

# Japan Food and Drink Report Q4 2015

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## Abstracts

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BMI View: Japan's Q215 real GDP growth release was a mixed bag. In quarter-on-quarter terms the economy posted a large contraction of 1.6% in annualised, seasonally adjusted terms (q-o-q SAAR) dragged lower by weakness in private consumption and net exports. In year-on-year terms, though, the economy grew by 0.7% after four quarters of contraction. However, economically speaking, the demographic situation facing Japan is atrocious. We believe that this factor alone will ensure the economy fails to grow above 1.0% per annum over the coming decade. Japan's population has been in decline since 2004 and this is projected to intensify over the coming years. As a result, growth in the food, drink and mass grocery retail sectors will be minimal.

### 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:  
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