A division of the IWSR Group

Japan

Wine Landscapes 2023

Contents

Wine Intelligence Viewpoint

The outlook for the Japanese wine market looks to be positive with the size of the wine drinking population increasing as drinkers' enthusiasm for the category also increases

Since 2021 the population of wine drinkers within the Japanese market has increased by 2 million for monthly drinkers and by 800,000 for weekly drinkers.

The volume of still wine sold within the Japanese market has experienced a year-on-year increase with the category experiencing a +2.5% growth between 2021-22. The growth of the category could be attributed to the increase in the size of the wine-drinking population in the market.

While the size of the wine-drinking population has grown the enthusiasm and interest shown in the category by respondents has increased significantly. A greater number of wine drinkers now say that the beverage is important to their lifestyle as well as say they hold a strong interest in wine when compared to previous years. In line with the growing interest seen among respondents, their knowledge and confidence levels have also increased.

Japanese wine drinkers are feeling more comfortable about their financial situation compared with 2022. They feel more confident in their ability to manage their finances, expect their households to be better off in a year, and are planning on travelling more

Opportunities

Growing wine drinking population
Enthusiasm for the category rising
Higher knowledge and confidence levels

Threats

Expanding alcohol beverage repertoire
Growing inflation may affect discretionary spending
Still wine volumes slow pace of recovery

Management Summary

Japan Wine Landscapes

2023

Management summary

Key takeaways

1. Regular and weekly wine drinking populations are growing

2. Spend increasing for all occasions though consumption frequency remains stable

3. Increasing involvement in the wine category

4. Wine knowledge and confidence increasing

5. Increases in power index across brands in Japan

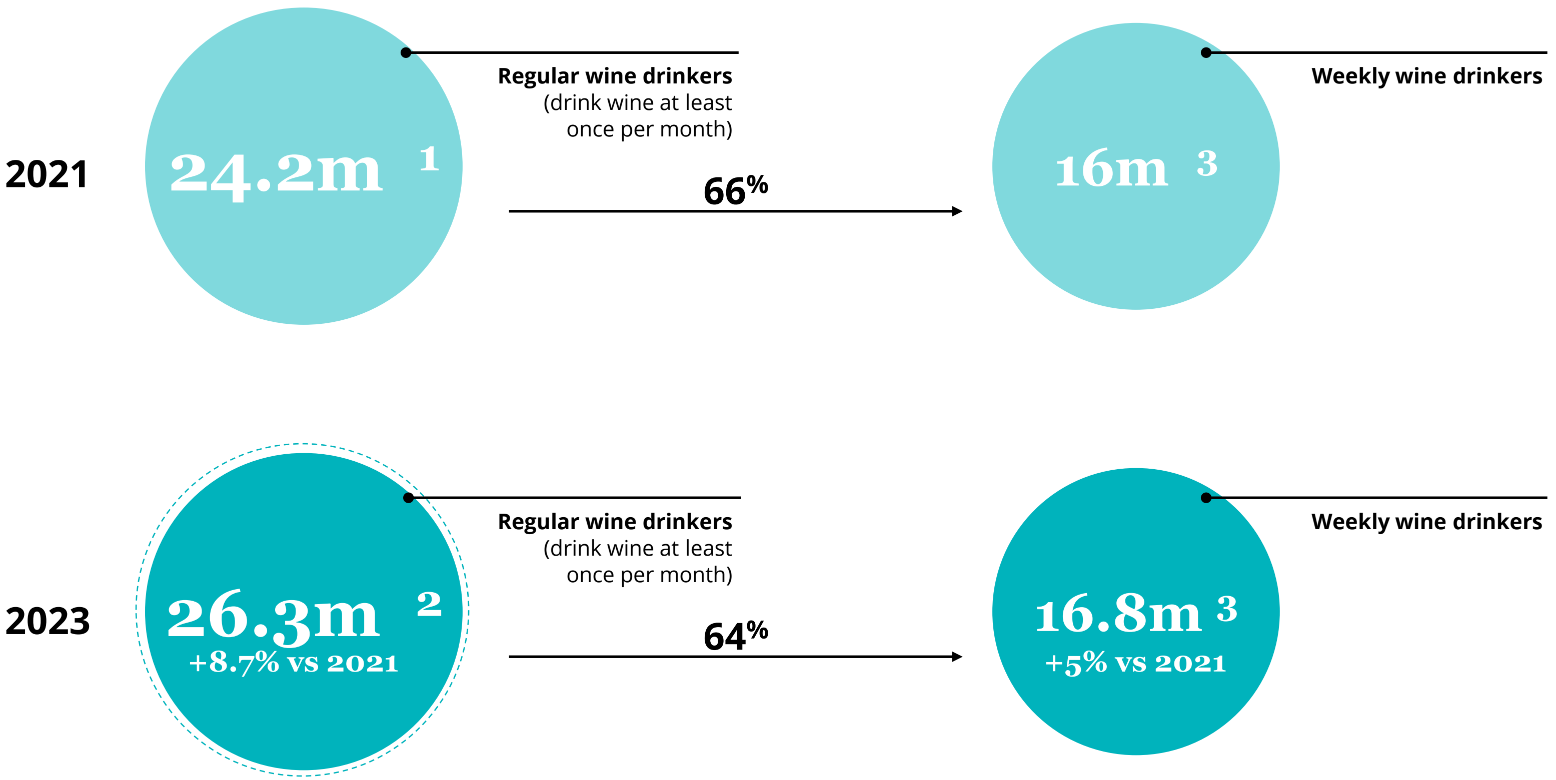
6. Consumer sentiment becoming more positive

1. Regular and weekly wine drinking populations are growing

The populations of both regular and weekly wine drinkers have increased in Japan since 2021,even though the adult population of the country has remained stable over this period

Increase in wine drinking population

Those who drink wine at least once a month



1 Wine Intelligence online calibration study rolling average of 2020 & 2021 (n=5,001) Japanese adults aged 20+. Wine=still light wine (red, white, rosé)

2 Wine Intelligence online calibration study rolling average of 2022 & 2023 (n=2,016) Japanese adults aged 20+. Wine=still wine (red, white, rosé)

3 Wine Intelligence, Vinitrac® Japan, Mar '21 & Jul '21, Apr' 23 (n≥1,021) Japanese regular wine drinkers

2. Year-on-year increase in the volume of still wine sold

Between 2017-22 the total volume of still wine sold in the Japanese market declined by -3.1%. However, the category has started to show signs of recovery with year-on-year growth of 2.5%. This recovery is expected to continue with the category forecast to grow steadily between 2022-2027; although this expected recovery will not offset the historical volume lost

Total wine volumes by category

'000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR 21-22	CAGR F 22-27
Total Wine	81,129.45	80,163.35	-5.2%	-1.2%	0.5%
Other Wines*	45,909.50	43,497.05	-7.2%	-5.3%	-1.6%
Still Wine	31,160.75	31,953.50	-3.1%	2.5%	2.8%
Sparkling Wine	3,951.25	4,596.00	2.0%	1.6%	3.6%
Light Aperitifs	52,25	60.15	-3.7%	1.5%	4.3%
Fortified Wine	55.70	56.56	-8.1%	1.7%	-0.3%

Market context:

The market is not expected to recover to pre-2019 levels in coming years due to rising inflation and consumers being less confident about going out

Executive Summary Report 2023 Japan

Source: IWSR

*Other Wines includes Non-Grape Based wines

3. Increasing involvement in the wine category

The growth in the overall number of regular wine drinkers has been accompanied by increased involvement levels, driven by Millennials and Gen X consumers.

These drinkers are driven to buy wine by external factors. Wine is perceived as fashionable, and drinking it confers an element of sophistication

Wine involvement: Tracking

Base = All Japanese regular wine drinkers (n≥1,000)

	2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
High involvement	**41%**	**50%**	**51%**	⬆	➡
Medium involvement	**28%**	**27%**	**26%**	➡	➡
Low involvement	**31%**	**23%**	**23%**	⬇	➡

Wine involvement by generation

Base = All Japanese regular wine drinkers (n=1,021)

	All Japanese Regular Wine Drinkers (n=1,021)	LDA-26 Gen Z (n=73)	27-42 Millennials (n=185)	43-58 Gen X (n=311)	59+ Boomers (n=452)
High involvement	**51%**	**60%**	**63%**	**55%**	**42%**
Medium involvement	**26%**	**20%**	**19%**	**24%**	**31%**
Low involvement	**23%**	**20%**	**18%**	**21%**	**27%**

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

4. Wine knowledge and confidence both increasing

Wine knowledge and confidence have grown significantly since 2018, with both of these metrics experiencing year-on-year increases.

Wine confidence is driven by Millennials, who over-index on this measure compared to Japanese regular wine drinkers as a whole

Wine knowledge index: Tracking

Base = All Japanese regular wine drinkers (n≥1,000)

	2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	vs. '22
Knowledge Index	**24.1**	**28.2**	**28.3**	↑	→

+4.2 Index change

Wine knowledge index (0–100) is calculated based on consumer-reported awareness of wine-growing regions and wine brands.
*Wine knowledge index is the 'objective' measurement of consumer knowledge about wine.

Wine confidence index: Tracking

Base = All Japanese regular wine drinkers (n=1,021)

	2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	vs. '22
Confidence Index	**33.2**	**34.8**	**36.6**	↑	↑

+3.4 Index change

Wine confidence index (0–100) is calculated based on the extent to which consumers feel competent about their wine knowledge. Wine confidence index uses consumers' answers to three attitudinal statements: 1) I feel competent about my knowledge of wine / 2) Compared to others, I know less about the subject of wine / 3) I don't understand much about wine.
**Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge.

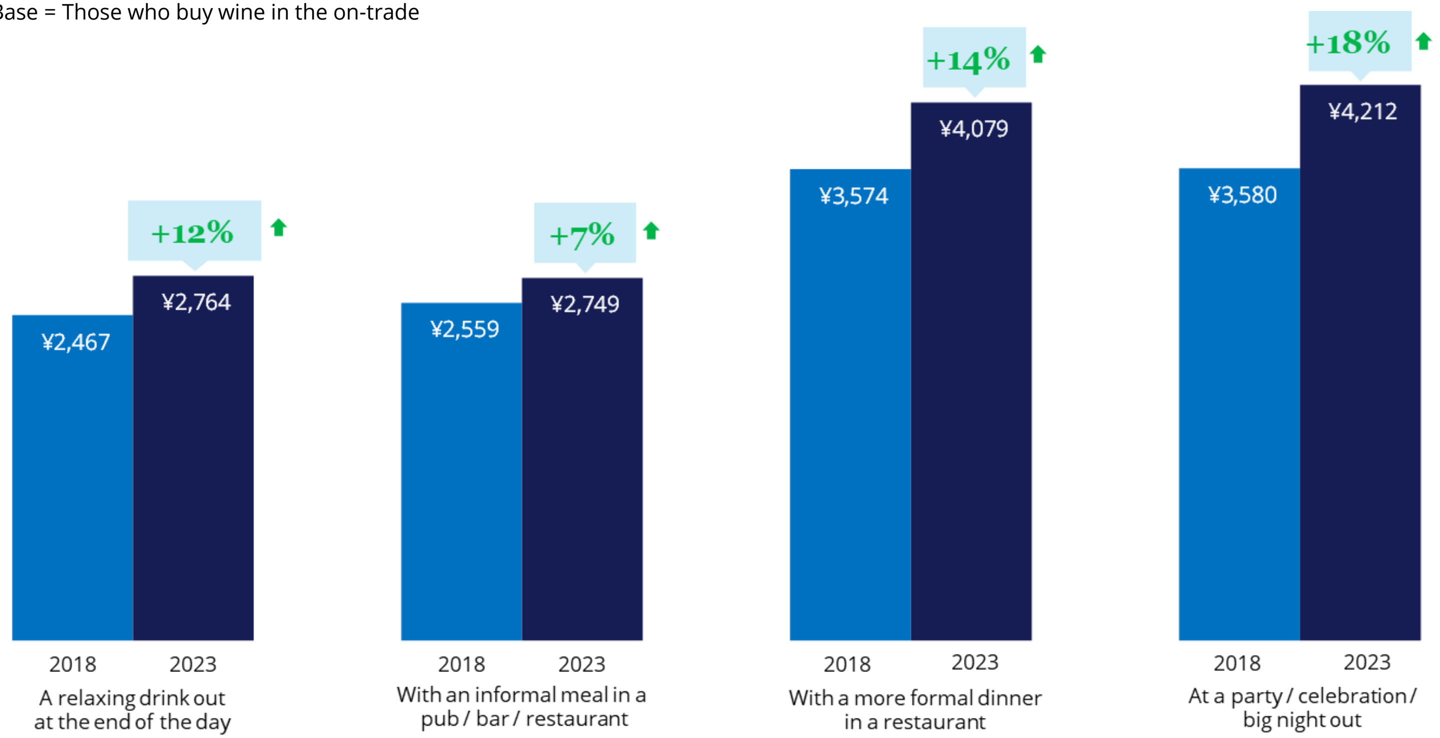
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

5. Spend increasing for all occasions though consumption frequency remains stable

Wine consumption has remained stable for nearly all off- and on-trade occasions since 2018. This is despite the fact that spend has increased significantly for all of these occasions over the same period

On-trade: Typical spend per occasion

Base = Those who buy wine in the on-trade



⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

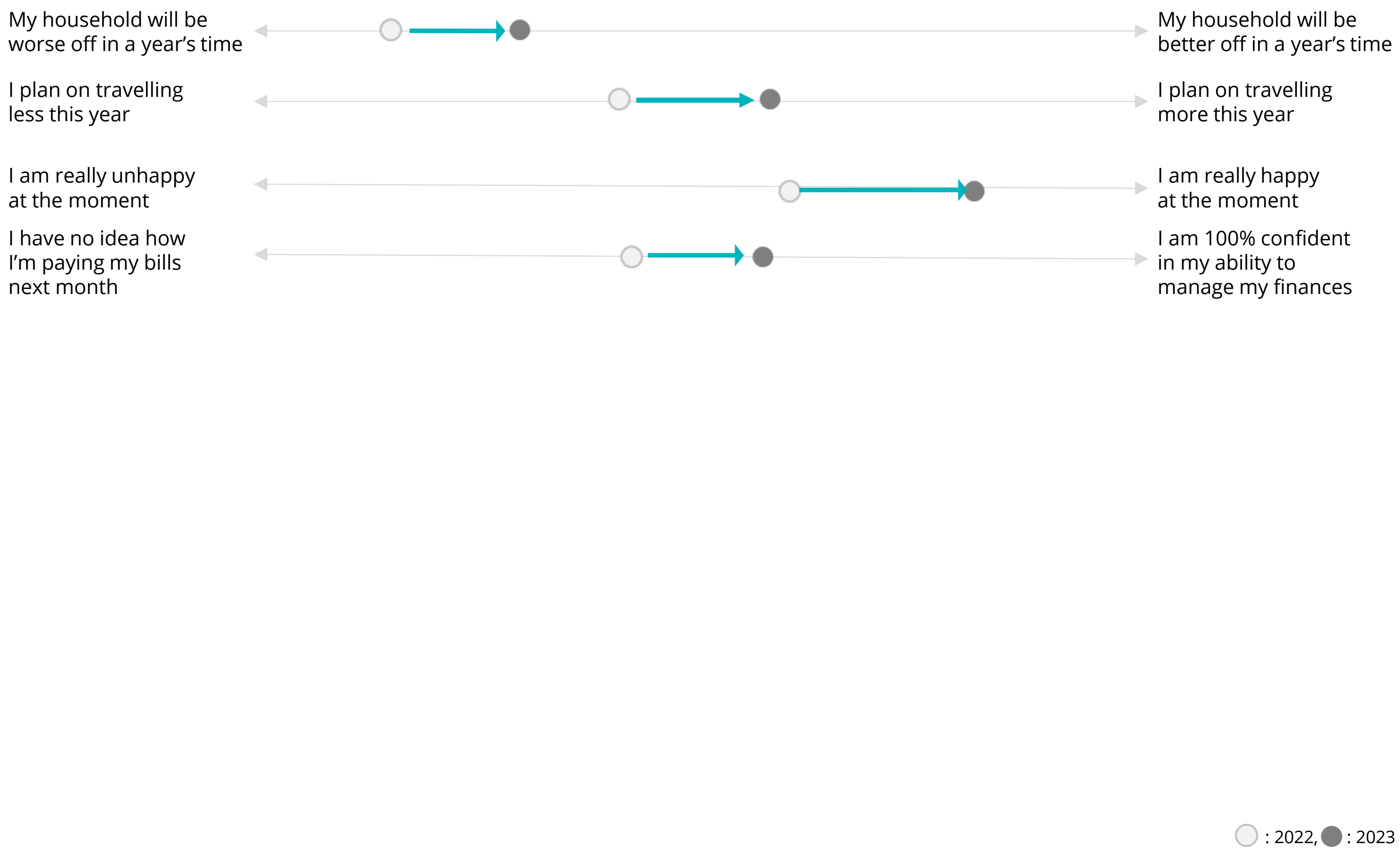
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '23, (n≥1,000) Japanese regular wine drinkers

