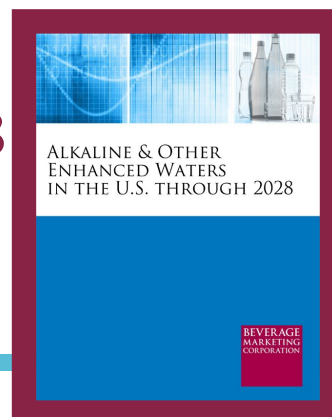


ALKALINE & OTHER ENHANCED WATERS IN THE U.S. THROUGH 2028

2024 EDITION (Published December 2024. Data through 2023, preliminary 2024 figures and forecasts through 2028.) More than 175 pages, with extensive text analysis, graphs, charts and tables.



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

Water with many twists. This research report on the rapidly evolving segments of the U.S. value-added water industry assesses the current state and future expectations for a market characterized by innovation and new product entries with increasingly varied ingredients and functional benefits. It provides an overview of the sub-segments including alkaline water, regular and low-calorie enhanced waters, flavored water and essence water, examining sales, growth, share, distribution channels and more. 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. It also discusses and quantifies niche water beverage segments (such as floral waters, weight management/ keto waters, wine waters, detox waters, plant waters, protein waters, fiber waters, spice (herbal) waters, probiotic waters, collagen (beauty) waters and rain waters) that are not included in value-added water market totals but are considered separately in a dedicated chapter providing details on each segment's gallonage, wholesale dollar and retail dollar size, growth and market share. These emerging and increasingly fragmented functional benefit or ingredient-based beverage segments are quantified and discussed and their growth prospects through 2028 are forecasted. The market forces driving innovation and blurring the lines between beverage segments as interest in premium quasi-water beverages continues is also discussed and analyzed.

AVAILABLE FORMAT & PRICING



Direct Download
Word, Excel & PDF

\$4,595

*To learn more, to place an advance order or to inquire about additional user licenses **call:** Charlene Harvey +1 212.688.7640 ext. 250 charvey@beveragemarketing.com*

INSIDE:

REPORT OVERVIEW

A brief discussion of key features of this report. **2**

TABLE OF CONTENTS

A detailed outline of this report's contents and data tables. **7**

SAMPLE TEXT AND INFOGRAPHICS

A few examples of this report's text, data content layout and style. **12**



**HAVE
QUESTIONS?**

Contact Charlene Harvey: 212-688-7640 x 250
charvey@beveragemarketing.com

**BEVERAGE
MARKETING
CORPORATION**

BEVERAGE MARKETING CORPORATION
P.O. Box 2399 | 143 Canton Road, 2nd Floor
Wintersville, OH 43953
Tel: 212-688-7640 Fax: 740-314-8639

THE ANSWERS YOU NEED

Alkaline and Other Enhanced Waters in the U.S. through 2028 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, how did they perform in 2023 and what is the preliminary read on how their year-end numbers will shake out in 2024?
- What product types comprise the category? What percentage of market share does each sub-segment hold? What segments comprise the newly-added niche water beverage category?
- What trends and developments drive the U.S. market for enhanced and other value added waters? How big are the niche water beverage segments?
- 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? What is the likely size of the niche water beverage segment in 2028?
- There is much excitement about innovative niche segments based on function or premium ingredients. How big are the plant water, protein waters, detox waters, wine waters, flower/floral waters, spice/herbal waters, weight-management/keto waters, collagen/beauty water and rain water segments? How large are they expected to be by 2028?

THIS U.S. VALUE ADDED WATER REPORT FEATURES

The report assesses the historical and current state of the market and provides a look forward at category expectations through 2028. 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 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, BlueTriton Brands, Nestlé USA, Alkaline Water Company, Keurig Dr Pepper (Bai and Core), Aquahydrate, Hint Inc., Evamor, Eternal and Talking Rain.

