

WATER SUPPLY IN JAPAN 2015



Published by Japan Water Works Association

Executive Director's Message

This report is published annually by JWWA and presents data from water utilities across Japan. The data is predominantly from FY 1975—2013.

As executive director of JWWA, I am pleased to share this report with domestic and foreign water professionals. I really appreciate the supreme endeavors that the publication of this report has made in contributing towards an international exchange of information.



尾崎 勝
Masaru Ozaki
Executive Director

Profile of Japan Water Works Association



At the time when the Federation of Water Authorities (JWWA's predecessor) was established in 1904, Japan was in an early stage of introducing modern water supply. Modern water supply services were provided only in major port cities including Yokohama (service started in 1887), Hakodate, Nagasaki, Osaka, Tokyo, Hiroshima and Kobe.

In those days, there were growing tendency among water utilities toward research and study of subjects related to construction, public hygiene and administration of water supply, and water quality was the most critical issue. Dr. Toyama Chinkichi (Director of Tokyo Institute of Public Health), who advocated establishing a "standard method of water quality examination", called on holding a "Consultative Meeting for Establishing a Standard Water Quality Examination Method" (the first meeting was held in Tokyo), and this became the origin of JWWA.

In the second meeting held in the following year and subsequent meeting, not only water quality but general issues relating to water supply including purification and distribution were also included in the meeting.

This led to the current tradition in the water-supply industry that all stakeholders of water supply are involved to collectively find solutions for various operational issues in water supply services.

As water supply started spreading to various cities in Japan and the number of cities participating in the consultative meeting increased, the role of the "Federation of Water Authorities" became increasingly important. This trend led to the establishment of JWWA on May 12th, 1932 under the approval of the then Minister of Interior. (The name was changed to Incorporated Association of JWWA in 1956 and became Public Interest Incorporated Association of JWWA in 2013 in line with a law amendment.)

The structure and secretariat of JWWA have changed several times over the years. Currently, there are seven regional branches, 46 prefectural branches as well as five consultative committees in Hokkaido. The secretariat consists of five departments, one regional office, one institute and one center. With these branches and secretariat, JWWA is committed to fulfilling our members' objectives for advancing water supply services and providing safe and sustainable water supply for the public.

Activities

Annual events
JWWA General Assembly / JWWA Annual Conference and Symposium.

Lobby Activity
We concerns government affairs and organize lobby activities such as;
To submit petition / list of demands to government raised by member utilities
To organize actions by members to influence politicians on special issues.

Training Programs
JWWA provides more than 30 training courses in management / engineering / science / technical areas annually.

Research / Consultation
We conduct researches / studies on issues raised by

members and compile report / guideline / manual and standards of water supply equipment and materials. Also, we provide consultation services to member utilities on water supply management/technologies.

Publications
We publish a journal, manuals, guidelines, reports for water supply.

Inspection Services
JWWA implement inspection of water supply materials, to secure "Safe and Stable Water Supply" by fair and strict performance test upon manufacturer's request.

Certification Services
JWWA issues certifications according to the Regulation of Japanese Waterworks Law on water supply equipments / tools.

1 Introduction

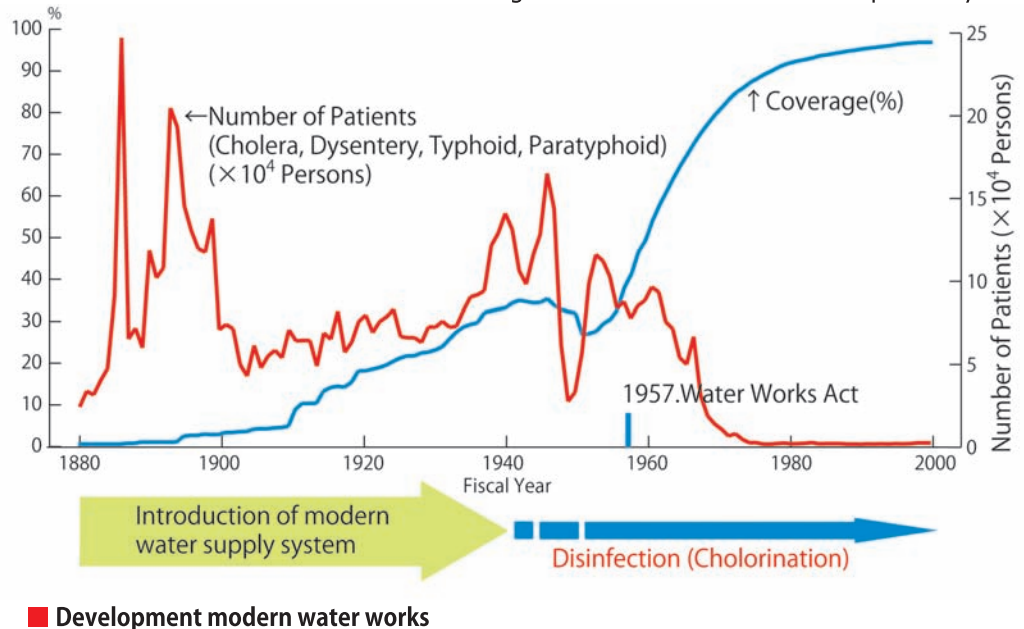
History of Japan Water Supply

Japan's first modern water supply system was introduced in Yokohama and began its operation in 1887. At the time, the modern water supply system, which provides purified water with pressure through mains, was needed to prevent the infection of water-borne diseases.

