

Trends and changes in Japanese wine market

Presented by Megumi NISHIDA



Trends and key point

- **Quality first** Consumption 3L but 3rd Champagne import country and good market of Bourgogne Grand Cru and Premier Cru.
- **High health conscious** Domestic bland “no SO2 extra polyphenol” wines sales are more than 23831kl (total 117936kl /2017)
Organic, Biodynamic, no SO2 wines are very popular imported wine too.
- **Woman** are important consumer.
- **Knowledgeable** people love studying wine, often visit abroad wine region.
- **Curiosity** increasing old and new wine country Georgia, South Africa, Bulgaria etc . Interested in Amphora wine, no SO2 wine, Orange wine.
- **Wine anywhere** restaurant, wine bar , Japanese restaurant, Izakaya,
- **Japanese wine** increasing quality , quantity since 15 years. Especially becoming popular these 5 years more and more. (Koshu wine start export)
Japanese wine law has just been enacted 2018 30th October.

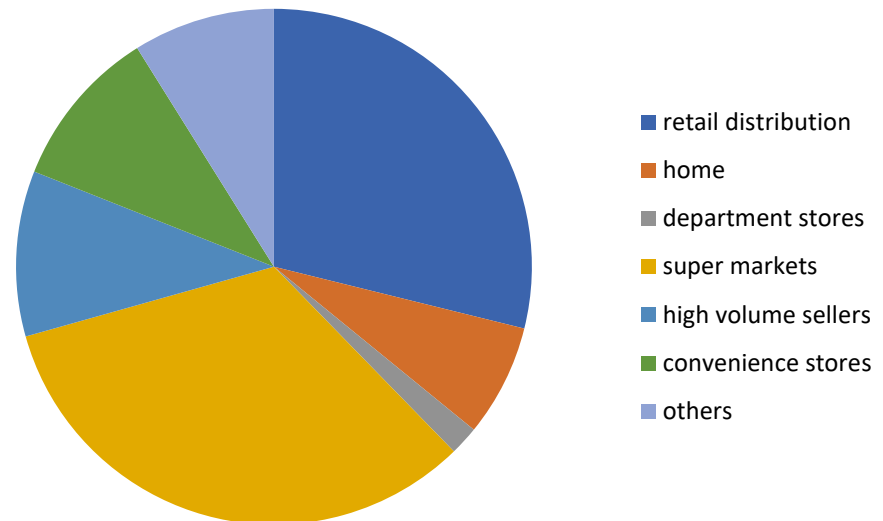
Japanese sales market

- Consumption 3.58L (2.98L)
- Under 4 euro : *Japan made wine
- 4-8 euro : organic , no SO2 Japan made wine / Chilean wine
- 8-12 euro : France ,Italy Australia wine with awarded medal
- Internet online sales more expensive wine
- Super markets and Convenience stores increase 1990~ (due to change liquor retail rules)

Price range

proce/per bottle	cases(750ml × 12bottle)		
	retail	home	total
over 80	52,000	40,000	93,000
40--50	121,000	86,000	208,000
24--30	321,000	264,000	585,000
16--24	820,000	740,000	1,560,000
12 --16	1,058,000	1,581,000	2,640,000
8--12	2,022,000	3,415,000	5,436,000
4--8	3,634,000	8,262,000	11,897,000
under 4	87,000	1,263,000	1,350,000

