



Tea in Japan

November 2025

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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

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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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