

Coffee – Japan – a snapshot

Generated by Mintel Global Market Navigator



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Note: This report has been generated by Mintel Global Market Navigator

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Mintel understands the importance of market size data within your organisation. Whether you're seeking expansion opportunities, diversifying to new markets or capturing new clients, understanding the characteristics of a market is critical to your decision making process.

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Contents

Definitions

Market volume

Highlights	6
■ Figure 1: Volume - Absolute size (2005 - 2014)	6
■ Figure 2: Volume - Growth (2005 - 2014)	6
■ Table 1: Volume (2005 - 2014)	7

Market value in local currency

Highlights	8
■ Figure 3: Value in Local Currency - Value (2005 - 2014)	8
■ Figure 4: Value in Local Currency - Value growth (2005 - 2014)	8
■ Table 2: Value in Local Currency (2005 - 2014)	9

Market value in GBP

■ Figure 5: Value in GBP - Value (2005 - 2014)	10
■ Figure 6: Value in GBP - Value growth (2005 - 2014)	10
■ Table 3: Value in GBP (2005 - 2014)	10

Market segmentation

■ Figure 7: Japan - Coffee: Market segmentation by volume (2009)	11
■ Table 4: Japan - Coffee: Market segmentation by volume (2009)	11
■ Figure 8: Japan - Coffee: Market segmentation by value (2009)	12
■ Table 5: Japan - Coffee: Market segmentation by value (2009)	12

Market shares

■ Figure 9: Japan - Fresh Coffee Coffee: Company market share by volume (2009)	13
■ Table 6: Japan - Fresh Coffee Coffee: Company market share by volume (2009)	14
■ Figure 10: Japan - Instant Coffee Coffee: Company market share by volume (2009)	15
■ Table 7: Japan - Instant Coffee Coffee: Company market share by volume (2009)	15
■ Figure 11: Japan - Fresh Coffee Coffee: Company market share by value (2009)	16
■ Table 8: Japan - Fresh Coffee Coffee: Company market share by value (2009)	17
■ Figure 12: Japan - Instant Coffee Coffee: Company market share by value (2009)	18
■ Table 9: Japan - Instant Coffee Coffee: Company market share by value (2009)	18

Compound annual growth rates

■ Table 10: Compound annual growth rates (2005 - 2014)	19
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Socio-economic data

■ Figure 13: Population (millions) (2003 - 2014)	20
■ Table 11: Population (millions) (2003 - 2014)	20
■ Figure 14: Consumer price index (CPI) (2002 - 2014)	21
■ Table 12: Consumer price index (CPI) (2002 - 2014)	21
■ Figure 15: Gross domestic product (m GBP) (2003 - 2014)	22
■ Table 13: Gross domestic product (m GBP) (2003 - 2014)	22
■ Figure 16: Exchange rates (2003 - 2014)	23
■ Table 14: Exchange rates (2003 - 2014)	23

Sources of Data

■ Table 15: Japan - Coffee: Sources of Data	24
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[Methodology](#)

[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%.

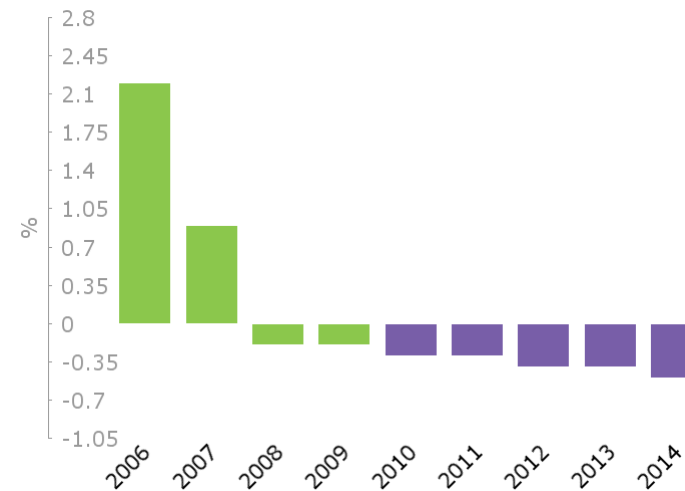
- Compound annual growth rate for Coffee (Japan) for the period 2005-2009 was 0.652%.
- In 2014 the Coffee (Japan) market is forecast to reach 282.6 (000) tonnes representing a volume CAGR of -0.408% since 2010.

