Coffee – Japan – a snapshot
Generated by Mintel Global Market Navigator

2010
Coffee – Japan 2010
Mintel Global Market Navigator

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About Mintel
Definitions

This market covers fresh and instant coffee. Market size is based on retail and non-retail sales; values are at prices in retailers.

Units

**JPY**: Japanese yen
**GBP**: Pound sterling

Note: one billion is a thousand million, one trillion is a thousand billion.
### Market volume

#### Highlights
- The Coffee (Japan) market by volume decreased by 0.2% in 2009.
- Total volume for Coffee (Japan) in 2009 was 288.2 (000) tonnes.
- The strongest growth in recent years for Coffee (Japan) was in 2006, with a rate of 2.2%.
- Compound annual growth rate for Coffee (Japan) for the period 2005-2009 was 0.652%.
- In 2014 the Coffee (Japan) market is forecast to reach 282.6 (000) tonnes representing a volume CAGR of -0.408% since 2010.

### Figure 1: Volume - Absolute size

![Bar chart showing volume of Coffee in Japan from 2005 to 2014](image1)

**Sources:** Ministry of Agriculture Forestry and Fisheries, Ministry of Finance, Nikkan Keizai Tsushinsha, GMN Estimations

### Figure 2: Volume - Growth

![Line chart showing growth rate of Coffee in Japan from 2005 to 2014](image2)

**Sources:** Ministry of Agriculture Forestry and Fisheries, Ministry of Finance, Nikkan Keizai Tsushinsha, GMN Estimations
### Table 1: Volume

<table>
<thead>
<tr>
<th>Units</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Absolute size</td>
<td>280.8</td>
<td>287.0</td>
<td>289.5</td>
<td>288.9</td>
<td>288.2</td>
<td>287.2</td>
<td>286.2</td>
<td>285.1</td>
<td>283.9</td>
<td>282.6</td>
</tr>
<tr>
<td>Growth</td>
<td>2.2</td>
<td>0.9</td>
<td>-0.2</td>
<td>-0.2</td>
<td>-0.3</td>
<td>-0.3</td>
<td>-0.4</td>
<td>-0.4</td>
<td>-0.5</td>
<td></td>
</tr>
<tr>
<td>Volume Consumption per capita (population)</td>
<td>0.00220</td>
<td>0.00225</td>
<td>0.00227</td>
<td>0.00227</td>
<td>0.00226</td>
<td>0.00226</td>
<td>0.00226</td>
<td>0.00226</td>
<td>0.00226</td>
<td></td>
</tr>
</tbody>
</table>

Sources: Ministry of Agriculture Forestry and Fisheries, Ministry of Finance, Nikkan Keizai Tsushinsha, GMN estimates
Market value in local currency

**Highlights**

- The Coffee (Japan) market by value decreased by 7.4% in 2009.
- Total value for Coffee (Japan) in 2009 was 680.0 bn JPY.
- The strongest growth in recent years for Coffee (Japan) was in 2006, with a rate of 5.3%.

- Compound annual growth rate for Coffee (Japan) for the period 2005-2009 was -0.0899%.
- In 2014 the Coffee (Japan) market is forecast to reach 581.5 bn JPY representing a value CAGR of ~4.09% since 2010.

**Figure 3: Value in Local Currency - Value**

**Figure 4: Value in Local Currency - Value growth**

Sources: Ministry of Agriculture Forestry and Fisheries, Ministry of Finance, Nikkan Keizai Tsushinsha, GMN Estimations
Table 2: Value in Local Currency

<table>
<thead>
<tr>
<th>Units</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>bn JPY</td>
<td>682.5</td>
<td>718.5</td>
<td>751.5</td>
<td>734.5</td>
<td>680.0</td>
<td>687.1</td>
<td>650.9</td>
<td>626.8</td>
<td>611.8</td>
</tr>
<tr>
<td>Unit prices</td>
<td>JPY per tonne</td>
<td>2,430,484.3</td>
<td>2,503,414.6</td>
<td>2,595,751.3</td>
<td>2,542,298.4</td>
<td>2,359,576.7</td>
<td>2,392,215.6</td>
<td>2,273,851.5</td>
<td>2,198,449.7</td>
<td>2,155,165.7</td>
</tr>
<tr>
<td>Value growth</td>
<td>%</td>
<td>5.3</td>
<td>4.6</td>
<td>-2.3</td>
<td>-7.4</td>
<td>1.0</td>
<td>-5.3</td>
<td>-3.7</td>
<td>-2.4</td>
<td>-5.0</td>
</tr>
</tbody>
</table>