6. Consumer sentiment becoming more positive

Japanese wine drinkers are feeling more positive about their financial situation compared with 2022. They feel more confident in their ability to manage their finances, expect their households to be better off in a year, and are planning on travelling more

Consumer sentiment: tracked

Net score of % who agree with the negative statement subtracted from the % who agree with the positive statement
Minimum value: -49%, Maximum value: 43%
Base = All Japanese regular wine drinkers (n≥1,021)



Source: Wine Intelligence, Vinitrac®, Japan, Apr '22, Apr '23, (n≥1,021) Japanese regular wine drinkers

Management summary – tracking metrics

Japanese consumers are increasingly buying wines from different countries and are also increasing their purchases of brands

Top alcoholic beverages

% who have drunk the following beverages in the past 12 months

	2018	2023	Tracking
Red wine	**92%**	**91%**	→
Beer	**85%**	**85%**	→
White wine	**74%**	**73%**	→
Sake	**56%**	**64%**	↑
Shochu	**50%**	**52%**	→

Top country of origin

% who have drunk wine from the following places in the past six months

	2018	2023	Tracking
Japan	**49%**	**60%**	↑
France	**44%**	**52%**	↑
Chile	**48%**	**48%**	→
Italy	**33%**	**38%**	↑
Spain	**28%**	**31%**	→

Top region of origin

% who have bought wine from the following regions in the past three months

	2018	2023	Tracking
Kofu	**28%**	**35%**	↑
Bordeaux	**27%**	**30%**	→
Bourgogne	**15%**	**17%**	→
Beaujolais	**19%**	**16%**	→
Champagne	**12%**	**13%**	→

Top wine brands

% who have bought the following brands in the past three months

	2018	2023	Tracking
Alpaca	**22%**	**27%**	↑
Yellow Tail	**10%**	**14%**	↑
Sunrise	**10%**	**11%**	→
Santa	**6%**	**10%**	↑
Rela	**n/a**	**7%**	n/a

n/a = tracking unavailable for this wave

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '23, (n≥1,000) Japanese regular wine drinkers

Management summary – tracking metrics

Japanese consumers are increasingly buying wine from retailers such as Donki and Amazon and less often from liquor stores

Top red varietals

% who have drunk the following varietals in the past six months

	2018	2023	Tracking
Cabernet Sauvignon	37%	43%	↑
Merlot	33%	37%	→
Pinot Noir	27%	32%	↑
Shiraz / Syrah	15%	15%	→
Sangiovese	10%	13%	→

Top wine-shopping channels

% who have bought wine from the following channels in the past six months

	2018	2023	Tracking
In a supermarket	51%	47%	→
In a hypermarket / mass merchant	46%	43%	→
In a liquor store	31%	25%	↓
In a convenience store	25%	23%	→
From an online retailer	n/a	20%	n/a

Top white varietals

% who have drunk the following varietals in the past six months

	2018	2023	Tracking
Chardonnay	46%	50%	→
Sauvignon Blanc	29%	33%	→
Pinot Grigio / Pinot Gris	12%	15%	→
Riesling	13%	13%	→
Sémillon	8%	10%	↑

Top wine-buying retailers

% who mainly use the following retailers to buy wine

	2018	2023	Tracking
AEON	24%	28%	→
Donki	10%	13%	↑
Amazon	9%	13%	↑
7-Eleven	12%	13%	→
Seijo Ishii	11%	11%	→

n/a = tracking unavailable for this wave

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '23, (n≥1,000) Japanese regular wine drinkers

Market Data

Japan Wine Landscapes

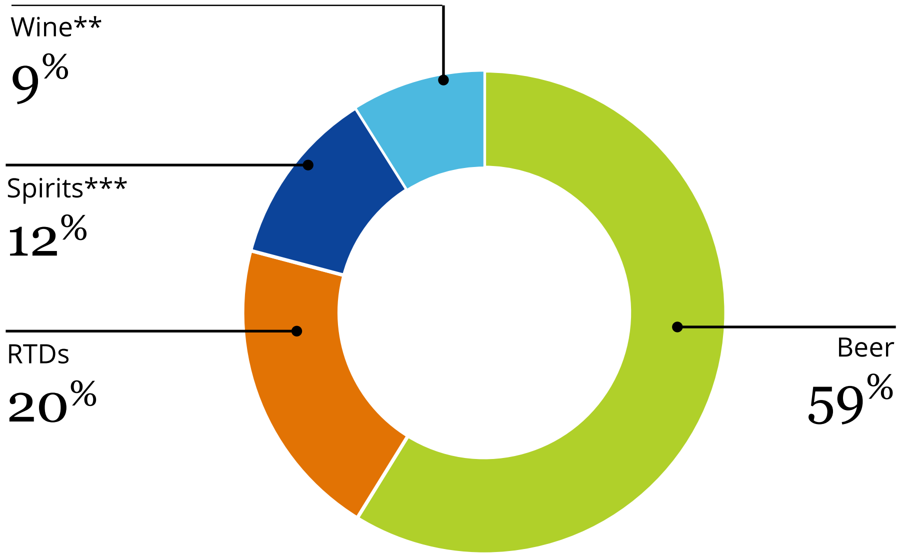
2023

Total beverage alcohol market share by category

The wine category saw a marked decline to its total volumes in the Japanese market between 2017-22, although the near future is more optimistic, with slight growth expected

Total beverage alcohol market share by category*

% of purchases that fall within the categories below



Total beverage alcohol market volumes by category

'000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total beverage alcohol	893,521.34	897,957.00	-1.6%	0.7%
Beer	520,986.66	527,551.66	-3.4%	-0.4%
RTDs	185,172.25	182,185.00	9.1%	4.0%
Spirit***	105,324.65	107,122.54	-2.4%	-0.4%
Wine**	81,129.45	80,163.35	-5.2%	0.5%
Cider	908.33	934.44	6.6%	3.8%

Source: IWSR

* Cider omitted from pie chart due to low percentage value

** Wine includes Non-Grape Based Wines, Still Wine, Sparkling Wine, Fortified Wine and Light Aperitifs

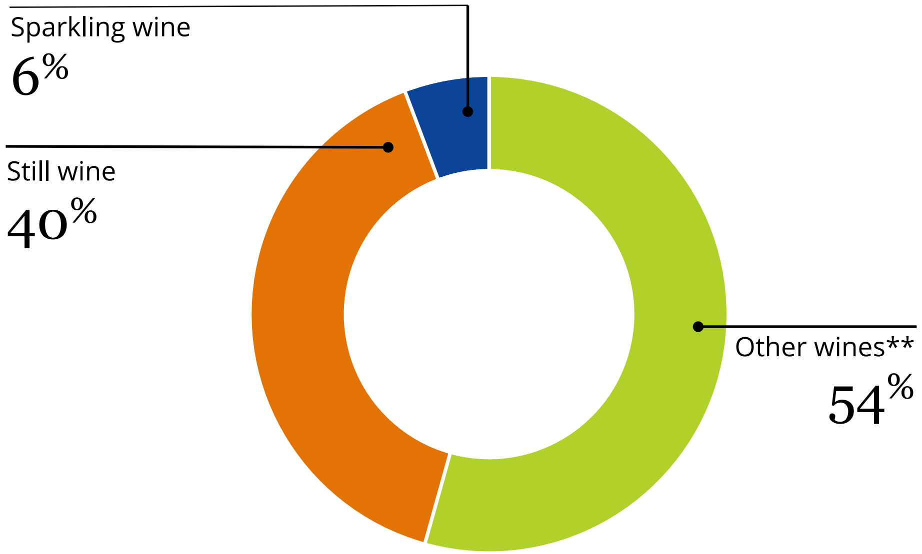
*** Spirits include Whisky, Gin and Genever, Vodka, Agave-Based Spirits, National Spirits, Rum, Cane, Brandy and Flavoured Spirits

Total wine market volumes

In the Japanese market all wine categories have experienced a decline to their total volumes sales, with the only exception to this being sparkling wine

Total wine share by category*

% of purchases that fall within the categories below



Total wine volumes by category

'000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total Wine	81,129.45	80,163.35	-5.2%	0.5%
Other Wines**	45,909.50	43,497.05	-7.2%	-1.6%
Still Wine	31,160.75	31,953.50	-3.1%	2.8%
Sparkling Wine	3,951.25	4,596.00	2.0%	3.6%
Light Aperitifs	52,25	60.15	-3.7%	4.3%
Fortified Wine	55.70	56.56	-8.1%	-0.3%

Source: IWSR

*Light Wine and Fortified Wine omitted from pie chart due to low percentage value

**Other Wines includes Non-Grape Based wines

Still wine volumes by origin

All of the top 10 countries of origin have seen a decline in the volumes sold in the Japanese market, although all are expected to partially recover volumes in the near future

Total still wine volumes and market share by origin

'000s 9-litre cases

		2021	2022	CAGR 17-22	CAGR F 22-27	Market Share
	Total	31,160.75	31,953.50	-3.1%	2.8%	
1	Japanese	12,362.00	12,435.00	-4.0%	3.2%	39%
2	Chilean	6,033.60	6,081.00	-3.1%	2.5%	19%
3	French	4,660.50	4,597.75	-2.1%	1.7%	14%
4	Italian	2,770.75	3,552.50	-6.0%	6.7%	11%
5	Spanish	2,132.50	2,045.00	0.3%	5.7%	6%
6	Australian	1,073.30	1,059.50	-12.1%	3.1%	3%
7	US	1,018.00	1,042.00	-2.7%	7.2%	3%
8	German	260.45	270.00	-2.9%	1.4%	1%
9	Argentinian	199.45	205.00	-10.5%	4.5%	1%
10	International*	190.95	172.25	6.3%	3.5%	1%

*International refers to wine where grapes are from multiple countries of origin

Source: IWSR

Still wine retail price by origin

Most leading countries of origin in Japan have experienced a rise in their price points between 2017-22

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

		Retail price per 0.75l 2022 (US$)	CAGR 17-22	CAGR F 22-27
	Total	7.48	1.7%	-0.2%
1	Japanese	3.50	1.4%	-0.1%
2	Chilean	6.48	1.6%	0.4%
3	French	15.96	2.9%	-1.0%
4	Italian	9.96	-0.2%	-0.9%
5	Spanish	6.95	0.8%	0.1%
6	Australian	7.79	-2.4%	-0.5%
7	US	12.39	14.4%	1.3%
8	German	8.96	-0.5%	0.2%
9	Argentinian	10.40	-1.4%	-0.6%
10	South African	10.08	3.2%	0.9%

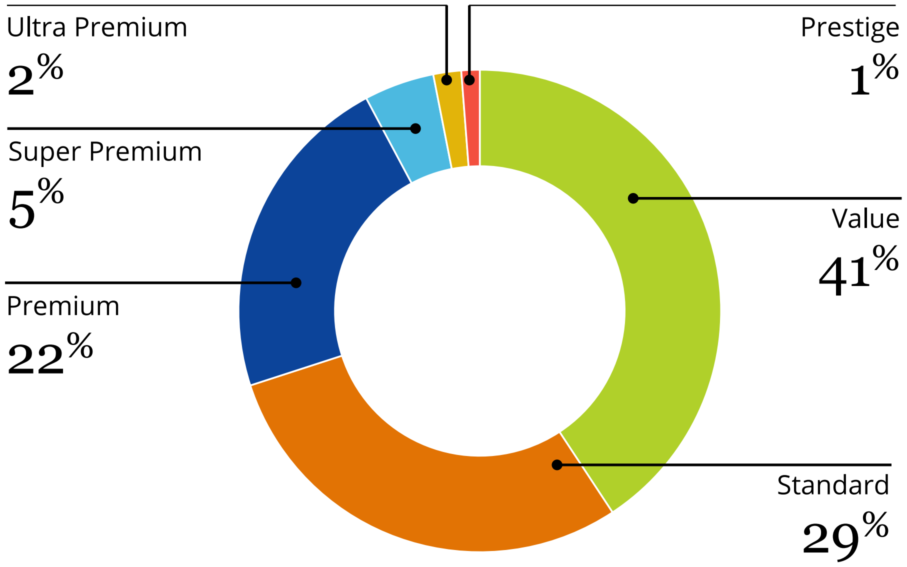
Source: IWSR

Still wine by price band

Entry-level price points experienced the sharpest drop in volume between 2017-22

Still wine by price band*

% of purchases that fall within the categories below



Total wine volumes by category

'000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Value (under ¥500.00)	13,162.85	13,014.00	-3.3%	3.1%
Standard (between ¥500.00 and ¥999.99)	8,955.22	9,354.80	-3.2%	3.1%
Premium (between ¥1,000.00 and ¥1,999.99)	6,695.18	7,092.70	-3.6%	2.2%
Super Premium (between ¥2,000.00 and ¥2,999.99)	1,415.80	1,503.45	-1.4%	0.8%
Ultra Premium (between ¥3,000.00 and ¥4,999.99)	546.90	596.00	-0.1%	3.4%
Prestige (over ¥5,000.00)	384.80	392.55	5.3%	2.3%

Source: IWSR

* Prestige omitted from pie chart due to low percentage value

Still wine consumption per capita

Japan is a top 100 country for per capita consumption of still wine. While the market has experienced a long-term decrease in per capita consumption between 2017-22, it has seen a year-on-year increase for this metric

