

It is also worth noting that of the seven largest import markets for bottled water, five are members of the European group slated to become part of the Europe 92 trading block in less than two years. These countries present a special case for Canadian exporters and should be looked at as a group (see p. 14).

The trading patterns of 1988 are very different from those that existed in 1980. For one thing, in 1980, Saudi Arabia purchased bottled waters for a total of \$143.7 million out of a total market worth \$595.3 million. This gave Saudi Arabia a market share of over 24% and made it by far the largest buyer in the world. Germany, the second largest buyer of water in 1980, had purchases worth \$72 million, around 12% of the market and about half of the Saudi market share. Figure 10 which gives market shares for 1988 makes no mention of Saudi Arabia at all: it had disappeared as a buyer of water. By 1985, major desalination plants had come on stream and Saudi Arabia had become self-sufficient.

7.2 The Sellers

In the export overview above, we have stated that Canada is far from being a major world player in the bottled water trade. What exactly is Canada's position and who are the major players?

In figure 11, the major players are shown with their sales in dollars shown in brackets besides their names. Canada did not even come close to making it on this list. It ranks 15th among exporters with \$11,259,000 US in export sales, less than 1% of the total. It is ironic that, in 1988, Japan, which we usually consider to be a prime market for our bottled water, had higher exports than Canada: it ranked 13th among exporters.

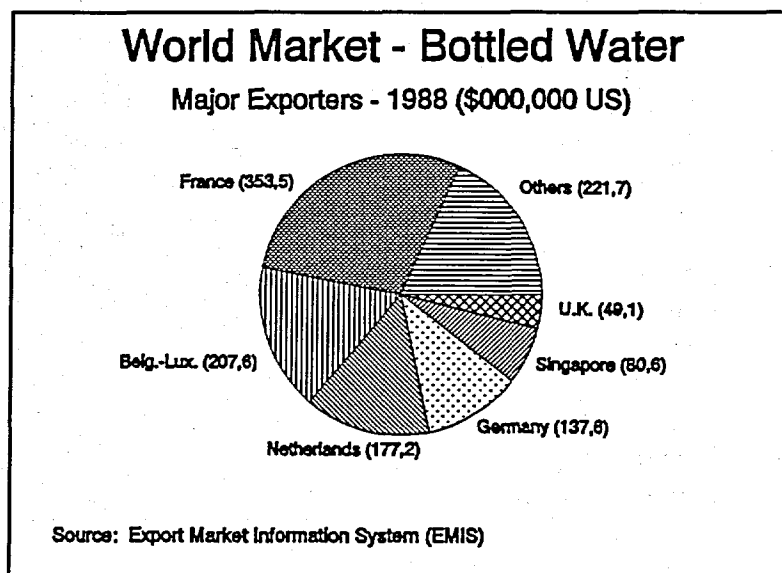


Figure 11