Sources: Ministry of Agriculture Forestry and Fisheries, Ministry of Finance, Nikkan Keizai Tsushinsha, GMN estimates
Market value in GBP

Table 3: Value in GBP

<table>
<thead>
<tr>
<th></th>
<th>Units</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>m GBP</td>
<td>3,405.6</td>
<td>3,336.0</td>
<td>3,190.7</td>
<td>3,837.2</td>
<td>4,651.3</td>
<td>5,045.4</td>
<td>4,759.2</td>
<td>4,540.1</td>
<td>4,322.7</td>
<td>3,898.0</td>
</tr>
<tr>
<td>Spend per capita (population)</td>
<td>GBP</td>
<td>26.70</td>
<td>26.16</td>
<td>25.04</td>
<td>30.14</td>
<td>36.60</td>
<td>39.79</td>
<td>37.63</td>
<td>36.00</td>
<td>34.39</td>
<td>31.13</td>
</tr>
<tr>
<td>Spend as a proportion of GDP</td>
<td>%</td>
<td>0.136</td>
<td>0.142</td>
<td>0.146</td>
<td>0.145</td>
<td>0.143</td>
<td>0.143</td>
<td>0.134</td>
<td>0.127</td>
<td>0.122</td>
<td>0.113</td>
</tr>
<tr>
<td>Unit prices</td>
<td>GBP per tonne</td>
<td>12,128.2</td>
<td>11,623.8</td>
<td>11,021.4</td>
<td>13,282.1</td>
<td>16,139.0</td>
<td>17,565.1</td>
<td>16,626.0</td>
<td>15,923.9</td>
<td>15,226.7</td>
<td>13,794.4</td>
</tr>
<tr>
<td>Value growth</td>
<td>%</td>
<td>-2.0</td>
<td>-4.4</td>
<td>20.3</td>
<td>21.2</td>
<td>8.5</td>
<td>-5.7</td>
<td>-4.6</td>
<td>-4.8</td>
<td>-9.8</td>
<td></td>
</tr>
</tbody>
</table>
## Market segmentation

### Figure 7: Japan - Coffee: Market segmentation by volume

![Graph showing market segmentation by volume for instant and fresh coffee](image)

### Table 4: Japan - Coffee: Market segmentation by volume

<table>
<thead>
<tr>
<th>Segment</th>
<th>2009 ((000) tonnes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instant Coffee</td>
<td>175.0</td>
</tr>
<tr>
<td>Fresh Coffee</td>
<td>113.2</td>
</tr>
</tbody>
</table>

Sources: Ministry of Agriculture Forestry and Fisheries, Ministry of Finance, Nikkan Keizai Tsushinsha, GMN Estimations
Figure 8: Japan - Coffee: Market segmentation by value

Table 5: Japan - Coffee: Market segmentation by value

<table>
<thead>
<tr>
<th>Segment</th>
<th>2009 (bn JPY)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instant Coffee</td>
<td>469.2</td>
</tr>
<tr>
<td>Fresh Coffee</td>
<td>210.8</td>
</tr>
</tbody>
</table>

Sources: Ministry of Agriculture Forestry and Fisheries, Ministry of Finance, Nikkan Keizai Tsushins ha, GMN Estimations
Figure 9: Japan - Fresh Coffee: Company market share by volume

- UCC Ueshima (15.0%)
- Ajinomoto General Foods (10.4%)
- Key Coffee (7.8%)
- Kataoka & Co (2.1%)
- Uni Café (1.3%)
- Capital Coffee (1.2%)
- Kunitaro (1.2%)
- Nippon Hills (0.9%)
- Starbucks (0.8%)
- Kyowasa Coffee (0.6%)
- Others (58.7%)
Table 6: Japan - Fresh Coffee Coffee: Company market share by volume

