

MARKET INNOVATION OVERVIEW

CATEGORY: Water, Juices & Soft Drinks | **COUNTRY:** Japan

Este documento foi elaborado no âmbito do projeto PortugalFoods Qualifica, com o objetivo de criar informação de alto valor acrescentado para as PME e restantes entidades do setor agroalimentar nacional, para que estas se possam posicionar estrategicamente no contexto do mercado global.

A informação contida neste documento provém do Observatório da PortugalFoods que, com recurso à plataforma Mintel, permite contribuir para a qualificação e sensibilização do setor agroalimentar, tanto ao nível do conhecimento sobre novos produtos e técnicas de produção, como ao nível do acompanhamento da evolução tecnológica e da evolução das preferências do consumidor.

A Mintel cataloga mais de 38 000 novos lançamentos de produto por mês, provenientes dos 86 mercados que monitoriza, analisando e categorizando todos os seus atributos, tais como os ingredientes, posicionamento e comunicação ao consumidor.

O Observatório da PortugalFoods constitui-se assim como uma ferramenta de grande importância para alicerçar o conhecimento das empresas do Setor Agroalimentar.

A REGIONAL INTRODUCTION:

WATER, JUICES & SOFT DRINKS IN ASIA PACIFIC

WATER

Be transparent about the water source: Water sources from glaciers, lakes, snow etc are associated with different qualities in Asia. For example, spring water from volcanoes score high for its rarity whilst water from mountains is deemed to be better for health. Bottled water brands can capitalise on this by flagging up more provenance information about the source.

JUICES

Emphasise natural qualities: Naturalness continues to be a major trend in juice and beverage concentrates in Asia. While some brands use cold-pressed techniques to enhance natural credentials, others rely on eliminating undesirable ingredients such as preservatives and sugar.

CARBONATED SOFT DRINKS

Adding value with fortification: CSDs with added vitamins, functional ingredients or with superfoods can resonate with consumers who want 'better-for-you' options and who are replacing what they perceive as overly sugary and processed CSDs with enhanced waters.



WATER, JUICES & SOFT DRINKS IN JAPAN

Market Overview

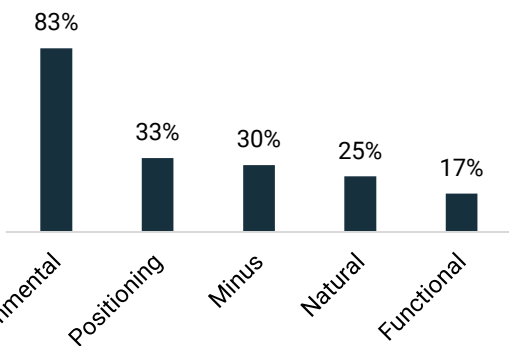
The Japanese water, juices & soft drinks sector is expected to grow from €50.2 billion in 2018 to €58.9 billion by 2023, at a CAGR of 3.3%. In volume terms, the sector is expected to decrease from 23.5 billion L in 2018 to 23.1 billion L by 2023, registering a CAGR of -0.3%.

Per capita consumption of water, juices & soft drinks in Japan stood at 186.2 L in 2018 and is expected to grow and reach 186.6 L by 2023. Per capita expenditure in Japan stood at €397.7 in 2018 and is expected to grow and reach €476.1 by 2023. (GlobalData, 2020)

New Product Development Analysis

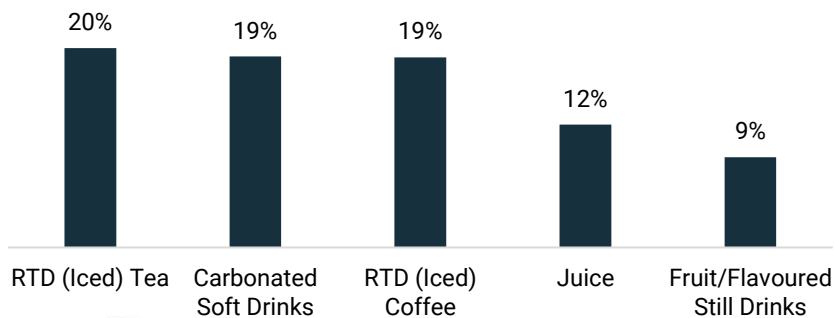
51% of drink products launched in Japan in 2019 were Water, Juices & Soft Drinks.

Top 5 Claim Categories in Water, Juices & Soft Drinks product launches, 2019



The majority of new product launches in the water, juices & soft drinks sector featured an 'Ethical & environmental' claim, mainly the 'Ethical - Recycling'. The 'Limited Edition' claim was the driver of the 'Positioning' claim category, while the 'Low/No/Reduced Calorie' was the top claim from the 'Minus' category.

Top 5 Sub-Categories of Water, Juices & Soft Drinks product launches, 2019



The New Product Development in this sector, in Japan, was distributed by the 'Ready-to-Drink (Iced) Tea', the 'Carbonated Soft Drinks' and the 'Ready-to-Drink (Iced) Coffee', with the 'Juice' sub-category accounting for 12% of launches.



This product retails in a 400ml recyclable bottle.



This carbonated drink was a limited edition and seasonal variety for Christmas 2019.



This low sugar & low calorie iced coffee drink retails in a recyclable 930ml bottle.



THE JAPANESE CONSUMER

Which of the following best describes your choice of non-alcoholic beverages? (2019)

17%

I proactively seek products that contain **only natural ingredients**

38%

I proactively seek products that contain **some natural ingredients**

45%

I don't mind **unnatural/chemical ingredients**

How often do you consume (2018)

	Carbonated drinks	Juice and smoothies
Daily	6%	6%
More than 4 times a week	5%	4%
3-4 times a week	9%	7%
1-2 times a week	22%	17%
Less than once a week/A few times per month	16%	15%
Once per month or less	23%	23%
Never	18%	28%

(GlobalData, 2020)

A GLOBAL LOOK INTO THE FUTURE

WATER

Relaxing waters will be more prevalent: Waters are already offering energy, protein and added fibre benefits, and the next function to emerge will be relaxing. After all, consumers around the world need help to de-stress.

JUICES

Transparency 2.0: Honest communication about added sugars, sweeteners, and the origin of ingredients are more important than ever. In the era of Full Disclosure, honest and direct communication about added sugars and, where applicable, types of sweetener, is needed to address consumer concerns. Juice companies are also increasingly challenged to provide more clarity about the quality and origin of ingredients.

CARBONATED SOFT DRINKS

CSDs – the 'next better-for-you' drink?: CSDs can reposition themselves as 'better-for-you (BFY)' drinks by innovating with botanical ingredients. CSDs with healthier and more natural profiles will appeal to health-minded consumers.

Para mais informações acerca do Observatório da PortugalFoods, por favor contactar

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