- Brand volume and wholesale data, growth and market share for leading alkaline water brands including: Essentia, Core Hydration, Alkaline 88, Re2al Alkalized Water and Aquahydrate. Detailed performance results for key essence waters including: Smartwater, Vitaminwater, Bai, Propel, Vitaminwater Zero, LIFEWTR, SoBeWater Zero, Penta, SoBeWater and Private label. Plus, in-depth sales data for flavored water brands including: Capri Sun Roarin' Waters, Nestle Pure Life Splash, Aquafina Splash, Fruit2O, Dasani and the private label market.
- Data detailing volume of the value-added water market and its sub-segments by various on and off-premise distribution channels including foodservice. The sub-segments detailed by channel include flavored waters, enhanced waters, essence water and alkaline water.
- An analysis of volume by container type, including plastic and pouches, also broken down by value-added sub-segments.
- Discussion of the fledgling niche water beverage segment, including winners and losers to 2025 and a profile of four promising niche water beverage brands. Niche segments quantified and forecasted include: Plant Waters, Protein Waters, Detox, Fiber Water, Wine Waters, Spice (Herbal) Waters , Flower/Floral Waters, Weight Management/Keto Water, Probiotic Waters, Collagen (Beauty) Waters and Rain Waters.
- 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 2028.



ALKALINE & OTHER ENHANCED WATERS IN THE U.S. THROUGH 2028

BEVERAGE
MARKETING
CORPORATION

Alkaline & Other Enhanced Waters in the U.S. through 2028

December 2024

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.

Contents

Table of Contents

TABLE OF CONTENTS

TABLE OF CONTENTS -----	i
INTRODUCTION -----	vi

Chapter

1. THE U.S. BOTTLED WATER MARKET

The National Bottled Water Market-----	1
--	---

Exhibits

1.1 U.S. Bottled Water Market Gallonage by Segment 2018 – 2028 -----	4
1.2 U.S. Bottled Water Market Share of Gallonage by Segment 2018 – 2028 -----	5
1.3 U.S. Bottled Water Market Change in Gallonage by Segment 2019 – 2028 -----	6

2. THE VALUE-ADDED WATER MARKET

The Value-Added Water Market Segments -----	7
---	---

• Overview -----	7
• Enhanced Water -----	13
• Flavored Water -----	15
• Essence Water -----	19
• Alkaline Water -----	20

The Niche Water Beverage Segment-----	22
---------------------------------------	----

Exhibits

2.4 Value-Added Water Market Dollars, Volume and Price Per Gallon 2000 – 2028 -----	23
2.5 Value-Added Water Market Per Capita Consumption 2000 – 2028 -----	24
2.6 Value-Added Water Market Retail Dollars and Growth 2000 – 2028 -----	25
2.7 Value-Added Water Market Quarterly Volume Shares 2007 – 2023 -----	26
2.8 U.S. Q1 2024 Estimated Volume, Share and Growth Value-Added Water by Segment	27
2.9 U.S. Q2 2024 Estimated Volume, Share and Growth Value-Added Water by Segment	28
2.10 U.S. Q3 2024 Estimated Volume, Share and Growth Value-Added Water by Segment	29
2.11 U.S. 9M YTD 2024 Estimated Volume, Share and Growth Value-Added Water by Segment -----	30
2.12 Value-Added Water Market Volume by Category 2018 – 2028 -----	31
2.13 Value-Added Water Market Share of Volume by Category 2018 – 2028 -----	32
2.14 Value-Added Water Market Change in Volume by Category 2019 – 2028 -----	33
2.15 Enhanced Water Market Dollars, Volume and Price Per Gallon 2000 – 2028 -----	34
2.16 Flavored Water Market Dollars, Volume and Price Per Gallon 2000 – 2028-----	35
2.17 Essence Water Market Dollars, Volume and Price Per Gallon 2006 – 2028 -----	36
2.18 Alkaline Water Market Dollars, Volume and Price Per Gallon 2014 – 2028-----	37
2.19 Value-Added and Niche Water Beverage Market Wholesale Dollars, Share and Growth 2023 – 2028 -----	38

