

Bottled Water - China - February 2013

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In this report we answer the key questions:

"Packaged water has only been sold in China for a little over 30 years. The category has posted significant growth due to the market's young age, with volume sales growing at a CAGR of 24.4% over the past five years. The category posted volume sales of 18,119 million litres in 2007, reaching nearly 47,890 million litres in 2011, and an expected 54,048 million litres in 2012. Over the next five years, volume sales CAGR is expected to slow but remain within double-digits at 13.5%.

Environmental pollution, both surface and groundwater, is encouraging people to consume more packaged water. Rapid urbanisation and economic development has led to more people being on the move or doing outdoors activities. Consumers also like that packaged water does not have anything added to it and is more affordable compared with other soft drinks.

The packaged water market today is highly fragmented and even more so for the water cooler market, with the top ten companies combined accounting for less than 60% of market share. National brands are generally weak, and there are numerous regional brands.

In the future, bottled water companies that are able to do so need to look at entering the high-end (eg mineral water) market and finding their own water sources or acquiring small businesses with their own high-quality water source. The market share of small bottled water is low and requires more investment from companies while the flavoured water segment has great potential. Activity in this segment has been low-key and quiet to date, but as can be seen from the success of this segment in some foreign markets, the potential for growth should not be underestimated."

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