

Alcoholic Drinks in Japan

Market Direction | 2024-06-12 | 79 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €1750.00
- Multiple User License (1 Site) €3500.00
- Multiple User License (Global) €5250.00

Report description:

In 2023, total volume sales of alcoholic drinks in Japan saw a slight decline. However, performances differed widely across the two different channels. The on-trade channel demonstrated a second year of robust rebound as Japan began to move past the COVID-19 pandemic. In May 2023, COVID-19 was reclassified to level five by the government, the same as seasonal influenza, which significantly altered how the disease was managed, and perceived socially. This reclassification meant that the governmen...

Euromonitor International's Alcoholic Drinks in Japan report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data (2019-2023), allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they legislative, distribution or pricing issues. Forecasts to 2028 illustrate how the market is set to change.

Product coverage: Beer, Cider/Perry, RTDs, Spirits, Wine.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- * Get a detailed picture of the Alcoholic Drinks market;
- * Pinpoint growth sectors and identify factors driving change;
- * Understand the competitive environment, the market's major players and leading brands;
- * Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

tel. 0048 603 394 346 e-mail: support@scotts-international.com www.scotts-international.com

Table of Contents:

Alcoholic Drinks in Japan Euromonitor International June 2024

List Of Contents And Tables

ALCOHOLIC DRINKS IN JAPAN

EXECUTIVE SUMMARY

Alcoholic drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

On-trade vs off-trade split

What next for alcoholic drinks?

MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

Summary 1 Number of On-trade Establishments by Type 2017-2023

TAXATION AND DUTY LEVIES

Summary 2 Taxation and Duty Levies on Alcoholic Drinks 2023

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 1 Retail Consumer Expenditure on Alcoholic Drinks 2018-2023

MARKET DATA

Table 2 Sales of Alcoholic Drinks by Category: Total Volume 2018-2023

Table 3 Sales of Alcoholic Drinks by Category: Total Value 2018-2023

Table 4 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2018-2023

Table 5 Sales of Alcoholic Drinks by Category: % Total Value Growth 2018-2023

Table 6 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2023

Table 7 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2023

Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2023

Table 9 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2023

Table 10 ☐GBO Company Shares of Alcoholic Drinks: % Total Volume 2019-2023

Table 11 □Distribution of Alcoholic Drinks by Format: % Off-trade Value 2018-2023

Table 12 [Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2023

Table 13 [Forecast Sales of Alcoholic Drinks by Category: Total Volume 2023-2028

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com www.scotts-international.com

Table 14 [Forecast Sales of Alcoholic Drinks by Category: Total Value 2023-2028

Table 15 [Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2023-2028

Table 16 ∏Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 3 Research Sources

BEER IN JAPAN

KEY DATA FINDINGS

2023 DEVELOPMENTS

Total volumes show a slight decline, but performances differ across price platforms due to tax regulation change

Asahi leads, while Suntory gains share with a new product launch

Diversification of beer

PROSPECTS AND OPPORTUNITIES

Major players to focus on "beer"

Players likely to offer experiences

Non alcoholic beer has further potential as it matches the health trend

CATEGORY BACKGROUND

Lager price band methodology

Summary 4 Lager by Price Band 2023

Table 17 Number of Breweries 2018-2023

CATEGORY DATA

Table 18 Sales of Beer by Category: Total Volume 2018-2023

Table 19 Sales of Beer by Category: Total Value 2018-2023

Table 20 Sales of Beer by Category: % Total Volume Growth 2018-2023

Table 21 Sales of Beer by Category: % Total Value Growth 2018-2023

Table 22 Sales of Beer by Off-trade vs On-trade: Volume 2018-2023

Table 23 Sales of Beer by Off-trade vs On-trade: Value 2018-2023

Table 24 Sales of Beer by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 25 Sales of Beer by Off-trade vs On-trade: % Value Growth 2018-2023

Table 26 □Sales of Beer by Craft vs Standard 2018-2023

Table 27 [GBO Company Shares of Beer: % Total Volume 2019-2023

Table 29 □LBN Brand Shares of Beer: % Total Volume 2020-2023

Table 30 ☐Forecast Sales of Beer by Category: Total Volume 2023-2028

Table 31 ∏Forecast Sales of Beer by Category: Total Value 2023-2028

Table 32 ☐Forecast Sales of Beer by Category: % Total Volume Growth 2023-2028

Table 33 [Forecast Sales of Beer by Category: % Total Value Growth 2023-2028

WINE IN JAPAN

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price increases impact off-trade purchases of wine