Following the operation in Yokohama, the water supply system spread in municipalities all over Japan. However, the number of patients suffering from water-borne diseases had not been decreasing until the chlorination was imposed by the Waterworks Act, which was implemented in 1957.

Through the strict water quality control required by the Act, tap water got to be safe and drinkable without boiling.

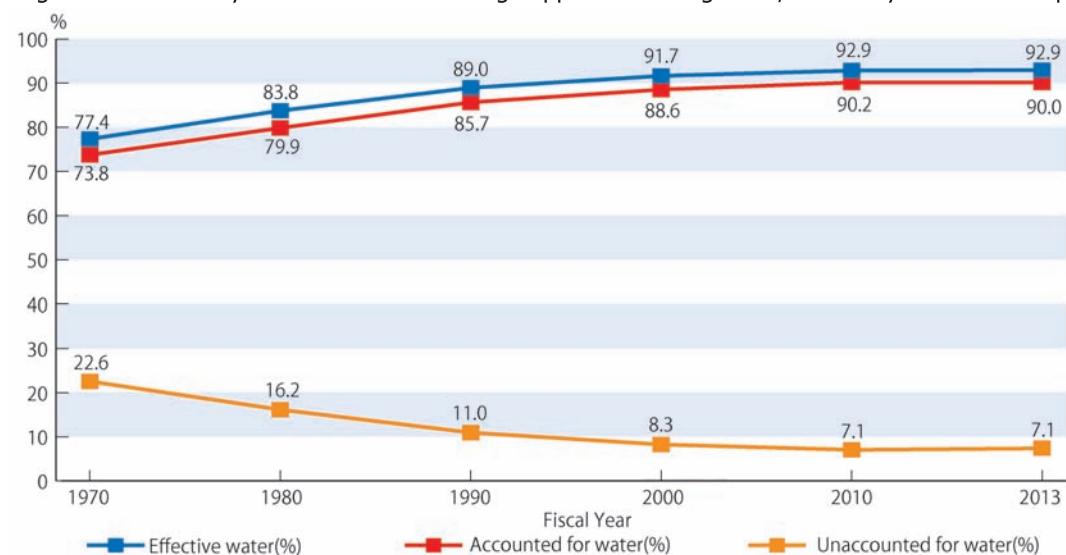
Today, very few people suffer from water-borne diseases, thanks to the achievement of nearly 100 % coverage of water supply in Japan.



Leakage Control

Leakage affects the management of water supply businesses since the process of water treatment requires huge costs. Therefore, water utilities have made great efforts to reduce leakage. In 1970s, only 78% of water distributed reached taps, but in 2006, more than 92% of water distributed reached taps (This ratio is called effective water ratio). Therefore, leakage had improved down to only 8%. The goal of effective ratio is set to be 98% for large water utilities and 95% for small water utilities by the national government.

Leakage is caused by some sort of pipe damages. Pipes could have cracks caused by load or vibration from traffic, or pipes might be corroded by acidic soil. When leakage appears on the ground, it is easily detected and pipe can be rehabilitated immediately.



However, when leakage occurs underground, its detection is not easy. Therefore, leakage control survey, rehabilitation and renewal of old pipes should be conducted according to plans made by water utilities.

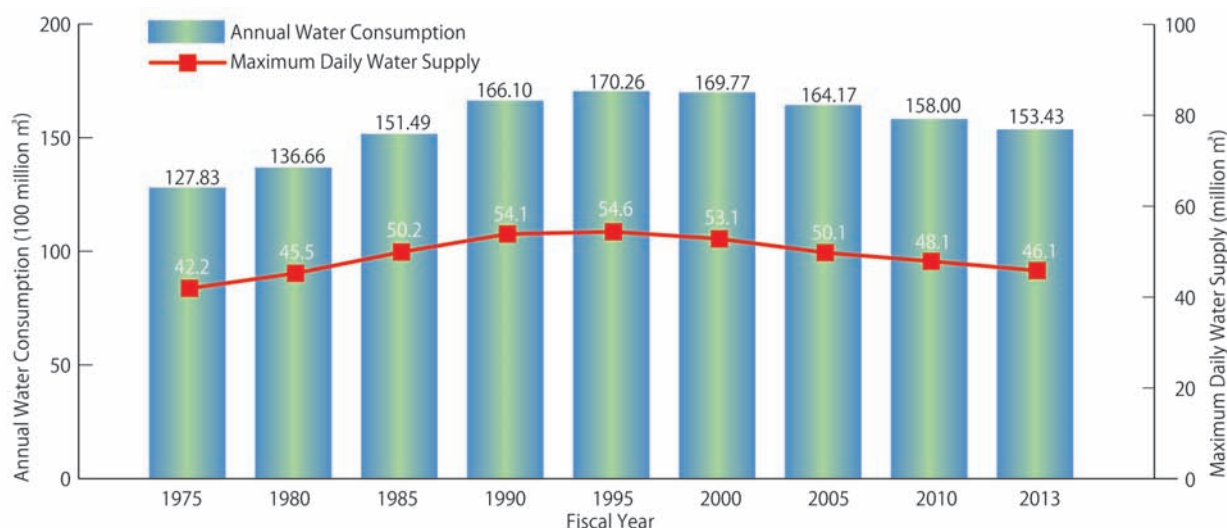
Effective water ratio

(Reference:Ministry of Health, Labour and Welfare <http://www.mhlw.go.jp/english/index.html>)

2 Water Consumption

There are 15,736 waterworks in Japan and most of them are small scale utilities. Supplied water volume is 15.3 billion m³ in FY 2013 and it is 110 million m³ lower than the volume in 2012. 124.3 million people (97.7% of total population) are using supplied tap water in FY 2013.

