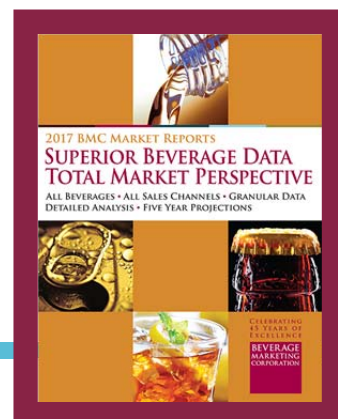


THE GLOBAL BOTTLED WATER MARKET

2017 EDITION (Published February 2018. Data through 2017. Market projections through 2022.) More than 225 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.

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

AVAILABLE FORMAT & PRICING

↓
Direct
Download

\$4,995

*To learn more, to place an advance order or to inquire about additional user licenses **call**: Charlene Harvey +1 212.688.7640 ext. 1962 charvey@beveragemarketing.com*

INSIDE:

REPORT OVERVIEW

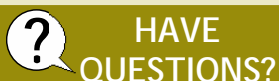
A brief discussion of this report's key features. 2

TABLE OF CONTENTS

A detailed outline of this report's contents and data tables. 5

SAMPLE TEXT AND INFOGRAPHICS

Examples of report text, data content, layout and style. 8



Contact Charlene Harvey: 212-688-7640 x 1962
charvey@beveragemarketing.com



BEVERAGE MARKETING CORPORATION
850 Third Avenue, 13th Floor, New York, NY 10022
Tel: 212-688-7640 Fax: 212-826-1255

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 2022?

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 2022.

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 2022.

The Global Bottled Water Market

February 2018



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

Copyright © 2018 Beverage Marketing Corporation of New York, 850 Third Avenue, New York, New York 10022, (212) 688-7640. All rights reserved. Reproductions in any form prohibited by law.

Contents

Table of Contents

TABLE OF CONTENTS

TABLE OF CONTENTS -----	i
DEFINITIONS USED IN THIS REPORT-----	v
INTRODUCTION -----	viii

Chapter

1. THE GLOBAL BOTTLED WATER MARKET

The World's Bottled Water Markets -----	1
• Overview -----	1
• Consumption by Country-----	5
• Per Capita Consumption-----	8
The Regions' Bottled Water Markets -----	10
• Trends by Region -----	10

Exhibits

1.1 Global Bottled Water Market Consumption and Annual Change 1996 – 2017 -----	14
1.2 Global Bottled Water Market Per Capita Consumption 1996 – 2017 -----	15
1.3 Global Bottled Water Market Consumption by Country 2012 – 2017-----	16
1.4 Global Bottled Water Market Share of Consumption by Country 2012 – 2017 -----	18
1.5 Global Bottled Water Market Change in Consumption by Country 2013 – 2017 -----	20
1.6 Global Bottled Water Market Per Capita Consumption by Country 2012 – 2017 -----	22
1.7 Global Bottled Water Market Consumption by Region 2012 – 2017 -----	24
1.8 Global Bottled Water Market Share of Consumption by Region 2012 – 2017 -----	25
1.9 Global Bottled Water Market Change in Consumption by Region 2013 – 2017 -----	26
1.10 Global Bottled Water Market Per Capita Consumption by Region 2012 – 2017 -----	27

2. THE LEADING GLOBAL COMPANIES AND THEIR BRANDS

The World's Leading Companies-----	28
• Overview -----	28
• Brands-----	29

Nestlé S.A.

• Overview -----	30
• Marketing -----	33

Danone

• Overview -----	59
• Marketing -----	61

Coca-Cola Company

• Overview -----	77
• Marketing -----	78

PepsiCo, Inc.

• Overview -----	91
• Marketing -----	91

TABLE OF CONTENTS

Chapter

2. THE LEADING GLOBAL COMPANIES AND THEIR BRANDS (cont'd)

Exhibits

2.11 Global Bottled Water Market Estimated Volume by Company 2012 – 2017 -----	100
2.12 Global Bottled Water Market Estimated Share by Company 2012 – 2017 -----	101
2.13 Global Bottled Water Market Estimated Growth by Company 2013 – 2017 -----	102

3. THE EUROPEAN BOTTLED WATER MARKET

Europe's Bottled Water Market -----	103
• Overview -----	103
• Consumption by Country -----	103
• Per Capita Consumption -----	173

Exhibits

3.14 European Bottled Water Market Consumption by Country 2012 – 2017 -----	174
3.15 European Bottled Water Market Share of Consumption by Country 2012 – 2017 ----	175
3.16 European Bottled Water Market Change in Consumption by Country 2013 – 2017 ---	176
3.17 European Bottled Water Market Per Capita Consumption by Country 2012 – 2017 --	177

4. THE NORTH AMERICAN BOTTLED WATER MARKET

North America's Bottled Water Market -----	178
• Overview -----	178
• Consumption by Country -----	179
• Per Capita Consumption -----	184

Exhibits

4.18 North American Bottled Water Market Consumption by Country 2012 – 2017 -----	186
4.19 North American Bottled Water Market Share of Consumption by Country 2012 – 2017 -----	187
4.20 North American Bottled Water Market Change in Consumption by Country 2013 – 2017 -----	188
4.21 North American Bottled Water Market Per Capita Consumption by Country 2012 – 2017 -----	189

