Coffee in Asia Pacific

March 2023

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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
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Taiwan: Market context
Taiwan: Competitive and retail landscape

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