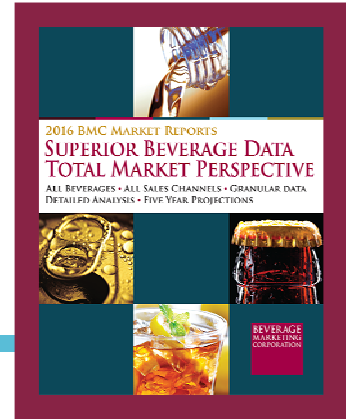


THE GLOBAL BOTTLED WATER MARKET

2016 EDITION (Published February 2017. Data through 2016. Market projections through 2021.) More than 250 pages, with extensive text analysis, graphs, charts and more than 30 tables.



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

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HAVE
QUESTIONS?

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THE ANSWERS YOU NEED

The Global Bottled Water Market report provides country-by-country data and discussion to shed light on various aspects of the industry through an analysis of what the numbers really mean. Questions answered in BMC's report include:

- What country leads the world in overall bottled water consumption? Which one leads in per capita consumption? How have various countries' market share rankings shifted in recent years?
- What are the latest developments in 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 market over the next five years through 2021?

THIS GLOBAL BOTTLED WATER INDUSTRY REPORT FEATURES

This comprehensive report 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 2021.

The research offers a 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, readers of this report get a thorough understanding of all facets of the 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.
- The bottled water research study concludes with BMC's exclusive projections for the market, including consumption estimates for the entire world as well as its principal regions through 2021.

The Global Bottled Water Market

February 2017



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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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.

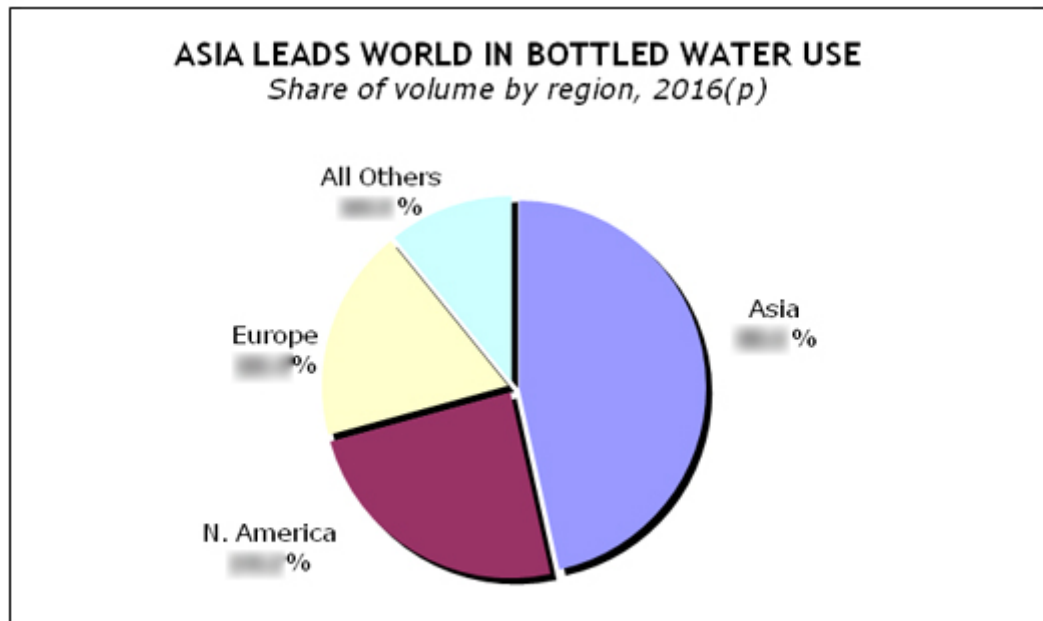
- Swiss food and beverage company Nestlé and French entity Danone are the traditional leaders of the bottled water pack. Both companies centered their operations around the core markets of Western Europe and the U.S.

**GLOBAL BOTTLED WATER MARKET
SHARE OF CONSUMPTION BY REGION (r)
2011 – 2016(p)**

Regions	2011	2012	2013	2014	2015	2016(p)
Asia	38%	39%	40%	41%	42%	43%
North America	22%	22%	22%	22%	22%	22%
Europe	18%	18%	18%	18%	18%	18%
South America	10%	10%	10%	10%	10%	10%
Africa/Mideast/Oceania	12%	11%	10%	9%	8%	7%
TOTAL	100%	100%	100%	100%	100%	100%

(r) Revised; (p) Preliminary

Source: Beverage Marketing Corporation



(p) Preliminary

Source: Beverage Marketing Corporation