Wine rebounds strongly on-trade, but is not yet at the pre-pandemic level

Suntory pushes Nihon (Japanese) wine

PROSPECTS AND OPPORTUNITIES

A need to capture new consumers

Strengthening sales of sake to inbound tourists

Non alcoholic and low alcohol wine have further potential for growth

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

CATEGORY DATA

Table 34 Sales of Wine by Category: Total Volume 2018-2023

Table 35 Sales of Wine by Category: Total Value 2018-2023

Table 36 Sales of Wine by Category: % Total Volume Growth 2018-2023

Table 37 Sales of Wine by Category: % Total Value Growth 2018-2023

Table 38 Sales of Wine by Off-trade vs On-trade: Volume 2018-2023

Table 39 Sales of Wine by Off-trade vs On-trade: Value 2018-2023

Table 40 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 41 Sales of Wine by Off-trade vs On-trade: % Value Growth 2018-2023

Table 42 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2018-2023

Table 43 | Sales of Still Rose Wine by Price Segment: % Off-trade Volume 2018-2023

Table 44 ∏Sales of Still White Wine by Price Segment: % Off-trade Volume 2018-2023

Table 45 ∏Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2018-2023

Table 46 ∏GBO Company Shares of Still Light Grape Wine: % Total Volume 2019-2023

Table 48 [LBN Brand Shares of Still Light Grape Wine: % Total Volume 2020-2023

Table 49 ☐GBO Company Shares of Champagne: % Total Volume 2019-2023

Table 50 NBO Company Shares of Champagne: % Total Volume 2019-2023

Table 51 [LBN Brand Shares of Champagne: % Total Volume 2020-2023

Table 52 ☐GBO Company Shares of Other Sparkling Wine: % Total Volume 2019-2023

Table 53 NBO Company Shares of Other Sparkling Wine: % Total Volume 2019-2023

Table 54 [LBN Brand Shares of Other Sparkling Wine: % Total Volume 2020-2023

Table 55 ∏GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2019-2023

Table 56 ☐NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2019-2023

Table 57 ∏LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2020-2023

Table 58 ☐GBO Company Shares of Non-grape Wine: % Total Volume 2019-2023

Table 59 ☐NBO Company Shares of Non-grape Wine: % Total Volume 2019-2023

Table 60 ☐LBN Brand Shares of Non-grape Wine: % Total Volume 2020-2023

Table 61 ☐Forecast Sales of Wine by Category: Total Volume 2023-2028

Table 62 ☐Forecast Sales of Wine by Category: Total Value 2023-2028

Table 63 [Forecast Sales of Wine by Category: % Total Volume Growth 2023-2028

Table 64 ☐ Forecast Sales of Wine by Category: % Total Value Growth 2023-2028

SPIRITS IN IAPAN

KEY DATA FINDINGS

2023 DEVELOPMENTS

On-trade demand for whiskies rebounds, while off-trade consumption is rooted

Popularity of Japanese whisky continues

Suntory continues to drive the growth of gin

PROSPECTS AND OPPORTUNITIES

Price increases set to continue in 2024

Shochu needs to attract younger consumers of legal drinking age to end its struggle

CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology

Summary 5 Benchmark Brands 2023

CATEGORY DATA

Table 65 Sales of Spirits by Category: Total Volume 2018-2023 Table 66 Sales of Spirits by Category: Total Value 2018-2023

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 67 Sales of Spirits by Category: % Total Volume Growth 2018-2023

Table 68 Sales of Spirits by Category: % Total Value Growth 2018-2023

Table 69 Sales of Spirits by Off-trade vs On-trade: Volume 2018-2023

Table 70 Sales of Spirits by Off-trade vs On-trade: Value 2018-2023

Table 71 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 72 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2018-2023

Table 73 Sales of Dark Rum by Price Platform: % Total Volume 2018-2023

Table 74 [Sales of White Rum by Price Platform: % Total Volume 2018-2023

Table 75 ☐Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2018-2023

Table 76 Sales of English Gin by Price Platform: % Total Volume 2018-2023

Table 77 ∏Sales of Vodka by Price Platform: % Total Volume 2018-2023

Table 78 | Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2018-2023

Table 79 ☐GBO Company Shares of Spirits: % Total Volume 2019-2023

Table 80

☐NBO Company Shares of Spirits: % Total Volume 2019-2023

Table 81 [LBN Brand Shares of Spirits: % Total Volume 2020-2023

Table 82 ☐Forecast Sales of Spirits by Category: Total Volume 2023-2028

Table 83 ☐Forecast Sales of Spirits by Category: Total Value 2023-2028

Table 84 ☐Forecast Sales of Spirits by Category: % Total Volume Growth 2023-2028

Table 85 [Forecast Sales of Spirits by Category: % Total Value Growth 2023-2028

CIDER/PERRY IN JAPAN

KEY DATA FINDINGS

2023 DEVELOPMENTS

On-trade sales continue to show strong recovery as lifestyles normalise

Nikka continues to lead cider/perry and sees brand renewal

PROSPECTS AND OPPORTUNITIES

Acknowledgement from consumers remains an issue

A good match with the low alcohol trend

Craft cider/perry trend to continue

CATEGORY DATA

Table 86 Sales of Cider/Perry: Total Volume 2018-2023

Table 87 Sales of Cider/Perry: Total Value 2018-2023

Table 88 Sales of Cider/Perry: % Total Volume Growth 2018-2023

Table 89 Sales of Cider/Perry: % Total Value Growth 2018-2023

Table 90 Sales of Cider/Perry by Off-trade vs On-trade: Volume 2018-2023

Table 91 Sales of Cider/Perry by Off-trade vs On-trade: Value 2018-2023

Table 92 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 93 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2018-2023

