SPARKLING WINE IN THE JAPANESE MARKET

JUNE 2017

Sparkling wine in the Japanese market 2017

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GBP 1,500
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EUR 1,860

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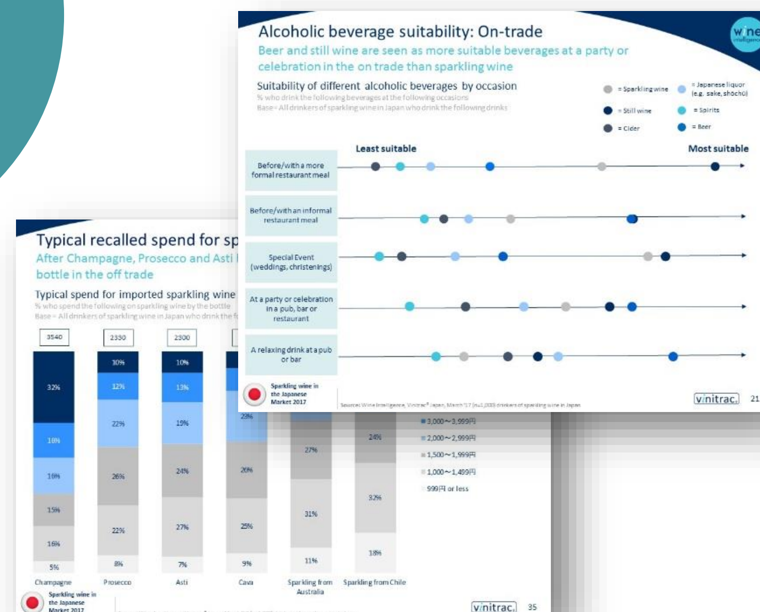
The Sparkling wine in the Japanese market 2017 report includes:

- 66-page PowerPoint report with the latest information regarding the Japanese sparkling wine market, supported by:
  - Wine Intelligence Vinitrac®
  - Wine Intelligence market experience



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Excerpts from the introduction

Sparkling wine in the Japanese market 2017

Whilst Japan ranks 11th in terms of total volume of sparkling consumed within in a market, the per capita consumption remains low, demonstrating that this is a market of sparkling wine drinkers who enjoy their fizz typically infrequently.

Sparkling wine has strong competition from other alcoholic beverages, with sparkling wine drinkers in Japan drinking beer, wine, Japanese liquor, cider, and spirits more frequently than the sparkling wine they enjoy – again, indicating that it is currently a more occasional choice rather than a frequent part of their drinking repertories. In fact, around half of sparkling wine drinkers drink sparkling wine less than once a month.

The Japanese sparkling wine market is dominated by imported sparkling wine, with 98% of the volume coming from outside Japan. In particular, French and Spanish sparkling wine make up almost two thirds of the imported volume, and a significant volume increase seen for sparkling wine from Chile. When it comes to the sparkling sub-category repertoire, Champagne has the largest consumer reach, followed by sparkling wine from Chile and Australia.

Sparkling wine in Japan is not exclusively a female beverage choice as 48% of sparkling wine drinkers are men, whilst Prosecco and Asti both have significantly more men than women consuming them. A broad age range of Japanese consumers enjoy sparkling wine, with Cava, Prosecco, and Asti all having significantly more sparkling drinkers aged in their 30s, an indication of these consumers more adventurous beverage repertoire.

Unsurprisingly, Champagne scores highest for quality perceptions, followed by Cava, Prosecco and Asti, with sparkling wine from Chile receiving the lowest quality perceptions. However, whilst sparkling wine from Chile does not perform so well in term of quality perceptions, it does score highest in terms of consumers' perceptions for value for money. Interestingly, Cava is the sparkling wine sub-category that manages to have the best balance in terms of perceived quality and value for money.

When asked to name sparkling wine brands unprompted, Moët & Chandon and Dom Perignon are recalled most frequently reflecting the strong awareness levels of high quality Champagne in this market. However, when prompted with brand logos, Martini is the most recognised brand. In terms of purchase levels, Moët & Chandon and Alpaca are equal, followed by Martini, Chandon, and Sunrise. When sparkling wine drinkers are asked which brands they would be most likely to recommend, it is the well established French Champagne houses of Moët & Chandon, Krug, and Veuve Cliquot that lead.

Research methodology

Sampling and quotas used for Vinitrac® Japan

- The data for this study was collected in March 2017
- Data was gathered via Wine Intelligence's Vinitrac® online survey of drinkers of sparkling wine in Japan :
  - 2017 – 1,000 all sparkling wine drinkers
- Respondents meet the following requirements:
  - Adult drinking age
  - Permanent resident of the country
  - Drink sparkling wine (for sparkling wine category)
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The survey was quota-based and post-weighted to be representative of Japanese sparkling wine drinkers and sparkling wine drinkers in terms of age and gender
- The distribution of the sample can be seen in the table to the right

Research methodology

IWSR 2017

- Measures from the IWSR correspond to actual wine consumption figures. This means sales into the trade (on + off trade)
- The IWSR visits each market each year. Discussions are held with key local experts in the market including importers, producers, grey market operators, duty free operators, and supermarket/hypermarket buyers.
- All volume data is given in thousand 9 Litre Cases
- In the breakdown by country of origin, IWSR includes (depending on the market and the size of the category) the following two categories: 'Other' and 'International'
  They are defined as followed:
  - 'Other': category including wine blends (normally in bulk or bottled without specified country of origin) and wines from other countries with volumes too small to break out separately
  - 'International': Category including wine brands that have wines from various countries
- The IWSR includes the following types of wine in its definition of 'wine':

Definitions	
WINE =	
Still light wine +	Sub-categories
Sparkling (Champagne & other) +	
Fortified +	
Light aperitifs (vermouth…) +	
Other (rice wines…)	

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