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Japan’s beer tax overhaul lifts supermarket beer sales 19.5%

Early supermarket data suggest shoppers quickly returned to standard beer from lower-tax substitutes in the first three days.

Tuesday, October 6, 2026



Beer sales in Japanese supermarkets jumped in the first three days after Japan changed its tax treatment of beer and beer-like drinks, while lower-tax substitutes fell sharply, according to point-of-sale data published Tuesday by Merchandising-On’s RDS-POS service.

From Oct. 1 through Oct. 3, unit sales of beer rose 19.5% from the comparable period a year earlier after adjusting for the day of the week, the data provider said. Over the same three-day window, happoshu sales dropped 25.6% and the category known commercially as “new genre” fell 35.1%.

The figures cover nationwide supermarket sales in Japan and compare Oct. 1-3, 2026, with Oct. 2-4, 2025. The dataset reports units sold through supermarket POS systems, not liters sold, revenue, or average prices.

The early reading offers one of the first measurable signs that the tax change may be pushing shoppers back toward standard beer from categories that had long benefited from lower tax rates. Even so, the provider said the figures are only a three-day estimate and should be treated with caution because they are limited to supermarkets and may reflect factors beyond the tax change, including promotions, weather, pricing, delayed purchases before the reform, and product changes.

Japan’s revised tax schedule took effect on Oct. 1. Under the change, the tax on beer-related drinks was unified at ¥54.25 per 350 milliliters. That lowered the tax burden on conventional beer and raised it for happoshu with less than 25% malt content and for products sold as “new genre,” a commercial classification used in the retail data. The source said that “new genre” in the POS data does not exactly match the legal tax definition.

The move marks a sharp shift from September, when beer sales had been down 5% from a year earlier. The change from a 5% decline in September to a 19.5% increase in the Oct. 1-3 period amounts to an improvement of 24.5 percentage points, although the two figures are not directly comparable because one covers a full month and the other only three days. Over the same comparison, happoshu worsened by 21.5 percentage points and “new genre” by 19.9 points.

The day-to-day numbers show the break more clearly. Beer sales were still negative in the days before the tax change, falling 17.8% on Sept. 26, 11.2% on Sept. 27, 10.8% on Sept. 28 and 20.1% on Sept. 29, compared with the same weekdays a year earlier. After the new tax took effect, beer turned positive immediately, rising 22.3% on Oct. 1, 17.3% on Oct. 2 and 19.3% on Oct. 3.

The gains were visible in several major brands and package sizes. Among selected single-can products tracked in the supermarket data, Kirin Ichiban Shibori in a 350-milliliter can rose 57.2% from a year earlier. Suntory Nama Beer in a 500-milliliter can increased 49.4%, Sapporo Black Label in a 500-milliliter can climbed 48.5%, and Asahi Super Dry in a 350-milliliter can was up 20.7%.

Japan’s beer tax structure has long shaped the market by encouraging brewers to develop lower-tax alternatives to standard beer. Happoshu and later “new genre” products gained share over many years because they could be sold at lower prices than regular beer. The latest tax revision reduces that gap by making standard beer relatively cheaper from a tax standpoint while increasing the burden on some substitutes.

That change in relative taxation appears to be reflected in the supermarket numbers almost immediately, but the scale of the shift may also have been influenced by short-term buying behavior around the policy change. Consumers may have stocked up on lower-tax categories before Oct. 1 and then switched purchases afterward, which could make the initial decline in substitutes and the early rebound in beer look larger than the underlying trend. Discounting by retailers and brewers could also have played a role, as could temperature and holiday-related shopping patterns.

Because the data cover only supermarkets, the results do not show what happened in convenience stores, drugstores, restaurants, bars, or online channels. They also do not indicate whether total alcohol demand changed, only how many units were sold in the reported categories. Without volume, revenue, and price data, it is not possible to tell from this release how much of the shift reflects changes in household spending, package mix, or actual drinking volumes.

Merchandising-On dated the release Oct. 6 and described it as a rapid estimate based on RDS-POS supermarket data. The company said the figures provide early evidence of redistribution across beer-related categories after the tax revision, but it also said POS data alone do not prove causation.