Sales distribution channels

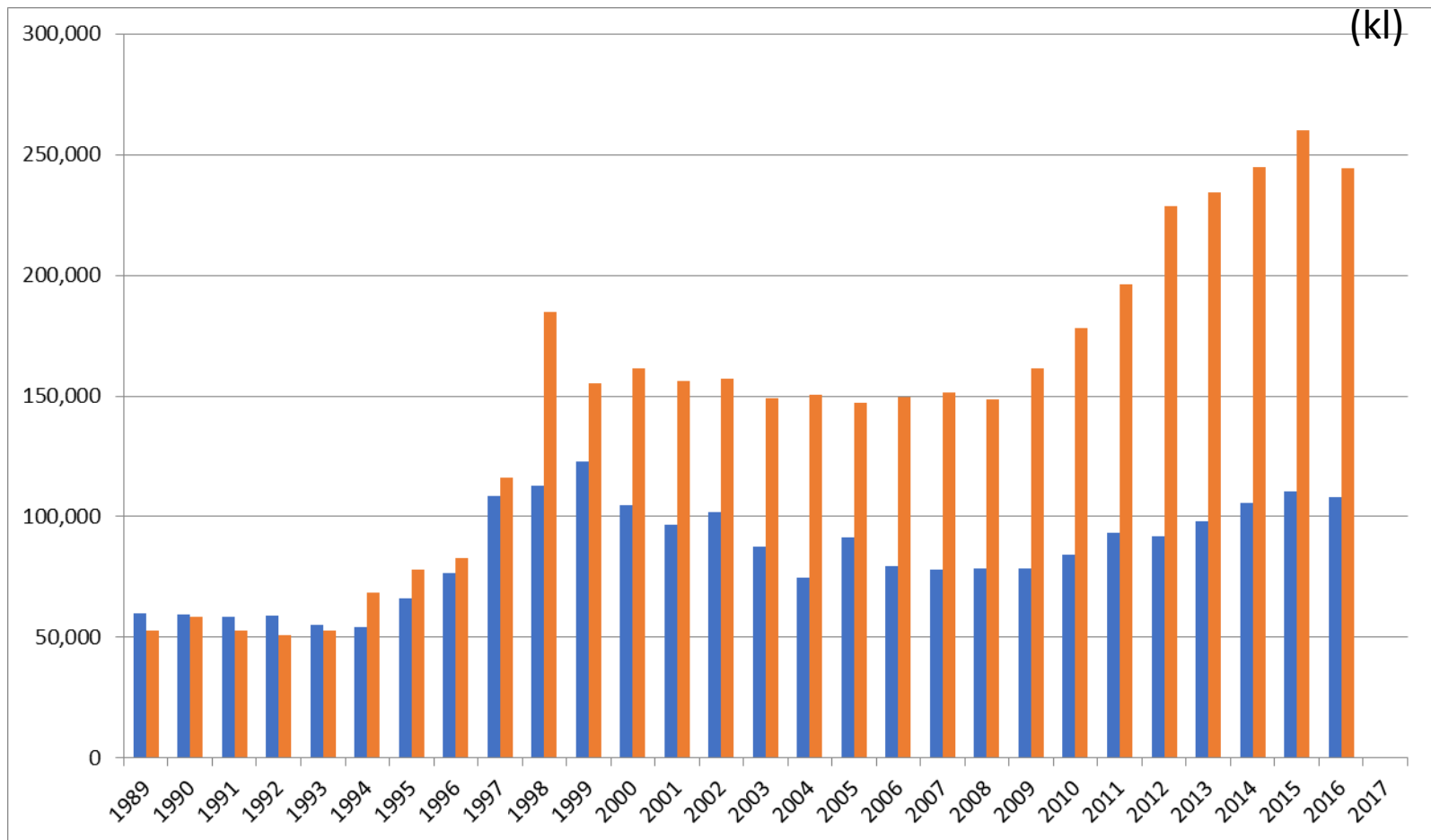


Consumption domestic and import bottled wine

1989-2016

2016 Domestic : 108,215 kl / Import : 244,277 kl

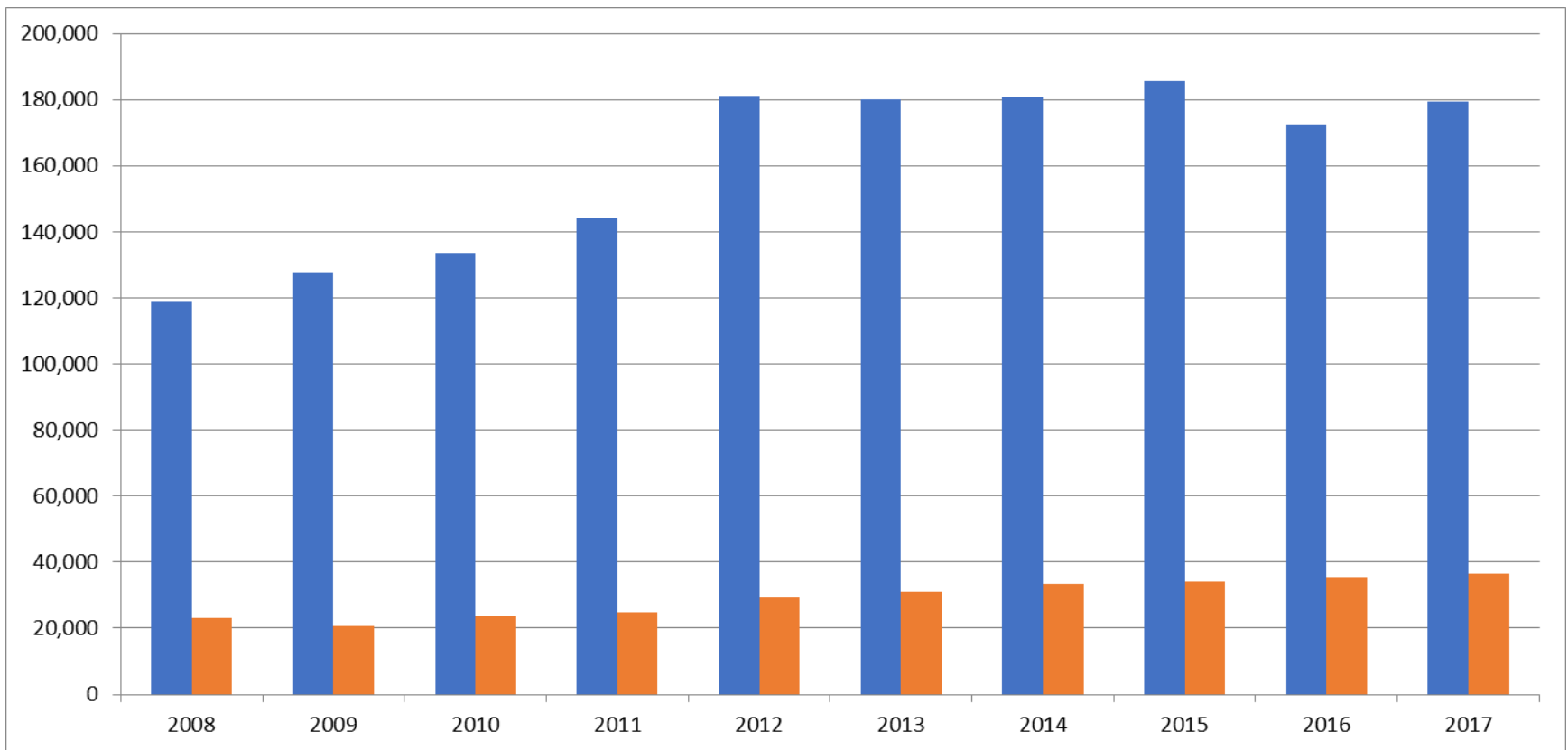
Domestic : blue
Import : orange



Import Still wine and Sparkling wine

- 2017 Total 215,604 kl / 1.4 billion euro
- 6th by value , 10th by volume in the world
- 3rd Champagne import country