Figure 1: Volume - Absolute size



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

Figure 2: Volume - Growth



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

Table 1: Volume

	Units	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Absolute size	(000) tonnes	280.8	287.0	289.5	288.9	288.2	287.2	286.2	285.1	283.9	282.6
Growth	%		2.2	0.9	-0.2	-0.2	-0.3	-0.3	-0.4	-0.4	-0.5
Volume Consumption per capita (population)	tonnes	0.00220	0.00225	0.00227	0.00227	0.00227	0.00226	0.00226	0.00226	0.00226	0.00226

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%.

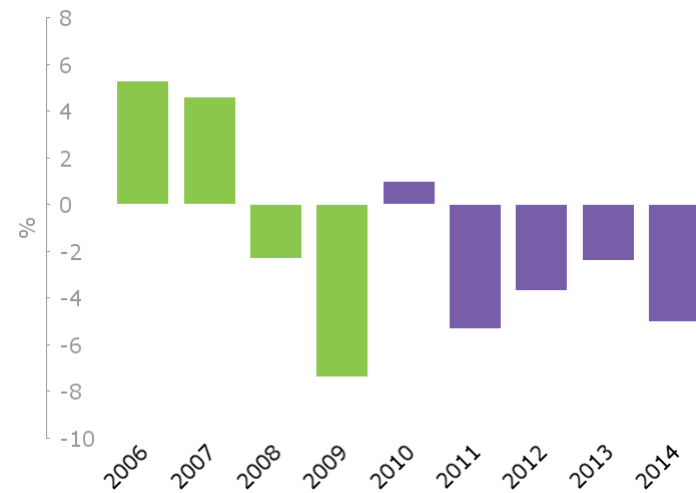
- Compound annual growth rate for Coffee (Japan) for the period 2005-2009 was -0.0899%.
- In 2014 the Coffee (Japan) market is forecast to reach 581.5 bn JPY representing a value CAGR of -4.09% since 2010.

Figure 3: Value in Local Currency - Value



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

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

	Units	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Value	bn JPY	682.5	718.5	751.5	734.5	680.0	687.1	650.9	626.8	611.8	581.5
Unit prices	JPY per tonne	2,430,484.3	2,503,414.6	2,595,751.3	2,542,298.4	2,359,576.7	2,392,215.6	2,273,851.5	2,198,449.7	2,155,165.7	2,057,859.7
Value growth	%		5.3	4.6	-2.3	-7.4	1.0	-5.3	-3.7	-2.4	-5.0