<table>
<thead>
<tr>
<th>Market Player</th>
<th>2009 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCC Ueshima</td>
<td>15.0</td>
</tr>
<tr>
<td>Ajinomoto General Foods</td>
<td>10.4</td>
</tr>
<tr>
<td>Key Coffee</td>
<td>7.8</td>
</tr>
<tr>
<td>Kataoka &amp; Co</td>
<td>2.1</td>
</tr>
<tr>
<td>Uni Café</td>
<td>1.3</td>
</tr>
<tr>
<td>Capital Coffee</td>
<td>1.2</td>
</tr>
<tr>
<td>Kunitaro</td>
<td>1.2</td>
</tr>
<tr>
<td>Nippon Hills</td>
<td>0.9</td>
</tr>
<tr>
<td>Starbucks</td>
<td>0.8</td>
</tr>
<tr>
<td>Kyowas Coffee</td>
<td>0.6</td>
</tr>
<tr>
<td>Others</td>
<td>58.7</td>
</tr>
</tbody>
</table>

Sources: Nikkan Keizai Tsushinsha, GMN Estimations

Notes: Market share is based on retail sales.
Figure 10: Japan - Instant Coffee Coffee: Company market share by volume

Table 7: Japan - Instant Coffee Coffee: Company market share by volume

<table>
<thead>
<tr>
<th>Market Player</th>
<th>2009 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nestle</td>
<td>60.0</td>
</tr>
<tr>
<td>Ajinomoto General Foods</td>
<td>31.2</td>
</tr>
<tr>
<td>Others</td>
<td>8.8</td>
</tr>
</tbody>
</table>
Figure 11: Japan - Fresh Coffee Coffee: Company market share by value

- UCC Ueshima (11.9%)
- Key Coffee (8.7%)
- Ajinomoto General Foods (6.3%)
- Kataoka & Co (4.4%)
- Capital Coffee (1.2%)
- Kunitaro (1.2%)
- Nippon Hills (1.0%)
- Starbucks (1.0%)
- Kyowas Coffee (0.7%)
- Uni Café (0.6%)
- Others (63.0%)
Table 8: Japan - Fresh Coffee

<table>
<thead>
<tr>
<th>Market Player</th>
<th>2009 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCC Ueshima</td>
<td>11.9</td>
</tr>
<tr>
<td>Key Coffee</td>
<td>8.7</td>
</tr>
<tr>
<td>Ajinomoto General Foods</td>
<td>6.3</td>
</tr>
<tr>
<td>Kataoka &amp; Co</td>
<td>4.4</td>
</tr>
<tr>
<td>Capital Coffee</td>
<td>1.2</td>
</tr>
<tr>
<td>Kunitaro</td>
<td>1.2</td>
</tr>
<tr>
<td>Nippon Hills</td>
<td>1.0</td>
</tr>
<tr>
<td>Starbucks</td>
<td>1.0</td>
</tr>
<tr>
<td>Kyowas Coffee</td>
<td>0.7</td>
</tr>
<tr>
<td>Uni Café</td>
<td>0.6</td>
</tr>
<tr>
<td>Others</td>
<td>63.0</td>
</tr>
</tbody>
</table>

Sources: GMN Estimations

Notes: Market share is based on retail sales.
Figure 12: Japan - Instant Coffee: Company market share by value

Table 9: Japan - Instant Coffee: Company market share by value

<table>
<thead>
<tr>
<th>Market Player</th>
<th>2009 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nestle</td>
<td>69.9</td>
</tr>
<tr>
<td>Ajinomoto General Foods</td>
<td>21.9</td>
</tr>
<tr>
<td>Others</td>
<td>8.2</td>
</tr>
</tbody>
</table>

Sources: company information
## Compound annual growth rates

### Table 10: Compound annual growth rates

<table>
<thead>
<tr>
<th>Units</th>
<th>2005-2009</th>
<th>2010-2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>%</td>
<td>-0.0899</td>
</tr>
<tr>
<td>Volume</td>
<td>%</td>
<td>0.652</td>
</tr>
</tbody>
</table>

