

plastic jugs); in such cases, transportation costs become a major consideration and, unless the market in question is next door to the potential exporter, competing successfully may be out of the question.

These figures indicate the general trends and provide a fairly accurate view of the market as a whole. However, because of the general nature of this analysis and of the inconsistencies noted above, potential exporters would be well advised to carry out further investigations into specific market areas before launching major marketing programs requiring significant expenditures.

### 7.1 The Buyers

During the 1980s, the market for bottled water not only grew substantially, it was in fact subjected to several upheavals that altered its composition and irremediably changed the relationships between buyers and sellers.

As can be seen in figure 10, the largest single country market in the world for bottled water is the U.S., with imports of \$178.6 million. We stress again that this represents less than 9% of the American market on a dollar basis.

Belgium and Luxembourg are in second place with imports of \$159.3 million. However, for other commodities

Belgium reports as imports and then as exports goods sold by other European countries to overseas buyers and shipped through the port of Antwerp. We are convinced that the data for bottled water includes this type of trade. It is impossible to determine the net amount of Belgium's bottled water imports, but it is likely to be considerably less than the amount reported.

Japan is third and has been growing at a phenomenal rate, particularly in the last five to six years. Because Japan constitutes a valid potential export market for Canadian bottled water producers, we have devoted a section of this report to this country (see p. 13).

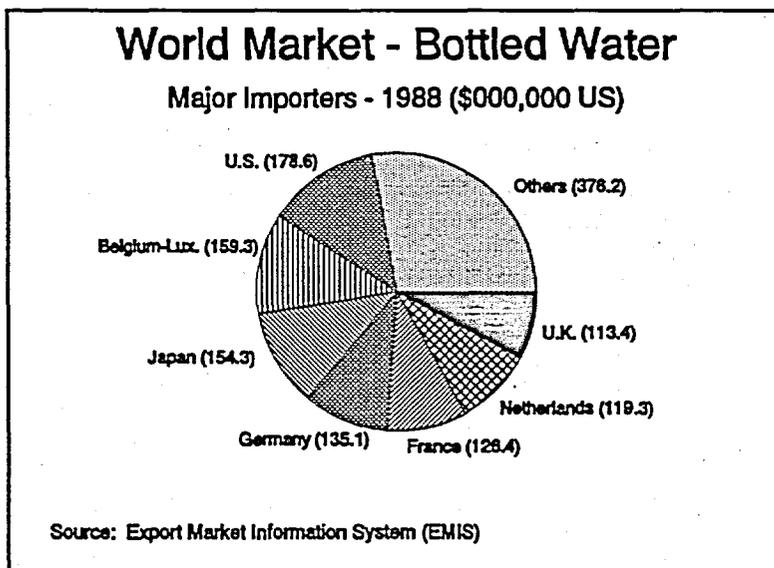


Figure 10