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

Market value in GBP

Figure 5: Value in GBP - Value

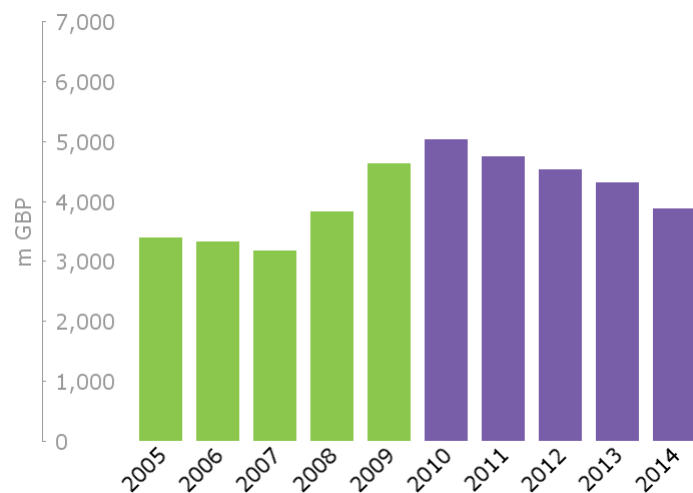


Figure 6: Value in GBP - Value growth

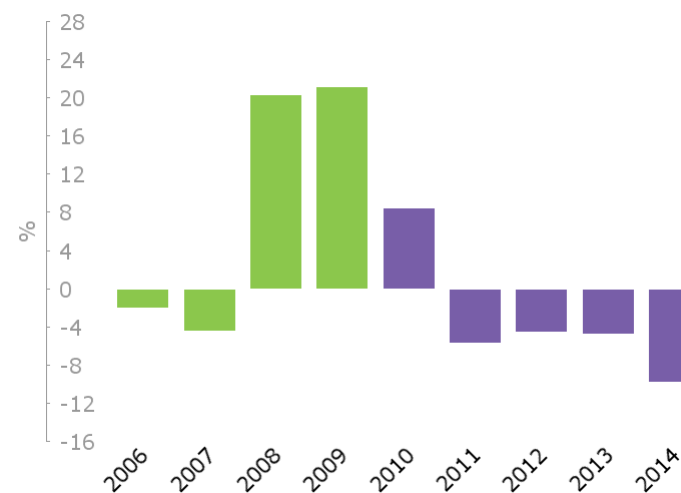


Table 3: Value in GBP

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

Market segmentation

Figure 7: Japan - Coffee: Market segmentation by volume

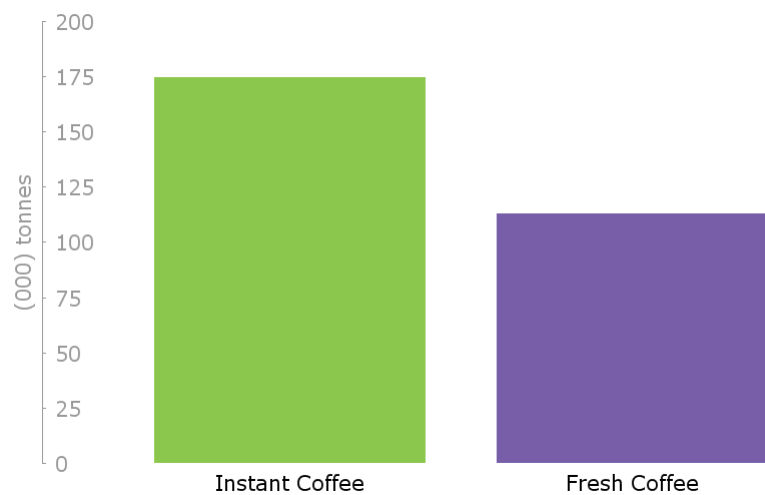


Table 4: Japan - Coffee: Market segmentation by volume

Segment	2009 ((000) tonnes)
Instant Coffee	175.0
Fresh Coffee	113.2

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