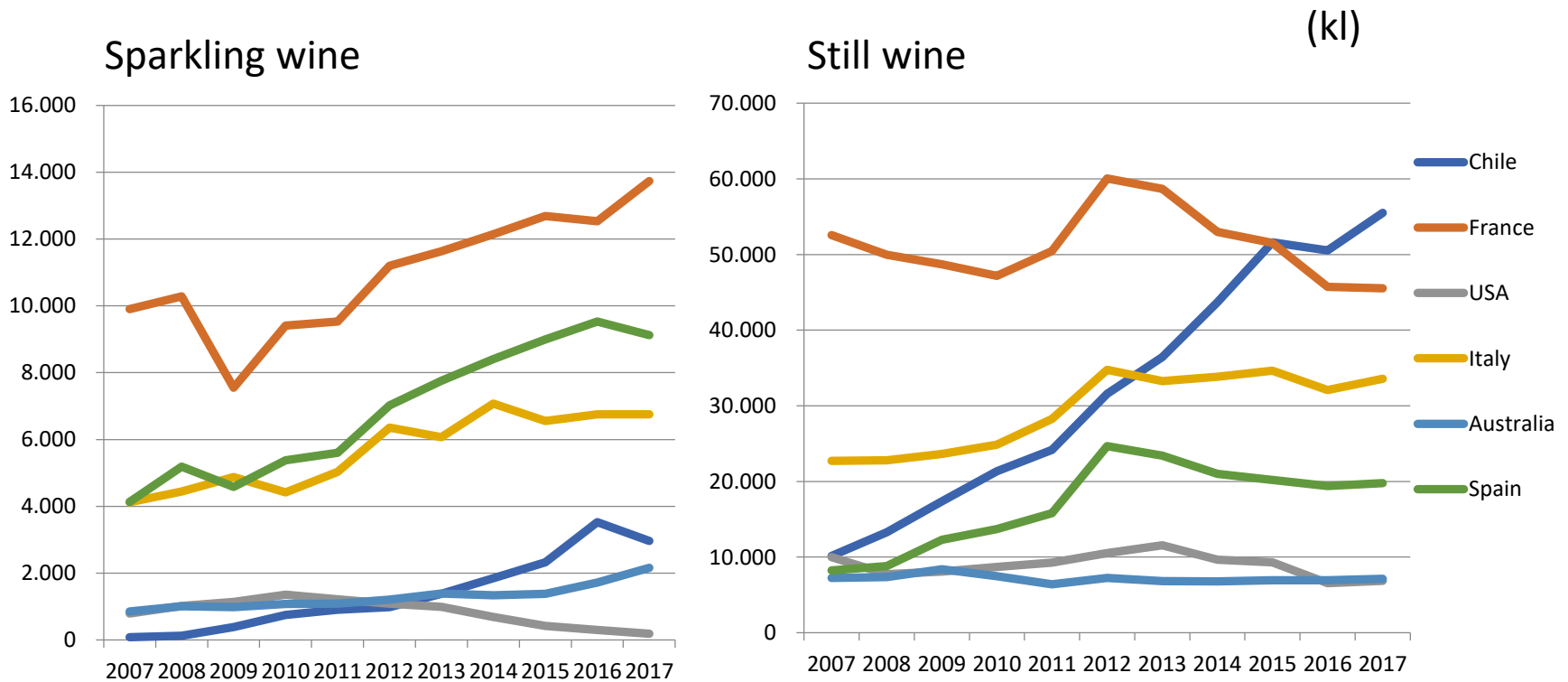
still : blue
sparkling : orange



Top6 import country

2017	Chile	France	USA	Italy	Australia	Spain
sparkling	2,960	13,730	183	6,752	2,156	9,124
still	55,519	45,523	6,876	33,590	7,144	19,761

