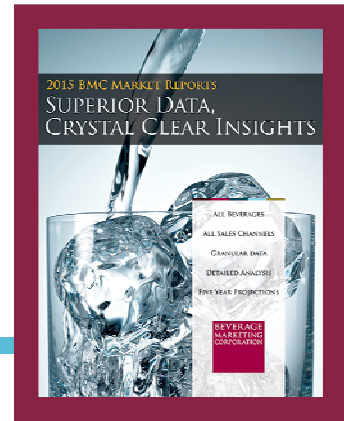


THE GLOBAL BOTTLED WATER MARKET

2015 EDITION (Published February 2016. Data through 2015. Market projections through 2020.) More than 250 pages, with extensive text analysis, graphs, charts and more than 30 tables.



This comprehensive global bottled water market research study from Beverage Marketing Corporation looks at worldwide, continent and country bottled water trends. It discusses the leading companies' brands and strategies. Additionally, BMC's global bottled water market report includes five-year projections.

FOR A FULL CATALOG OF REPORTS AND DATABASES, GO TO bmcreports.com

AVAILABLE FORMAT & PRICING

↓
Direct
Download

\$4,995

To learn more, to place an advance order or to inquire about additional user licenses **call:** Charlene Harvey +1 212.688.7640 ext. 1962 charvey@beveragemarketing.com

INSIDE:

REPORT OVERVIEW

A brief discussion of this report's key features. 2

TABLE OF CONTENTS

A detailed outline of this report's contents and data tables. 5

SAMPLE TEXT AND INFOGRAPHICS

Examples of report text, data content, layout and style. 9



HAVE
QUESTIONS?

Contact Charlene Harvey: 212-688-7640 x 1962
charvey@beveragemarketing.com

BEVERAGE
MARKETING
CORPORATION

BEVERAGE MARKETING CORPORATION
850 Third Avenue, 13th Floor, New York, NY 10022
Tel: 212-688-7640 Fax: 212-826-1255

THE ANSWERS YOU NEED

The Global Bottled Water Market provides country-by-country data and market exegesis, shedding light on various aspects of the global bottled water industry through analysis of what the numbers really mean. Questions answered in BMC's global bottled water report include:

- What country leads the world in overall bottled water consumption? Which one leads in per capita consumption? How has various countries' global bottled water market share rankings shifted in recent years?
- What are the latest developments with the top bottled water companies? What are the leaders' strategies?
- Which countries' bottled water markets are continuing to see substantial volume growth? Which have slowed in recent years?
- What are the growth prospects for the global bottled water market over the next five years through 2020?

THIS GLOBAL BOTTLED WATER INDUSTRY REPORT FEATURES

The Global Bottled Water Market offers an in-depth look at the category, companies and brands shaping the international market for packaged water and the drivers impacting current and anticipated growth through 2020. BMC's global bottled water industry research offers well rounded perspective on the market, providing volume and per capita consumption statistics. Through a combination of discussion and Beverage Marketing's reliable global data, users of this report get a thorough understanding of all facets of the global bottled water market including:

- Consumption volume, share, growth and per capita intake for more than 70 countries
- Discussion of the top international bottled water companies - their histories, recent performance, strategies and brands - with coverage of Nestlé Waters, Danone, Coca-Cola Company and PepsiCo
- Discussion of and statistics on regional consumption volume, share and growth as well as analysis of country and company developments
- BMC's global bottled water research study concludes with BMC's exclusive projections for the global bottled water market, including consumption estimates for the entire world as well as its major regions through 2020

The Global Bottled Water Market

February 2016



RESEARCH • DATA • CONSULTING

NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

Copyright © 2016 Beverage Marketing Corporation of New York, 850 Third Avenue, New York, New York 10022, (212) 688-7640. All rights reserved. Reproductions in any form prohibited by law.