Per capita consumption of still wine

Litres per annum (adult LDA+ population)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Martin and St. Maarten	46.7	49.0	12.3%	5.0%
2	Portugal	43.0	45.7	-0.9%	6.3%
3	Montenegro	41.8	42.6	-0.9%	2.0%
4	Italy	42.2	39.9	-2.8%	-5.2%
5	Slovenia	37.6	37.8	-2.8%	0.5%
6	St. Barths	33.9	37.2	9.3%	9.8%
7	Switzerland	36.1	34.9	-1.5%	-3.3%
8	France	35.7	33.9	-5.2%	-5.0%
9	Greece	28.0	33.8	0.5%	20.9%
10	Hungary	31.5	32.7	0.6%	3.6%
11	Denmark	33.4	31.0	-1.2%	-7.1%
12	Austria	30.9	30.1	-1.3%	-2.6%
13	Turks and Caicos	27.6	30.1	-2.9%	9.2%
14	Romania	27.5	27.9	2.4%	1.2%
15	US Virgin Islands	27.8	27.9	-2.6%	0.3%
16	Germany	26.5	25.3	-2.5%	-4.8%
17	Argentina	25.3	24.9	-2.7%	-1.5%
18	Malta	21.2	24.3	-6.4%	14.9%
19	Uruguay	25.6	23.4	-1.3%	-8.6%
20	Slovakia	22.9	23.4	-0.1%	1.9%
82=	Japan	2.7	2.8	-3.0%	2.7%

Source: IWSR

Sparkling wine volumes by origin

The sparkling wine market in Japan is dominated by the Old World, though all the leading producer countries experienced growth year-on-year and this positive trend is expected to continue

Total sparkling wine volumes and market share by origin

'000s 9-litre cases

		2021	2022	CAGR 17-22	CAGR F 22-27	Market Share
	Total	3,951.25	4,596.00	2.0%	3.6%	
1	French	1,479.90	1,847.10	3.8%	3.2%	40%
2	Spanish	1,129.00	1,296.00	5.0%	3.4%	28%
3	Italian	781.75	867.00	2.9%	3.6%	19%
4	Chilean	176.50	192.50	-10.2%	6.5%	4%
5	Australian	170.00	179.50	-5.6%	3.6%	4%
6	Japanese	60.00	67.00	-0.3%	3.6%	1%
7	International*	33.35	35.30	-2.8%	4.7%	1%
8	German	29.50	30.00	-1.3%	8.8%	1%
9	Belg / Lux	17.00	18.25	n/a	4.7%	0%
10	US	13.35	15.50	-5.2%	13.7%	0%

*International refers to wine where grapes are from multiple countries of origin

Source: IWSR

Sparkling wine retail price by origin

The average retail price of sparkling wine in the Japanese market has increased for most countries

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a fixed exchange rate

		Retail price per 0.75l 2022 (US$)	CAGR 17-22	CAGR F 22-27
	Total	21.21	4.6%	0.2%
1	French	40.06	5.6%	0.6%
2	Spanish	7.40	-3.8%	-0.2%
3	Italian	9.69	0.1%	0.0%
4	Chilean	9.01	2.3%	-0.2%
5	Australian	11.48	4.0%	-1.0%
6	Japanese	3.42	-2.1%	0.0%
7	International*	6.85	-5.3%	0.0%
8	German	9.86	-1.8%	-0.4%
9	Belg / Lux	9.95	n/a	0.0%
10	US	13.88	1.5%	-3.3%

*International refers to wine where grapes are from multiple countries of origin

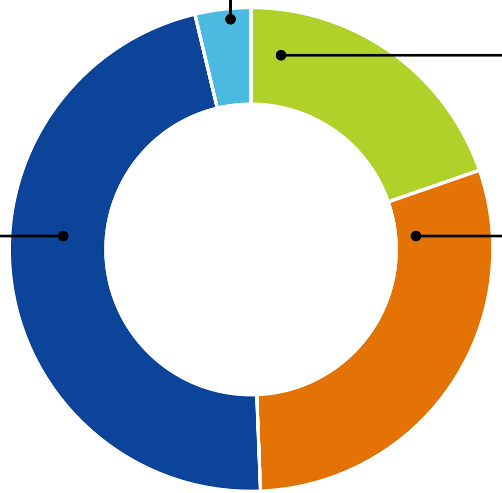
Source: IWSR

Sparkling wine by price band

Sparkling wine sold at a value price point experienced a large increase in volumes, which could suggest that Japanese drinkers are trading down within this category

Sparkling wine by price brand*

% of purchases that fall within the categories below



Sparkling wine volumes by price band

'000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Value (under ¥500.00)	579.68	655.25	17.9%	4.4%
Standard (between ¥500.00 and ¥999.99)	912.70	987.95	-5.4%	3.9%
Premium (between ¥1,000.00 and ¥1,999.99)	1,367.92	1,560.45	2.1%	3.2%
Super Premium (between ¥2,000.00 and ¥2,999.99)	101.95	124.15	-0.1%	3.8%
Ultra Premium (over ¥3,000.00)	26.30	27.50	-1.1%	5.5%

Note: Sparkling Wine includes all sparkling wine types except Champagne, and includes Low and No Sparkling Wine types

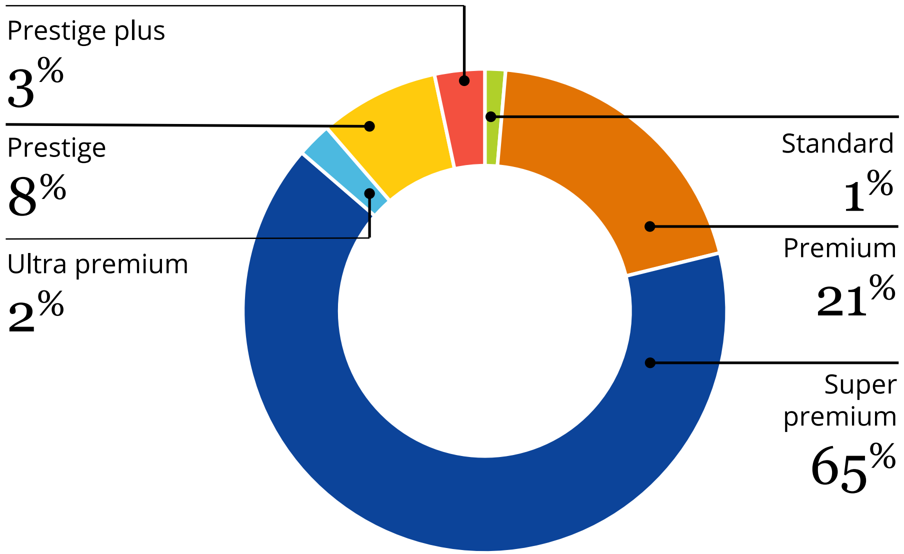
*Ultra premium omitted from pie chart due to low percentage value
Source: IWSR

Champagne by price band

All price points for champagne have experienced growth in the Japanese market, with standard, ultra premium and prestige plus all experiencing high double-digit increases

Champagne by price brand

% of purchases that fall within the categories below



Champagne volumes by price band

'000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Standard (under ¥3,000.00)	**15.00**	**17.00**	**14.3%**	**7.1%**
Premium (between ¥3,000.00 and ¥4,199.99)	**176.30**	**245.00**	**3.4%**	**4.1%**
Super Premium (between ¥4,200.00 and ¥6,999.99)	**644.80**	**807.70**	**3.8%**	**2.2%**
Ultra Premium (between ¥7,000.00 and ¥11,999.99)	**16.40**	**28.80**	**13.7%**	**12.5%**
Prestige (between ¥12,000.00 and ¥24,999.99)	**91.20**	**99.00**	**3.1%**	**4.8%**
Prestige Plus (over ¥25,000.00)	**18.90**	**41.50**	**15.7%**	**6.7%**

Source: IWSR

Sparkling wine consumption per capita

Japan is a top 100 country for per capita consumption of sparkling wine. The country has seen increases in per capita consumption between 2017-22 and also year-on-year

Market context:

Per capita consumption is much lower than in other developed countries, and younger consumers are not getting into wine very much, as RTDs and whisky highballs compete effectively on mealtime occasions.

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Per capita consumption of sparkling wine

Litres per annum (LDA+ adults)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Barths	12.5	13.6	13.1%	8.9%
2	St. Martin and St. Maarten	6.3	8.3	21.7%	32.6%
3	Italy	7.9	7.4	-1.2%	-6.2%
4	Turks and Caicos	5.3	6.5	-2.4%	23.4%
5	Germany	5.3	5.5	-1.9%	3.7%
6	Lithuania	4.9	5.1	7.3%	3.6%
7=	Latvia	4.5	4.9	2.6%	9.4%
7=	France	4.7	4.9	-1.3%	2.7%
9	Guadeloupe	4.2	4.8	-1.8%	15.5%
10	Martinique	4.2	4.4	-4.6%	4.8%
11=	Estonia	4.1	4.3	4.0%	6.3%
11=	Belgium and Luxembourg	4.3	4.3	-1.5%	-0.2%
13	Austria	3.4	3.5	0.3%	2.9%
14=	Switzerland	3.2	3.3	0.9%	3.0%
14=	Cayman Islands	3.1	3.3	2.1%	5.8%
14=	Sweden	3.3	3.3	6.7%	0.6%
17=	United Kingdom	3.2	3.0	-0.6%	-4.8%
17=	Slovenia	2.9	3.0	3.0%	4.1%
19=	New Zealand	3.1	2.9	-1.6%	-6.1%
19=	Reunion	2.6	2.9	0.7%	14.7%
68=	Japan	0.3	0.4	2.2%	16.5%

Source: IWSR

Market Demographics

Japan Wine Landscapes

2023

Japanese regular wine drinkers

Japan has seen an increase in the number of adults who drink wine weekly and monthly, despite the adult population remaining stable

1 Japan national statistics, estimates

2 Wine Intelligence online calibration study rolling average of 2020 & 2021 (n=5,001) Japanese adults aged 20+. Wine=still light wine (red, white, rosé)

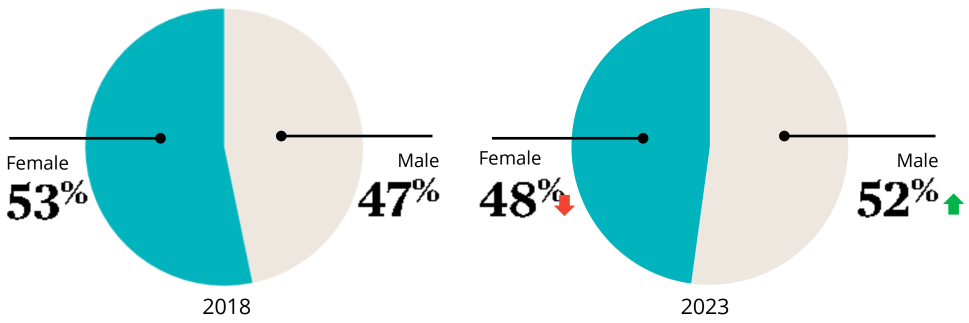
3 Wine Intelligence online calibration study rolling average of 2022 & 2023 (n=2,016) Japanese adults aged 20+. Wine=still wine (red, white, rosé)

4 Wine Intelligence, Vinitrac® Japan, Mar ‘21 & Jul '21, Apr’ 23 (n≥1,021) Japanese regular wine drinkers

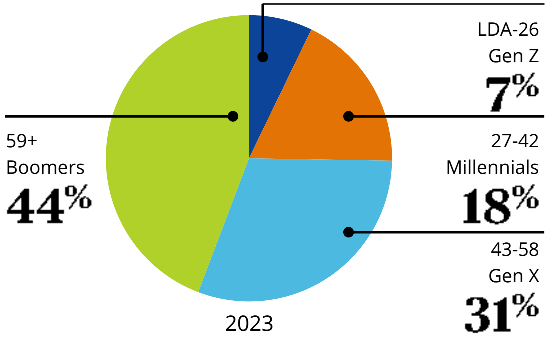
Demographics of regular wine drinkers

Three quarters of Japanese regular wine drinkers are over the age of 40 – with a drop in consumption among the less affluent households

Gender



Generation cohorts



Regions

	2018	2023	Tracking
Hokkaido	5%	5%	➡
Tohoku	4%	4%	➡
Kanto	47%	45%	➡
Chubu	11%	14%	➡
Kansai	19%	18%	➡
Chugoku	5%	6%	➡
Shikoku	1%	2%	➡
Kyushu	7%	7%	➡

Annual household income before tax

	2018	2023	Tracking
Less than 4 Million円	23%	26%	➡
4 - 7.99 Million円	41%	35%	⬇
8 - 9.99 Million円	13%	12%	➡
10 Million円 or above	17%	19%	➡
Prefer not to say	7%	9%	➡

Note: tracking not available for generation cohorts due to change in data collection

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '23, (n≥1,000) Japanese regular wine drinkers

Drinking Repertoire

Japan Wine Landscapes

2023

Drinking repertoire

Alcoholic beverage repertoires have broadened in Japan since 2018, with regular wine drinkers increasingly trying different beverages, especially spirits and craft beer

Alcoholic beverage repertoire: Tracking

% who have drunk the following beverages in the past 12 months
Base = All Japanese regular wine drinkers (n≥1,000)

Ranking '23		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
1	Red wine	92%	92%	91%	→	→
2	Beer	85%	84%	85%	→	→
3	White wine	74%	73%	73%	→	→
4	Sake	56%	63%	64%	↑	→
5	Shochu	50%	48%	52%	→	↑
6	Whisky / Whiskey	43%	44%	50%	↑	↑
7	Craft beer	29%	36%	40%	↑	↑
8	Champagne	36%	36%	37%	→	→
9	Cider	34%	35%	33%	→	→
10	Cocktails	38%	29%	32%	↓	→
11	Rosé wine	33%	30%	30%	→	→
12	Gin	18%	19%	23%	↑	↑
13	Other sparkling wine	22%	23%	22%	→	→
14	Pre-mixed / ready to drink alcoholic beverages	17%	16%	21%	↑	↑
15	Liqueurs	18%	14%	18%	→	↑

= Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Varietal consumption

Consumption of the main red and white grape varieties has remained broadly stable since 2018

White varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months
Base = All Japanese regular wine drinkers (n≥1,000)

Ranking '23		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
1	Chardonnay	46%	52%	50%	→	→
2	Sauvignon Blanc	29%	33%	33%	→	→
3	Pinot Grigio / Pinot Gris	12%	16%	15%	→	→
4	Riesling	13%	13%	13%	→	→
5=	Sémillon	8%	10%	10%	↑	→
5=	Moscato	7%	9%	10%	→	→
7	Albariño	8%	8%	9%	→	→
8	Chenin Blanc	5%	6%	7%	→	→
9	Viognier	7%	6%	6%	→	→
10=	Colombard	5%	5%	5%	→	→
10=	Verdejo	4%	4%	5%	→	→
10=	Grüner Veltliner	5%	5%	5%	→	→
13	Gewürztraminer	5%	5%	4%	→	→
14	Torrontés	5%	4%	3%	→	→
	Other	3%	3%	4%	→	→

Red varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months
Base = All Japanese regular wine drinkers (n≥1,000)

Ranking '23		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
1	Cabernet Sauvignon	37%	43%	43%	↑	→
2	Merlot	33%	39%	37%	→	→
3	Pinot Noir	27%	34%	32%	↑	→
4	Shiraz / Syrah	15%	18%	15%	→	→
5	Sangiovese	10%	11%	13%	→	→
6=	Tempranillo	10%	9%	10%	→	→
6=	Malbec	9%	8%	10%	→	→
8	Pinotage	7%	7%	9%	→	→
9	Grenache	7%	7%	8%	→	→
10=	Carménère	8%	7%	7%	→	→
10=	Zinfandel	5%	6%	7%	→	→
12	Gamay	7%	6%	6%	→	→
	Other	3%	3%	3%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Ideal wine attributes