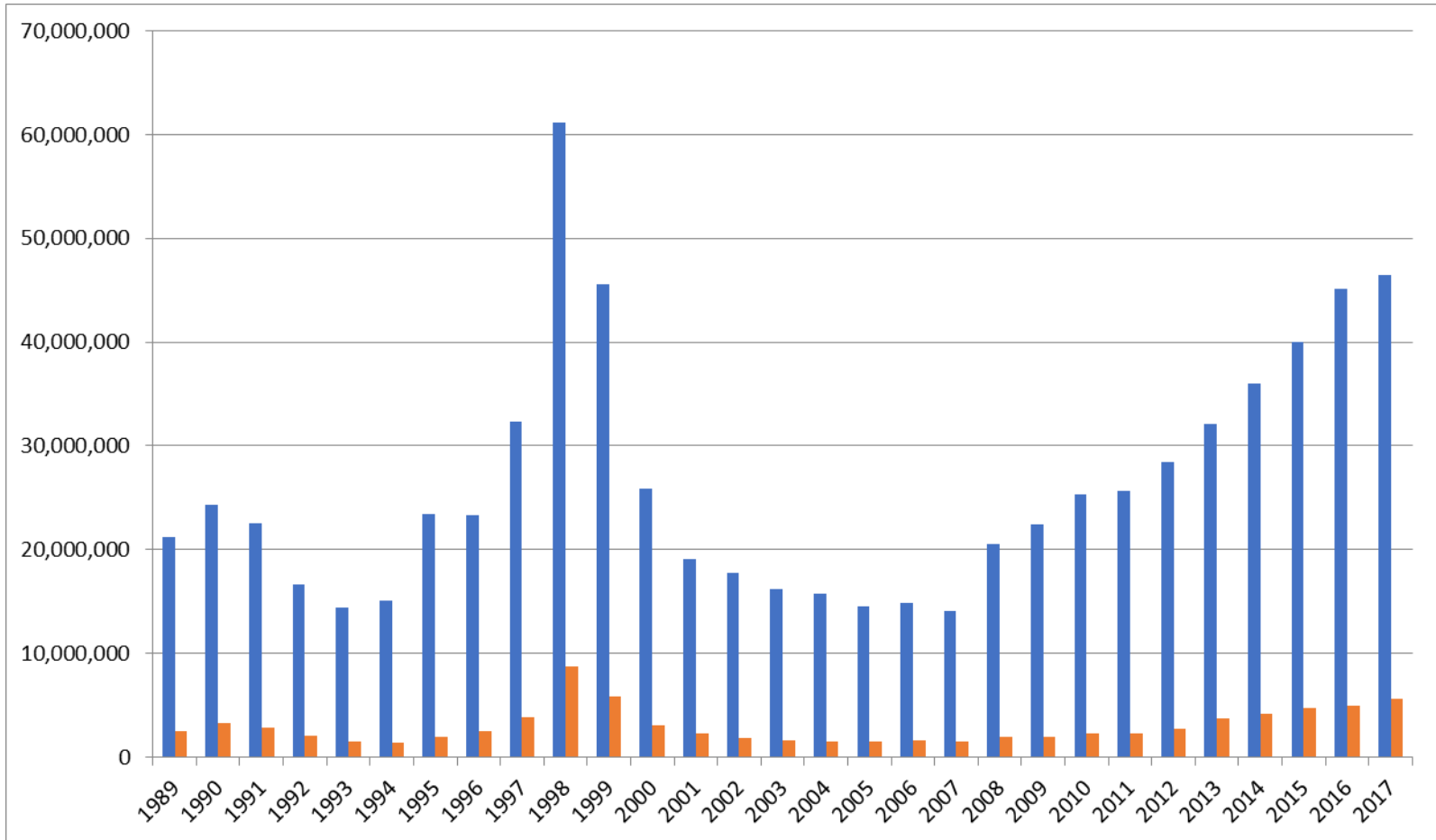
Champagne 12.8million bottle



Bulk Wine import 1989-2017

(Blue: Liter / Orange-Japanese yen)