Table 94 GBO Company Shares of Cider/Perry: % Total Volume 2019-2023

Table 95 ☐NBO Company Shares of Cider/Perry: % Total Volume 2019-2023

Table 96 ☐LBN Brand Shares of Cider/Perry: % Total Volume 2020-2023

Table 97 [Forecast Sales of Cider/Perry: Total Volume 2023-2028

Table 98 ☐Forecast Sales of Cider/Perry: Total Value 2023-2028

Table 99 ☐Forecast Sales of Cider/Perry: % Total Volume Growth 2023-2028

Table 100 ☐ Forecast Sales of Cider/Perry: % Total Value Growth 2023-2028

RTDS IN JAPAN

KEY DATA FINDINGS

2023 DEVELOPMENTS

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Positive performance for RTDs, driven by sugar-free trend Suntory continues to lead RTDs, and sees new product launches Non alcoholic RTDs continues to grow PROSPECTS AND OPPORTUNITIES

RTDs expected to grow thanks to the wide product variety available

Labelling the amount of pure alcohol may push a shift to lower alcohol products

Premiumisation will be key for value growth

CATEGORY DATA

Table 101 Sales of RTDs by Category: Total Volume 2018-2023 Table 102 Sales of RTDs by Category: Total Value 2018-2023

Table 103 Sales of RTDs by Category: % Total Volume Growth 2018-2023

Table 104 Sales of RTDs by Category: % Total Value Growth 2018-2023 $\,$

Table 105 Sales of RTDs by Off-trade vs On-trade: Volume 2018-2023

Table 106 Sales of RTDs by Off-trade vs On-trade: Value 2018-2023

Table 107 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2018-2023 Table 108 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2018-2023

Table 109 GBO Company Shares of RTDs: % Total Volume 2019-2023

Table 110 ☐NBO Company Shares of RTDs: % Total Volume 2019-2023

Table 111 [LBN Brand Shares of RTDs: % Total Volume 2020-2023

Table 112 ☐Forecast Sales of RTDs by Category: Total Volume 2023-2028

Table 113 [Forecast Sales of RTDs by Category: Total Value 2023-2028

Table 114 [Forecast Sales of RTDs by Category: % Total Volume Growth 2023-2028 Table 115 [Forecast Sales of RTDs by Category: % Total Value Growth 2023-2028



☐ - Print this form

To place an Order with Scotts International:

 $\hfill \Box$ - Complete the relevant blank fields and sign

Alcoholic Drinks in Japan

Market Direction | 2024-06-12 | 79 pages | Euromonitor

| Select license | License | | | | Price |
|--|--------------------------------|--|---|-------------------|--------------|
| | Single User Licence | | | €1750.00 | |
| | Multiple User License (1 Site) | | | €3500.00 | |
| | Multiple User License (Global) | | | €5250.00 | |
| | | | | VAT | |
| | | | | Total | |
| ** VAT will be added a | | ompanies, individuals and EU based | @scotts-international.co companies who are una | able to provide a | valid EU Vat |
| | | empanies, individuals and EU based Phone* | | able to provide a | valid EU Vat |
| imail* | | | | able to provide a | valid EU Vat |
| :mail* irst Name* | | Phone* | | able to provide a | valid EU Vat |
| mail* irst Name* ob title* | | Phone* Last Name* | companies who are una | able to provide a | valid EU Vat |
| mail* irst Name* bb title* Company Name* | | Phone* Last Name* EU Vat / Tax ID | companies who are una | able to provide a | valid EU Vat |
| Email* First Name* Ob title* Company Name* | | Phone* Last Name* | companies who are una | able to provide a | valid EU Vat |
| imail* iirst Name* ob title* Company Name* | | Phone* Last Name* EU Vat / Tax ID | companies who are una | able to provide a | valid EU Vat |
| ** VAT will be added a Email* First Name* ob title* Company Name* Address* Zip Code* | | Phone* Last Name* EU Vat / Tax ID City* | companies who are una | able to provide a | valid EU Vat |
| Email* First Name* ob title* Company Name* Address* | | Phone* Last Name* EU Vat / Tax ID City* Country* | / NIP number* | able to provide a | valid EU Vat |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com www.scotts-international.com