

Japan Bottled Water Market Assessment, By Type [Still Water, Sparkling Water, Functional Water, Others], By Packaging [PET Bottles, Glass Bottles, Biodegradable Packaging, Metal Cans, Others], By End-user [Individual, Commercial], By Distribution Channel [Convenience Stores, Grocery Shops, Internet Retailing, Supermarkets/Hypermarkets, Others], By Region, Opportunities, and Forecast, FY2017-FY2031F

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Abstracts

Japan Bottled Water Market presents a compelling landscape marked by a confluence of factors that drive its growth and evolution. The rapid expansion of the market can be attributed to the flourishing tourism sector and a growing awareness among consumers regarding its health advantages. Furthermore, the market's growth is propelled by the introduction of numerous bottled water brands that provide a range of flavors and appealing packaging.

The market size was estimated at USD 4.7 billion in FY2023 and is anticipated to reach USD 6.7 billion by FY2031, witnessing a CAGR of 4.6% during the forecast period FY2024-2031. An additional factor propelling the market is the robust representation of both global and domestic brands, providing consumers with a diverse range of options to cater to various preferences and requirements. Innovations in packaging, such as eco-friendly and biodegradable options, are also attracting environmentally conscious consumers. Japan's unique geographical landscape, prone to natural disasters, including earthquakes and tsunamis, has led to a heightened awareness of emergency preparedness. As a result, there is a growing trend to stockpile bottled water for

emergencies, further boosting the market. The flourishing tourism sector in the country significantly contributes to the demand for bottled water. Tourists frequently opt for bottled water as a precautionary measure, given the unfamiliarity with the quality of local tap water, thereby boosting its demand. The development of unique flavours and types of bottled water catering specifically to tourists, further drives sales.

Besides this, technological advancements in water purification and bottling processes ensure a high standard of water quality and safety. The increased trust in these processes has led to consumer confidence in bottled water products, bolstering the market's growth. In alignment with this, stringent government regulations and industry standards in Japan ensure the quality and safety of bottled water. This fosters trust among consumers and stimulates growth in the market. Moreover, Japan's widespread distribution channels, including convenience stores, supermarkets, and vending machines, guarantee convenient access to bottled water for consumers nationwide. This accessibility profoundly influences market demand. Factors such as technological advancements and inventive marketing strategies also propel the market.

Upsurge in Advertising and Marketing Expenditure Propelling the Market Growth

Japan Bottled Water Market is experiencing accelerated growth, primarily fuelled by a notable upsurge in advertising and marketing expenditure. Key industry players, including giants like Suntory Holdings Limited and Coca-Cola Bottlers Japan Holdings Inc., strategically invest in promotional activities to enhance brand visibility and consumer engagement. This heightened focus on marketing initiatives drives product awareness and influences purchasing decisions. As consumer preferences evolve, the industry's dynamic response through increased advertising spending positions it for sustained growth, solidifying bottled water's status as a preferred beverage choice in the Japanese market.

In November 2022, Asahi Group Holdings, Ltd., a leading Japanese beer brewer, introduced warmed-up mineral water named Oishi Mizu Tennensui Sayu. Though lacking unique flavors, the hot beverage aimed to provide consumers with a caffeine-free option for body warmth. The drink was heated to around 50°C to 60°C, claimed by Asahi as the 'optimum temperature for hot water'.

Rising Health Consciousness Driving the Demand for Mineral Water

In Japan, tap water is known for its safety and is considered suitable for direct consumption, making the daily purchase of bottled water unnecessary for many.

Despite this, there is a noticeable uptrend in the sales of bottled mineral water. This rise can be attributed to an increasing consciousness about health among the population, prompting a growing number of individuals to opt for bottled mineral water as a choice for hydration, even in a nation where tap water is considered reliably safe. The surge in health awareness has become a significant factor influencing the preferences and purchasing behaviours of consumers in Japan. In August 2022, Kosme, a health and beauty products group with offices in Jakarta and Surabaya, introduced a new bottled mineral water named Jiwater in Indonesia and Japan. Jiwater was produced utilizing cutting-edge mineral water processing technology from Japan, ensuring a pH level between 7.5 and 8, considered optimal for maintaining good health.

Market Growth Being Restrained by Pollution Caused by Disposable Plastic Bottles

The market faces a pressing issue with environmental pollution stemming from the widespread use of single-use plastic bottles. The market's reliance on these bottles has contributed significantly to plastic pollution, raising environmental concerns. The annual production of plastic bottles in Japan has surged significantly, reaching an astonishing 23.2 billion from 14 billion in 2004. Despite the nation's advanced recycling technology, roughly 2.6 billion bottles are either incinerated, disposed in landfills, or end up in waterways and oceans each year. Recognizing this environmental impact, there is a growing call for sustainable packaging alternatives and eco-friendly initiatives within the industry. As awareness about environmental conservation increases among consumers, the market is witnessing a shift towards sustainable practices, with the industry under pressure to adopt eco-friendly alternatives and reduce its ecological footprint. This shift is not only crucial for environmental sustainability but also aligns with changing consumer expectations for responsible and environmentally conscious products.

Impact of COVID-19

The COVID-19 pandemic initially disrupted the Japan Bottled Water Market, causing shifts in consumer habits and supply chain interruptions. With lockdowns impacting on-the-go lifestyles, demand was temporarily dipped, especially in certain channels. However, as health consciousness surged, bottled water became a safe hydration option. Trusted brands emphasizing purity flourished, and e-commerce saw a notable uptick in sales due to contactless shopping preferences. Despite short-term challenges, the market showcased resilience, adapting to changing consumer needs and leveraging online platforms. The pandemic underscored the importance of bottled water, aligning with heightened health and safety priorities.

Key Players Landscape and Outlook

In Japan Bottled Water Market, key players shape the industry's landscape with a focus on innovation and quality. Major companies such as Suntory Holdings Limited, Coca-Cola Bottlers Japan Holdings Inc., and Kirin Holdings Company, Limited dominate the market, leveraging their extensive distribution networks and brand recognition. The market outlook is optimistic, driven by increasing health consciousness and a preference for convenient and safe hydration options. There is a growing trend toward functional and premium water products, with companies investing in research and development to meet evolving consumer demands. The competitive landscape is expected to witness further dynamism as players strive to capitalize on the rising demand for bottled water in Japan. In December 2021, Suntory Group revealed its global commitment to utilize 100% sustainable PET bottles for its Japanese mineral water brand, Suntory Tennensui, by the year 2030.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

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