TABLE OF CONTENTS

Chapter

3. VALUE-ADDED WATER DISTRIBUTION CHANNELS

Value-Added Water Distribution Channels -----	39
• Overview -----	39
• Enhanced Water -----	42
• Flavored Water -----	44
• Essence Water -----	47
• Alkaline Water -----	49

Exhibits

3.20 Value-Added Water Market Volume by Distribution Channel 2018 – 2028-----	52
3.21 Value-Added Water Market Share of Volume by Distribution Channel 2018 – 2028---	53
3.22 Value-Added Water Market Change in Volume by Distribution Channel 2019 – 2028-	54
3.23 Enhanced Water Market Volume by Distribution Channel 2018 – 2028 -----	55
3.24 Enhanced Water Market Share of Volume by Distribution Channel 2018 – 2028-----	56
3.25 Enhanced Water Market Change in Volume by Distribution Channel 2019 – 2028 ----	57
3.26 Flavored Water Market Volume by Distribution Channel 2018 – 2028 -----	58
3.27 Flavored Water Market Share of Volume by Distribution Channel 2018 – 2028 -----	59
3.28 Flavored Water Market Change in Volume by Distribution Channel 2019 – 2028 -----	60
3.29 Essence Water Market Volume by Distribution Channel 2018 – 2028-----	61
3.30 Essence Water Market Share of Volume by Distribution Channel 2018 – 2028-----	62
3.31 Essence Water Market Change in Volume by Distribution Channel 2019 – 2028 -----	63
3.32 Alkaline Water Market Volume by Distribution Channel 2018 – 2028 -----	64
3.33 Alkaline Water Market Share of Volume by Distribution Channel 2018 – 2028 -----	65
3.34 Alkaline Water Market Change in Volume by Distribution Channel 2019 – 2028 -----	66

4. VALUE-ADDED WATER PACKAGING

Packaging Types-----	67
----------------------	----

Exhibits

4.35 Value-Added Water Market Volume by Container Material 2018 – 2028-----	69
4.36 Value-Added Water Market Share by Container Material 2018 – 2028-----	70
4.37 Value-Added Water Market Change by Container Material 2019 – 2028-----	71

5. THE LEADING VALUE-ADDED WATER COMPANIES AND BRANDS

Leading Value-Added Water Brands-----	72
• Enhanced Water -----	72
• Flavored Water -----	74
• Alkaline Water -----	75

Coca-Cola Company

• Glacéau -----	76
-----------------	----

PepsiCo

• Propel -----	84
• LIFEWTR -----	88
• SoBeWater -----	89

TABLE OF CONTENTS

Chapter

5. THE LEADING VALUE-ADDED WATER COMPANIES AND BRANDS (cont'd)

Alkaline Water Company

- Alkaline88----- 92

BlueTriton Brands

- Splash Blast----- 94

Nestlé USA

- Essentia ----- 96

Aquahydrate

- Aquahydrate ----- 98

Hint, Inc.