Note: Value figures are based on the market sizes in the local currency.
Socio-economic data

Figure 13: Population (millions)

Table 11: Population (millions)

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>127.4</td>
<td>127.5</td>
<td>127.5</td>
<td>127.5</td>
<td>127.4</td>
<td>127.3</td>
<td>127.1</td>
<td>126.8</td>
<td>126.5</td>
<td>126.1</td>
<td>125.7</td>
<td>125.2</td>
</tr>
</tbody>
</table>

Sources: Economist Intelligence Unit - http://www.eiu.com/
Figure 14: Consumer price index (CPI)

Table 12: Consumer price index (CPI)

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>100.0</td>
<td>99.75</td>
<td>99.74</td>
<td>99.47</td>
<td>99.71</td>
<td>99.77</td>
<td>101.1</td>
<td>99.78</td>
<td>98.88</td>
<td>99.38</td>
<td>100.4</td>
<td>101.5</td>
<td>102.7</td>
</tr>
</tbody>
</table>

Sources: Economist Intelligence Unit - http://www.eiu.com/
Figure 15: Gross domestic product (m GBP)

Table 13: Gross domestic product (m GBP)

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
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<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>2,581,099.1</td>
<td>2,533,949.0</td>
<td>2,504,606.5</td>
<td>2,356,614.0</td>
<td>2,188,785.0</td>
<td>2,639,277.0</td>
<td>3,242,848.0</td>
<td>3,526,384.8</td>
<td>3,562,642.4</td>
<td>3,585,987.4</td>
<td>3,555,506.5</td>
<td>3,438,710.3</td>
</tr>
</tbody>
</table>

Sources: Economist Intelligence Unit - http://www.eiu.com/
Figure 16: Exchange rates

![Graph showing exchange rates](image)

Table 14: Exchange rates

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>JPY / USD</td>
<td>115.9</td>
<td>108.2</td>
<td>110.2</td>
<td>116.3</td>
<td>117.8</td>
<td>103.4</td>
<td>93.57</td>
<td>92.61</td>
<td>93.00</td>
<td>92.50</td>
<td>92.00</td>
<td>91.00</td>
</tr>
</tbody>
</table>

Sources: Economist Intelligence Unit - http://www.eiu.com/
Sources of Data

Table 15: Japan - Coffee: Sources of Data

<table>
<thead>
<tr>
<th>Source</th>
<th>Telephone</th>
<th>Fax</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Japan Coffee Association (AJCA)</td>
<td>+81 (0)3 5649 8377</td>
<td>+81 (0)3 5649 8388</td>
<td><a href="http://ajca.or.jp/English/whatis.html">http://ajca.or.jp/English/whatis.html</a></td>
</tr>
<tr>
<td>Ministry of Agriculture Forestry and Fisheries</td>
<td>+81 (0)3 3502 8111</td>
<td></td>
<td><a href="http://www.maff.go.jp/e/index.html">http://www.maff.go.jp/e/index.html</a></td>
</tr>
<tr>
<td>Ministry of Finance</td>
<td>+81 (0)3 3581 4111</td>
<td></td>
<td><a href="http://www.mof.go.jp/english/">http://www.mof.go.jp/english/</a></td>
</tr>
<tr>
<td>Nikkan keizai tsushinsya , Inc</td>
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Economist Intelligence Unit

Mintel has forged a strong working relationship with the Economist Intelligence Unit (EIU). Both companies share a respected heritage in delivering market research, analysis and forecasts to business-leaders around the world.

The EIU is the source of all socio-economic data contained within GMN. With specialist economic and political insight for over 200 countries EIU data perfectly complements GMN.

To learn more visit eiu.com
Methodology

A Snapshot report generated by Mintel Global Market Navigator (GMN) is designed to provide instant preliminary market research. Each report provides an overview of the defined market, including market size, market forecast, segmentation, company market share along with top-line socio economic data. The data is supplied in both graphical and tabular format for ease of interpretation and analysis.

