



**Euromonitor
International**

Rtds in Japan

June 2025

Table of Contents

KEY DATA FINDINGS

2024 DEVELOPMENTS

Solid growth thanks to the health and wellness trend and changing beer taxes

Suntory continues to lead RTDs, but Asahi sees stronger dynamism

Changing consumer habits limit on-trade rebound; off-trade, supermarkets remains dominant

PROSPECTS AND OPPORTUNITIES

RTDs expected to continue its growth trend thanks to wide product variety

Premiumisation will be key for value growth

Increase in sustainable innovations likely

CATEGORY DATA

Table 1 - Sales of RTDs by Category: Total Volume 2019-2024

Table 2 - Sales of RTDs by Category: Total Value 2019-2024

Table 3 - Sales of RTDs by Category: % Total Volume Growth 2019-2024

Table 4 - Sales of RTDs by Category: % Total Value Growth 2019-2024

Table 5 - Sales of RTDs by Off-trade vs On-trade: Volume 2019-2024

Table 6 - Sales of RTDs by Off-trade vs On-trade: Value 2019-2024

Table 7 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 8 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2019-2024

Table 9 - GBO Company Shares of RTDs: % Total Volume 2020-2024

Table 10 - NBO Company Shares of RTDs: % Total Volume 2020-2024

Table 11 - LBN Brand Shares of RTDs: % Total Volume 2021-2024

Table 12 - Forecast Sales of RTDs by Category: Total Volume 2024-2029

Table 13 - Forecast Sales of RTDs by Category: Total Value 2024-2029

Table 14 - Forecast Sales of RTDs by Category: % Total Volume Growth 2024-2029

Table 15 - Forecast Sales of RTDs by Category: % Total Value Growth 2024-2029

Alcoholic Drinks in Japan - Industry Overview

EXECUTIVE SUMMARY

Alcoholic drinks in 2024: The big picture

2024 key trends

Competitive landscape

Retail 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

TAXATION AND DUTY LEVIES

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

MARKET INDICATORS

Table 16 - Retail Consumer Expenditure on Alcoholic Drinks 2019-2024

MARKET DATA

Table 17 - Sales of Alcoholic Drinks by Category: Total Volume 2019-2024

Table 18 - Sales of Alcoholic Drinks by Category: Total Value 2019-2024

Table 19 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2019-2024

Table 20 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2019-2024

Table 21 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2024

Table 22 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2024

Table 23 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2024

Table 24 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2020-2024

Table 25 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2019-2024

Table 26 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2024

Table 27 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2024-2029

Table 28 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2024-2029

Table 29 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2024-2029

Table 30 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - 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/rtds-in-japan/report.