Water supply utilities have been increasing their capacity to cope with an increasing water demand. The current trend however, is a decrease in water consumption due to the population reducing their annual water usage.



■ Trend of Annual Water Consumption and Maximum Daily Water Supply

Served Population		Number of Supplies	Population Served	Supplied Water Volume (100 million m ³ /year)	Daily Demand per Capita		
					Maximum(ℓ)	Average(ℓ)	Capacity of Facility(m ³ /day)
Public Water Supply	More than 1,000,000	15	39,850,000	47.1	360	324	554,000
	500,000 ~ 999,999	11	7,180,000	8.5	363	326	500,000
	250,000 ~ 499,999	56	19,340,000	23.2	370	329	534,000
	100,000 ~ 249,999	143	21,290,000	25.9	377	333	537,000
	50,000 ~ 99,999	208	14,490,000	18.4	403	348	590,000
	30,000 ~ 49,999	200	7,730,000	10.1	422	356	616,000
	20,000 ~ 29,999	150	3,710,000	4.9	439	361	657,000
	10,000 ~ 19,999	266	3,870,000	5.5	490	388	720,000
	5,000 ~ 9,999	252	1,800,000	2.6	526	396	793,000
	Less than 4,999	96	310,000	0.6	755	515	1,199,000
Public Water Supply	Under Construction	4	—	—	—	—	—
	Total	1,401	119,570	146.8	384	336	567,000
Small Public Water Supply		6,105	4,380	6.3	546	395	—
Private Water Supply		8,135	420	0.3	—	—	—
Total		15,736	124,370	153.4	—	—	—

● Number of Waterworks in FY2013

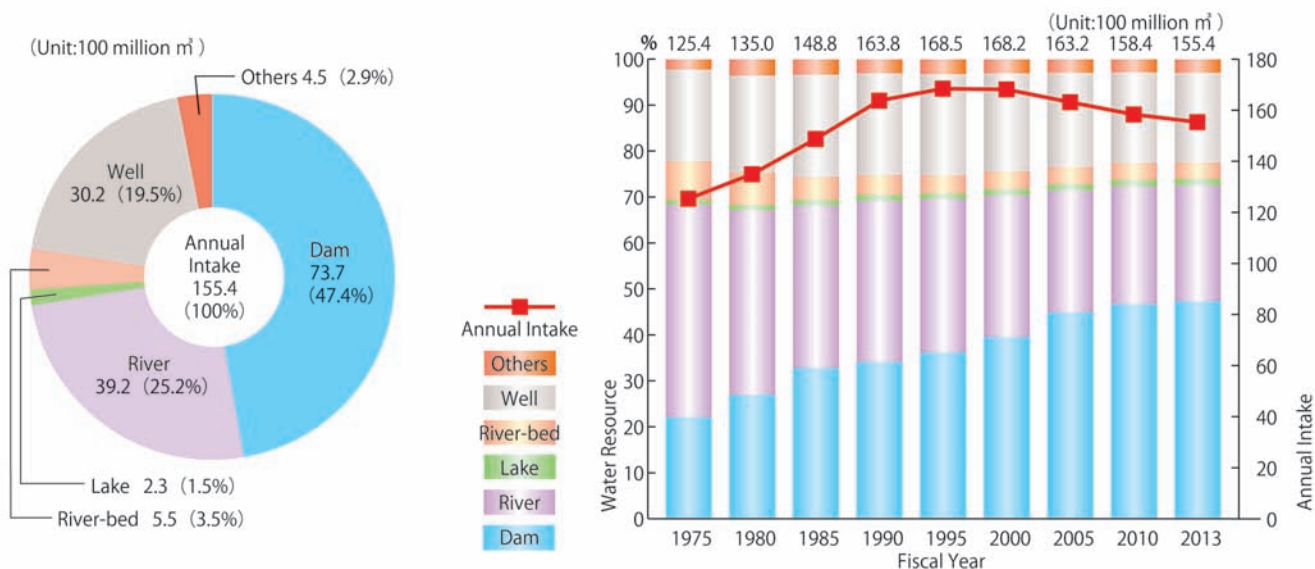
Types of Water Supply

Under the Water Works Law, water system shall mean the whole facilities to supply water for human consumption including water conduit and other structures. However, temporary facilities shall be excluded. The water supply system is classified as follows:

- 1) Large Public Water Supply : the facilities to supply to the population of more than 5,001.
- 2) Small Public Water Supply : the facilities to supply to the population of between 101 and 5,000.
- 3) Private Water Supply : the facilities to supply for privately owned water supply to the lodgings, apartment houses of private or public firms owned by enterprises having a population exceeding 100.

