

RTD Coffee in Asia Pacific

July 2021

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INTRODUCTION

Scope

Key findings

REGIONAL OVERVIEW

Asia Pacific dominates RTD coffee globally, with further growth potential

RTD coffee negatively hit by COVID-19 due to home seclusion

Japan's dominance slowly declining in the region

Yet, still huge gap between Japan and other countries

Increasing demand for on-the-go options in Indonesia and the Philippines

Volumes increase in most countries, except for Japan and Taiwan

Mixed performance for RTD coffee from 2015 to 2020

Small format retail is important to the category

Convenience stores is a key channel in the leading markets

LEADING COMPANIES AND BRANDS

High consolidation observed across Asia Pacific

Coca-Cola and Suntory fiercely compete in the region

Japan is the main market for most companies

Moderate changes in brand share rankings

Coca-Cola and Suntory expand their ranges to tackle stagnation in Japan

FORECAST PROJECTIONS

Volume growth expected outside Taiwan and Singapore

Struggle expected in Japan, while growth expected in most other markets

Drivers of growth largely vary across the key markets

COUNTRY SNAPSHOTS

Japan: Market Context

Japan: Competitive and Retail Landscape

China: Market Context

China: Competitive and Retail Landscape

South Korea: Market Context

South Korea: Competitive and Retail Landscape

Indonesia: Market Context

Indonesia: Competitive and Retail Landscape

Thailand: Market Context

Thailand: Competitive and Retail Landscape

Philippines: Market Context

Philippines: Competitive and Retail Landscape

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