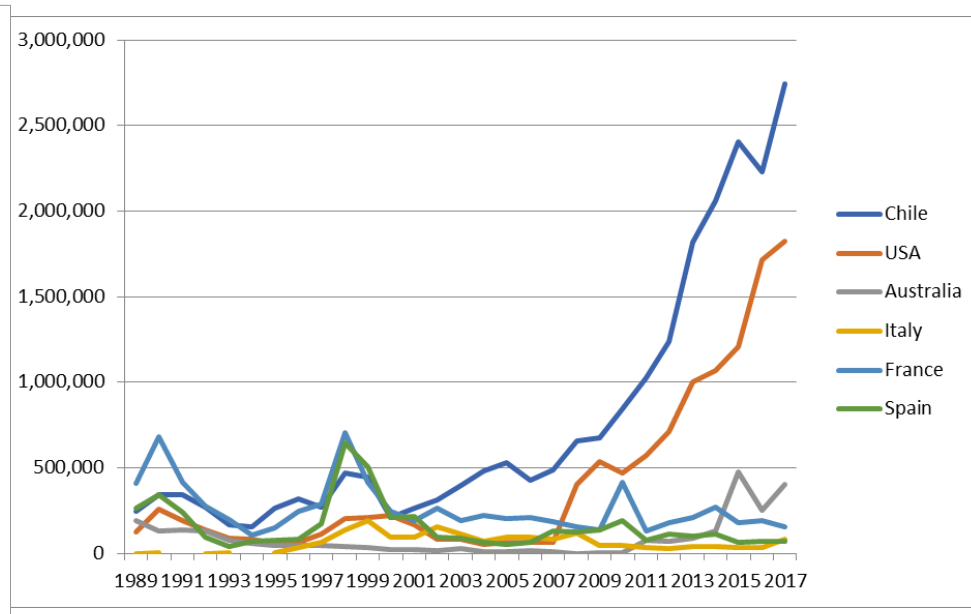
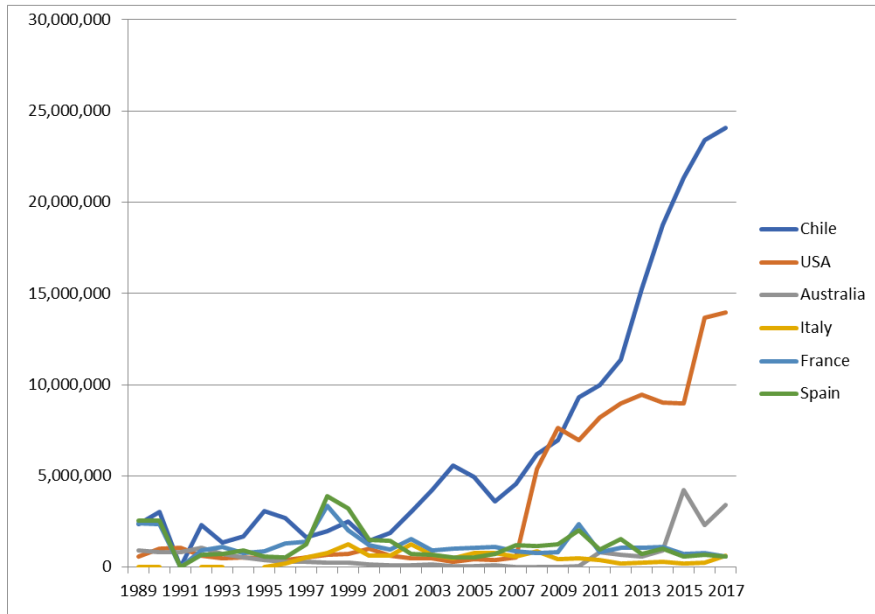
2017 46,460kl 5.6billion yen



Bulk wine Top6 import country

kl / Million yen

	Chile		USA		Australia		Italy		France		Spain	
	hl	M yen	hl	M yen	hl	M yen	hl	M yen	hl	M yen	hl	M yen
1989	2,366	247,762	574	122,503	925	188,530	-	-	2,422	408,165	2,553	265,678
1997	1,649	269,537	551	114,654	290	47,191	558	64,970	1,424	290,218	1,257	173,755
2007	4,551	487,680	520	65,715	24	6,694	603	79,590	887	187,689	1,220	127,538
2017	24,054	2,745,929	13,979	1,823,668	3,425	402,316	657	84,857	591	157,167	581	66,999



EPA change Japanese market?

NOW Chile 125 yen/Liter or 2.3%(EPA since 2007)
Australia 125 yen/Liter or 5.6%(EPA since 2015)
other country 125 yen/Liter or 15%

2019 April ~ Chile → ZERO
EU → ZERO

2021 April ~ Australia → ZERO

Thank you very much!