3 Water Resources & Treated Water

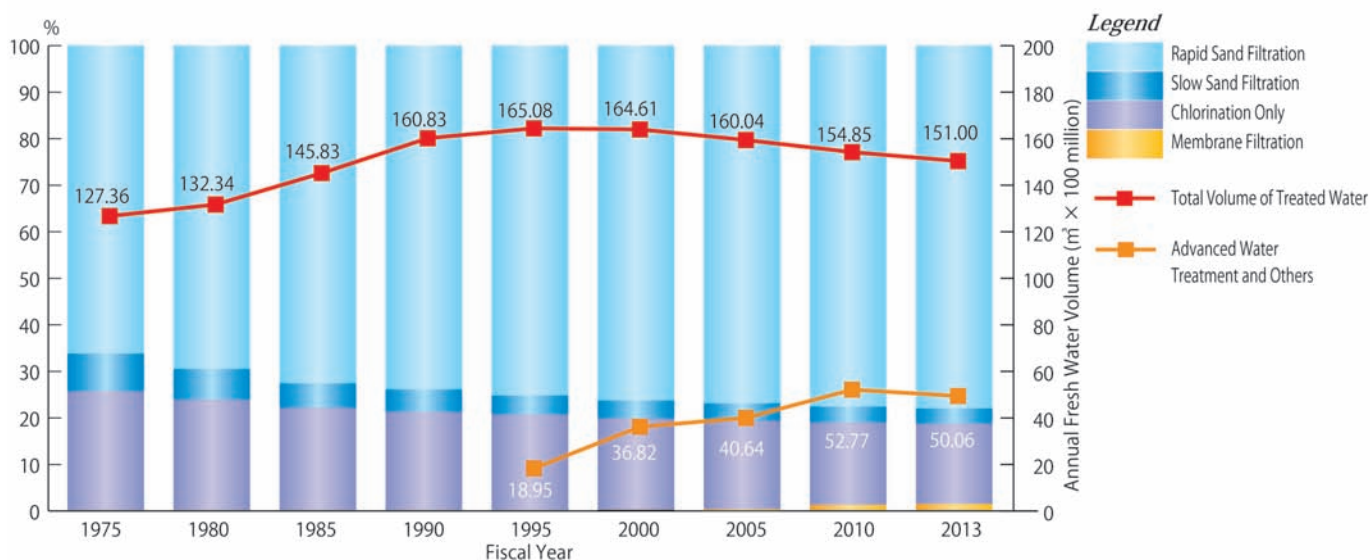
Raw water makes up 72.6% of rivers and dams. The total annual volume collected is around 15.54 billion cubic meters.



■ Water Sources of Public Water Supplies and Bulk Water Supplies (as of March, 2013)

■ Intake Amount and Water Resource

At present, chlorination is an obligatory form of disinfection for all water. Recently, the advanced water treatment systems, using ozone-GAC treatment (including membrane filtration) has been introduced in Japan, offering a viable method for treating water. The advanced water treatment system completely eliminates musty odors and THM substances that cannot be removed by conventional treatment systems.

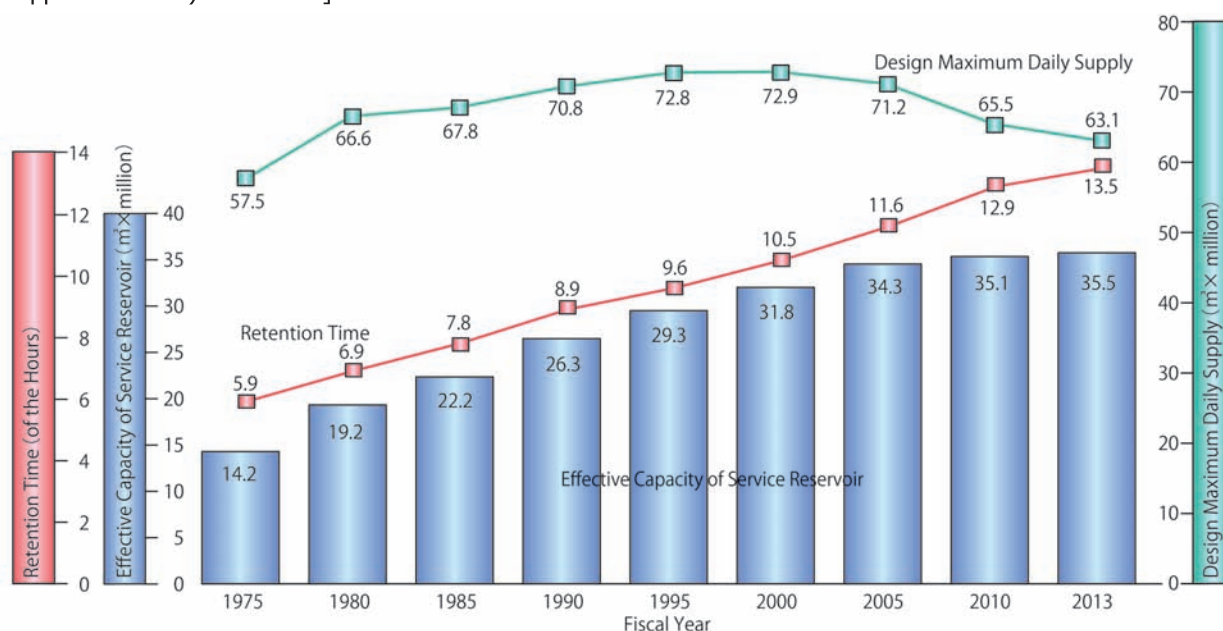


■ Annual Fresh Water Volume by Water Treatment Systems (Large Public Water Supply + Bulk Water Supply)

4 Water Supply Facilities

Human industry and daily life act on the premise that stable water will always be available. Our water utilities are making positive steps towards future stability by building plural distribution systems, reconstructing aging facilities and ensuring water works are resilient to earthquakes.