Ideal wine attributes remain ‘easy to drink’ and ‘fruity’ for both red and white wines

Ideal white wine attributes: Top 15

% who select each description for their ideal white wine
Base = All Japanese regular wine drinkers (n≥1,021)

Ranking '23		2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '22
1	Easy to drink	48%	51%	➡
2	Fruity	48%	44%	➡
3	Dry	36%	33%	➡
4	Fresh	30%	32%	➡
5	Smooth	21%	25%	➡
6=	Simple	18%	19%	➡
6=	Elegant	19%	19%	➡
8	Sweet	18%	18%	➡
9=	Light	16%	17%	➡
9=	Juicy	15%	17%	➡
11	Soft	13%	13%	➡
12	Full-bodied	11%	11%	➡
13	Mineral	8%	8%	➡
14	Delicate	6%	7%	➡
15	Complex	5%	5%	➡

Ideal red wine attributes: Top 15

% who select each description for their ideal red wine
Base = All Japanese regular wine drinkers (n≥1,021)

Ranking '23		2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '22
1	Easy to drink	39%	42%	➡
2	Fruity	33%	35%	➡
3	Full-bodied	32%	31%	➡
4=	Rich	25%	26%	➡
4=	Savoury	25%	26%	➡
4=	Elegant	24%	26%	➡
7	Dry	24%	23%	➡
8=	Smooth	18%	18%	➡
8=	Sweet	18%	18%	➡
10	Juicy	16%	16%	➡
11	Tannic	16%	15%	➡
12	Complex	15%	14%	➡
13	Soft	9%	12%	➡
14	Spicy	12%	11%	➡
15	Simple	9%	10%	➡

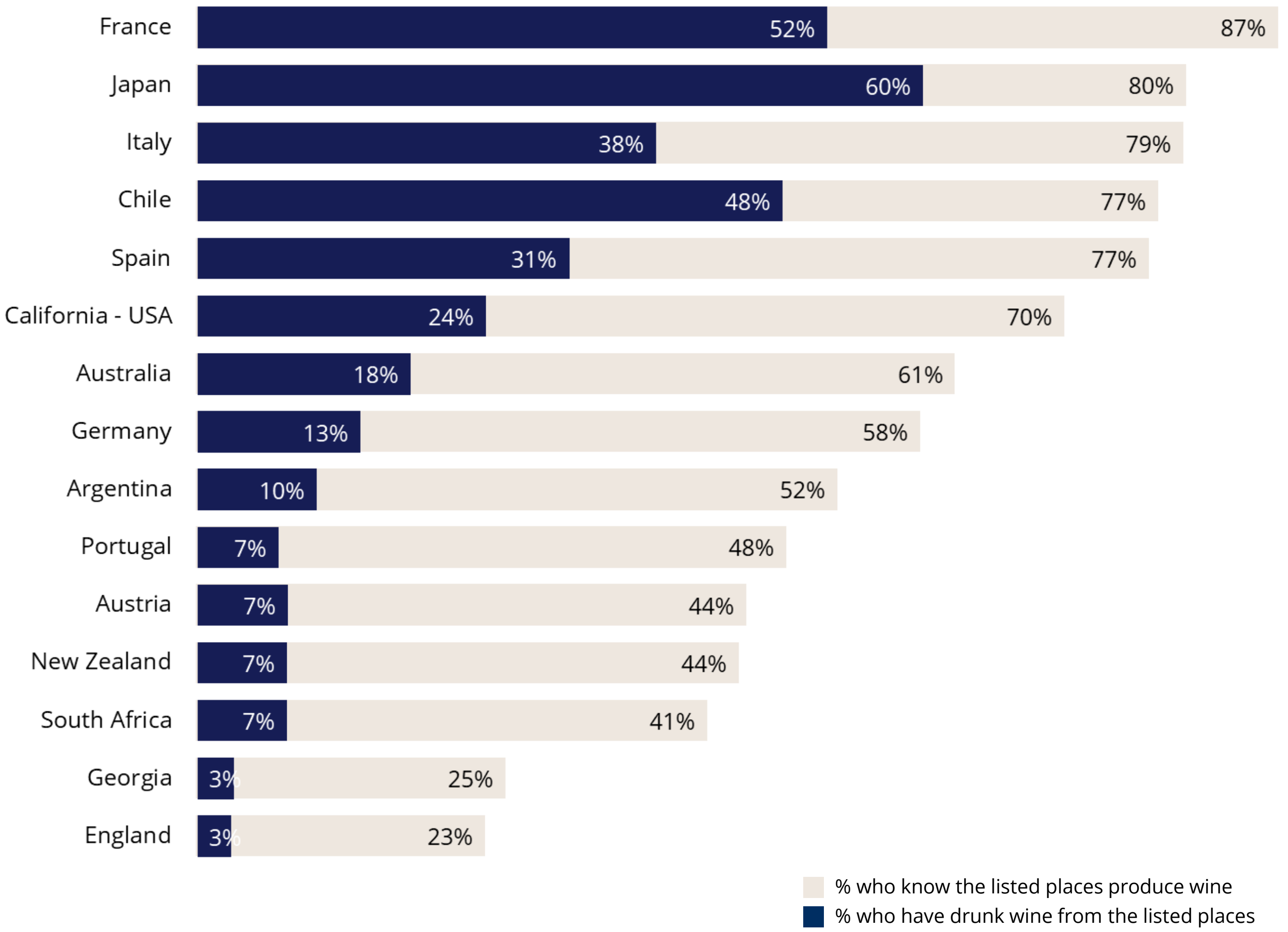
= Represents equal ranking
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Apr ’22, Apr ’23, (n≥1,000) Japanese regular wine drinkers

Country of origin awareness / consumption

Domestically-produced wine has the highest consumption incidence in the Japanese market, followed closely by France and Chile

Country of origin: Top 15 awareness and consumption levels

% of those who know of or have drunk wine from the following places in the past six months
Base = All Japanese regular wine drinkers (n=1,021)



Source: Wine Intelligence, Vinitrac®, Japan, Apr '23, (n=1,021) Japanese regular wine drinkers

Country of origin awareness

There has been a significant long-term increase in the proportion of Japanese regular wine drinkers who know about different wine-producing countries

Country of origin awareness: Tracking

% of those who know the following places produce wine
Base = All Japanese regular wine drinkers (n≥1,000)

Ranking '23		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
1	France	79%	86%	87%	↑	→
2	Japan	71%	79%	80%	↑	→
3	Italy	74%	81%	79%	↑	→
4=	Chile	74%	79%	77%	→	→
4=	Spain	68%	76%	77%	↑	→
6	California - USA	60%	70%	70%	↑	→
7	Australia	48%	61%	61%	↑	→
8	Germany	50%	58%	58%	↑	→
9	Argentina	44%	54%	52%	↑	→
10	Portugal	39%	48%	48%	↑	→
11=	Austria	30%	43%	44%	↑	→
11=	New Zealand	29%	44%	44%	↑	→
13	South Africa	33%	44%	41%	↑	→
14	Georgia	12%	23%	25%	↑	→
15	England	13%	20%	23%	↑	→

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Country of origin consumption

Despite significant increases in the awareness of country of origin, purchase has remained broadly stable for all countries apart from Japan, which has increased year-on-year since 2018

Market context:

French wine continues to be coveted by Japanese consumers which will secure future growth

Executive Summary Report 2023 Japan

Country of origin consumption: Tracking

% who have drunk wine from the following places in the past six months
Base = All Japanese regular wine drinkers (n≥1,000)

Ranking '23		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
1	Japan	49%	54%	60%	↑	↑
2	France	44%	49%	52%	↑	→
3	Chile	48%	50%	48%	→	→
4	Italy	33%	39%	38%	↑	→
5	Spain	28%	32%	31%	→	→
6	California - USA	21%	23%	24%	→	→
7	Australia	13%	18%	18%	↑	→
8	Germany	13%	12%	13%	→	→
9	Argentina	10%	11%	10%	→	→
10=	Austria	5%	7%	7%	→	→
10=	New Zealand	5%	7%	7%	→	→
10=	South Africa	9%	9%	7%	→	→
10=	Portugal	6%	7%	7%	→	→
14=	Georgia	2%	4%	3%	→	→
14=	England	2%	3%	3%	→	→

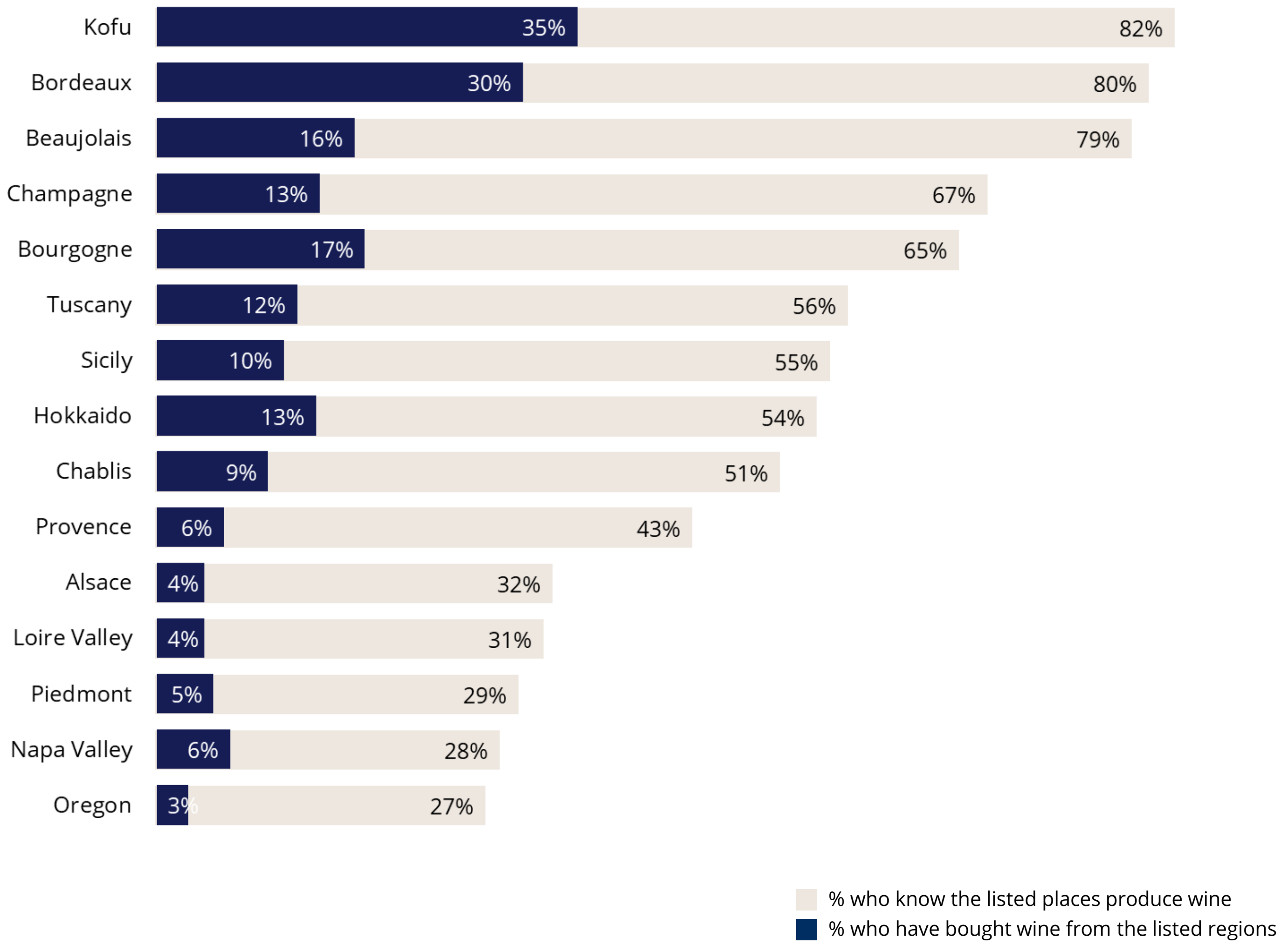
= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Region of origin awareness / purchase

Domestic region Kofu is the best-known and most widely-purchased region of origin, followed closely by popular French regions

Region of origin: Top 15 awareness and purchase levels

% of those who know of or have bought wine from the following regions in the past three months
Base = All Japanese regular wine drinkers (n=1,021)



Source: Wine Intelligence, Vinitrac®, Japan, Apr ‘23, (n=1,021) Japanese regular wine drinkers

Region of origin awareness

Awareness of domestic regions has increased since 2018 and remains stable. Some foreign regions have experienced declines in awareness year-on-year

Region of origin awareness: Top 15, tracking

% of those who know the following regions produce wine
Base = All Japanese regular wine drinkers (n≥1,000)

Ranking '23		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
1	Kofu	79%	84%	82%	↑	→
2	Bordeaux	79%	84%	80%	→	↓
3	Beaujolais	79%	81%	79%	→	→
4	Champagne	65%	70%	67%	→	→
5	Bourgogne	61%	67%	65%	→	→
6	Tuscany	53%	58%	56%	→	→
7	Sicily	51%	55%	55%	→	→
8	Hokkaido	47%	56%	54%	↑	→
9	Chablis	48%	53%	51%	→	→
10	Provence	43%	51%	43%	→	↓
11	Alsace	31%	35%	32%	→	→
12	Loire Valley	24%	32%	31%	↑	→
13	Piedmont	29%	33%	29%	→	↓
14	Napa Valley	24%	30%	28%	↑	→
15	Oregon	21%	28%	27%	↑	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar ’18, Apr ‘22, Apr ‘23, (n≥1,000) Japanese regular wine drinkers

Region of origin purchase

In line with awareness, purchase incidences for domestic regions have increased significantly since 2018

Region of origin purchase: Top 15, tracking

% who have bought wine from the following regions in the past three months
Base = All Japanese regular wine drinkers (n≥1,000)

Ranking '23		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
1	Kofu	**28%**	**32%**	**35%**	↑	→
2	Bordeaux	**27%**	**28%**	**30%**	→	→
3	Bourgogne	**15%**	**16%**	**17%**	→	→
4	Beaujolais	**19%**	**17%**	**16%**	→	→
5=	Champagne	**12%**	**13%**	**13%**	→	→
5=	Hokkaido	**10%**	**12%**	**13%**	↑	→
7	Tuscany	**8%**	**10%**	**12%**	↑	→
8	Sicily	**8%**	**9%**	**10%**	→	→
9	Chablis	**11%**	**10%**	**9%**	→	→
10=	Napa Valley	**4%**	**7%**	**6%**	→	→
10=	Prosecco	**3%**	**5%**	**6%**	↑	→
10=	Provence	**6%**	**6%**	**6%**	→	→
13=	Chianti	**5%**	**6%**	**5%**	→	→
13=	Piedmont	**4%**	**5%**	**5%**	→	→
15=	Kyushu	**2%**	**4%**	**4%**	↑	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Wine-Buying Behaviours

Japan Wine Landscapes

2023

Wine-buying channel usage

Channel usage has remained broadly stable in Japan since 2018, with a long-term decline in liquor stores and an increase in the use of convenience stores over the past year

Wine-buying channel usage: Tracking

% who have bought wine from the following channels in the past six months
Base = All Japanese regular wine drinkers (n≥1,000)

