



Spirits in Japan

June 2024

Table of Contents

Spirits in Japan - Category analysis

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 1 - Benchmark Brands 2023

CATEGORY DATA

Table 1 - Sales of Spirits by Category: Total Volume 2018-2023

Table 2 - Sales of Spirits by Category: Total Value 2018-2023

Table 3 - Sales of Spirits by Category: % Total Volume Growth 2018-2023

Table 4 - Sales of Spirits by Category: % Total Value Growth 2018-2023

Table 5 - Sales of Spirits by Off-trade vs On-trade: Volume 2018-2023

Table 6 - Sales of Spirits by Off-trade vs On-trade: Value 2018-2023

Table 7 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 8 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2018-2023

Table 9 - Sales of Dark Rum by Price Platform: % Total Volume 2018-2023

Table 10 - Sales of White Rum by Price Platform: % Total Volume 2018-2023

Table 11 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2018-2023

Table 12 - Sales of English Gin by Price Platform: % Total Volume 2018-2023

Table 13 - Sales of Vodka by Price Platform: % Total Volume 2018-2023

Table 14 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2018-2023

Table 15 - GBO Company Shares of Spirits: % Total Volume 2019-2023

Table 16 - NBO Company Shares of Spirits: % Total Volume 2019-2023

Table 17 - LBN Brand Shares of Spirits: % Total Volume 2020-2023

Table 18 - Forecast Sales of Spirits by Category: Total Volume 2023-2028

Table 19 - Forecast Sales of Spirits by Category: Total Value 2023-2028

Table 20 - Forecast Sales of Spirits by Category: % Total Volume Growth 2023-2028

Table 21 - Forecast Sales of Spirits by Category: % Total Value Growth 2023-2028

Alcoholic Drinks in Japan - Industry Overview

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 2 - Number of On-trade Establishments by Type 2017-2023

TAXATION AND DUTY LEVIES

Summary 3 - 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 22 - Retail Consumer Expenditure on Alcoholic Drinks 2018-2023

MARKET DATA

Table 23 - Sales of Alcoholic Drinks by Category: Total Volume 2018-2023

Table 24 - Sales of Alcoholic Drinks by Category: Total Value 2018-2023

Table 25 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2018-2023

Table 26 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2018-2023

Table 27 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2023

Table 28 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2023

Table 29 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2023

Table 30 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2023

Table 31 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2019-2023

Table 32 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2018-2023

Table 33 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2023

Table 34 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2023-2028

Table 35 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2023-2028

Table 36 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2023-2028

Table 37 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 4 - 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/spirits-in-japan/report.