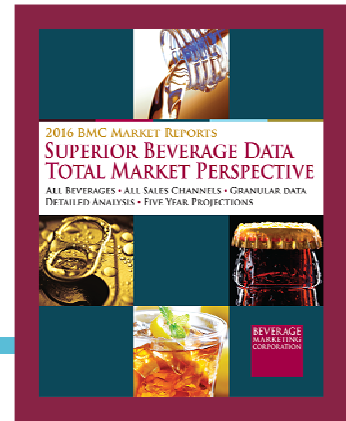


U.S. VALUE-ADDED WATER THROUGH 2020

2016 EDITION (Published October 2016. Data through 2015. Market projections through 2020.) More than 150 pages, with extensive text analysis, graphs, charts and more than 50 tables.



This U.S. value-added water industry research report from Beverage Marketing Corporation assesses the current state of the market. It provides an overview of the sub-segments including regular and low-calorie enhanced waters, flavored water, alkaline water and essence water. Principal competitors are identified along with small, growing companies and their brands. It includes analysis of leading brands' advertising expenditures, market drivers that will propel growth and five year market projections.

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HAVE
QUESTIONS?

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THE ANSWERS YOU NEED

The Value-Added Water report provides in-depth data and market analysis, shedding light on various aspects of the market through BMC's reliable data and discussions of what the numbers really mean. Questions answered in this market report include:

- What are the leading brands, and how did they perform in 2015?
- What product types comprise the category? What percentage of market share does each sub-segment hold?
- What trends and developments drive the U.S. market for vitamin enhanced and other value added waters?
- How big is the U.S. value-added bottled water market, as measured in wholesale dollars and gallons?
- What is the likely market size for flavored, enhanced, alkaline and other value-added waters over the next five years?

THIS REPORT FEATURES

The report assesses the historical and current state of the market and provides a look forward at category expectations through 2020. Category performance is analyzed through discussion of trends as well as a look at 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.

This comprehensive industry report includes analysis of distribution channels, packaging, advertising expenditures and demographics - as well as category projections. Through in-depth analysis backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, readers of this market research get a thorough understanding of all facets of the market including:

- An overview and current statistics of the overall bottled water, as well as value-added water markets.
- A drill-down into the various sub-segments of the market, with statistical data on volume, per capita consumption, retail dollars and wholesale dollars by sub-segment for regular enhanced water, low-calorie enhanced water, flavored water, alkaline water and essence water.
- Detailed profiles and analysis of the leading companies and brands, discussions of their marketing activities and distribution strategies as well as company and brand sales volume data. Coverage includes Coca-Cola Company, PepsiCo, Sunny Delight Beverages Company, Nestlé Waters North America (NWN), Aquahydrate, Herbal Water Inc., Hint Inc., Bai Brands, Karma Culture, Essentia Water, Avitae USA and Core Nutrition.
- Data detailing volume of value-added sub-segments by distribution channels.
- An analysis of volume by container type, including plastic and pouches, also broken down by value-added sub-segments.
- Advertising expenditures of the leading brands and a look at category spending by 18 media types (including Internet).
- Consumer demographic profiles comparing consumers of key segments.
- Five-year projections for the market and its sub-segments through 2020.

U.S. Value-Added Water through 2020

October 2016

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

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Value-added water is comprised of flavored, enhanced, essence and alkaline waters – together which provide value above and beyond “just hydration.” The larger single-serve water segment includes both value-added water and retail PET water.

- The segments comprising value-added water are flavored sweetened still, flavored sweetened still enhanced (with minerals and vitamins), unsweetened flavored (or unflavored) essence, oxygenated, alkaline and structured/clustered.
- Throughout this report, in the discussion of wholesale dollars, structured and, oxygenated waters are grouped with enhanced waters. In this year’s report, alkaline waters have been broken out as a separate item for the first time.
- Value-added water represents about 15% of total single-serve water category revenues.
- On a volumetric basis, value-added water comprises approximately 10% of total single-serve water; premium pricing makes value share much higher.