The total capacity of service reservoirs is increasing annually. It has grown from 14.2 million cubic meters in FY 1975 to 35.5 million cubic meters in FY 2013. Retention time of service reservoirs: [(Effective Capacity of Service Reservoir / Maximum Daily Support of Model) X 24 hours] has also increased from 5.9 hours in FY 1975 to 13.5 hours in FY 2013.



Effective Capacity, Retention Time and Maximum Daily Supply

The total length of water mains in Japan comes up to 653,618km. According to the aged pipe-renewal project, gray cast iron pipes and asbestos cement ones are decreasing. These replacements follow on the basis of long term plan which facilitates introduction of the quake-resistant pipes.

Type \ Fiscal Year	1975	1980	1985	1990	1995	2000	2005	2010	2013
Ductile Iron Pipe (Seismic Type ※)	—	141.35	181.36	179.13	240.45 (6.65)	289.10 (19.67)	327.38 (29.77)	356.28 (48.43)	369.26 (60.70)
Steel Pipe	—	13.78	16.02	16.28	18.25	19.34	19.26	18.60	18.33
Hard-type PVC Pipe	—	83.65	109.64	132.15	155.42	174.35	189.23	201.75	207.59
Cast-iron Pipe	—	—	—	46.99	33.25	29.79	25.90	18.76	16.22
Asbestos Cement Pipe	—	86.87	82.49	67.73	47.51	26.79	14.72	7.92	6.01
Others	—	14.59	12.32	13.44	11.45	14.76	20.19	29.55	36.21
Total	262.18	340.24	401.83	455.72	506.33	554.13	596.68	632.86	653.62

Length of Pipelines by its Type (unit : 1,000 km)

(Length of Pipelines are included for Bulk Water Supplies.)

※No data for the FY pre-1995.

5 A Clean and Safe Drinking Water Supply

The Ministry of Health, Labour and Welfare established the drinking water quality standards containing 51 items, to ensure the sanitation and safety of drinking water. In response to these standards, all water utilities have started renovation works on their water quality facilities. They also regularly examine the water quality of tap water, to see if it meets these regulations.

No	Item	Standard Value	No	Item	Standard Value
1	Common Bacteria	100 per 1 ml less or equal	27	Total Trihalomethanes <small>(Total of Chloroform, Dibromochloromethane, Bromodichloromethane and Bromoform)</small>	0.1 mg/L less or equal
2	E. coli	Not to be detected	28	Trichloroacetic acid	0.2 mg/L "
3	Cadmium	0.003 mg/L less or equal	29	Bromodichloromethane	0.03 mg/L "
4	Mercury	0.0005 mg/L "	30	Bromoform	0.09 mg/L1 "
5	Selenium	0.01 mg/L "	31	Formaldehyde	0.08 mg/L "
6	Lead	0.01 mg/L "	32	Zinc	1.0 mg/L "
7	Arsenic	0.01 mg/L "	33	Aluminium	0.2 mg/L "
8	Chromium (VI)	0.05 mg/L "	34	Iron	0.3 mg/L "
9	Nitrite Nitrogen	0.04 mg/L "	35	Copper	1.0 mg/L "
10	Cyanide ion and Cyanogens chloride	0.01mg/L as Cyanide "	36	Sodium	200 mg/L "
11	Nitrate and Nitrite	10mg/L as Nitrogen "	37	Manganese	0.05 mg/L "
12	Fluoride	0.8 mg/L "	38	Chloride	200 mg/L "
13	Boron	1.0 mg/L "	39	Calcium, Magnesium (Hardness)	300 mg/L "
14	Carbon Tetrachloride	0.002 mg/L "	40	Total residue	500 mg/L "
15	1,4-dioxane	0.05 mg/L "	41	Anionic surface active agent	0.2 mg/L "
16	cis-1,2-Dichloroethylene & Trans-1,2-Dichloroethylene	0.04 mg/L "	42	(4S, 4aS, 8aR)-Octahydro-4,8a-Dimethylnaphthalene-4a(2H)-ol	0.00001 mg/L "
17	Dichloromethane	0.02 mg/L "	43	1,2,7,7 - Tetramethylbicyclo[2,2,1]Heptane-2-ol	0.00001 mg/L "
18	Tetrachloroethylene	0.01 mg/L "	44	Nonionic surface active agent	0.02 mg/L "
19	Trichloroethylene	0.01 mg/L "	45	Phenols	0.005mg/L in terms of Phenol "
20	Benzene	0.01 mg/L "	46	Organic substances (Total Organic Carbon)	3 mg/L "
21	Chlorate	0.6mg/L "	47	pH Value	5.8-8.6
22	Chloroacetic acid	0.02mg/L "	48	Taste	Not abnormal
23	Chloroform	0.06mg/L "	49	Odor	Not abnormal
24	Dichloroacetic acid	0.03mg/L "	50	Color	5 degree less or equal
25	Dibromochloromethane	0.1mg/L "	51	Turbidity	2 degree "
26	Bromate	0.01mg/L "			

Water Quality Standards of Drinking Water

When concentrations exceed those set out by the standards, it is necessary to ascertain the causes and hence take preventative action; modifying operation management of the treatment plant is usually a good solution as is renovating the water purification facilities. All these measures are necessary to supply a constant, stable and safe service.