- Hint Water ----- 100

Keurig Dr Pepper

- Bai----- 103
- Core Water----- 107

Evamor

- Evamor----- 111

Eternal

- Eternal ----- 112

Other Value-Added Water Brands ----- 113

Exhibits

- 5.38 Enhanced Water Market Estimated Wholesale Dollars by Brand 2018 – 2023----- 116
- 5.39 Enhanced Water Market Share of Estimated Wholesale Dollars by Brand
2018 – 2023 ----- 117
- 5.40 Enhanced Water Market Change in Estimated Wholesale Dollars by Brand
2019 – 2023 ----- 118
- 5.41 Enhanced Water Market Estimated Volume by Brand 2018 – 2023 ----- 119
- 5.42 Enhanced Water Market Share of Estimated Volume by Brand 2018 – 2023 ----- 120
- 5.43 Enhanced Water Market Change in Estimated Volume by Brand 2019 – 2023 ----- 121
- 5.44 Flavored Water Market Estimated Wholesale Dollars by Brand 2018 – 2023 ----- 122
- 5.45 Flavored Water Market Share of Estimated Wholesale Dollars by Brand 2018 – 2023 123
- 5.46 Flavored Water Market Change in Estimated Wholesale Dollars by Brand
2019 – 2023 ----- 124
- 5.47 Flavored Water Market Estimated Volume by Brand 2018 – 2023----- 125
- 5.48 Flavored Water Market Share of Estimated Volume by Brand 2018 – 2023 ----- 126
- 5.49 Flavored Water Market Change in Estimated Volume by Brand 2019 – 2023----- 127
- 5.50 Alkaline Water Market Estimated Wholesale Dollars by Brand 2018 – 2023 ----- 128
- 5.51 Alkaline Water Market Share of Estimated Wholesale Dollars by Brand 2018 – 2023- 129
- 5.52 Alkaline Water Market Change in Estimated Wholesale Dollars by Brand
2019 – 2023 ----- 130
- 5.53 Alkaline Water Market Estimated Volume by Brand 2018 – 2023 ----- 131
- 5.54 Alkaline Water Market Share of Estimated Volume by Brand 2018 – 2023 ----- 132
- 5.55 Alkaline Water Market Change in Estimated Volume by Brand 2019 – 2023 ----- 133

TABLE OF CONTENTS

Chapter

6. THE NICHE WATER BEVERAGE MARKET

Niche Water Beverages Brands-----	134
• Overview -----	134
• Protein2O -----	137
• Treo Fruit & Birch Water -----	138
• True Nopal Cactus Water-----	140
• Caliwater -----	141

Exhibits

6.56 Niche Water Beverage Market Estimated Wholesale Dollars by Category 2020 – 2028 -----	142
6.57 Niche Water Beverage Market Share of Estimated Wholesale Dollars by Category 2020 – 2028 -----	143
6.58 Niche Water Beverage Market Change in Estimated Wholesale Dollars by Category 2021 – 2028 -----	144
6.59 Niche Water Beverage Market Estimated Volume by Category 2020 – 2028 -----	145
6.60 Niche Water Beverage Market Share of Estimated Volume by Category 2020 – 2028	146
6.61 Niche Water Beverage Market Change in Estimated Volume by Category 2021 – 2028 -----	147
6.62 Niche Water Beverage Market Estimated Retail Dollars by Category 2020 – 2028 -----	148
6.63 Niche Water Beverage Market Share of Estimated Retail Dollars by Category 2020 – 2028 -----	149
6.64 Niche Water Beverage Market Change in Estimated Retail Dollars by Category 2021 – 2028 -----	150

7. VALUE-ADDED WATER ADVERTISING EXPENDITURES

Value-Added Water Advertising Expenditures -----	151
• Expenditures by Brand -----	151
• Expenditures by Media -----	152

Exhibits

7.65 Leading Value-Added Water Brands Advertising Expenditures 2018 – 2023-----	154
7.66 Leading Value-Added Water Brands Share of Advertising Expenditures 2018 – 2023-	155
7.67 Leading Value-Added Water Brands Change in Advertising Expenditures 2019 – 2023 -----	156
7.68 Estimated Advertising Expenditures for Value-Added Water Brands by Media 2018 – 2023 -----	157
7.69 Estimated Share of Advertising Expenditures for Value-Added Water Brands by Media 2018 – 2023 -----	158
7.70 Estimated Change in Advertising Expenditures for Value-Added Water Brands by Media 2019 – 2023 -----	159

TABLE OF CONTENTS

Chapter

8. DEMOGRAPHICS OF THE VALUE-ADDED WATER CONSUMER

The Value-Added Water Consumer----- 160

- Enhanced Water ----- 160
- Flavored Water ----- 164
- Comparative Demographics of Enhanced Water Brands ----- 167

Exhibits

8.71 Demographics of the Enhanced Water Consumer 2023 ----- 170

8.72 Demographics of the Flavored Water Consumer 2023 ----- 172

8.73 Demographics of the Glacéau Vitaminwater Consumer 2023----- 174

8.74 Demographics of the Glacéau Smartwater Consumer 2023----- 176

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. Alkaline waters have been broken out as a separate item.
- Value-added water represents about 21% of total wholesale dollars for the single-serve water category.
- On a volumetric basis, value-added water comprises approximately 7% of total single-serve water; premium pricing makes value share much higher.