Ranking '23		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
1	In a supermarket	**51%**	**47%**	**47%**	→	→
2	In a hypermarket / mass merchant	**46%**	**40%**	**43%**	→	→
3	In a liquor store	**31%**	**25%**	**25%**	↓	→
4	In a convenience store	**25%**	**18%**	**23%**	→	↑
5=	From an online retailer	**n/a**	**n/a**	**20%**	n/a	n/a
5=	From a supermarket / hypermarket website	**n/a**	**21%**	**20%**	n/a	→
7=	In a drug store	**n/a**	**18%**	**19%**	n/a	→
7=	In a wine shop	**17%**	**18%**	**19%**	→	→
7=	In a discount store	**20%**	**19%**	**19%**	→	→
10	In a department store	**20%**	**16%**	**18%**	→	→
11	From a winery's website	**n/a**	**9%**	**8%**	n/a	→
12	In a membership store	**6%**	**8%**	**7%**	→	→
13	From a winery during a visit	**n/a**	**5%**	**6%**	n/a	→
14	From Duty Free	**6%**	**2%**	**4%**	→	↑
15	From a delivery app	**n/a**	**3%**	**2%**	n/a	→

34%↑ are online wine buyers, compared with 28% in 2022

Market context:

Increased investment in online platforms and wine apps will provide the category with more exposure

Executive Summary Report 2023 Japan

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Wine-buying retailer usage

There has been a significant increase year-on-year in the use of Amazon and Donki for buying wine in Japan. Use of other retailers has remained broadly stable

Wine-buying retailer usage: Tracking

% who mainly use the following retailers to buy wine
Base = All Japanese regular wine drinkers (n≥1,000)

Ranking '23		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
1	AEON	**24%**	**29%**	**28%**	→	→
2=	Donki	**10%**	**11%**	**13%**	↑	→
2=	Amazon	**9%**	**10%**	**13%**	↑	↑
2=	7-Eleven	**12%**	**9%**	**13%**	→	↑
5=	Seijo Ishii	**11%**	**12%**	**11%**	→	→
5=	Rakuten	**10%**	**11%**	**11%**	→	→
7	Maxvalu	**9%**	**9%**	**9%**	→	→
8=	Yamaya	**10%**	**10%**	**8%**	→	→
8=	Seiyu	**9%**	**8%**	**8%**	→	→
8=	Ito Yokado	**10%**	**8%**	**8%**	→	→
11	LIFE	**6%**	**7%**	**6%**	→	→
12=	OK	**4%**	**5%**	**5%**	→	→
12=	Costco	**3%**	**5%**	**5%**	↑	→
12=	Lawson	**6%**	**4%**	**5%**	→	→
12=	Takashimaya	**4%**	**4%**	**5%**	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Consumption frequency

Wine consumption frequency has remained stable since 2018. There is very little deviation from the norm amongst the different generations of Japanese regular wine drinkers

Wine consumption frequency: Tracking

% who usually drink wine at the following frequency
Base = All Japanese regular wine drinkers (n≥1,000)

	2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
Most days / every day	**10%**	**12%**	**12%**	➡	➡
2-5 times a week	**25%**	**26%**	**28%**	➡	➡
About once a week	**27%**	**24%**	**25%**	➡	➡
1-3 times a month	**38%**	**38%**	**36%**	➡	➡

Wine consumption frequency: by generation

% who usually drink wine at the following frequency
Base = All Japanese regular wine drinkers (n=1,021)

	All Japanese Regular Wine Drinkers (n=1,021)	LDA-26 Gen Z (n=73)	27-42 Millennials (n=185)	43-58 Gen X (n=311)	59+ Boomers (n=452)
Most days / every day	**12%**	**6%**	**16%**	**11%**	**12%**
2-5 times a week	**28%**	**30%**	**29%**	**29%**	**26%**
About once a week	**25%**	**28%**	**25%**	**25%**	**24%**
1-3 times a month	**36%**	**37%**	**30%**	**35%**	**39%**

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Off-trade consumption frequency

At home, Japanese are increasingly consuming wine in relaxed and informal meal occasions compared to 2018

Off-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the off-trade

	2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
A relaxing drink at the end of the day at home	**4.77**	**5.31**	**5.69**	↑	→
With an informal meal at home	**5.46**	**6.34**	**6.48**	↑	→
With a more formal dinner party at home	**0.93**	**0.79**	**0.99**	→	↑
At a party / celebration at home	**0.94**	**0.77**	**0.89**	→	→

Note: Table above shows the number of days per month that consumers are drinking wine at these occasions

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

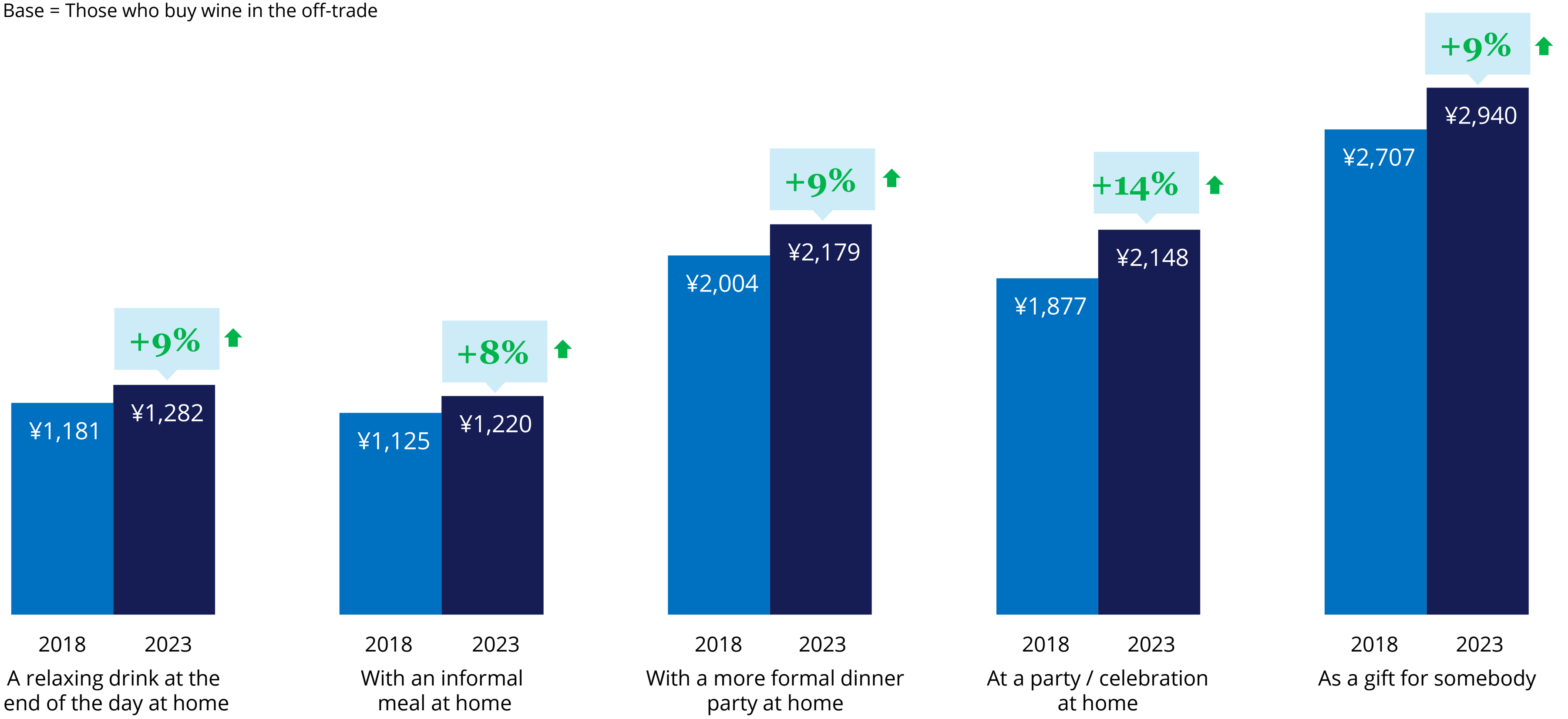
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Average off-trade spend

Though purchase remained stable for most at-home occasions, spend has increased significantly since 2018

Off-trade: Average spend per bottle by occasion

Base = Those who buy wine in the off-trade



⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '23, (n≥1,000) Japanese regular wine drinkers

On-trade consumption

Wine purchase has remained stable for all on-trade locations since 2018, though there are now slightly fewer on-trade drinkers overall

Market context:

Both imported and local wine segments saw a small recovery in 2022, thanks to the resuming on-trade. However, growth was a lot lower than expected as the on-trade was partially shut until mid-March 2022 and obligatory face masks were required until mid-March 2023. This cooled the market and many consumers kept away from busy public places

Executive Summary Report 2023 Japan

Wine purchase in on-trade

% who buy wine in a bar, pub or restaurant
Base = All Japanese regular wine drinkers (n≥1,000)

On-trade location		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
Bar or pub	Yes	79%	78%	77%	→	→
	No	21%	22%	23%	→	→
Restaurant	Yes	89%	89%	87%	→	→
	No	11%	11%	13%	→	→
Club or karaoke	Yes	42%	39%	40%	→	→
	No	58%	61%	60%	→	→
On-trade drinkers	Yes	94%	92%	91%	↓	→
	No	6%	8%	9%	↑	→

Wine purchase in on-trade: by generation

% who buy wine in a bar, pub or restaurant
Base = All Japanese regular wine drinkers (n=1,021)

On-trade location		All Japanese Regular Wine Drinkers (n=1,021)	LDA-26 Gen Z (n=73)	27-42 Millennials (n=185)	43-58 Gen X (n=311)	59+ Boomers (n=452)
Bar or pub	Yes	77%	79%	86%	81%	70%
	No	23%	21%	14%	19%	30%
Restaurant	Yes	87%	81%	89%	87%	88%
	No	13%	19%	11%	13%	12%
Club or karaoke	Yes	40%	38%	57%	44%	30%
	No	60%	62%	43%	56%	70%
On-trade drinkers	Yes	91%	91%	94%	90%	91%
	No	9%	9%	6%	10%	9%

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

On-trade consumption frequency

On-trade consumption frequency has remained stable overall since 2018, with an increase over the past year for relaxing end of day drinks

On-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the on-trade

	2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
A relaxing drink out at the end of the day	**1.31**	**1.13**	**1.49**	➡	⬆
With an informal meal in a pub / bar / karaoke / restaurant	**1.50**	**1.21**	**1.38**	➡	➡
With a more formal dinner in a restaurant	**1.09**	**1.00**	**1.17**	➡	➡
At a party / celebration / big night out	**0.94**	**0.80**	**0.90**	➡	➡

Note: Table above shows the number of days per month that consumers are drinking wine at these occasions

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

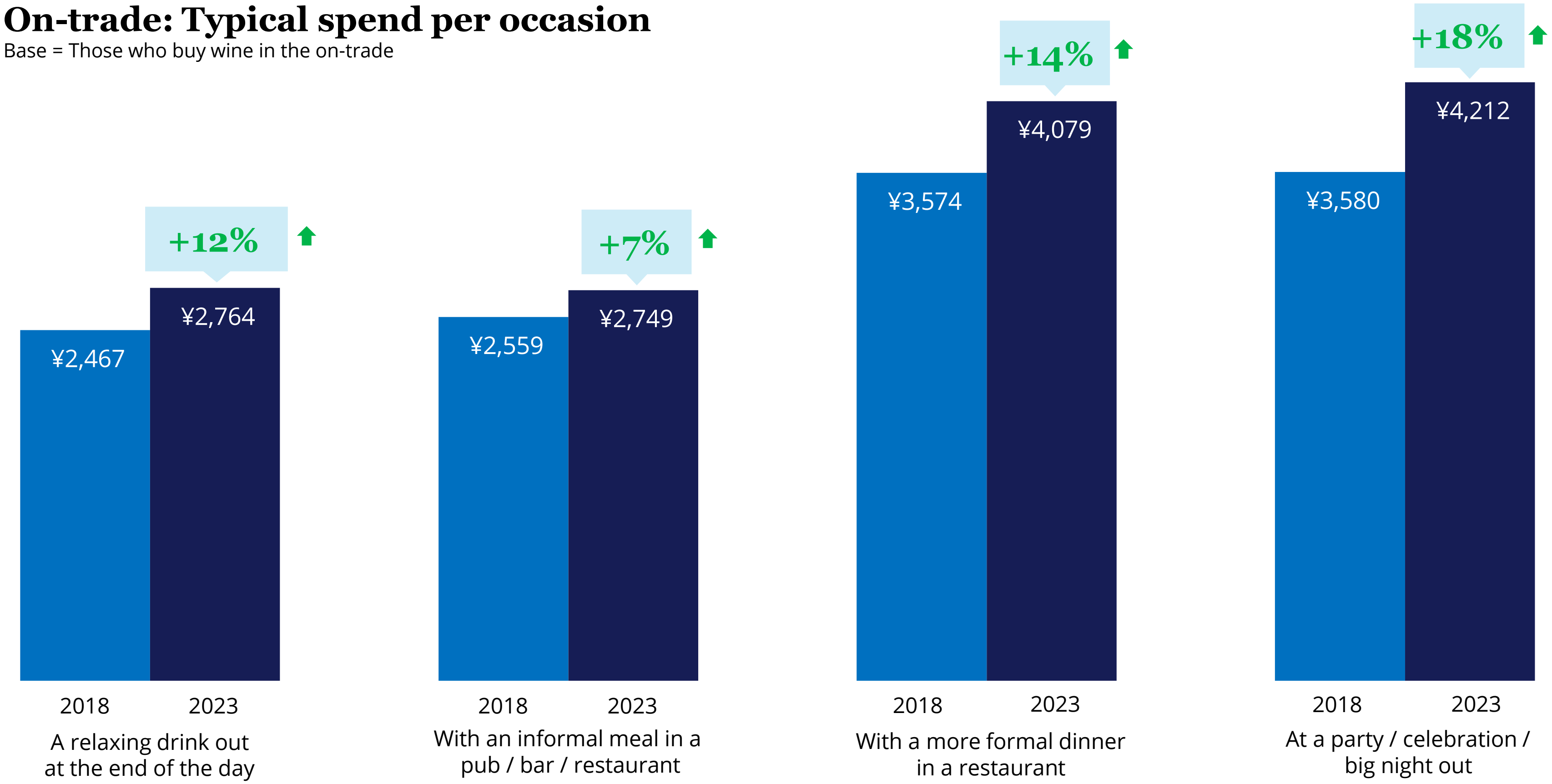
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Typical on-trade spend

In line with off-trade spend, on-trade spend has also increased significantly for all occasions

On-trade: Typical spend per occasion

Base = Those who buy wine in the on-trade



⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '23, (n≥1,000) Japanese regular wine drinkers

Wine Views and Attitudes

Japan Wine Landscapes

2023

Attitudes towards wine

Attitudes towards wine have remained stable since 2018. Gen Z and Millennials are most likely to enjoy trying new things while Boomers often stick to what they know

Attitudes towards wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Japanese regular wine drinkers (n≥1,000)

	2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
I enjoy trying new and different styles of wine on a regular basis	**27%**	**26%**	**29%**		
I don't mind what I buy so long as the price is right	**51%**	**48%**	**47%**		
I know what I like and I tend to stick to what I know	**22%**	**26%**	**24%**		

Attitudes towards wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Japanese regular wine drinkers (n=1,021)