Water Quality Management

It is vital to make prudent managerial decisions regarding water quality in order to ensure the future safety of tap water. A guideline has therefore been established, identifying 26 items to look for when examining water. Pesticides that are used in agriculture and other such activities are also included in a 120-item list. Local pesticide usage is accordingly monitored.

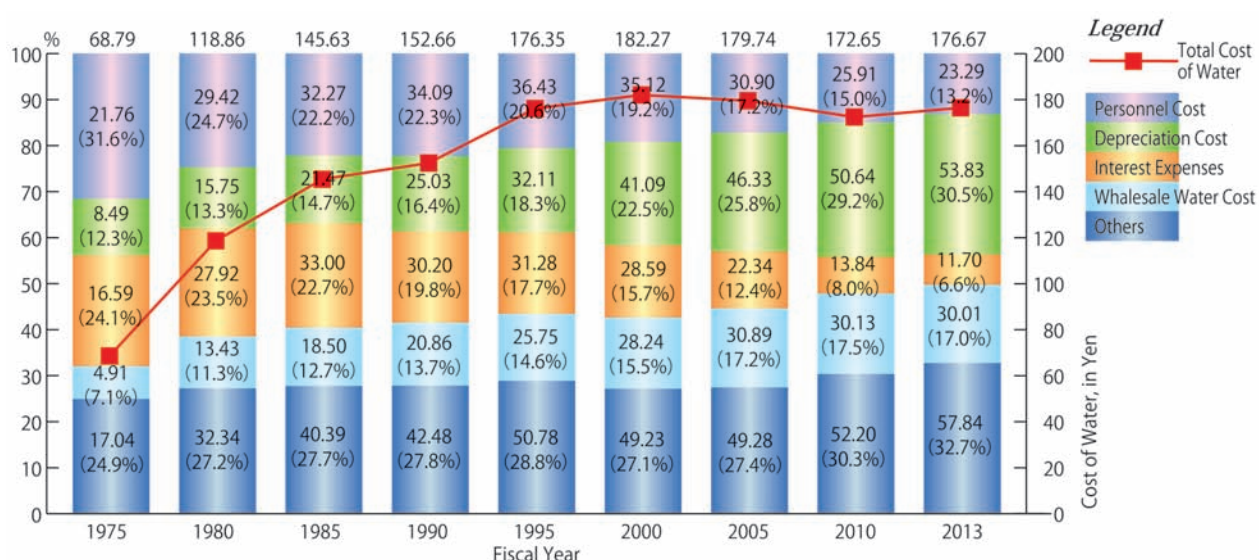
Revision of Drinking Water Quality Standards and Improvement to Water Supply

Drinking water quality standards are constantly updated by integrating the latest scientific approaches (eg. toxicity information). Water works facilities are encouraged to match new drinking water quality standards so as to supply good quality, safe tap water for the future.

6 Cost of Water : Capital Cost and Operation Cost

Depreciation costs and interest expenses account for about 37% of the total cost of water. This is especially true in cases of bulk water supply, where, the cost rises by about 55%.

Production costs of water per cubic meter increase annually relative to the individual charges, despite decreasing staff costs and interest paid. The reason for this is the renovation of the old water supply facilities as well as increasing of water reservoirs' capacity; these are measure implemented to improve our service, securing a safe and stable water supply.



■ Trend and Composition of Cost of water per cubic meter

Pipeline renewal projects, one of the key developments to operate water supply, require 988.6 billion yen annually. These projects account for about 41 % of the capital expenditure in the fiscal year of 2013, which increased from 13 % in the fiscal year of 1975.

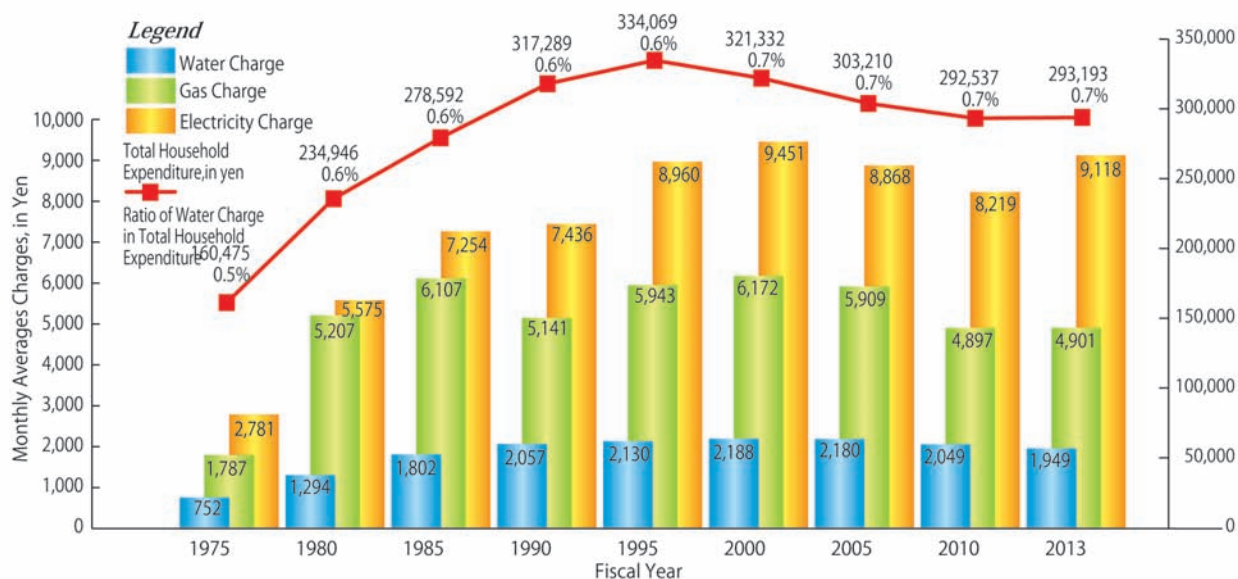
Fiscal Year	1975	1980	1985	1990	1995	2000	2005	2010	2013
Item									
New & Expansion Works	6,388	6,318	6,096	5,886	7,863	6,576	4,257	3,357	2,978
Improvement Works	1,154	2,373	3,209	5,810	8,644	7,635	6,263	5,889	6,908
Redemption Cost on Revenue Bond	876	1,390	2,812	2,827	4,195	5,021	7,710	6,941	6,525
Redemption Cost on Long-term Loan	52	85	83	90	97	106	63	62	69
Others	166	333	232	514	590	517	696	784	583
Total	8,636	10,499	12,432	15,127	21,389	19,855	18,989	17,033	16,790