Figure 8: Japan - Coffee: Market segmentation by value

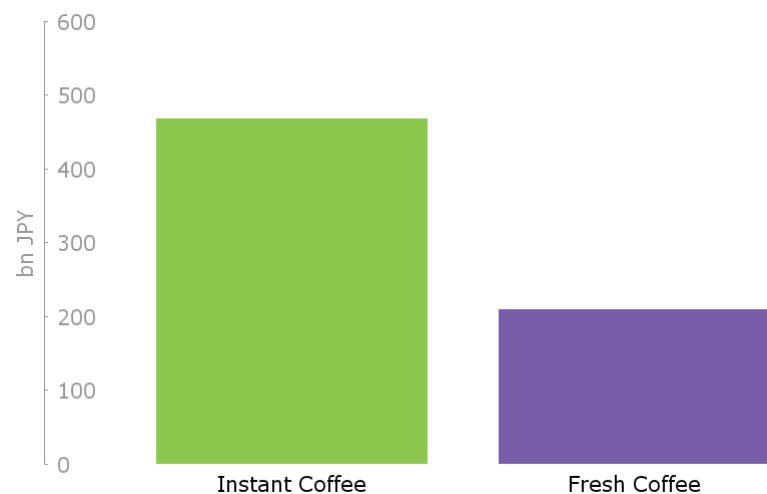


Table 5: Japan - Coffee: Market segmentation by value

Segment	2009 (bn JPY)
Instant Coffee	469.2
Fresh Coffee	210.8

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

Market shares

Figure 9: Japan - Fresh Coffee Coffee: Company market share by volume

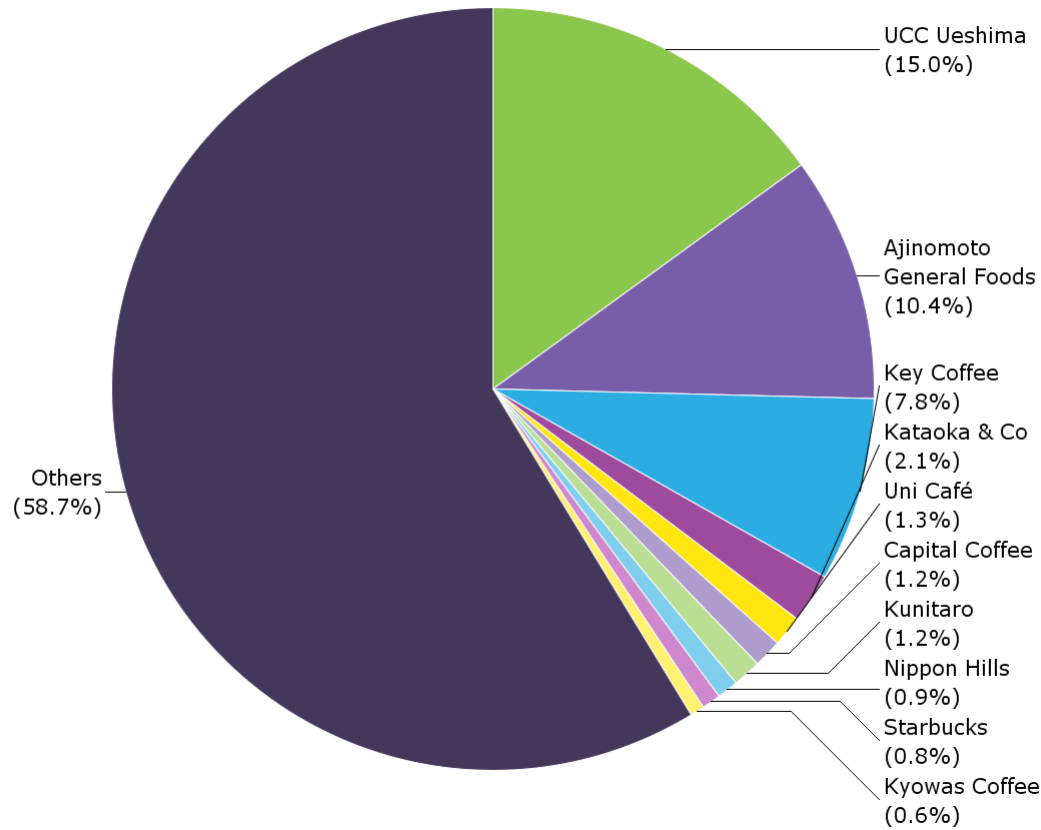


Table 6: Japan - Fresh Coffee Coffee: Company market share by volume

Market Player	2009 (%)
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
Kyowas Coffee	0.6
Others	58.7