Contents

Table of Contents

TABLE OF CONTENTS

TABLE OF CONTENTS -----	i
DEFINITIONS USED IN THIS REPORT-----	v
INTRODUCTION -----	viii

Chapter

1. THE GLOBAL BOTTLED WATER MARKET	
The World's Bottled Water Markets -----	1
• Overview -----	1
• Consumption by Country-----	5
• Per Capita Consumption-----	7
The Regions' Bottled Water Markets -----	9
• Trends by Region -----	9
Exhibits	
1.1 Global Bottled Water Market Consumption and Annual Change 1996 – 2015 -----	13
1.2 Global Bottled Water Market Per Capita Consumption 1996 – 2015 -----	14
1.3 Global Bottled Water Market Consumption by Country 2010 – 2015-----	15
1.4 Global Bottled Water Market Share of Consumption by Country 2010 – 2015 -----	17
1.5 Global Bottled Water Market Change in Consumption by Country 2011 – 2015 -----	19
1.6 Global Bottled Water Market Per Capita Consumption by Country 2010 – 2015 -----	21
1.7 Global Bottled Water Market Consumption by Region 2010 – 2015 -----	23
1.8 Global Bottled Water Market Share of Consumption by Region 2010 – 2015 -----	24
1.9 Global Bottled Water Market Change in Consumption by Region 2011 – 2015 -----	25
1.10 Global Bottled Water Market Per Capita Consumption by Region 2010 – 2015 -----	26
2. THE LEADING GLOBAL COMPANIES AND THEIR BRANDS	
The World's Leading Companies-----	27
• Overview -----	27
• Brands-----	28
Nestlé S.A.	
• Overview -----	29
• Marketing -----	32
Danone	
• Overview -----	57
• Marketing -----	59
Coca-Cola Company	
• Overview -----	74
• Marketing -----	75

TABLE OF CONTENTS

Chapter

2. THE LEADING GLOBAL COMPANIES AND THEIR BRANDS (cont'd)

PepsiCo, Inc.

- Overview ----- 88
- Marketing ----- 89

Exhibits

- 2.11 Global Bottled Water Market Estimated Volume by Company 2010 – 2015 ----- 96
- 2.12 Global Bottled Water Market Estimated Share by Company 2010 – 2015----- 97
- 2.13 Global Bottled Water Market Estimated Growth by Company 2011 – 2015 ----- 98

3. THE EUROPEAN BOTTLED WATER MARKET

- Europe's Bottled Water Market ----- 99
 - Overview ----- 99
 - Consumption by Country----- 99
 - Per Capita Consumption----- 164

Exhibits

- 3.14 European Bottled Water Market Consumption by Country 2010 – 2015----- 165
- 3.15 European Bottled Water Market Share of Consumption by Country 2010 – 2015 ---- 166
- 3.16 European Bottled Water Market Change in Consumption by Country 2011 – 2015--- 167
- 3.17 European Bottled Water Market Per Capita Consumption by Country 2010 – 2015 -- 168

4. THE NORTH AMERICAN BOTTLED WATER MARKET

- North America's Bottled Water Market ----- 169
 - Overview ----- 169
 - Consumption by Country----- 170
 - Per Capita Consumption----- 175

Exhibits

- 4.18 North American Bottled Water Market Consumption by Country 2010 – 2015----- 177
- 4.19 North American Bottled Water Market Share of Consumption by Country
2010 – 2015----- 178
- 4.20 North American Bottled Water Market Change in Consumption by Country
2011 – 2015----- 179
- 4.21 North American Bottled Water Market Per Capita Consumption by Country
2010 – 2015----- 180

5. THE ASIAN BOTTLED WATER MARKET

- Asia's Bottled Water Market ----- 181
 - Overview ----- 181
 - Consumption by Country----- 183
 - Per Capita Consumption----- 202

