



Euromonitor  
International

# Cafés/Bars in Japan

March 2025

Table of Contents

## KEY DATA FINDINGS

### 2024 DEVELOPMENTS

Improving sales for bars/pubs but challenges remain  
Value sales of cafés recover to pre-pandemic levels, driven by younger generations  
Starbucks Coffee Japan Ltd leads fragmented competitive landscape

### PROSPECTS AND OPPORTUNITIES

Changes to drinking habits set to hamper future growth of bars/pubs  
Positive outlook for cafés but competition with convenience stores will intensify  
Sustainability initiatives likely to accelerate

### CATEGORY DATA

Table 1 - Cafés/Bars by Category: Units/Outlets 2019-2024  
Table 2 - Sales in Cafés/Bars by Category: Number of Transactions 2019-2024  
Table 3 - Sales in Cafés/Bars by Category: Foodservice Value 2019-2024  
Table 4 - Cafés/Bars by Category: % Units/Outlets Growth 2019-2024  
Table 5 - Sales in Cafés/Bars by Category: % Transaction Growth 2019-2024  
Table 6 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2019-2024  
Table 7 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2020-2024  
Table 8 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2021-2024  
Table 9 - Forecast Cafés/Bars by Category: Units/Outlets 2024-2029  
Table 10 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2024-2029  
Table 11 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2024-2029  
Table 12 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2024-2029  
Table 13 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2024-2029  
Table 14 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2024-2029

## Consumer Foodservice in Japan - Industry Overview

### EXECUTIVE SUMMARY

Consumer foodservice in 2024: The big picture  
2024 key trends  
Competitive landscape  
Independent foodservice developments  
What next for consumer foodservice?

### MARKET DATA

Table 15 - Units, Transactions and Value Sales in Consumer Foodservice 2019-2024  
Table 16 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2019-2024  
Table 17 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2024  
Table 18 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2019-2024  
Table 19 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2019-2024  
Table 20 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2024  
Table 21 - Sales in Consumer Foodservice by Location: % Foodservice Value 2019-2024  
Table 22 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2019-2024  
Table 23 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2024  
Table 24 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2024  
Table 25 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2024  
Table 26 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2024-2029  
Table 27 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2024-2029

## DISCLAIMER

## SOURCES

### Summary 1 - Research Sources

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/cafes-bars-in-japan/report](http://www.euromonitor.com/cafes-bars-in-japan/report).