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

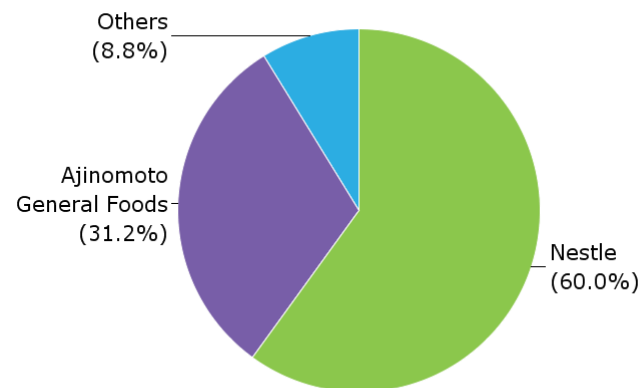


Table 7: Japan - Instant Coffee Coffee: Company market share by volume

Market Player	2009 (%)
Nestle	60.0
Ajinomoto General Foods	31.2
Others	8.8

Figure 11: Japan - Fresh Coffee Coffee: Company market share by value

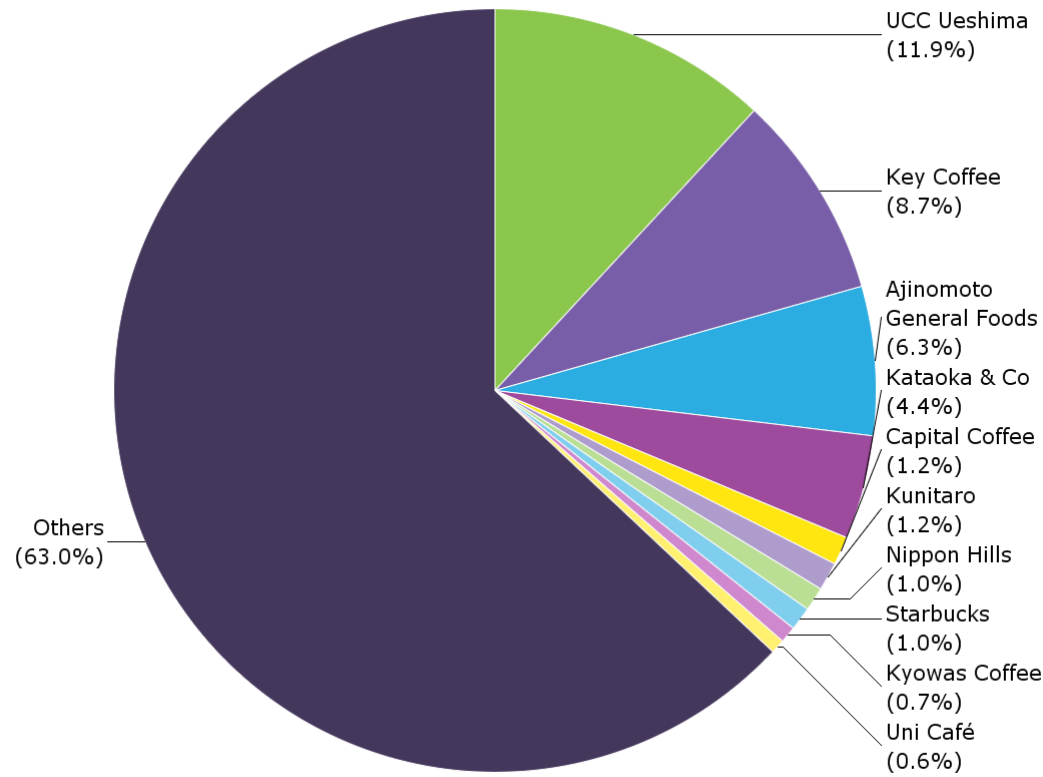


Table 8: Japan - Fresh Coffee Coffee: Company market share by value

Market Player	2009 (%)
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

Sources: GMN Estimations

Notes: Market share is based on retail sales.

