

# Japan Food and Drink Report Q2 2015

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## Abstracts

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BMI View: Japan emerged from recession in Q414 thanks to a recovery in net exports, with real GDP growth coming in at 2.2% quarter-on-quarter. We estimate GDP growth for 2014 at 0.3% and we forecast growth of 0.8% in 2015, as low oil prices continue to support positive growth. In previous quarters, one of the main reasons for the contraction of output was the depreciation of the yen against the US dollar. In addition, the April 2014 consumption tax hike directly affected consumers. We estimate that real private consumption declined by 1.2% in 2014. We forecast private consumption growth to stand at 0.6% in 2015 and 1.0% in 2016, but these figures will not be sufficient to drive significant growth in food consumption over our forecast period.

### Headline Industry Data (local currency)

Per capita food consumption (local currency) growth (y-o-y) in 2015: +0.3%;  
CAGR to 2019: +0.5%.

Alcoholic drinks value (local currency) sales growth (y-o-y) in 2015: +0.6%;  
CAGR to 2019: +0.9%.

Soft drinks value (local currency) sales growth (y-o-y) in 2015: +3.8%; CAGR to  
2019: +3.2%.

Total mass grocery retail value (local currency) sales growth (y-o-y) in 2015:  
+0.4%; CAGR to 2019

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