

Mineral Water Market in Japan: Key Research Findings 2016

◆ Research Outline

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

1. Research period: December 2016 to February 2017
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 and Water Delivery Business Markets?

Mineral water in this research indicates water originated from ground water bottled in plastic or glass bottles and sold commercially or for business use. The water delivery business consists of a packaged service of delivering water and lending a water server to households and offices. Such water delivery business without lending a server and home delivery services of plastic-bottled water are not included in this research.

◆ Key Findings

■ **Mineral Water Market in FY2015 Attained 288.5 Billion Yen, 108.1% on Y-o-Y Basis, Projected to Achieve 300.5 Billion Yen for FY2016, 104.2% on Y-o-Y Basis**

The domestic mineral water market in FY2015 attained 288.5 billion yen, 108.1% of the size of the previous fiscal year, and is expected to achieve 300.5 billion yen in FY2016, 104.2% of the size of the preceding fiscal year, based on the shipment values at manufacturers. In addition to mineral water becoming widely accepted in daily lives of consumers, its natural and healthy impressions are boosting the market. Furthermore, the consciousness of storing water, which once weakened, has been raised once again ever since the earthquake hit Kumamoto in April 2016. Also, flavored water, sparkling water, and other derivative products becoming hot sellers among top-selling makers have been contributing to the prosperity of the market.

■ **Water Delivery Business in FY2015 Attained 115.0 Billion Yen, 105.9% on Y-o-Y Basis, Projected to Achieve 120.5 Billion Yen for FY2016, 104.8% on Y-o-Y Basis**

The water delivery business in FY2015 based on end-user sales achieved 115.0 billion yen, 105.9% of the size of the previous fiscal year, and is expected to continue growing to attain 120.5 billion yen by FY2016, 104.8% of the size of the preceding fiscal year.

On the other hand, however, the growth rate has been quietened down, indicating the market to be in transition from growing to matured period. Number of companies entering the market that had once kept on increasing after the Great East Japan Earthquake is now on the decline. There even are those companies that transfer the business or withdraw from the market.

◆ Report Format:

Published report: "Mineral Water Market 2017"

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Price: 110,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

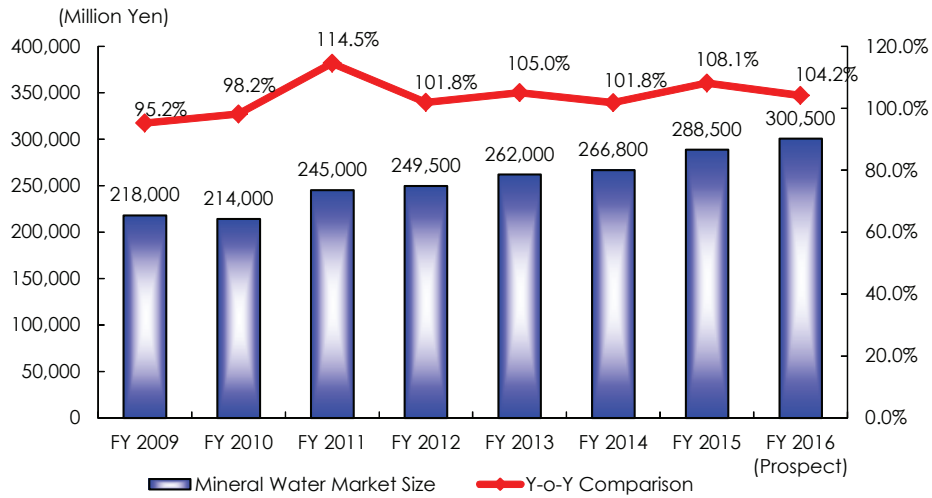
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■ **Figure 1: Transition of Size of Mineral Water Market**

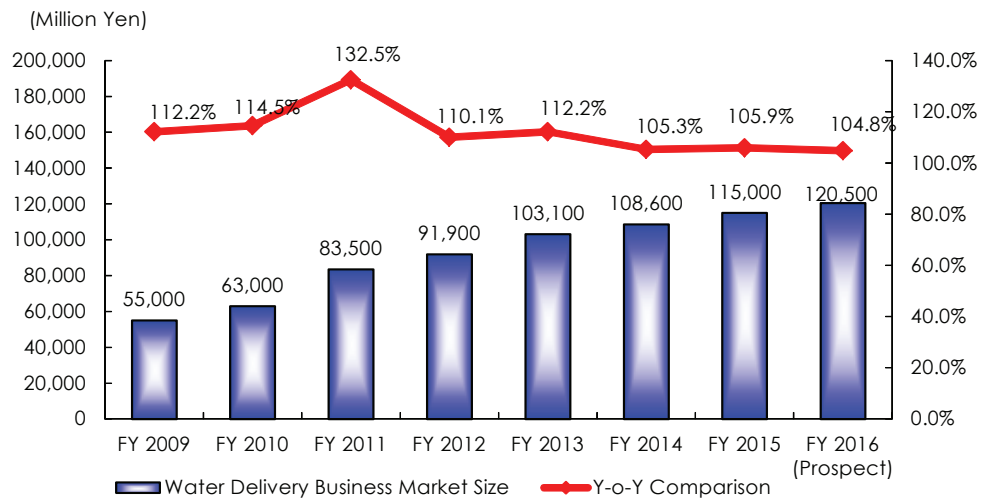


Calculated by Yano Research Institute

Notes:

1. The market size is based on the shipment values at manufacturers.

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



Calculated by Yano Research Institute

Notes:

2. The market size is based on the end-user sales.
3. The water delivery business is a packaged business of delivering water and lending a water server. However, size of the water delivery business excludes the fees related to water servers.