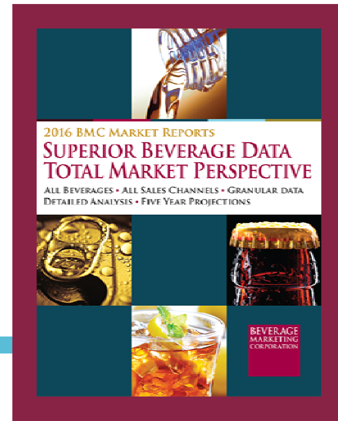
U.S. Bottled Water through 2020

2015 Edition (Published June 2016. Data through 2015. Market projections through 2020.) More than 320 pages, with extensive text analysis, graphs, charts and more than 120 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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Inside:

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The answers you need

U.S. Bottled Water through 2020 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 2015, and how are they like to develop by 2020?
- Which bottled water companies and brands experienced growth in 2015, and which did not?
- What are the drivers of the home- and office-delivery market for bottled water? Will HOD's recent mini-revival continue to 2020?
- 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 2020?

This report features

U.S. Bottled Water through 2020 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 2020. 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 and Spanish network TV advertising)
- Consumer demographic profiles comparing consumers of key bottled water brands
- Overview of the seltzer and club soda market and its key players
- Projections for the bottled water market and its sub-segments including premium PET, 1 and 2.5 gallon, bulk delivered water, imports and sparkling water through 2020, as well as five-year volume forecasts by region, distribution channels and packaging, and more

U.S. Bottled Water through 2020

June 2016

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 5.63

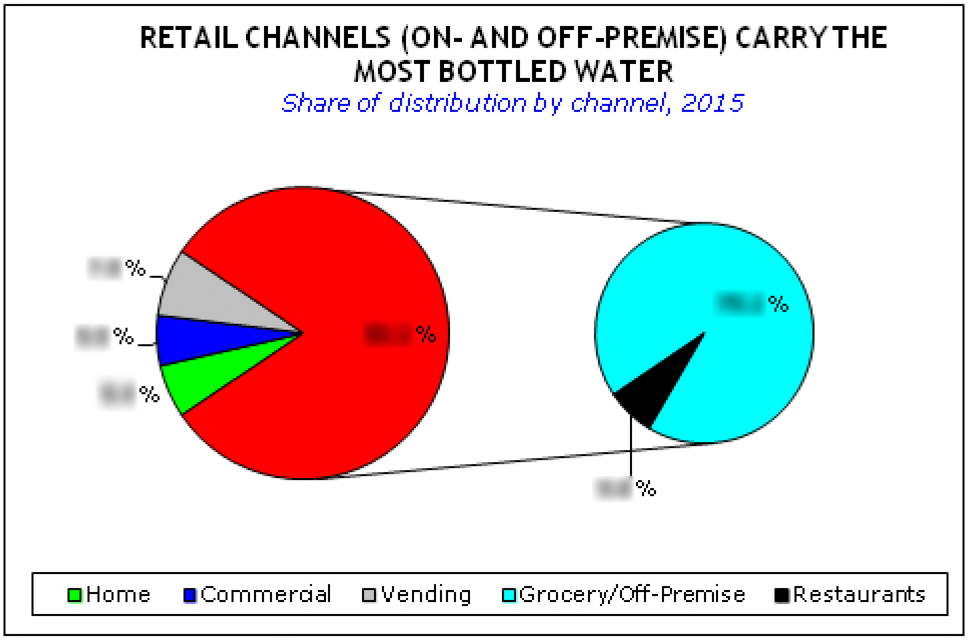
U.S. BOTTLED WATER MARKET
GROWTH BY WATER TYPE AND DISTRIBUTION
2006 – 2020(P)

Type	Year	Home	Commercial	Retail Off-Premise	Retail On-Premise	Vending	Total Growth
Non-Sparkling	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]%
	2013/14	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2014/15	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2015/20(P)	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Domestic Sparkling	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]%
	2013/14	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2014/15	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2015/20(P)	[illegible]	[illegible]	**[illegible]%**	**[illegible]%**	[illegible]	**[illegible]%**
Imports	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]%
	2013/14	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2014/15	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2015/20(P)	[illegible]	[illegible]	**[illegible]%**	**[illegible]%**	[illegible]	**[illegible]%**
Total Gallonage By Outlet	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]%
	2013/14	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2014/15	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2015/20(P)	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

