

Alcoholic Drinks in Japan

June 2023

Table of Contents

EXECUTIVE SUMMARY

Alcoholic drinks in 2022: The big picture

2022 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

Table 1 - Number of On-trade Establishments by Type 2017-2022

TAXATION AND DUTY LEVIES

Summary 1 - Taxation and Duty Levies on Alcoholic Drinks 2022

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 2 - Retail Consumer Expenditure on Alcoholic Drinks 2017-2022

MARKET DATA

Table 3 - Sales of Alcoholic Drinks by Category: Total Volume 2017-2022

Table 4 - Sales of Alcoholic Drinks by Category: Total Value 2017-2022

Table 5 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022

Table 6 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022

Table 7 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022

Table 8 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022

Table 9 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022

Table 10 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022

Table 11 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2018-2022

Table 12 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022

Table 13 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022

Table 14 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2022-2027

Table 15 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027

Table 16 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027

Table 17 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 2 - Research Sources

Beer in Japan

KEY DATA FINDINGS

2022 DEVELOPMENTS

Total beer volumes increase thanks to a rebound in on-trade sales

On-trade rebound and new products strengthen Asahi's lead

Non alcoholic beer records a decline after strong growth in 2021

PROSPECTS AND OPPORTUNITIES

A drastic impact expected due to tax reformation from 2023

With lifestyle changes, on-trade sales will struggle in the long run

Non alcoholic beer has further potential if new demand is successfully cultivated

CATEGORY BACKGROUND

Lager price band methodology

Summary 3 - Lager by Price Band 2022

Table 18 - Number of Breweries 2017-2022

CATEGORY DATA

Table 19 - Sales of Beer by Category: Total Volume 2017-2022

Table 20 - Sales of Beer by Category: Total Value 2017-2022

Table 21 - Sales of Beer by Category: % Total Volume Growth 2017-2022

Table 22 - Sales of Beer by Category: % Total Value Growth 2017-2022

Table 23 - Sales of Beer by Off-trade vs On-trade: Volume 2017-2022

Table 24 - Sales of Beer by Off-trade vs On-trade: Value 2017-2022

Table 25 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 26 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2017-2022

Table 27 - Sales of Beer by Craft vs Standard 2017-2022

Table 28 - GBO Company Shares of Beer: % Total Volume 2018-2022

Table 29 - NBO Company Shares of Beer: % Total Volume 2018-2022

Table 30 - LBN Brand Shares of Beer: % Total Volume 2019-2022

Table 31 - Forecast Sales of Beer by Category: Total Volume 2022-2027

Table 32 - Forecast Sales of Beer by Category: Total Value 2022-2027

Table 33 - Forecast Sales of Beer by Category: % Total Volume Growth 2022-2027

Table 34 - Forecast Sales of Beer by Category: % Total Value Growth 2022-2027

Cider/Perry in Japan

KEY DATA FINDINGS

2022 DEVELOPMENTS

On-trade sales rebound as consumers start to drink outside the home again

Nikka aims to develop demand for premium cider

Mercian renews its product to match the trend of enjoying alcohol with meals

PROSPECTS AND OPPORTUNITIES

Price increases expected in 2023

Cider/perry is compatible with the low alcohol trend

Prefectures where apples are grown focus on developing cider as a local speciality

CATEGORY DATA

Table 35 - Sales of Cider/Perry: Total Volume 2017-2022

Table 36 - Sales of Cider/Perry: Total Value 2017-2022
 Table 37 - Sales of Cider/Perry: % Total Volume Growth 2017-2022
 Table 38 - Sales of Cider/Perry: % Total Value Growth 2017-2022
 Table 39 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2017-2022
 Table 40 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2017-2022
 Table 41 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2017-2022
 Table 42 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2017-2022
 Table 43 - GBO Company Shares of Cider/Perry: % Total Volume 2018-2022
 Table 44 - NBO Company Shares of Cider/Perry: % Total Volume 2018-2022
 Table 45 - LBN Brand Shares of Cider/Perry: % Total Volume 2019-2022
 Table 46 - Forecast Sales of Cider/Perry: Total Volume 2022-2027
 Table 47 - Forecast Sales of Cider/Perry: Total Value 2022-2027
 Table 48 - Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027
 Table 49 - Forecast Sales of Cider/Perry: % Total Value Growth 2022-2027

[Rtds in Japan](#)

KEY DATA FINDINGS

2022 DEVELOPMENTS

Total volume sales of RTDs decline for the first time in 15 years
 Suntory tries to position gin soda as the next trend after lemon sour
 Strong growth for non alcoholic RTDs from a low base

PROSPECTS AND OPPORTUNITIES

Liquor tax revision and production expansion set to drive growth
 Shift to lower alcohol products due to new labelling of the pure alcohol content
 Targeting the increased evening relaxation time after the pandemic