Much of the new-product activity in the category has been in the enhanced water segment. Caffeinated and oxygenated brands were the pioneers, coming out more than 25 years ago; but none ever reached critical mass.

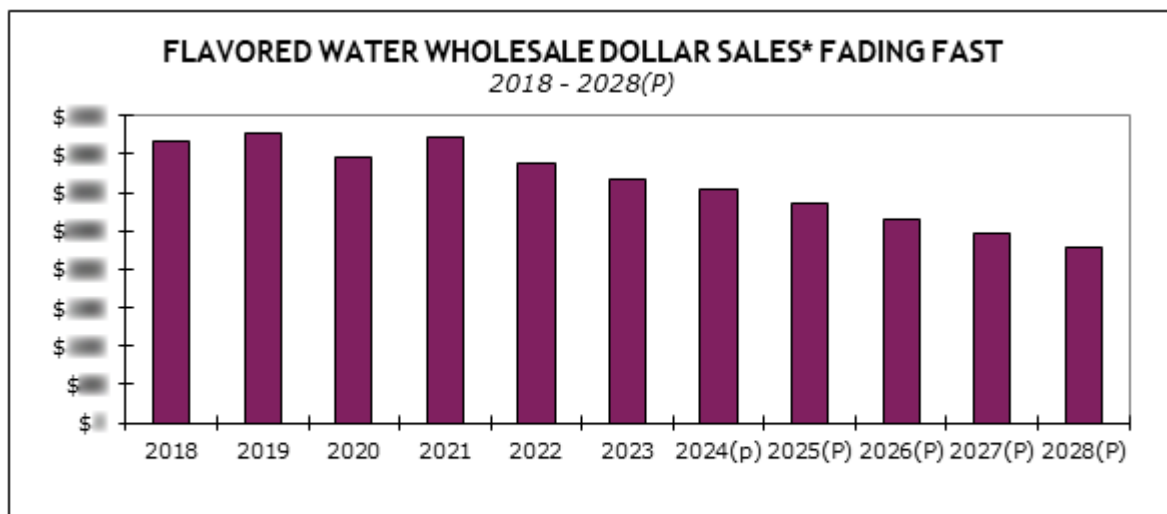
- In the mid-1990s, Water Joe caffeinated water made a minor splash. Later in the decade came Clearly Canadian O+2 oxygenated. Penta and Coral Water structured waters also debuted in the late 1990s.
- Vitamin-enhanced waters began to gain traction in 2000 with Glacéau Vitaminwater, which was later acquired by Coca-Cola Company. Others emerged, such as Propel, which continues to be a good revenue source for PepsiCo.
- 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.
- Flavored water, comprised of a few brands, is a more mainstream targeted segment, without specific functional benefits beyond hydration. Large beverage corporations such as Sunny Delight (now owned by buyout firm Brynwood Partners), Kraft Heinz, Coca-Cola, PepsiCo and BlueTriton dominated this segment.

VALUE-ADDED WATER MARKET
SHARE OF VOLUME BY CATEGORY
2018 – 2028(P)

Water Category	2018	2019	2020	2021	2022	2023	2024(p)	2028(P)
Regular Enhanced	15%	15%	15%	15%	15%	15%	15%	15%
Low-Calorie Enhanced	15%	15%	15%	15%	15%	15%	15%	15%
Subtotal Enhanced	30%	30%	30%	30%	30%	30%	30%	30%
Alkaline	15%	15%	15%	15%	15%	15%	15%	15%
Essence	15%	15%	15%	15%	15%	15%	15%	15%
Flavored	15%	15%	15%	15%	15%	15%	15%	15%
TOTAL	75%	75%	75%	75%	75%	75%	75%	75%

(p) Preliminary; (P) Projected

Source: Beverage Marketing Corporation



(p) Preliminary; (P) Projected

* In Millions

Source: Beverage Marketing Corporation