Although activity in the category has slowed somewhat recently, the last 10 years has seen a majority of brand introductions in the enhanced water segment. Caffeinated and oxygenated brands were the pioneers, coming out more than a decade ago; but none ever reached critical mass (although caffeinated waters may be finally be coming of age).

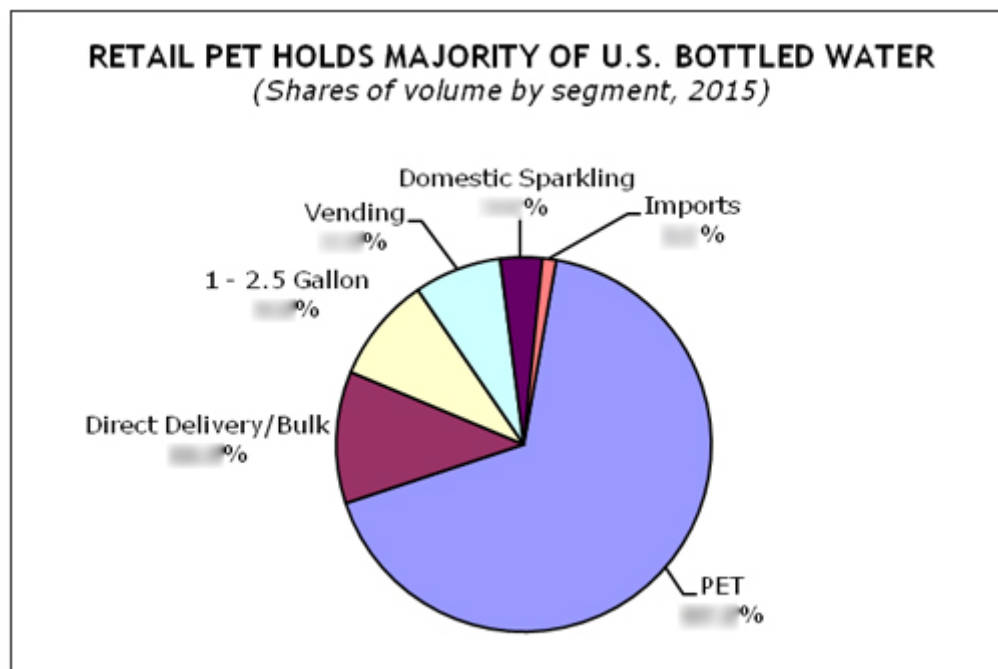
- In the mid-1990s, Water Joe caffeinated water made a minor splash. Later in the decade came Clearly Canadian O+2 oxygenated water and Essentia structured water. Penta and Coral Water structured waters also debuted in the late 1990s.
- Vitamin-enhanced waters began to gain traction in 2000 with Glaceau Vitaminwater. Others emerged, such as Propel and Fruit₂O Plus. Other vitamin-enhanced waters from companies such as Hansen’s, Baxter Healthcare and Snapple were on the market for a short while but were then discontinued, as was Fruit₂O Plus (although Fruit₂O flavored water remains on the market).
- In 2005, flavored waters such as Nestlé Pure Life, Aquafina FlavorSplash and Dasani flavors hit the market. But the flavored water segment has not seen a whole lot of activity since.

**VALUE-ADDED WATER MARKET
SHARE OF VOLUME BY CATEGORY
2010 – 2020(P)**

Category	2010	2011	2012	2013	2014	2015	2020(P)
Regular Enhanced Water	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%
Low-Calorie Enhanced Water	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%
Subtotal Enhanced Water	70.0%	70.0%	70.0%	70.0%	70.0%	70.0%	70.0%
Alkaline Water	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
Flavored Water	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
Essence Water	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
TOTAL	74.0%	74.0%	74.0%	74.0%	74.0%	74.0%	74.0%

(P) Projected

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation