

Alcoholic Drinks/Liquor Market in Japan: Key Research Findings 2017

◆ Research Outline

Yano Research Institute has conducted a study on the domestic alcoholic drinks/liquor market with the following conditions:

1. Research period: From March to June 2017
2. Research targets: Manufacturers, wholesalers, and importers of various alcoholic drinks and liquors
3. Research methodologies: Face-to-face interviews by the expert researchers, surveys via telephone, literature research, and questionnaire

What is the Alcoholic Drinks/Liquor Market?

The alcoholic drinks/liquor market in this research indicates the market of the following ten categories of alcoholic drinks and liquors: Beers (including ordinary beer, low-malt beer-like beverages called “happoshu”, and third-category beer), Sake, high-class Shochu (distilled spirit), second-class Shochu, whiskies, wines, low-alcoholic drinks, and other types of alcoholic drinks.

What is Low-Alcoholic Drinks?

Low-alcoholic drinks in this research indicate those brewed or distilled drinks and liquors diluted by fruit juices, teas, water, or sodas into less than 10% of alcoholics. They include Chuhai, whisky and soda, shochu-based beverages, Sour, and various Cocktails.

◆ Key Findings

■ **Size of Domestic Alcoholic Drinks/Liquor Market in FY2016 Estimated as 3,573.8 Billion Yen, 99.4% on Y-o-Y Basis**

The entire alcoholic drinks/liquor market size was 3,593.7 billion yen in FY2015, 99.7% of that of previous fiscal year, and is projected to attain 3,573.8 billion yen for FY2016, 99.4% of the preceding fiscal year. The market as a whole has shrunk, but some categories within the market, such as whiskies and low-alcoholic drinks, have been shipped favorably.

■ **Vigorous Attempts Made for Strengthening Beer at Beer Makers**

Changes in the tax rates for beer and the substitutes have encouraged the beer makers to enhance beer. Each of the beer makers concentrates the investments on core brands, from which the makers sell the derived products, thereby trying to enhance the brand power of the entire core brands.

■ **Whiskies and Low-Alcoholic Drinks Expected for Further Market Expansion**

While the alcoholic drinks/liquor market as a whole suffers from stagnant sales, the categories of whiskies and low-alcoholic drinks have driven the entire market. Whiskies and low-alcoholic drinks are expected to prosper further, because they have been accepted from a wide range of age groups and have acquired customer demand as such alcoholic beverages to enjoy during meals.

◆ **Report Format:**

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Price: 115,000 yen (the consumption tax shall additionally be charged for the sales in Japan.)

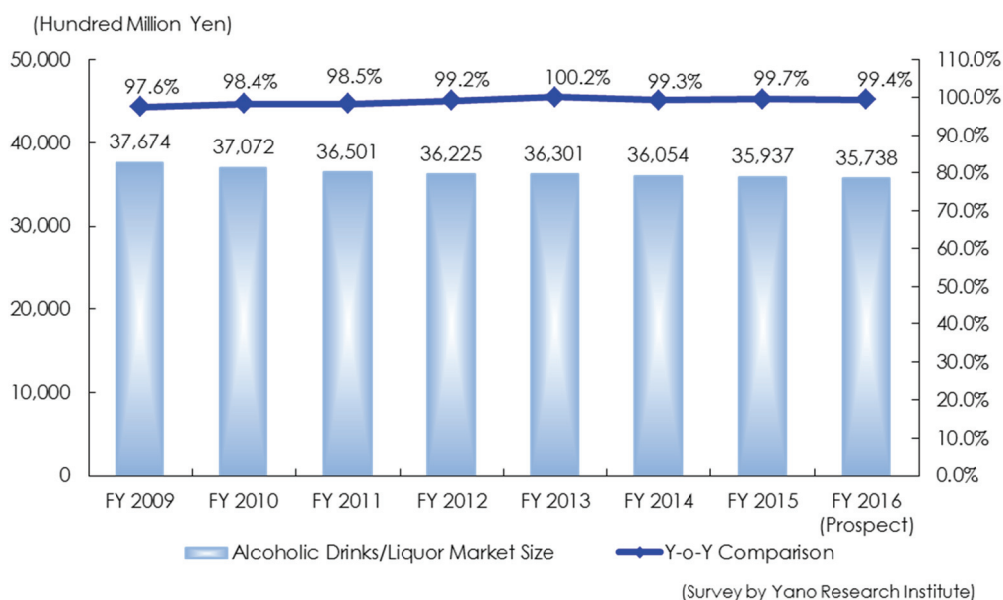
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■ **Figure & Table 1: Transition of Size of Alcoholic Drinks/Liquor Market**



(Hundred Million Yen)

| Fiscal Year | FY 2009 | FY 2010 | FY 2011 | FY 2012 | FY 2013 | FY 2014 | FY 2015 | FY 2016 (Prospect) | |
|-------------------------------------|---------|---------|---------|---------|---------|---------|---------|--------------------|-------|
| Alcoholic Drinks/Liquor Market Size | 37,674 | 37,072 | 36,501 | 36,225 | 36,301 | 36,054 | 35,937 | 35,738 | |
| Y-o-Y Comparison | | 97.6% | 98.4% | 98.5% | 99.2% | 100.2% | 99.3% | 99.7% | 99.4% |

(Survey by Yano Research Institute)

Note:

1. The market size is based on the shipment value of makers.