● Trend of Capital Expenditure (unit : 100million yen)

7 Water Charges

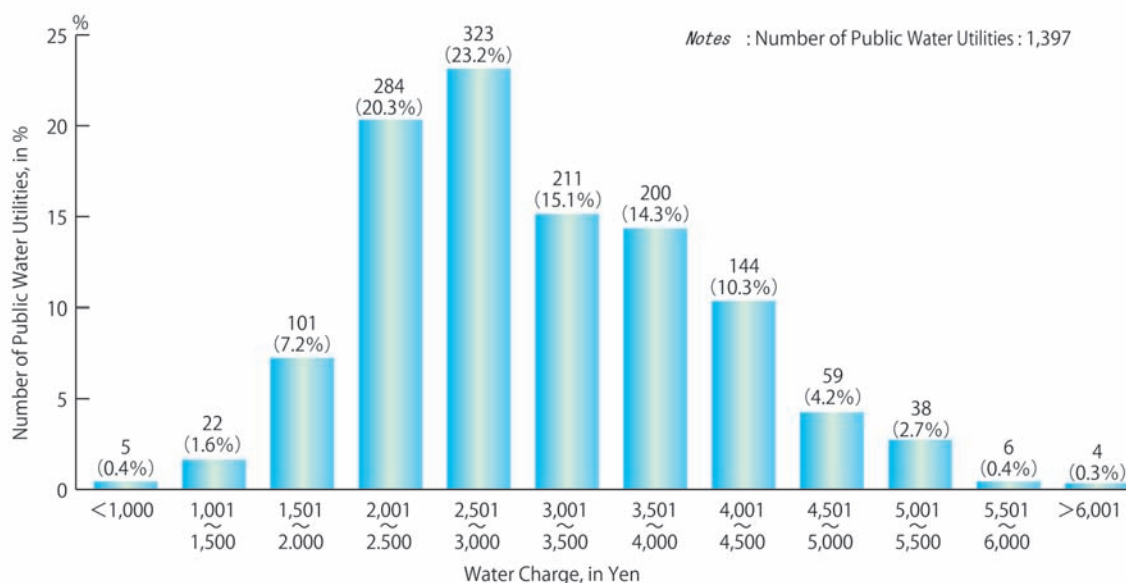
Most water supply utilities in Japan are established by prefecture or municipality and are operated on a self-sufficient basis. The water charge is set separately by each water supply utility; for an average household, it takes up about 0.7% (1,949 yen per month) of the household expenditure.

The average monthly water sales decline in the past few years. Water consumption expenses account for about 0.7 % in the total domestic expenses.



■ Trend of Total Household Expenditure and Water Charge in Monthly Average for the cities with Population over 50,000

Water suppliers are deemed to be self-sufficient, such that they are expected to meet their own costs of construction and facility operation through customer charges. Charges differ depending on region because there are differences in condition, distance from source, construction year, scale, staff costs, maintenance costs, etc.



■ Number of Water Supplies and Water Charge for Domestic Usage of 20 m³/month for a Family Living in a House Consuming (as of March, 2014)

Future Water Supply Services

Water supply infrastructure is indispensable for our life. But there are still some problems facing, such as need for anti-seismic measures, rehabilitation of aged facilities etc. For our future, it is important to resolve these issues by enhancing the information disclosure, ensuring user understanding and participation.

■ New Waterworks Vision

In June 2004, the Ministry of Health, Labour and Welfare had issued the "Waterworks Vision" and indicated the desired state of waterworks in Japan in the future together with the policies and pathway towards realization of such a vision. More than eight years have passed since release of the Vision, and the circumstances surrounding waterworks in Japan have changed significantly, such as pressing issues associated with the aging of society and of waterworks facilities and the additional suffering from the disastrous Great East Japan Earthquake. In response to such changes, the Ministry radically reviewed the Waterworks Vision and formulated and announced the New Vision for the next 50 years and a century ahead. From fiscal 2013, all the parties concerned will advance various steps towards realization of the ideal waterworks by sharing the principles of the "New Waterworks Vision" based on the aspects of "safety", "resilience", and "sustainability".