Figure 12: Japan - Instant Coffee Coffee: Company market share by value

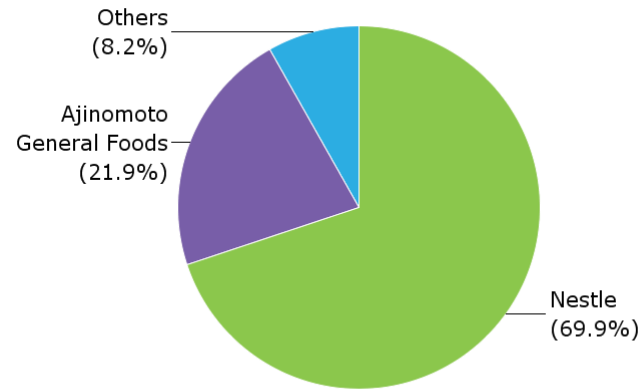


Table 9: Japan - Instant Coffee Coffee: Company market share by value

Market Player	2009 (%)
Nestle	69.9
Ajinomoto General Foods	21.9
Others	8.2

Sources: company information



Compound annual growth rates

Table 10: Compound annual growth rates

	Units	2005-2009	2010-2014
Value	%	-0.0899	-4.09
Volume	%	0.652	-0.408

Note: Value figures are based on the market sizes in the local currency.

Socio-economic data

Figure 13: Population (millions)

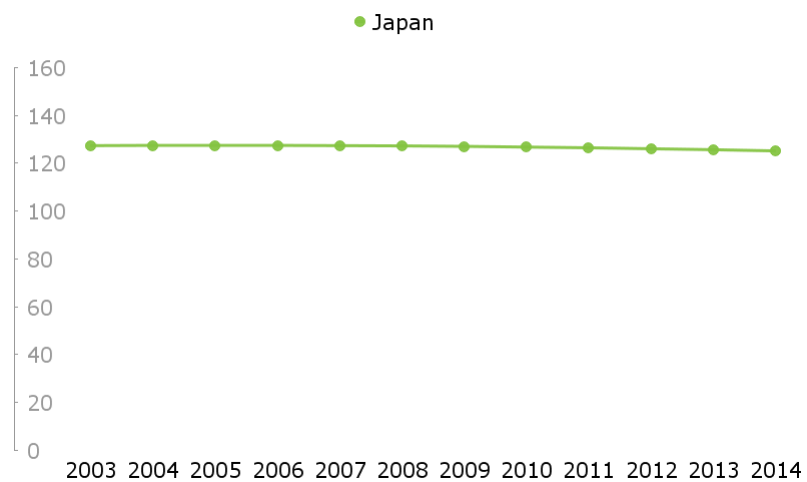


Table 11: Population (millions)

Country	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Japan	127.4	127.5	127.5	127.5	127.4	127.3	127.1	126.8	126.5	126.1	125.7	125.2

Sources: Economist Intelligence Unit - <http://www.eiu.com/>

Figure 14: Consumer price index (CPI)

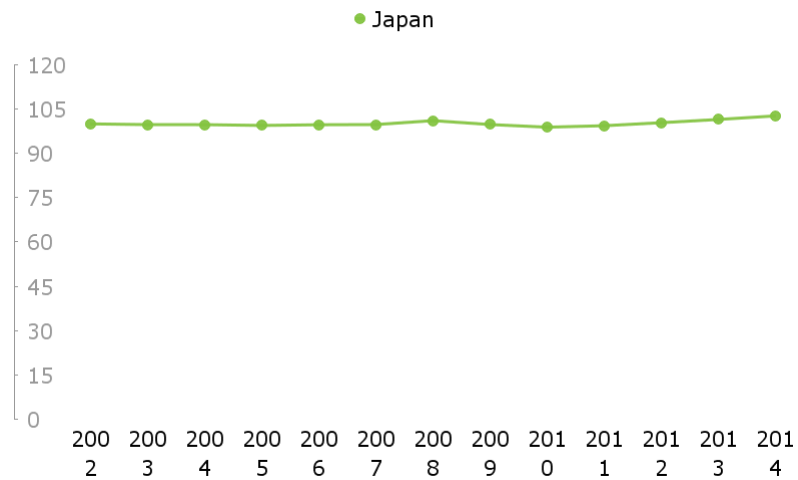


Table 12: Consumer price index (CPI)

Country	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Japan	100.0	99.75	99.74	99.47	99.71	99.77	101.1	99.78	98.88	99.38	100.4	101.5	102.7

Sources: Economist Intelligence Unit - <http://www.eiu.com/>

Figure 15: Gross domestic product (m GBP)

