



Coffee in Asia Pacific

March 2023

Table of Contents

INTRODUCTION

Scope

Key findings

REGIONAL OVERVIEW

Asia Pacific has the lowest per capita coffee expenditure and is becoming more mature

Supply chain disruptions and shift back towards on-trade soften off-trade growth in 2022

Polarised factors driving coffee consumption in Asia Pacific: Experience vs convenience

Convenience still influence instant coffee growth for smaller markets, albeit maturing

Instant coffee faces challenges from rising health awareness and regulation in Southeast Asia

Fresh coffee sees much higher absolute growth, driven by Japan and South Korea

Lifestyle trends are paving the way for premiumisation and sustainability efforts in the region

Geodemographic factors – eg rural vs urban population: Determine channel distribution

E-commerce enables increasing sophistication in coffee consumption in Asia Pacific

LEADING COMPANIES AND BRANDS

Coffee remains relatively consolidated, with the leading brands dominating sales

Most leading companies are losing market share to smaller companies, except for Unilever

Leading companies rely on either diverse market coverage or domestic stronghold

Brands in more dynamic categories and less matured markets are gaining higher position

FORECAST PROJECTIONS

Low single-digit off-trade value sales growth predicted in most markets

Consumption is challenged by competition and supply chain issues despite income growth

Both hard and soft drivers support the highest-in-region growth for Taiwan and India

COUNTRY SNAPSHOTS

Azerbaijan: Market context

Azerbaijan: Competitive and retail landscape

China: Market context

China: Competitive and retail landscape

Hong Kong, China: Market context

Hong Kong, China: Competitive and retail landscape

India: Market context

India: Competitive and retail landscape

Indonesia: Market context

Indonesia: Competitive and retail landscape

Japan: Market context

Japan: Competitive and retail landscape

Kazakhstan: Market context

Kazakhstan: Competitive and retail landscape

Malaysia: Market context

Malaysia: Competitive and retail landscape

Pakistan: Market context

Pakistan: Competitive and retail landscape

Philippines: Market context

Philippines: Competitive and retail landscape

Singapore: Market context

Singapore: Competitive and retail landscape

South Korea: Market context

South Korea: Competitive and retail landscape

Taiwan: Market context

Taiwan: Competitive and retail landscape

Thailand: Market context

Thailand: Competitive and retail landscape

Uzbekistan: Market context

Uzbekistan: Competitive and retail landscape

Vietnam: Market context

Vietnam: Competitive and retail landscape

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/coffee-in-asia-pacific/report.