MESSAGE

■ Principles

Waterworks Vision (released in June 2004, amended in 2008)

[Principle] Waterworks taking on constant challenges as the first runner in the world

■ Changes in circumstances surrounding water supply services

Too many issues encountered

- Diminishing population, decreasing water demand and service revenue
- Expanding needs of waterworks facilities renewal
- Water quality issues at the water source
- Deterioration of the service level due to decrease in personnel
- Risk management taking the experiences in the Great East Japan Earthquake into account

■ Requires coordinated approach by the parties concerned sharing the principle of the Vision

Principle to be shared among the parties concerned

Implementation of steady approaches based on the confidence from users in the regions established through 130-year efforts by predecessors

New Waterworks Vision

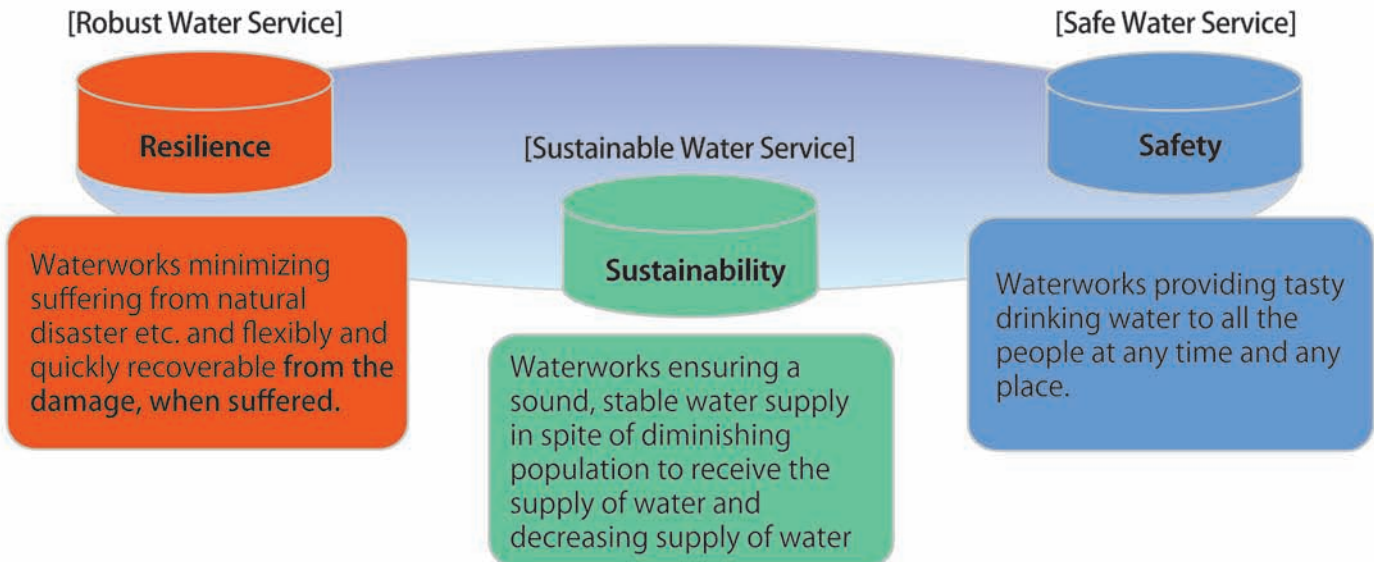
POLICY

[Principle] Waterworks in Japan to pass the confidence towards the future in regions
Pass the baton as the first runner of waterworks in the world to future generations

■ Outline of New Waterworks Vision

Ideal Image of Water Service

- Water services that ensure a supply of uninterrupted water in compliance with quality standards in the required quantity at any time and at any place to any person at reasonable cost, while correctly responding to changes in the times and environment.



The ideal image of waterworks for the next 50 years and the century ahead is presented, and the ideas are shared among parties concerned.



Key Steps

Steps to be implemented by concerned parties with water service challenges and coordination.
(Divided into 3 categories and 15 items)

1. Internal measures by the parties concerned

- (1) Upgrading of the waterworks facilities (R / Su) *
- (2) Utilization of asset management (Su)
- (3) Talent development and strengthening of organized ability (R / (Su))
- (4) Risk management and countermeasures (R / Sa)
- (5) Environmental measures (Su)

3. Measures to be taken based on new ideas

- (1) Optimization of water rate system (Su)
- (2) Measures for small-scale water service providers (small-scale water service / drinking water supply facility) (Sa / (Su))
- (3) Measures for small-scale water supply facility for in-house use (Sa / (Su))
- (4) Water supply using diversified methods (Su / (R))



2. Cooperation between parties concerned

- (1) Enhancement of cooperation (communication) with the community people (Su / Sa / R)
- (2) Progressive amalgamation of operation (Su / R)
- (3) Advancement of cooperation between government and private sector (Su)
- (4) Expansion of technology development, investigation, and research (Sa / Su)
- (5) Promotion of International cooperation and business activities (Su)
- (6) Promotion of environmental measures (Su)

* Indicates the item that should be met with the highest priority among the directions to be aimed at. Items in parentheses indicate the item to be met to some extent. R=Resilience, Sa=Safety, Su=Sustainability

WATER SUPPLY IN JAPAN

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