BOTTLED WATER IN THE U.S.

2014 EDITION (Published July 2014. Data through 2013. Market projections through 2018.) More than 300 pages, with extensive text analysis, graphs, charts and more than 140 tables.

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Beverage Marketing's definitive report on the second largest beverage category by volume considers every aspect of this resilient category and its competitive circumstances. Its detailed analysis covers regional and state markets as well as packaging, quarterly category growth, distribution, advertising, demographics and more.

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The answers you need

Bottled Water in the U.S. provides in-depth data and market analysis, shedding light on various aspects of the market through reliable data and discussions of what the numbers really mean. Questions answered include:

- How much bottled water is consumed per capita in the United States, how has this changed in recent years, and what is driving these developments?
- Which package sizes and types are hot right now and which are not?
- How did the various bottled water market segments perform in 2013, and how are they like to develop in the future?
- Which bottled water companies and brands experienced growth in 2013, and which did not?
- What are the drivers of the home- and office-delivery market for bottled water?
- Which nations ship the most bottled water to the U.S. and how does imported water affect the domestic producers?
- Which non-sparkling water distribution channels will gain market share by 2018?

This report features

Bottled Water in the U.S. surveys the domestic landscape of the soon-to-be leading beverage category, with volume, retail dollar, wholesale dollar and per capita consumption figures. The report provides an in-depth look at the leading companies and brands in the category and the drivers likely to propel consumption growth through 2018. All aspects of the bottled water market are considered, including segmentation by package size, distribution channels, water type and source. Advertising and demographic data are also offered. Backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, users get a thorough understanding of all facets of the bottled water market including:

- Historical and current statistics on all facets of the bottled water market, as well as insight into current trends and putting the U.S. market in a global perspective
- A regional look at the U.S. bottled water marketplace, with volume and growth of non-sparkling and sparkling water over the past three decades
- Includes profiles of the Nestlé Waters North America (NWNA), PepsiCo, Coca-Cola Company, DS Services of America, CG Roxane, Culligan International, Dr Pepper Snapple, Crystal Rock, Glacier Water Services and Niagara Bottling. Also tracks the performance of the top domestic and imported brands and the leading HOD water companies
- Data detailing sales by key on- and off-premise, as well as non-retail, distribution channels totaling 100% of market volume
- An analysis of non-sparkling volume by container type and by size as well as sparkling volume
- Advertising expenditures of the leading bottled water companies and a look at category spending by media type (including internet advertising)
- Consumer demographic profiles comparing consumers of key bottled water brands
- Overview of the seltzer and club soda market and its key players
- Five-year projections for the bottled water market and its sub-segments including bulk, premium PET, 1 and 2 gallon, bulk delivered water through 2018 and more

Bottled Water in the U.S.

2014 Edition

July 2014

BEVERAGE MARKETING CORPORATION

RESEARCH ● DATA ● CONSULTING

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

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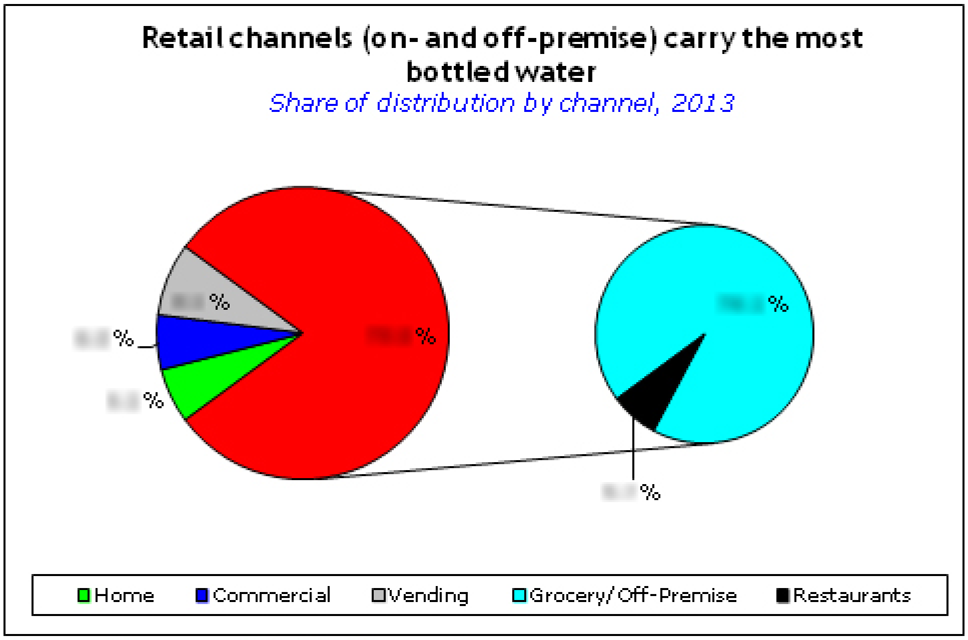
Appendix