	All Japanese Regular Wine Drinkers (n=1,021)	LDA-26 Gen Z (n=73)	27-42 Millennials (n=185)	43-58 Gen X (n=311)	59+ Boomers (n=452)
I enjoy trying new and different styles of wine on a regular basis	**29%**	**45%**	**47%**	**30%**	**18%**
I don't mind what I buy so long as the price is right	**47%**	**39%**	**37%**	**49%**	**51%**
I know what I like and I tend to stick to what I know	**24%**	**16%**	**16%**	**21%**	**31%**

Market context:

There is growing interest in wine and more brands are entering the market with interesting blends and propositions, which will help the category to grow

Executive Summary Report 2023 Japan

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Wine involvement

Involvement in the wine category has increased significantly since 2018, driven by Millennials

Wine involvement: Tracking

Base = All Japanese regular wine drinkers (n≥1,000)

	2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking	
				vs. '18	vs. '22
High involvement	**41%**	**50%**	**51%**	⬆	➡
Medium involvement	**28%**	**27%**	**26%**	➡	➡
Low involvement	**31%**	**23%**	**23%**	⬇	➡

Wine involvement by generation

Base = All Japanese regular wine drinkers (n=1,021)

	All Japanese Regular Wine Drinkers (n=1,021)	LDA-26 Gen Z (n=73)	27-42 Millennials (n=185)	43-58 Gen X (n=311)	59+ Boomers (n=452)
High involvement	**51%**	**60%**	**63%**	**55%**	**42%**
Medium involvement	**26%**	**20%**	**19%**	**24%**	**31%**
Low involvement	**23%**	**20%**	**18%**	**21%**	**27%**

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Involvement and perceived expertise (1)

Japanese regular wine drinkers are highly engaged, with wine an increasingly important part of their lifestyle. They take the subject seriously, and are keen to find the best bottles for their budget

Involvement and perceived expertise in wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Japanese regular wine drinkers (n≥1,000)

Ranking '23		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
1	Drinking wine gives me pleasure	70%	80%	79%	↑	→
2	Deciding which wine to buy is an important decision	61%	67%	69%	↑	→
3	I always look for the best quality wines I can get for my budget	56%	59%	63%	↑	→
4	Wine is important to me in my lifestyle	48%	60%	61%	↑	→
5	I have a strong interest in wine	53%	57%	60%	↑	→
6	I don't understand much about wine	59%	57%	56%	→	→
7	Compared to others, I know less about the subject of wine	56%	57%	54%	→	→
8	Generally speaking, wine is reasonably priced	37%	46%	48%	↑	→
9	I like to take my time when I purchase a bottle of wine	38%	42%	45%	↑	→
10	Generally speaking, wine is an expensive drink	33%	29%	36%	→	↑
11	I feel competent about my knowledge of wine	11%	14%	16%	↑	↑

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Involvement and perceived expertise (2)

The highest involvement levels in Japan are found among Millennials and Gen X consumers

Involvement and perceived expertise in wine: by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Japanese regular wine drinkers (n=1,021)

Ranking '23		All Japanese Regular Wine Drinkers (n=1,021)	LDA-26 Gen Z (n=73)	27-42 Millennials (n=185)	43-58 Gen X (n=311)	59+ Boomers (n=452)
1	Drinking wine gives me pleasure	79%	75%	81%	81%	79%
2	Deciding which wine to buy is an important decision	69%	73%	74%	72%	64%
3	I always look for the best quality wines I can get for my budget	63%	57%	68%	62%	62%
4	Wine is important to me in my lifestyle	61%	55%	68%	65%	56%
5	I have a strong interest in wine	60%	77%	68%	62%	53%
6	I don't understand much about wine	56%	59%	46%	53%	61%
7	Compared to others, I know less about the subject of wine	54%	54%	48%	51%	60%
8	Generally speaking, wine is reasonably priced	48%	59%	58%	45%	43%
9	I like to take my time when I purchase a bottle of wine	45%	57%	60%	47%	36%
10	Generally speaking, wine is an expensive drink	36%	48%	43%	36%	31%
11	I feel competent about my knowledge of wine	16%	23%	30%	16%	10%

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Wine knowledge and confidence

Wine knowledge and confidence among Japanese wine drinkers have both increased significantly since 2018

Wine knowledge index: Tracking

Base = All Japanese regular wine drinkers (n≥1,000)

	2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
Knowledge Index	**24.1**	**28.2**	**28.3**	⬆	➡

Wine knowledge index (0–100) is calculated based on consumer-reported awareness of wine-growing regions and wine brands.
*Wine knowledge index is the 'objective' measurement of consumer knowledge about wine.

+4.2 Index change

Wine confidence index: Tracking

Base = All Japanese regular wine drinkers (n=1,021)

	2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
Confidence Index	**33.2**	**34.8**	**36.6**	⬆	⬆

Wine confidence index (0–100) is calculated based on the extent to which consumers feel competent about their wine knowledge. Wine confidence index uses consumers' answers to three attitudinal statements: 1) I feel competent about my knowledge of wine / 2) Compared to others, I know less about the subject of wine / 3) I don't understand much about wine.
**Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge.

+3.4 Index change

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Wine-drinking motivations

Motivations for drinking wine have remained broadly stable over the past year

Wine drinking motivations: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Japanese regular wine drinkers (n≥1,000)

Ranking '23		2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '22
1	Wine enhances food and meals	60%	59%	→
2	I really love the taste of wine	60%	57%	→
3	Drinking wine makes me feel relaxed	54%	51%	→
4	Drinking wine can be good for my health	31%	31%	→
5=	I treat myself with wine at the end of the day	26%	25%	→
5=	Wine is about sharing with a partner / close friend or family member	25%	25%	→
7	To celebrate special occasions	24%	24%	→
8	Wine is a fashionable drink	21%	23%	→
9=	Wine is a refreshing drink	24%	20%	↓
9=	I like shopping / choosing wines to drink	21%	20%	→
11	Wine helps create a warm / friendly atmosphere	22%	18%	↓
12	Wine is about sharing something with others	12%	14%	→
13=	I like learning about new wines	10%	11%	→
13=	It makes people sophisticated	10%	11%	→
15	It makes me feel individual and unique	8%	9%	→
16	Most of my friends drink wine	7%	7%	→

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Wine-drinking motivations

Higher proportions of Millennials are motivated to drink wine by external reasons such as perceived fashionability or because they feel the drink confers sophistication

Wine drinking motivations: by generation

% who selected the following as reasons why they drink wine
Base = All Japanese regular wine drinkers (n=1,021)

Ranking '23		All Japanese Regular Wine Drinkers (n=1,021)	LDA-26 Gen Z (n=73)	27-42 Millennials (n=185)	43-58 Gen X (n=311)	59+ Boomers (n=452)
1	Wine enhances food and meals	59%	55%	50%	60%	63%
2	I really love the taste of wine	57%	47%	54%	64%	56%
3	Drinking wine makes me feel relaxed	51%	36%	53%	56%	50%
4	Drinking wine can be good for my health	31%	9%	28%	26%	38%
5=	I treat myself with wine at the end of the day	25%	16%	34%	27%	22%
5=	Wine is about sharing with a partner / close friend or family member	25%	29%	28%	22%	25%
7	To celebrate special occasions	24%	28%	34%	26%	18%
8	Wine is a fashionable drink	23%	41%	32%	22%	18%
9=	Wine is a refreshing drink	20%	19%	19%	21%	20%
9=	I like shopping / choosing wines to drink	20%	22%	26%	22%	16%
11	Wine helps create a warm / friendly atmosphere	18%	12%	19%	17%	19%
12	Wine is about sharing something with others	14%	20%	20%	11%	12%
13=	I like learning about new wines	11%	9%	20%	12%	6%
13=	It makes people sophisticated	11%	10%	21%	10%	7%
15	It makes me feel individual and unique	9%	10%	15%	10%	6%
16	Most of my friends drink wine	7%	8%	13%	6%	4%

= Represents equal ranking
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Apr '23, (n=1,021) Japanese regular wine drinkers

Wine-buying choice cues

Significantly more Japanese consumers consider a wide variety of purchase cues when buying their wine compared with 2018. Medals and awards are increasingly important

Wine choice cues: Tracking

% who indicate each of the following factors is 'important' or 'very important' when buying wine
Base = All Japanese regular wine drinkers (n≥1,000)

Ranking '23		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
1	Wine that matches or complements food	70%	75%	73%	→	→
2	The country of origin (eg France, Australia, Spain, Chile, USA, etc)	59%	68%	64%	↑	→
3	The region of origin	57%	66%	62%	↑	→
4	Taste or wine style descriptions displayed on the shelves or on wine labels	54%	59%	60%	↑	→
5	Grape variety (eg Cabernet Sauvignon, Chardonnay, etc)	51%	59%	59%	↑	→
6=	A brand I am aware of	43%	46%	47%	↑	→
6=	Alcohol content	41%	45%	47%	↑	→
8	Recommendation by friend or family	47%	45%	46%	→	→
9	Recommendations from shop staff or shop leaflets	44%	43%	45%	→	→
10=	Appeal of the bottle and / or label design	32%	35%	35%	→	→
10=	Whether or not the wine has won a medal or award	31%	30%	35%	↑	↑
12	Promotional offer (eg price discount or 3 for the price of 2)	28%	32%	34%	↑	→
13	Recommendation by wine guide books	31%	30%	33%	→	→
14	Recommendation by wine critic or writer	28%	28%	31%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Packaging type awareness and purchase

Though over a third of Japanese consumers are aware of various alternative packaging types, purchase incidences are low

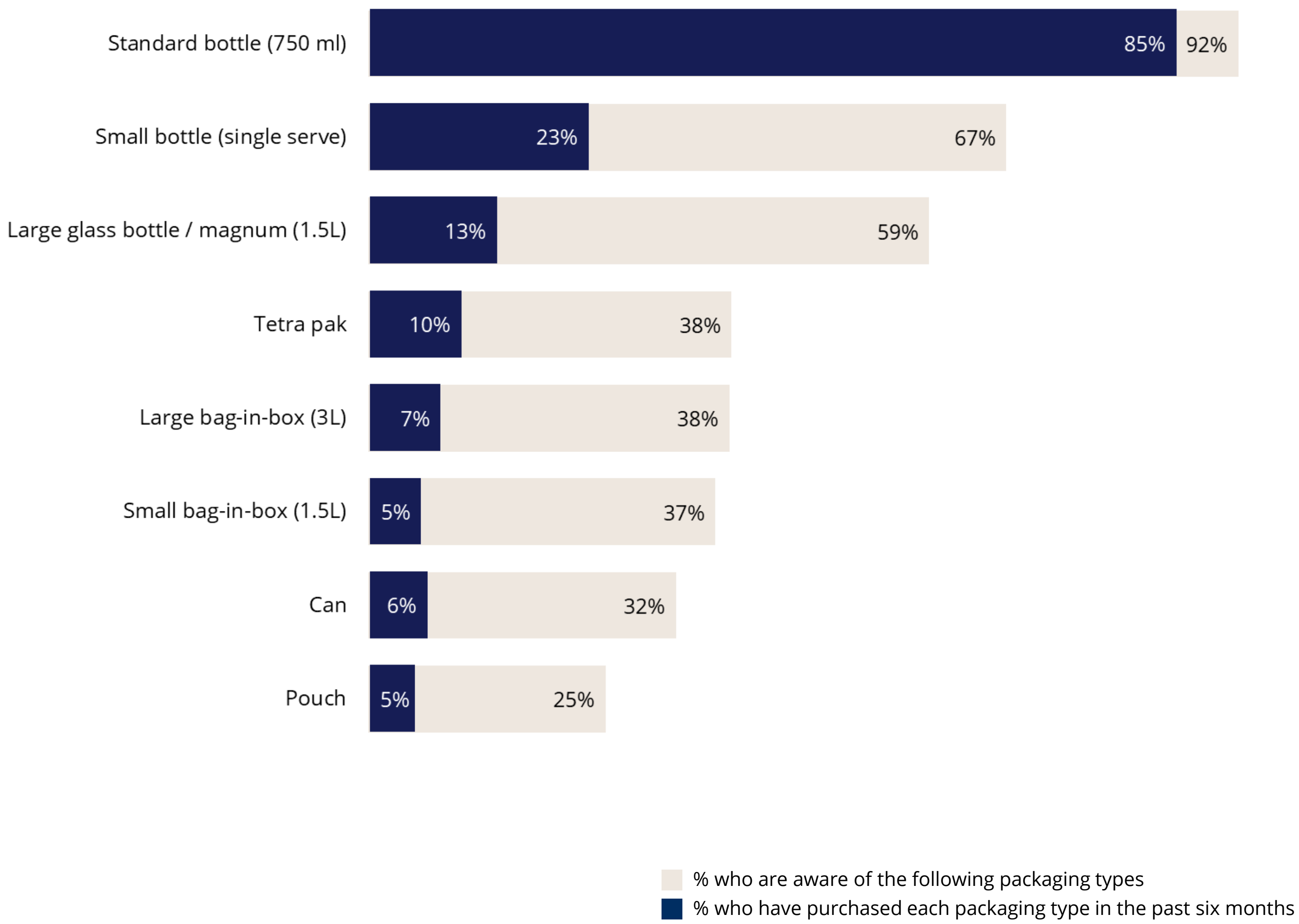
Market context:

Major producers are investing heavily in innovation and new product launches to attract younger age groups, but the industry needs to do more to educate consumers and make wine more readily available.