CATEGORY DATA

Table 50 - Sales of RTDs by Category: Total Volume 2017-2022
 Table 51 - Sales of RTDs by Category: Total Value 2017-2022
 Table 52 - Sales of RTDs by Category: % Total Volume Growth 2017-2022
 Table 53 - Sales of RTDs by Category: % Total Value Growth 2017-2022
 Table 54 - Sales of RTDs by Off-trade vs On-trade: Volume 2017-2022
 Table 55 - Sales of RTDs by Off-trade vs On-trade: Value 2017-2022
 Table 56 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2017-2022
 Table 57 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2017-2022
 Table 58 - GBO Company Shares of RTDs: % Total Volume 2018-2022
 Table 59 - NBO Company Shares of RTDs: % Total Volume 2018-2022
 Table 60 - LBN Brand Shares of RTDs: % Total Volume 2019-2022
 Table 61 - Forecast Sales of RTDs by Category: Total Volume 2022-2027
 Table 62 - Forecast Sales of RTDs by Category: Total Value 2022-2027
 Table 63 - Forecast Sales of RTDs by Category: % Total Volume Growth 2022-2027
 Table 64 - Forecast Sales of RTDs by Category: % Total Value Growth 2022-2027

[Spirits in Japan](#)

KEY DATA FINDINGS

2022 DEVELOPMENTS

Despite on-trade rebound, home drinking is entrenched
 Increased touchpoints expand the consumer base for whiskies
 Suntory expands the consumer base for gin by diversifying its brand portfolio

PROSPECTS AND OPPORTUNITIES

New standards for Japanese whisky are expected to enhance its value
Shortage of Japanese whisky will continue
Shochu will struggle from the shorter amount of time spent in foodservice outlets

CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology
Summary 4 - Benchmark Brands 2022

CATEGORY DATA

Table 65 - Sales of Spirits by Category: Total Volume 2017-2022
Table 66 - Sales of Spirits by Category: Total Value 2017-2022
Table 67 - Sales of Spirits by Category: % Total Volume Growth 2017-2022
Table 68 - Sales of Spirits by Category: % Total Value Growth 2017-2022
Table 69 - Sales of Spirits by Off-trade vs On-trade: Volume 2017-2022
Table 70 - Sales of Spirits by Off-trade vs On-trade: Value 2017-2022
Table 71 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2017-2022
Table 72 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2017-2022
Table 73 - Sales of Dark Rum by Price Platform: % Total Volume 2017-2022
Table 74 - Sales of White Rum by Price Platform: % Total Volume 2017-2022
Table 75 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2017-2022
Table 76 - Sales of English Gin by Price Platform: % Total Volume 2017-2022
Table 77 - Sales of Vodka by Price Platform: % Total Volume 2017-2022
Table 78 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2017-2022
Table 79 - GBO Company Shares of Spirits: % Total Volume 2018-2022
Table 80 - NBO Company Shares of Spirits: % Total Volume 2018-2022
Table 81 - LBN Brand Shares of Spirits: % Total Volume 2019-2022
Table 82 - Forecast Sales of Spirits by Category: Total Volume 2022-2027
Table 83 - Forecast Sales of Spirits by Category: Total Value 2022-2027
Table 84 - Forecast Sales of Spirits by Category: % Total Volume Growth 2022-2027
Table 85 - Forecast Sales of Spirits by Category: % Total Value Growth 2022-2027

Wine in Japan

KEY DATA FINDINGS

2022 DEVELOPMENTS

Post-pandemic behavioural changes create difficulties for wine in the on-trade
Players look for alternatives to Beaujolais Nouveau due to soaring prices
Diversified alcohol content from 0% ABV to attract new consumers

PROSPECTS AND OPPORTUNITIES

The need to expand the consumer base for wine
Nihon wine expected to benefit from the resumption of winery tours
Sake needs to go beyond tradition to attract more consumers

CATEGORY DATA

Table 86 - Sales of Wine by Category: Total Volume 2017-2022
Table 87 - Sales of Wine by Category: Total Value 2017-2022
Table 88 - Sales of Wine by Category: % Total Volume Growth 2017-2022
Table 89 - Sales of Wine by Category: % Total Value Growth 2017-2022
Table 90 - Sales of Wine by Off-trade vs On-trade: Volume 2017-2022
Table 91 - Sales of Wine by Off-trade vs On-trade: Value 2017-2022

Table 92 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2017-2022
Table 93 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2017-2022
Table 94 - Sales of Still Red Wine by Price Segment: % Off-trade Volume 2017-2022
Table 95 - Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2017-2022
Table 96 - Sales of Still White Wine by Price Segment: % Off-trade Volume 2017-2022
Table 97 - Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2017-2022
Table 98 - GBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022
Table 99 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022
Table 100 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2019-2022
Table 101 - GBO Company Shares of Champagne: % Total Volume 2018-2022
Table 102 - NBO Company Shares of Champagne: % Total Volume 2018-2022
Table 103 - LBN Brand Shares of Champagne: % Total Volume 2019-2022
Table 104 - GBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022
Table 105 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022
Table 106 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2019-2022
Table 107 - GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022
Table 108 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022
Table 109 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2019-2022
Table 110 - GBO Company Shares of Non-grape Wine: % Total Volume 2018-2022
Table 111 - NBO Company Shares of Non-grape Wine: % Total Volume 2018-2022
Table 112 - LBN Brand Shares of Non-grape Wine: % Total Volume 2019-2022
Table 113 - Forecast Sales of Wine by Category: Total Volume 2022-2027
Table 114 - Forecast Sales of Wine by Category: Total Value 2022-2027
Table 115 - Forecast Sales of Wine by Category: % Total Volume Growth 2022-2027
Table 116 - Forecast Sales of Wine by Category: % Total Value Growth 2022-2027

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/alcoholic-drinks-in-japan/report.