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Retail Sales of Hot Drinks by Category: Volume 2018-2023

Tonnes

	2018	2019	2020	2021	2022	2023
Coffee	Data removed from sample					
Tea						
Other Hot Drinks						
Hot Drinks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Retail Sales of Hot Drinks by Category: Value 2018-2023

JPY billion

	2018	2019	2020	2021	2022	2023
Coffee	Data removed from sample					
Tea						
Other Hot Drinks						
Hot Drinks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Retail Sales of Hot Drinks by Category: % Volume Growth 2018-2023

% volume growth

	2022/23	2018-23 CAGR	2018/23 Total
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Coffee
Tea
Other Hot Drinks
Hot Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Retail Sales of Hot Drinks by Category: % Value Growth 2018-2023

% current value growth

2022/23 2018-23 CAGR 2018/23 Total

Coffee
Tea
Other Hot Drinks
Hot Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Foodservice Sales of Hot Drinks by Category: Volume 2018-2023

Tonnes

2018 2019 2020 2021 2022 2023

Coffee
Tea
Other Hot Drinks
Hot Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 Foodservice Sales of Hot Drinks by Category: % Volume Growth 2018-2023

% volume growth

2022/23 2018-23 CAGR 2018/23 Total

Coffee
Tea
Other Hot Drinks
Hot Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Total Sales of Hot Drinks by Category: Total Volume 2018-2023

Tonnes

2018 2019 2020 2021 2022 2023

Coffee
Tea
Other Hot Drinks
Hot Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 Total Sales of Hot Drinks by Category: % Total Volume Growth 2018-2023

% total volume growth

2022/23

2018-23 CAGR

2018/23 Total

Coffee

Tea

Other Hot Drinks

Hot Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 21 NBO Company Shares of Hot Drinks: % Retail Value 2019-2023

% retail value rsp

Company

2019

2020

2021

2022

2023

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 22 LBN Brand Shares of Hot Drinks: % Retail Value 2020-2023

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
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Data removed from sample					
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 23 Penetration of Private Label in Hot Drinks by Category: % Retail Value 2018-2023

% retail value rsp	2018	2019	2020	2021	2022	2023
Coffee	Data removed from sample					
Other Hot Drinks						
Tea						
Hot Drinks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 24 Retail Distribution of Hot Drinks by Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
---- Convenience Stores						
---- Forecourt Retailers						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- Warehouse Clubs						
--- Food/drink/tobacco specialists						
--- Small Local Grocers						
-- Non-Grocery Retailers						
--- General Merchandise Stores						
--- Apparel and Footwear Specialists						
--- Appliances and Electronics Specialists						
--- Home Products Specialists						
--- Health and Beauty Specialists						
--- Leisure and Personal Goods Specialists						
--- Other Non-Grocery Retailers						
-- Vending						
-- Direct Selling						
- Retail E-Commerce						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 25 Retail Distribution of Hot Drinks by Format and Category: % Volume 2023

% retail volume	Coffee	Tea	Other Hot Drinks
Retail Channels	Data removed from sample		
- Retail Offline			
-- Grocery Retailers			
--- Convenience Retail			
---- Convenience Stores			
---- Forecourt Retailers			
--- Supermarkets			
--- Hypermarkets			
--- Discounters			
--- Warehouse Clubs			
--- Food/drink/tobacco specialists			
--- Small Local Grocers			
-- Non-Grocery Retailers			

--- General Merchandise Stores
 --- Apparel and Footwear Specialists
 --- Appliances and Electronics Specialists
 --- Home Products Specialists
 --- Health and Beauty Specialists
 --- Leisure and Personal Goods Specialists
 --- Other Non-Grocery Retailers
 -- Vending
 -- Direct Selling
 - Retail E-Commerce
 Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Key: C = coffee; T = tea; OHD = other hot drinks

Table 26 Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2023-2028

% volume analysis

	2023	2024	2025	2026	2027	2028
Retail	Data removed from sample					
Foodservice						
Total						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 27 Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2023-2028

% volume growth

	2023/24	2023-28 CAGR	2023/28 Total
Retail	Data removed from sample		
Foodservice			
Total			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 28 Forecast Retail Sales of Hot Drinks by Category: Volume 2023-2028

Tonnes

	2023	2024	2025	2026	2027	2028
Coffee	Data removed from sample					
Tea						
Other Hot Drinks						
Hot Drinks						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 29 Forecast Retail Sales of Hot Drinks by Category: Value 2023-2028

JPY billion

	2023	2024	2025	2026	2027	2028
--	------	------	------	------	------	------

Coffee
Tea
Other Hot Drinks
Hot Drinks

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 30 Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2023-2028

% volume growth

	2023/24	2023-28 CAGR	2023/28 Total
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Coffee
Tea
Other Hot Drinks
Hot Drinks

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 31 Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2023-2028

% constant value growth

	2023/2024	2023-28 CAGR	2023/28 Total
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Coffee
Tea
Other Hot Drinks
Hot Drinks

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 32 Forecast Foodservice Sales of Hot Drinks by Category: Volume 2023-2028

Tonnes

	2023	2024	2025	2026	2027	2028
--	------	------	------	------	------	------

Coffee
Tea
Other Hot Drinks
Hot Drinks

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 33 Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2023-2028

% volume growth

	2023/24	2023-28 CAGR	2023/28 Total
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Coffee
Tea
Other Hot Drinks
Hot Drinks

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 34 Forecast Total Sales of Hot Drinks by Category: Total Volume 2023-2028

Tonnes	2023	2024	2025	2026	2027	2028
Coffee Tea Other Hot Drinks Hot Drinks	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 35 Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2023-2028

% total volume growth	2023/24	2023-28 CAGR	2023/28 Total
Coffee Tea Other Hot Drinks Hot Drinks	Data removed from sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

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Source: Euromonitor International