

Mineral Water Market in Japan: Key Research Findings 2014

◆ Research Outline

Yano Research Institute has conducted a study on the domestic mineral water market with the following conditions:

1. Research period: November to December, 2014
2. Research target: Beverage manufacturers, water delivery companies, etc
3. Research methodologies: Face-to-face interviews by the specialized researchers, survey via telephone, and questionnaire

What are Mineral Water Market and Water Home Delivery Market?

Mineral water in this research indicates water originated from ground water bottled in plastic or glass bottles and sold commercially. The water delivery business is a packaged business of delivering water and lending a water server. Such water delivery business without lending a server is not included in this research.

◆ Key Findings

■ Size of FY2013 Mineral Water Market Attained 262.0 Billion Yen, 105.0% of Prior Year, Projected to Achieve 265.5 Billion Yen in FY2014, 101.3% of Previous Year

The domestic mineral water market for FY2013 attained 262.0 billion yen, 105.0% of the size in the previous fiscal year. The market is expected to reach 265.5 billion yen in FY2014, 101.3% of the size of the last fiscal year, achieving four consecutive years of growth since FY2011, based on the shipment value from manufacturers. In addition to the daily use of mineral water in large bottles or through water server has becoming usual, the record-breaking heat in the summer of FY2013 increased the sales of mineral water in small bottles to work as a countermeasure of heatstroke. Driven by flavor water and sparkling water, the market in FY2014 is likely to maintain the rising tendency.

■ FY2013 Water Delivery Business Attained 103.1 Billion Yen, 112.2% of Previous Year to Mark Double-Digit Growth, FY2014 Business Projected to Achieve 109.5 Billion Yen, 106.2% of Prior Year

Size of the water delivery business in FY2013 based on end-user sales achieved 103.1 billion yen, 112.2% of the size in the previous fiscal year. Although some of the reasons that triggered people to use mineral water, such as renewed anxiety against tap water right after the Great East Japan Earthquake; and a habit of storing water both for daily-use and for emergency, may have die down average number of bottles bought by existing customers and number of newly registered customers increased, because of the needs to quench the thirst in the record-breaking heat of the summer, which is the essential value of water. The market in FY2014, on the other hand, sees difficulty to expand both the number of new customers and the bottles purchased, due to a reaction of consumption tax increase and the bad weather in the summer time, unlike what it was in the previous year.

◆ **Report format:**

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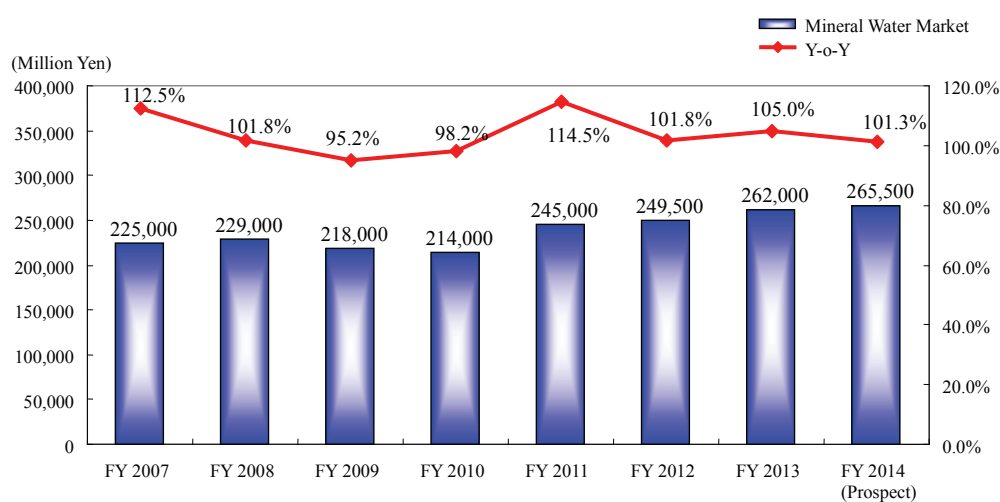
Language: Japanese

Format: 496 pages in A4 format

Price: 105,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

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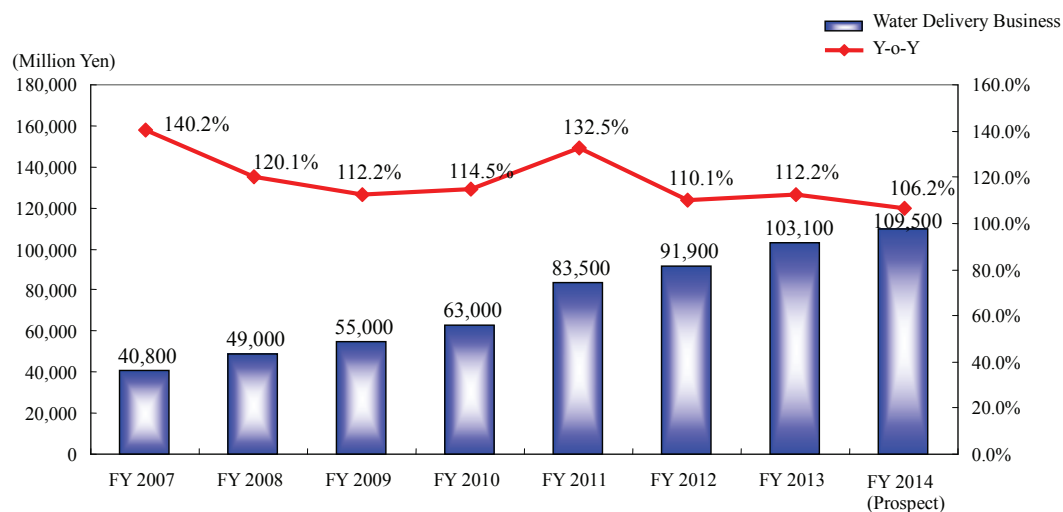
■ **Figure 1: Transition of Mineral Water Market Size**



Notes:

1. The figure is based on shipment volume from manufacturers.

■ **Figure 2: Transition of Estimated Size of Water Delivery Business Market**



Notes:

2. The figure is based on the end-user sales.

3. The water delivery business is a packaged business of delivering water and lending a water server. Such water delivery business without lending a server is not included in this research.