

Coffee in Asia Pacific

March 2023

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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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Kazakhstan: Market context

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Vietnam: Competitive and retail landscape

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