

## Bottled Water - China - March 2014

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Pure sourcing is key to attracting bottled water consumers, which has created intense competition between manufacturers for acquiring water sources and has even led to merger and acquisition activity. Wide availability in both the on-trade and off-trade, as well as the introduction of smaller pack sizes, is encouraging impulse purchases and on-the-go consumption."

– Eileen Ngieng, Senior Research Analyst

### This report looks at the following areas:

- What is the current state of the bottled water market, and how is the market expected to develop in the near future? What are the key market drivers and restraints?
- What influences consumer behaviour and attitudes towards bottled water, and what are the key factors affecting product choice and encouraging consumption?
- What areas offer future potential for product development?

China's bottled water market has enjoyed volume compound annual growth between 2008 and 2013. This rate is expected to slow in the next five years, but should still maintain double-digit annual gains. Value sales are expected to grow slightly ahead of volumes due to price increases and higher demand for value-added products. The bottled water market remains highly fragmented and is dominated by regional brands. In fact, only the top three companies have double-digit market share.

This market covers all bottled still, sparkling and flavoured water. It also includes natural and purified water. Market size is based on retail (off-trade) sales directly to consumers and non-retail (on-trade) sales, including food service restaurants and any supplies to other industries.

This report includes all bottled water for human consumption, including bulk containers (eg for companies' water stations), bottled water sold to consumers, which may include door-to-door deliveries, and all catering and institutions including bulk supplies to business. This report also includes any bottled water used by processors to make other products.

This report does not cover un-bottled water, such as filters for tap water and enhanced/vitamin/mineral enriched waters without flavouring.

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