Executive Summary Report 2023 Japan

Packaging types: Awareness and purchase levels

% of those who are aware of or have purchased wine in the following packaging types
Base = All Japanese regular wine drinkers (n=1,021)



Source: Wine Intelligence, Vinitrac®, Japan, Apr '23, (n=1,021) Japanese regular wine drinkers

Packaging purchase

There has been a significant rise in purchases of wine in magnums compared with 2022, driven by Gen Z and Millennial consumers

Packaging purchase: Tracking

% who have purchased wine in the following packaging types
Base = All Japanese regular wine drinkers (n≥1,000)

Ranking '23		2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '22
1	Standard bottle (750 ml)	88%	85%	↓
2	Small bottle (single serve)	21%	23%	→
3	Large glass bottle / magnum (1.5L)	11%	13%	↑
4	Tetra pak	9%	10%	→
5	Large bag-in-box (3L)	9%	7%	→
6	Can	6%	6%	→
7=	Small bag-in-box (1.5L)	7%	5%	→
7=	Pouch	3%	5%	↑

Packaging purchase: by generation

% who have purchased wine in the following packaging types
Base = All Japanese regular wine drinkers (n=1,021)

Ranking '23		All Japanese Regular Wine Drinkers (n=1,021)	LDA-26 Gen Z (n=73)	27-42 Millennials (n=185)	43-58 Gen X (n=311)	59+ Boomers (n=452)
1	Standard bottle (750 ml)	85%	69%	86%	85%	87%
2	Small bottle (single serve)	23%	33%	33%	24%	17%
3	Large glass bottle / magnum (1.5L)	13%	34%	20%	13%	7%
4	Tetra pak	10%	13%	16%	11%	5%
5	Large bag-in-box (3L)	7%	6%	8%	9%	6%
6	Can	6%	15%	8%	6%	4%
7=	Small bag-in-box (1.5L)	5%	3%	9%	6%	4%
7=	Pouch	5%	3%	8%	7%	2%

= Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Japan, Apr '22, Apr '23, (n≥1,021) Japanese regular wine drinkers

Hot Topic: Consumer Sentiment

Japan Wine Landscapes

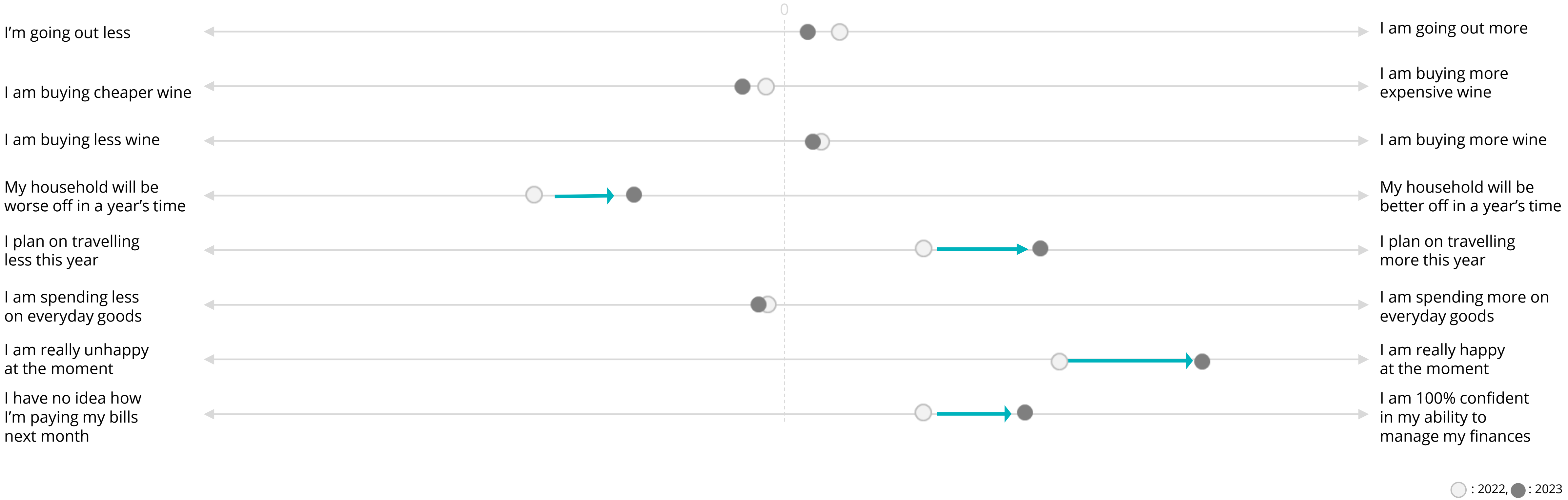
2023

Consumer sentiment

Consumer sentiment is trending more positively this year, with an increase in the proportion of consumers who are happy, feel their household will be better off in a year's time and are planning on travelling more

Consumer sentiment: tracked

Net score of % who agree with the negative statement subtracted from the % who agree with the positive statement
Minimum value: -49%, Maximum value: 43%
Base = All Japanese regular wine drinkers (n≥1,021)



Source: Wine Intelligence, Vinitrac®, Japan, Apr '22, Apr '23, (n≥1,021) Japanese regular wine drinkers

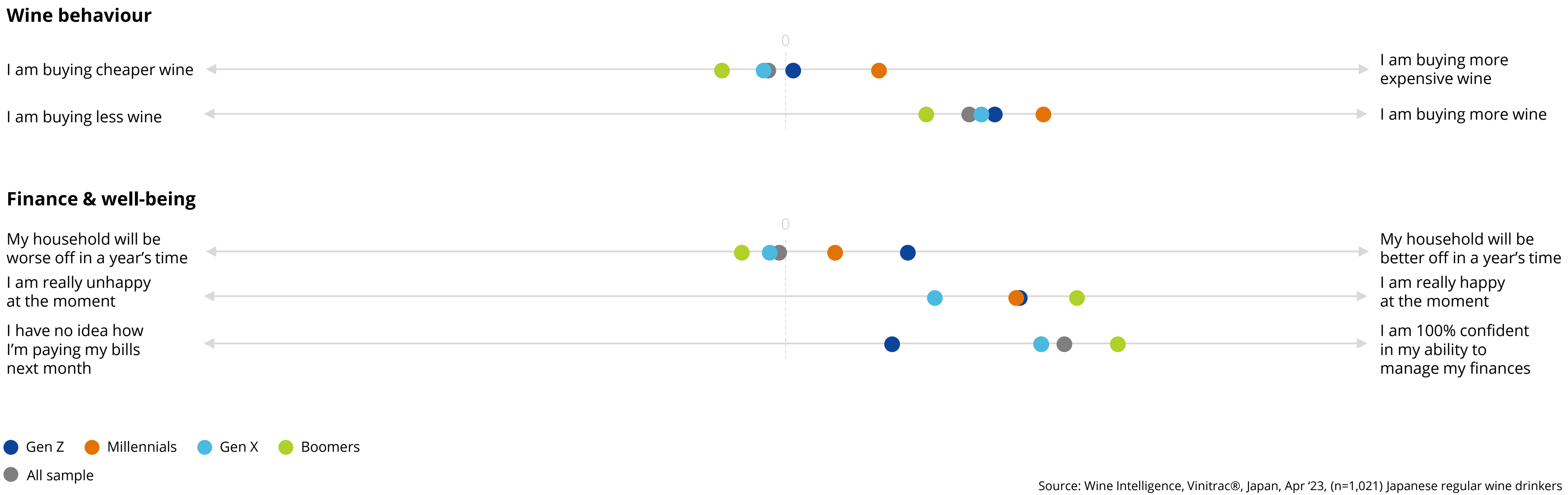
HOT TOPIC

Consumer sentiment

Gen Z are the least confident generational group regarding their finances, but have a positive outlook for the next year compared with all Japanese consumers

Consumer sentiment: by generation

Net score of % who agree with the negative statement subtracted from the % who agree with the positive statement
Minimum value: -62%, Maximum value: 62%
Base = All Japanese regular wine drinkers (n=1,021)



Source: Wine Intelligence, Vinitrac®, Japan, Apr '23, (n=1,021) Japanese regular wine drinkers

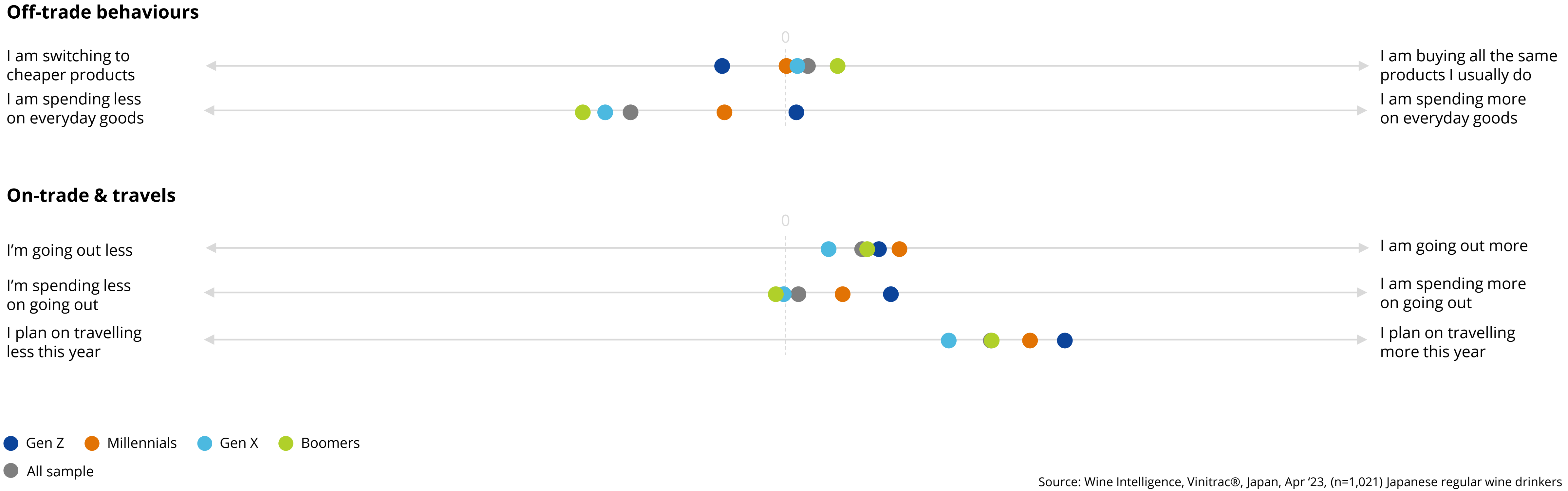
HOT TOPIC

Consumer sentiment

Though they are the least confident in their finances, Japanese Gen Z consumers are going out more and plan on travelling this year

Consumer sentiment: by generation

Net score of % who agree with the negative statement subtracted from the % who agree with the positive statement
Minimum value: -62%, Maximum value: 62%
Base = All Japanese regular wine drinkers (n=1,021)



Source: Wine Intelligence, Vinitrac®, Japan, Apr '23, (n=1,021) Japanese regular wine drinkers

Brand Health

Japan Wine Landscapes

2023

Global Wine Brand Power Index

Brand health measures included in the index

Awareness	% who have heard of each brand (when prompted with a list of brand names with logos) Base = All wine drinkers	**Brand awareness index**
Purchase	% who have bought each brand in the past 3 months Base = All wine drinkers	**Brand purchase index**
Conversion	% who have bought each brand in the past 3 months Base = Those who have heard of each brand	
Consideration	% who would consider buying each brand Base = Those who have heard of each brand	
Affinity	% who think each brand is right for people like them Base = Those who have heard of each brand	**Brand connection index**
Recommendation	% who would recommend each brand to a friend Base = Those who have heard of each brand	

Wine Brand Power Index

Japan Brand Power

The three most powerful brands in the Japanese market remain the same as in 2022, with Chilean brand Alpaca leading the way

Alpaca

1st

[yellow tail]

2nd

FOLLOW THE SUN
SUNRISE
SELECTED VINEYARDS

3rd

Japanese Brand Power Index 2023

Brand index scores have increased for nearly all brands over the past year, suggesting that wine brands are growing in relevance for Japanese consumers

Japanese Brand Power Index

The top 30 most powerful wine brands in the Japanese market based on consumer feedback from six key brand health measures
Base = All Japanese regular wine drinkers (n≥1,001)

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
1	Alpaca	99.0	=	-1.0
2	Yellow Tail	73.8	=	2.2
3	Sunrise	65.4	=	0.7
4	Santa	60.5	↑+1	3.4
5	Cono Sur	56.9	↑+2	7.1
6	Rela	56.0	=	5.1
7	Montebello - Italian wine	54.8	↑+4	7.5
8	Casillero del Diablo	53.3	↑+6	8.2
9	Pudú	52.2	↑+3	5.0
10	Carlo Rossi	51.7	↓-2	1.9
11	Manns	51.1	↓-2	3.2
12	Mouton Cadet	50.8	↑+3	6.3
13	Santa Carolina	47.0	=	0.6
14	Brancott Estate	46.8	↑+26	16.1
15	Franzia	46.7	↑+1	2.5

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
16	Frontera	46.5	↑+2	5.4
17	Montes	46.3	↑+6	8.5
18	Penfolds	45.9	↑+30	23.2
19	Baron de Lestac	44.9	↑+3	6.7
20	Jacob's Creek	43.4	↓-10	-4.1
21	Yalumba	43.4	↑+3	6.2
22	Torres	42.7	↓-5	0.9
23	Luis Felipe Edwards	42.5	↑+14	10.4
24	Wolf Blass	42.2	↑+9	8.2
25	Viña Maipo	41.8	↑+9	8.3
26	Ladera Verde	41.6	=	4.7
27	Maison Castel	41.6	↑+9	9.3
28	Villa Maria	41.4	↑+14	12.3
29	Concha y Toro	40.4	↓-10	1.7
30	Advini	40.1	↓-2	4.8

Source: Wine Intelligence, Vinitrac®, Japan, Feb '22, Apr '23, (n≥1,001) Japanese regular wine drinkers

Brand health: Consumption / awareness

While brand awareness is relatively high for all main wine brands, actual purchase rates outside the top four remain quite low

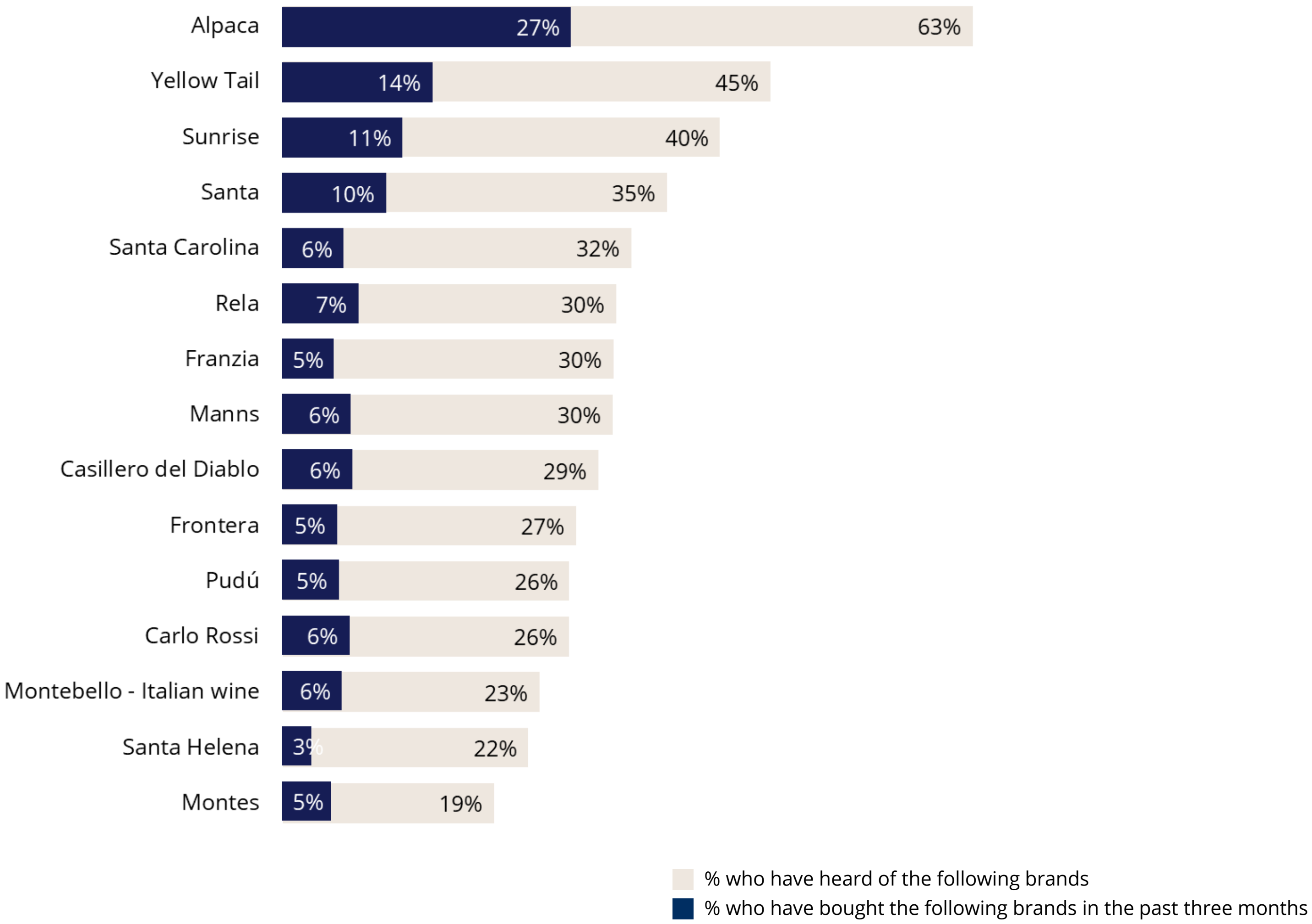
Market context:

In the past few years, there has been a surge in products with cute cartoon animal labels. These affordable and accessible wines, mostly Chilean, are often colour-coded to indicate the varietal. Examples include Alpaca from Santa Helena and Concha y Toro's Pudu.