A wealth of international sources feed into GMN. This is a mix of primary and secondary data sources. In addition each market contains an exclusive 5 year market size forecast. What’s more, our team of international research analysts are always on hand to provide further assistance where required. It’s a level of service you won’t find anywhere else.

Secondary Research
GMN is a team of in-house, multi-national researchers who have expertise in local markets and over 20 languages. All researchers are specialists in data collection in over 50 countries across 18 industries, including niche industries and developing markets. All secondary data sets in both local and global languages are derived from a range of sources, from government statistics to trade magazines. In addition, Mintel has strong relationships with companies such as SymphonyIRI Group and Nielsen who partner Mintel to provide secondary data points to cross check research.

Typically GMN analysts use a minimum of 3 to 4 data points for each table, analysing different aspects of the market. Full transparency of source data is provided for all secondary sources. Furthermore, Mintel seeks written permission from the original source which is quoted in every case on GMN, reinforcing the integrity and robust nature of the data.

Primary Research – Trade Interviews
Once secondary research has been exhausted, the language specialist researcher will then validate the information collected through semi-structured telephone interviews. Validation through telephone interviews is critical for GMN. We aim to receive confirmation from a minimum of 2-3 GMN Partners such as National Trade Associations, Statistic Offices, and major players of each quoted market.

Primary Research – Shopper Insights, Store Audits
Mintel has a worldwide network of over 13,000 associates. This valuable resource allows GMN to tap into local knowledge and market expertise to research and validate what products are available through retail channels.

Once instructed, the associate is instructed to visit main retailers related to specific research subject. The associate will provide comprehensive analysis of items, companies and brands available on shelf, available for consumers to purchase. Data collection is based on strict guidelines to avoid misinterpretation of the local market. After submission, the information collected is analysed by GMN statisticians and processed into data point format, providing an overview of the market.
Primary Research – Consumer Surveys

In some circumstances depending on the country, category, and market analysed, secondary or primary research are insufficient to identify the values of a market. Consumer Surveys are necessary to understand consumer behaviour towards the specific subject being researched. In partnership with Toluna, GMN builds up a robust estimated market size based on commissioned on-line consumer surveys of 1,000 adults, questioning expenditure, frequency of purchase, companies and brands for each market.

Forecast Methodology

The basic model which the GMN forecast was built on is called the ISDE model, which is a framework based on four main concepts, namely:

1. Interface
2. Supply
3. Demand
4. Environment

These four concepts can each affect the fluctuation of markets. First, all the main parameters are identified that affect the market/industry which is to be forecasted. Once identified the parameter is matched to and classified with the ISDE model.

Interface

These are factors which affect markets or industries. Mainly they regard to conditions and factors in the transition phase between the supply and demand.

Supply

The total amount of goods and services that are available to purchase.

Demand

Desire, ability or need by individuals or companies to purchase goods or services.

Environment

The environment includes all factors external to the market or industry, which in one way or another, influence them.

Each element of the ISDE model is affected by different parameters. Based on their understanding of the sector in question, the analyst selects the parameter regarded as the most relevant. For reasons of conformity, reliability and currency, the range of parameters at the analyst’s disposal is confined to eight parameters. These are updated on a monthly basis:

1. Real agriculture
2. Real industry
3. Real manufacturing
4. Real services
5. Population
6. Private Consumption
7. GDP
8. Households
An example of usage:

For the media industry, it depends on the title in question: for example in the advertising report: market size is usually based on gross expenditure, i.e. the amount spent on advertising through different segments (such as TV, magazines, journals), can be related to GDP, manufacturing or consumption depending on the particular target of advertising campaigns. By contrast for consumer journals it is related more to population, and driven by other factors such as the internet’s influence on substituting the printed copies to online version.
About Mintel

Mintel is an independent award-winning provider of world-leading market intelligence, delivering robust information, analysis and critical recommendations. Mintel's trusted portfolio of proprietary industry solutions and products has been supporting high profile clients in key sectors such as FMCG, financial services, media, retail, leisure and education for over 38 years. With office locations in London, Chicago, New York, Shanghai, Tokyo and Sydney our global presence continues to grow.

To learn more visit mintel.com.