



# 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](http://www.euromonitor.com/spirits-in-japan/report).