Executive Summary Report 2023 Japan

Brand health: Top 15 awareness and consumption levels

Base = All Japanese regular wine drinkers (n=1,021)



Source: Wine Intelligence, Vinitrac®, Japan, Apr '23, (n=1,021) Japanese regular wine drinkers

Brand awareness: Tracking

Brand awareness has broadly increased across the top 30 brands in the Japanese market since 2018. This growth is most marked for the top 15

Awareness: Tracking

% who have heard of the following brands
Base = All Japanese regular wine drinkers (n≥1,000)

Ranking '23		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
1	Alpaca	**55%**	**63%**	**63%**	↑	→
2	Yellow Tail	**38%**	**44%**	**45%**	↑	→
3	Sunrise	**38%**	**38%**	**40%**	→	→
4	Santa	**24%**	**37%**	**35%**	↑	→
5	Santa Carolina	**17%**	**32%**	**32%**	↑	→
6=	Rela	**n/a**	**29%**	**30%**	n/a	→
6=	Franzia	**23%**	**33%**	**30%**	↑	→
6=	Manns	**n/a**	**31%**	**30%**	n/a	→
9	Casillero del Diablo	**25%**	**28%**	**29%**	↑	→
10	Frontera	**22%**	**29%**	**27%**	↑	→
11=	Pudú	**17%**	**25%**	**26%**	↑	→
11=	Carlo Rossi	**27%**	**28%**	**26%**	→	→
13	Montebello - Italian wine	**n/a**	**23%**	**23%**	n/a	→
14	Santa Helena	**n/a**	**n/a**	**22%**	n/a	n/a
15=	Montes	**13%**	**18%**	**19%**	↑	→
15=	Campo Viejo	**14%**	**18%**	**19%**	↑	→
17=	Torres	**17%**	**17%**	**18%**	→	→
17=	Cono Sur	**14%**	**18%**	**18%**	↑	→
19=	Gallo Family Vineyards	**12%**	**15%**	**17%**	↑	→
19=	Jacob's Creek	**15%**	**16%**	**17%**	→	→
21=	Mouton Cadet	**14%**	**16%**	**16%**	→	→
21=	Wolf Blass	**13%**	**15%**	**16%**	→	→
23=	Gato Negro	**10%**	**13%**	**15%**	↑	→
23=	San Pedro	**15%**	**13%**	**15%**	→	→
23=	Maison Castel	**n/a**	**14%**	**15%**	n/a	→
26	Villa Maria	**10%**	**14%**	**14%**	↑	→
27=	Rosemount Estate	**12%**	**12%**	**13%**	→	→
27=	Concha y Toro	**12%**	**12%**	**13%**	→	→
27=	Grande Polaire	**n/a**	**13%**	**13%**	n/a	→
30=	Peter Lehmann	**12%**	**12%**	**12%**	→	→

Results for all brands available in the data table

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Brand purchase: Tracking

Higher awareness levels have not translated into higher purchase. Few brands – particularly outside the top 10 – have dramatically increased purchase rates in the Japanese market since 2018

Purchase: Tracking

% who have bought the following brands in the past three months
Base = All Japanese regular wine drinkers (n≥1,000)

Ranking '23		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
1	Alpaca	22%	26%	27%	↑	→
2	Yellow Tail	10%	11%	14%	↑	↑
3	Sunrise	10%	9%	11%	→	↑
4	Santa	6%	9%	10%	↑	→
5	Rela	n/a	7%	7%	n/a	→
6=	Casillero del Diablo	4%	6%	6%	↑	→
6=	Manns	n/a	5%	6%	n/a	→
6=	Carlo Rossi	6%	6%	6%	→	→
6=	Santa Carolina	2%	4%	6%	↑	→
6=	Montebello - Italian wine	n/a	5%	6%	n/a	→
11=	Cono Sur	4%	6%	5%	→	→
11=	Pudú	5%	5%	5%	→	→
11=	Frontera	4%	5%	5%	→	→
11=	Franzia	4%	6%	5%	→	→
11=	Montes	2%	3%	5%	↑	→

Ranking '23		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
16	Jacob's Creek	4%	3%	4%	→	→
17=	Torres	3%	2%	3%	→	→
17=	Mouton Cadet	2%	3%	3%	→	→
17=	Campo Viejo	2%	2%	3%	→	→
17=	Villa Maria	2%	2%	3%	→	↑
17=	Rosemount Estate	1%	2%	3%	↑	↑
17=	Santa Helena	n/a	n/a	3%	n/a	n/a
17=	Gallo Family Vineyards	2%	2%	3%	→	→
24=	Wolf Blass	2%	2%	2%	→	→
24=	Ladera Verde	n/a	2%	2%	n/a	→
24=	Baron de Lestac	1%	2%	2%	→	→
24=	Les Dauphins	2%	2%	2%	→	→
24=	La Châsse	1%	1%	2%	↑	→
24=	Maison Castel	n/a	2%	2%	n/a	→
24=	Viña la Rosa	2%	1%	2%	→	→

Results for all brands available in the data table

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Brand conversion: Tracking

Brand conversion has remained broadly stable across the top 30 brands since 2018

Conversion: Tracking

% who have bought the following brands in the past three months
Base = Those who have heard of each brand

Ranking '23		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
1	Alpaca	39%	41%	42%	→	→
2	Yellow Tail	28%	26%	31%	→	↑
3	Cono Sur	29%	33%	30%	→	→
4	Sunrise	26%	23%	28%	→	→
5	Santa	24%	23%	27%	→	→
6=	Carlo Rossi	21%	20%	24%	→	→
6=	Montebello - Italian wine	n/a	20%	24%	n/a	→
6=	Montes	13%	18%	24%	↑	→
9=	Rela	n/a	23%	23%	n/a	→
9=	Penfolds	29%	17%	23%	→	→
9=	Casillero del Diablo	17%	22%	23%	→	→
12=	Jacob's Creek	25%	21%	22%	→	→
12=	Rosemount Estate	12%	14%	22%	↑	↑
14=	Villa Maria	18%	13%	21%	→	↑
14=	Manns	n/a	16%	21%	n/a	→
16=	Mouton Cadet	18%	20%	20%	→	→
16=	Les Dauphins	25%	22%	20%	→	→
16=	Baron de Lestac	17%	21%	20%	→	→
16=	La Châsse	11%	16%	20%	→	→
16=	Pudú	26%	21%	20%	→	→
16=	Ladera Verde	n/a	18%	20%	n/a	→
16=	Hardys	14%	17%	20%	→	→
23=	Brancott Estate	16%	9%	19%	→	↑
23=	Yalumba	18%	16%	19%	→	→
23=	Frontera	17%	19%	19%	→	→
23=	Torres	16%	14%	19%	→	→
23=	Viña la Rosa	21%	14%	19%	→	→
28=	Advini	18%	10%	18%	→	→
28=	Santa Carolina	10%	14%	18%	↑	→
28=	Aresti	n/a	13%	18%	n/a	→

Results for all brands available in the data table

= Represents equal ranking
Grey shading: low sample size (n<50)
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Brand consideration: Tracking

Brand consideration has remained stable in Japan since 2018

Consideration: Tracking

% who would consider buying the following brands
Base = Those who have heard of each brand

Ranking '23		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
1	Alpaca	58%	56%	60%	→	→
2	Cono Sur	53%	50%	55%	→	→
3=	Brancott Estate	32%	34%	53%	↑	↑
3=	Penfolds	53%	40%	53%	→	→
5	Yellow Tail	51%	49%	52%	→	→
6=	Luis Felipe Edwards	n/a	38%	50%	n/a	→
6=	Mouton Cadet	39%	48%	50%	→	→
6=	Viña Maipo	42%	37%	50%	→	↑
9=	Montebello - Italian wine	n/a	47%	48%	n/a	→
9=	Santa	46%	43%	48%	→	→
11=	Sunrise	48%	44%	46%	→	→
11=	Casillero del Diablo	42%	43%	46%	→	→
13=	Villa Maria	40%	32%	45%	→	↑
13=	Baron de Lestac	36%	44%	45%	→	→
13=	Rela	n/a	40%	45%	n/a	→
13=	Yalumba	46%	37%	45%	→	→
13=	Pudú	45%	42%	45%	→	→
18=	Carlo Rossi	39%	39%	44%	→	→
18=	Concha y Toro	40%	43%	44%	→	→
18=	Wolf Blass	44%	40%	44%	→	→
18=	Matua	n/a	43%	44%	n/a	→
18=	Advini	31%	33%	44%	→	→
23=	Frontera	35%	34%	43%	→	↑
23=	J.P. Chenet	33%	33%	43%	→	→
23=	Ladera Verde	n/a	48%	43%	n/a	→
26=	Montes	32%	39%	42%	→	→
26=	La Châsse	30%	38%	42%	→	→
28=	Viña la Rosa	30%	40%	41%	→	→
28=	Jacob's Creek	49%	44%	41%	→	→
28=	Les Dauphins	40%	42%	41%	→	→

Results for all brands available in the data table

= Represents equal ranking
Grey shading: low sample size (n<50)
n/a = tracking unavailable for this wave
Note: Brancott Estate's logo changed between 2022 and 2023 which has likely affected its incidence rates
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Brand affinity: Tracking

Despite solid brand awareness, affinity rates are quite low in the Japanese market, suggesting consumers feel relatively little emotional attachment to brands

Affinity: Tracking

% who think the following brands are right for people like them
Base = Those who have heard of each brand

Ranking '23		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
1	Alpaca	43%	46%	49%	→	→
2	Cono Sur	36%	40%	42%	→	→
3	Yellow Tail	36%	39%	40%	→	→
4	Mouton Cadet	23%	26%	39%	↑	↑
5=	Yalumba	35%	19%	38%	→	↑
5=	Penfolds	24%	26%	38%	→	→
7=	Rela	n/a	32%	37%	n/a	→
7=	Baron de Lestac	24%	34%	37%	→	→
9=	Pudú	30%	31%	36%	→	→
9=	Sunrise	32%	32%	36%	→	→
9=	Montebello - Italian wine	n/a	27%	36%	n/a	↑
12=	Santa	31%	32%	34%	→	→
12=	Brancott Estate	15%	20%	34%	↑	↑
12=	Luis Felipe Edwards	n/a	27%	34%	n/a	→
12=	Maison Castel	n/a	23%	34%	n/a	↑
16=	Viña Maipo	29%	20%	32%	→	↑
16=	Advini	13%	22%	32%	↑	→
16=	Jacob's Creek	28%	33%	32%	→	→
19=	Carlo Rossi	30%	26%	31%	→	→
19=	Manns	n/a	27%	31%	n/a	→
21=	Peter Lehmann	16%	16%	30%	↑	↑
21=	Viña la Rosa	26%	23%	30%	→	→
23=	Casillero del Diablo	20%	27%	29%	↑	→
23=	Torres	25%	27%	29%	→	→
23=	Montes	20%	25%	29%	→	→
23=	J.P. Chenet	29%	21%	29%	→	→
23=	Concha y Toro	23%	26%	29%	→	→
23=	Les Dauphins	28%	29%	29%	→	→
29=	Wolf Blass	23%	26%	28%	→	→
29=	Villa Maria	25%	21%	28%	→	→

Results for all brands available in the data table

= Represents equal ranking
Grey shading: low sample size (n<50)
n/a = tracking unavailable for this wave
Note: Brancott Estate's logo changed between 2022 and 2023 which has likely affected its incidence rates
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Brand recommendation: Tracking

Recommendation levels for wine brands have increased in the Japanese market since 2018, especially for those ranking in the top 15

Recommendation: Tracking

% who would recommend the following brands to a friend
Base = Those who have heard of each brand

Ranking '23		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
1	Brancott Estate	17%	15%	42%	↑	↑
2=	Alpaca	35%	36%	39%	→	→
2=	Luis Felipe Edwards	n/a	27%	39%	n/a	→
2=	Cono Sur	26%	39%	39%	↑	→
5	Mouton Cadet	26%	24%	38%	↑	↑
6=	Ladera Verde	n/a	28%	37%	n/a	→
6=	Penfolds	23%	21%	37%	→	↑
6=	Montebello - Italian wine	n/a	26%	37%	n/a	↑
9	Baron de Lestac	23%	27%	35%	→	→
10	Yellow Tail	28%	30%	34%	↑	→
11	Yalumba	23%	21%	33%	→	→
12=	Les Dauphins	33%	23%	32%	→	→
12=	J.P. Chenet	14%	18%	32%	↑	↑
12=	Montes	16%	22%	32%	↑	↑
15=	Concha y Toro	18%	19%	31%	↑	↑

Ranking '23		2018 (n=1,000)	2022 (n=2,049)	2023 (n=1,021)	Tracking vs. '18	Tracking vs. '22
15=	La Châsse	7%	21%	31%	↑	→
15=	Wolf Blass	22%	24%	31%	→	→
15=	Torres	22%	24%	31%	→	→
15=	Advini	22%	19%	31%	→	↑
20=	Viña Maipo	21%	20%	30%	→	↑
20=	Casillero del Diablo	21%	24%	30%	↑	↑
20=	Sunrise	27%	27%	30%	→	→
20=	Beringer	17%	27%	30%	→	→
20=	Viña la Rosa	21%	22%	30%	→	→
25=	Maison Castel	n/a	20%	29%	n/a	↑
25=	Carlo Rossi	23%	23%	29%	→	→
27	Rosemount Estate	15%	19%	28%	↑	→
28=	Pudú	21%	26%	27%	→	→
28=	Santa	27%	25%	27%	→	→
28=	Hardys	26%	24%	27%	→	→

Results for all brands available in the data table

= Represents equal ranking
Grey shading: low sample size (n<50)
n/a = tracking unavailable for this wave
Note: Brancott Estate's logo changed between 2022 and 2023 which has likely affected its incidence rates
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000) Japanese regular wine drinkers

Research Methodology

Japan Wine Landscapes

2023

Research methodology

QUANTITATIVE

Data has been collected in the Japanese market since March 2018

The waves March 2018 and April 2022 were tracked against April 2023

Data was gathered via Wine Intelligence's Vinitrac® online survey

Respondents were screened to ensure that they were at least 18 years old; drank red, white or rosé wine at least once a month; and bought wine in the off-trade or in the on-trade

Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

The data is representative of Japanese regular wine drinkers in terms of gender* and age

The distribution of the sample is shown in the table:

		Mar-18	Apr1+Apr2-22	Apr-23
	n=	1,000	2,049	1,021
Gender	Male	47%	44%	52%
	Female	53%	56%	48%
	Total	***100%***	***100%***	***100%***
Age	20-24	8%	2%	6%
	25-34	14%	7%	9%
	35-44	13%	10%	13%
	45-54	16%	16%	16%
	55 and over	49%	65%	55%
	Total	***100%***	***100%***	***100%***

Source: Wine Intelligence, Vinitrac®, Japan, Mar '18, Apr '22, Apr '23, (n≥1,000)
Japanese regular wine drinkers

**Please note that additional Gender categories were also surveyed. These categories fell naturally in the sample and were not enforced via quotas*

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