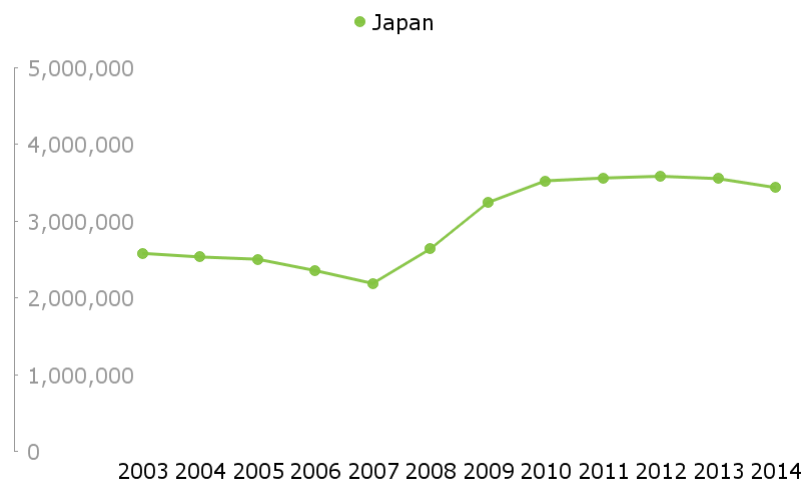


Table 13: Gross domestic product (m GBP)

Country	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Japan	2,581,099.1	2,533,949.0	2,504,606.5	2,356,614.0	2,188,785.0	2,639,277.0	3,242,848.0	3,526,384.8	3,562,642.4	3,585,987.4	3,555,506.5	3,438,710.3

Sources: Economist Intelligence Unit - <http://www.eiu.com/>

Figure 16: Exchange rates

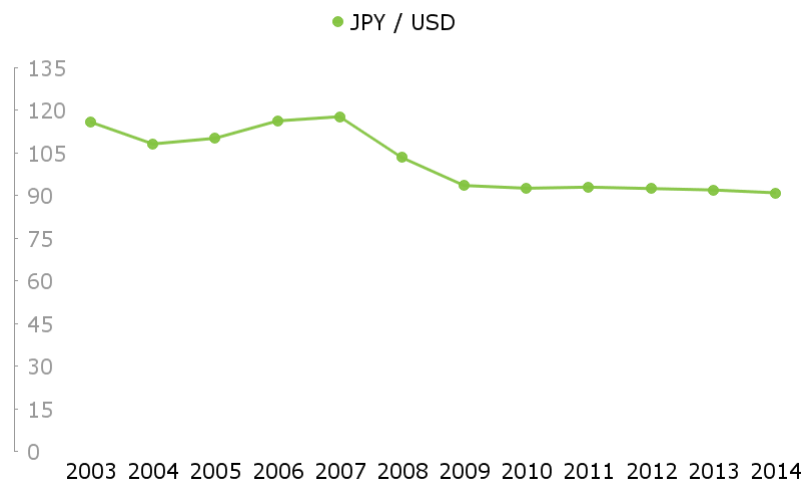


Table 14: Exchange rates

Currency	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
JPY / USD	115.9	108.2	110.2	116.3	117.8	103.4	93.57	92.61	93.00	92.50	92.00	91.00

Sources: Economist Intelligence Unit - <http://www.eiu.com/>



Sources of Data

Table 15: Japan - Coffee: Sources of Data

	Telephone	Fax	Website
All Japan Coffee Association (AJCA)	+81 (0)3 5649 8377	+81 (0)3 5649 8388	http://ajca.or.jp/English/whatis.html
Ministry of Agriculture Forestry and Fisheries	+81 (0)3 3502 8111		http://www.maff.go.jp/e/index.html
Ministry of Finance	+81 (0)3 3581 4111		http://www.mof.go.jp/english/
Nikkan keizai tsushinsya , Inc	+81 (0)3 5847 6611	+81 (0)3 5847 6601	http://www.nikkankeizai.co.jp/

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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.

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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.



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