



Euromonitor  
International

# RTD Coffee in Japan

November 2025

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## RTD Coffee in Japan - Category analysis

### KEY DATA FINDINGS

#### 2025 PERFORMANCE

RTD coffee under pressure to revamp its image

#### INDUSTRY PERFORMANCE

Demand for RTD coffee negatively impacted by price hikes and heatwaves

New products featuring plant-based milk are rapidly emerging in Japan

#### WHAT'S NEXT?

Continuous shift from cans to bottles expected

Coca-Cola and Suntory's battle in RTD coffee ramps up in vending

Health-conscious innovations and mushroom coffee offer growth potential

#### COMPETITIVE LANDSCAPE

Coca-Cola leads RTD coffee thanks to strategic branding

Tully's feeds off the success of its café chain

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Rising prices put pressure on volume sales in 2025

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#### 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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