Exhibit 5.65

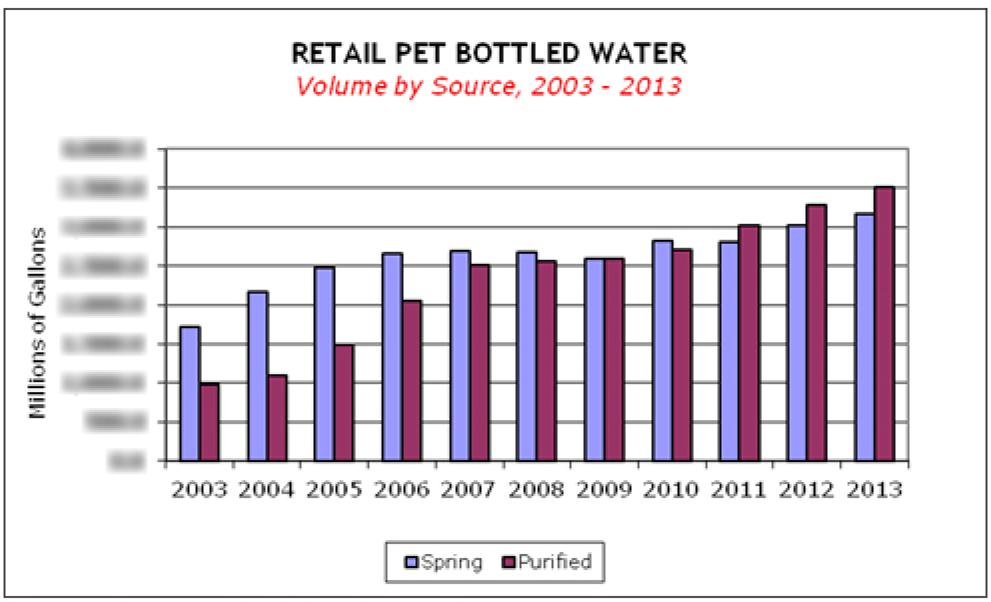
U.S. BOTTLED WATER MARKET
GROWTH BY WATER TYPE AND DISTRIBUTION
2004 – 2013

Type	Year	Home	Commercial	Retail Off-Premise	Retail On-Premise	Vending	Total Growth
Non-Sparkling	2003/04	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2004/05	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2005/06	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2006/07	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2007/08	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2008/09	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2009/10	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2010/11	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2011/12	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2012/13	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Domestic Sparkling	2003/04	–	–	[illegible]%	[illegible]%	–	[illegible]%
	2004/05	–	–	[illegible]%	[illegible]%	–	[illegible]%
	2005/06	–	–	[illegible]%	[illegible]%	–	[illegible]%
	2006/07	–	–	[illegible]%	[illegible]%	–	[illegible]%
	2007/08	–	–	[illegible]%	[illegible]%	–	[illegible]%
	2008/09	–	–	[illegible]%	[illegible]%	–	[illegible]%
	2009/10	–	–	[illegible]%	[illegible]%	–	[illegible]%
	2010/11	–	–	[illegible]%	[illegible]%	–	[illegible]%
	2011/12	–	–	[illegible]%	[illegible]%	–	[illegible]%
	2012/13	–	–	**[illegible]%**	**[illegible]%**	–	**[illegible]%**
Imports	2003/04	–	–	[illegible]%	[illegible]%	–	[illegible]%
	2004/05	–	–	[illegible]%	[illegible]%	–	[illegible]%
	2005/06	–	–	[illegible]%	[illegible]%	–	[illegible]%
	2006/07	–	–	[illegible]%	[illegible]%	–	[illegible]%
	2007/08	–	–	[illegible]%	[illegible]%	–	[illegible]%
	2008/09	–	–	[illegible]%	[illegible]%	–	[illegible]%
	2009/10	–	–	[illegible]%	[illegible]%	–	[illegible]%
	2010/11	–	–	[illegible]%	[illegible]%	–	[illegible]%
	2011/12	–	–	[illegible]%	[illegible]%	–	[illegible]%
	2012/13	–	–	**[illegible]%**	**[illegible]%**	–	**[illegible]%**
Total Gallonage By Outlet	2003/04	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2004/05	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2005/06	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2006/07	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2007/08	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2008/09	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2009/10	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2010/11	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2011/12	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2012/13	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation

Packaging is one of the key drivers in the bottled water market.

- Since many consumers do not distinguish between spring and purified water, and most likely do not detect much of a difference in flavor between bottled water brands, packaging becomes that much more important.
- The immediate consumption segment is the fastest growing in the bottled water market as Americans increasingly purchase bottled water for on-the-spot refreshment, rather than as a take-home substitute for tap water.
- Whether the water is bought cold in single units at c-stores or in multi-packs at grocery or club stores, consumers want lightweight, non-breakable packaging. Plastic is the perfect package for active consumers with its portability and its wide range of sizes. Glass has mainly been replaced by plastic, except in certain on-premise venues, such as restaurants.

The expansion in plastic packaging formats and sizes spurred growth in the bottled water market as a whole, and especially in the non-sparkling segment.

- The broadening demand for portable, healthy beverages helped make premium retail PET water the fastest growing segment in the bottled water industry.
- As late as the mid-1990s, PET waters were almost exclusively sold in three sizes – 0.5-, 1.0- and 1.5-liter PET bottles. Since then, the segment's packaging mix has greatly expanded.
- PET waters are now sold in a very wide array of package sizes with and without sports caps. This rapid proliferation of new packages spurred more take-home and on-the-go usage of PET waters.
- Of course, one may argue that the proliferation of new sizes and multi-packs has also been the result of increasing demand and not merely the cause of such demand.