5. THE ASIAN BOTTLED WATER MARKET

Asia's Bottled Water Market -----	190
• Overview -----	190
• Consumption by Country -----	192
• Per Capita Consumption -----	212

Exhibits

5.22 Asian Bottled Water Market Consumption by Country 2012 – 2017 -----	214
5.23 Asian Bottled Water Market Share of Consumption by Country 2012 – 2017 -----	215
5.24 Asian Bottled Water Market Change in Consumption by Country 2013 – 2017 -----	216
5.25 Asian Bottled Water Market Per Capita Consumption by Country 2012 – 2017 -----	217

TABLE OF CONTENTS

Chapter

6. THE SOUTH AMERICAN BOTTLED WATER MARKET

South America's Bottled Water Market-----	218
• Overview -----	218
• Consumption by Country-----	220
• Per Capita Consumption-----	231

Exhibits

6.26 South American Bottled Water Market Consumption by Country 2012 – 2017 -----	232
6.27 South American Bottled Water Market Share of Consumption by Country 2012 – 2017-----	233
6.28 South American Bottled Water Market Change in Consumption by Country 2013 – 2017-----	234
6.29 South American Bottled Water Market Per Capita Consumption by Country 2012 – 2017-----	235

7. THE AFRICAN, MIDDLE EASTERN AND OCEANIAN BOTTLED WATER MARKETS

Africa, Middle East & Oceania's Bottled Water Markets -----	236
• Overview -----	236
• Consumption by Country-----	238
• Per Capita Consumption-----	249

Exhibits

7.30 African, Middle Eastern & Oceanian Bottled Water Market Consumption by Country 2012 – 2017 -----	251
7.31 African, Middle Eastern & Oceanian Bottled Water Market Share of Consumption by Country 2012 – 2017 -----	252
7.32 African, Middle Eastern & Oceanian Bottled Water Market Change in Consumption by Country 2013 – 2017 -----	253
7.33 African, Middle Eastern & Oceanian Bottled Water Market Per Capita Consumption by Country 2012 – 2017 -----	254

8. THE PROJECTED GLOBAL BOTTLED WATER MARKET

The Projected International Bottled Water Market -----	255
• Overview -----	255
• The Global Market -----	257
• The Regional Markets -----	258

Exhibit

8.34 The Projected Global Bottled Water Market Consumption and Compound Annual Growth by Region 2012 – 2022-----	262
---	-----

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 two decades 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 the ability to segment the market, the possibility of trading up and high growth. Yet, the bottled water market remains highly fragmented, leaving the window open for acquisition and investment opportunities.
- 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 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 occurring, as four companies have come to dominate much of the market.

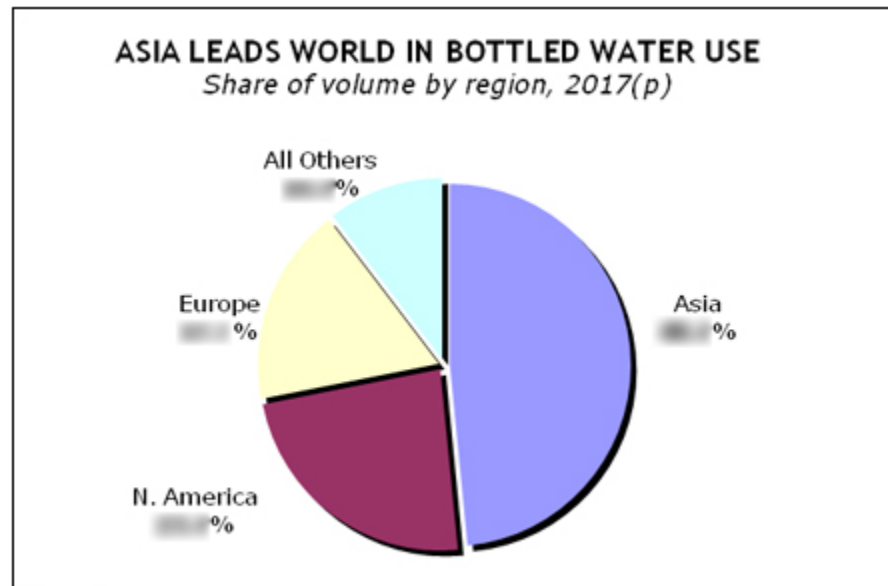
- Swiss food and beverage company Nestlé and French entity Danone are the traditional leaders of the bottled water pack. Both companies centered their operations around the core markets of Western Europe and the U.S.

**GLOBAL BOTTLED WATER MARKET
SHARE OF CONSUMPTION BY REGION (r)
2012 – 2017(p)**

Regions	2012	2013	2014	2015	2016	2017(p)
Asia	44%	45%	46%	47%	48%	49%
North America	22%	22%	22%	22%	22%	22%
Europe	18%	18%	18%	18%	18%	18%
South America	8%	8%	8%	8%	8%	8%
Africa/Mideast/Oceania	8%	8%	8%	8%	8%	8%
TOTAL	100%	100%	100%	100%	100%	100%

(r) Revised; (p) Preliminary

Source: Beverage Marketing Corporation



(p) Preliminary

Source: Beverage Marketing Corporation