TABLE OF CONTENTS

Chapter

5. THE ASIAN BOTTLED WATER MARKET (cont'd)	
<i>Exhibits</i>	
5.22 Asian Bottled Water Market Consumption by Country 2010 – 2015 -----	204
5.23 Asian Bottled Water Market Share of Consumption by Country 2010 – 2015 -----	205
5.24 Asian Bottled Water Market Change in Consumption by Country 2011 – 2015 -----	206
5.25 Asian Bottled Water Market Per Capita Consumption by Country 2010 – 2015 -----	207
6. THE SOUTH AMERICAN BOTTLED WATER MARKET	
South America’s Bottled Water Market-----	208
• Overview -----	208
• Consumption by Country-----	210
• Per Capita Consumption-----	221
<i>Exhibits</i>	
6.26 South American Bottled Water Market Consumption by Country 2010 – 2015 -----	222
6.27 South American Bottled Water Market Share of Consumption by Country 2010 – 2015-----	223
6.28 South American Bottled Water Market Change in Consumption by Country 2011 – 2015-----	224
6.29 South American Bottled Water Market Per Capita Consumption by Country 2010 – 2015-----	225
7. THE AFRICAN, MIDDLE EASTERN AND OCEANIAN BOTTLED WATER MARKETS	
Africa, Middle East & Oceania’s Bottled Water Markets -----	226
• Overview -----	226
• Consumption by Country-----	228
• Per Capita Consumption-----	238
<i>Exhibits</i>	
7.30 African, Middle Eastern & Oceanian Bottled Water Market Consumption by Country 2010 – 2015 -----	240
7.31 African, Middle Eastern & Oceanian Bottled Water Market Share of Consumption by Country 2010 – 2015 -----	241
7.32 African, Middle Eastern & Oceanian Bottled Water Market Change in Consumption by Country 2011 – 2015 -----	242
7.33 African, Middle Eastern & Oceanian Bottled Water Market Per Capita Consumption by Country 2010 – 2015 -----	243

TABLE OF CONTENTS

Chapter

8. THE PROJECTED GLOBAL BOTTLED WATER MARKET

The Projected International Bottled Water Market ----- 244

- Overview ----- 244
- The Global Market ----- 246
- The Regional Markets ----- 247

Exhibit

8.34 The Projected Global Bottled Water Market Consumption and Compound Annual
Growth by Region 2010 – 2020----- 251

Although the global per capita consumption figure may belie vast regional differences, bottled water's persistent global growth indicates its suitability for diverse markets. Consumers have demonstrated demand for it in highly developed markets, in less developed ones and in economies in transition, demonstrating the beverage's versatility.

- Bottled water has been able to make strong volume gains over the last decade and a half by successfully tapping into some divergent consumer trends around the globe.
- Bottled water is in many respects the ideal category for beverage manufacturers. It is characterized by high gross margins, the ability to segment the market, the possibility of trading up and high growth.
- In developed countries such as the U.S. and Canada, bottled water has tapped into a growing health and well-being consciousness on the part of consumers.
- This increased health awareness has helped position bottled water as an alternative not only to tap water, but, perhaps most important, as an alternative to carbonated soft drinks (CSDs) and juice drinks, in the multiple beverage marketplace. Many in the developed world see bottled water as not only a way of achieving hydration, but as a functional beverage as well.
- At the same time, in the developing world, bottled water is increasingly positioned as a safe and relatively affordable alternative to the often-unsafe tap water found in many countries.

While much of the world's bottled water market is still highly fragmented and controlled by local brands, consolidation is rapidly occurring, as four companies have come to dominate much of the market.

- Swiss food and beverage company Nestlé and French entity Danone are the traditional leaders of the bottled water pack. Both companies centered their operations around the core markets of Western Europe and the U.S.

**GLOBAL BOTTLED WATER MARKET
SHARE OF CONSUMPTION BY REGION (r)
2010 – 2015(p)**

Regions	2010	2011	2012	2013	2014	2015(p)
Asia	38.1%	38.1%	38.1%	38.1%	38.1%	38.1%
North America	22.1%	22.1%	22.1%	22.1%	22.1%	22.1%
Europe	18.1%	18.1%	18.1%	18.1%	18.1%	18.1%
South America	10.1%	10.1%	10.1%	10.1%	10.1%	10.1%
Africa/Mideast/Oceania	11.5%	11.5%	11.5%	11.5%	11.5%	11.5%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

(r) Revised; (p) Preliminary

Source: Beverage Marketing Corporation



(p) Preliminary

Source: Beverage Marketing Corporation