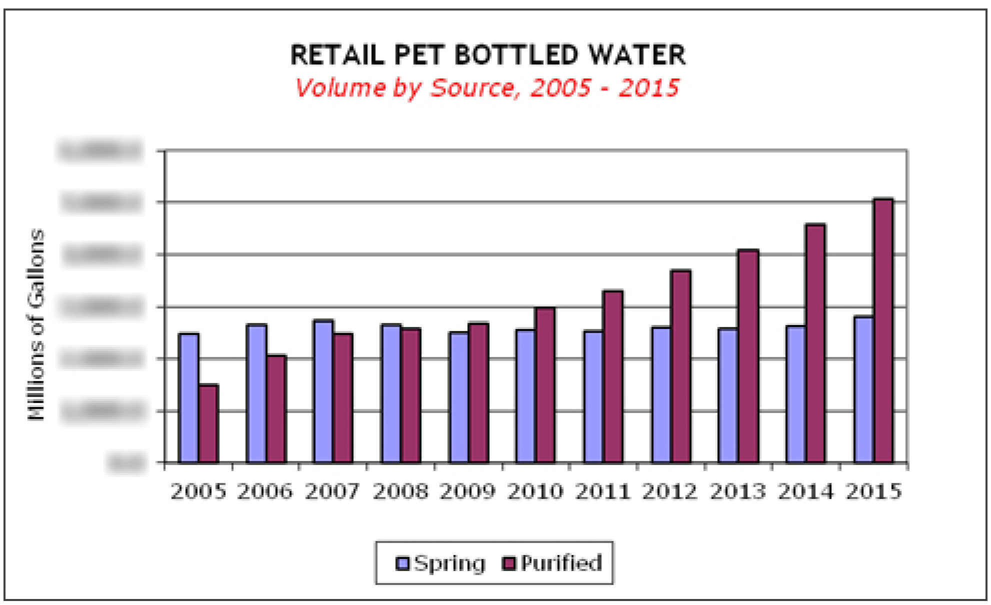
(P) Projected

Note: The 2015/20 figures are the projected five-year compound annual growth rates.

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation

Despite the industry's efforts to offer its side of the story, environmentalists and other anti-corporate activists received another shot in the arm with the ongoing drought in California.

- On 25 April 2015, California Governor Edmund "Jerry" Brown Jr. issued an executive order continuing the state of emergency declared on 17 January 2014. The April 2015 directive imposes a "25% statewide reduction in potable urban water usage" through 28 February 2016. Agricultural use of water, which comprises an estimated 80% of water usage in the state, was exempted from the statewide reduction.
- Even before the mandatory water restriction was announced there was a lot of finger-pointing, much of it directed towards Nestlé, which as the world's largest food and beverage company stands as a symbol of multinational corporatism. Much of enmity towards the Swiss company is pre-existing, as the Swiss company is accused of pushing baby formula to replace the more nutritious breast milk and, as noted, contributing to the large stockpile of plastic bottles piling up in landfills.
- The main accusation is that Nestlé pays a pittance for a scarce public resource that it turns into large profits. Another bone of contention has been NWNA's contract with the Morongo Band of Mission Indians' reservation to provide water for Arrowhead Mountain Spring Water. Some decry the fact that, as a sovereign nation, the Morongo tribe is not required to allow monitoring of water usage by the state of California.
- In October 2014, members of Occupy Sacramento protested outside of NWNA's plant in that city. NWNA released a statement saying that it pays the standard rate for municipal water and that it used only 0.0016% of Sacramento's total water demand. Later, NWNA claimed the amount of water used by Arrowhead and Nestlé Pure Life in California during a given year was equivalent to the annual usage of two typical California golf courses.
- In May 2015, Nestlé announced it would reduce the amount of water it uses in its five Californian water bottling plants as well as in four plants involved in food or petcare.
- In the same press release, the company subtly pointed out that there were a total of 108 bottled water plants in the state. Even so, the International Bottled Water claimed that bottled water accounted for only 0.02% of water used in California.