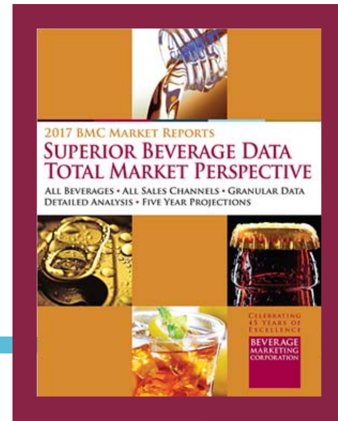
U.S. BOTTLED WATER THROUGH 2021

2017 EDITION (Published June 2017. Data through 2016. Market projections through 2021.) More than 320 pages, with extensive text analysis, graphs, charts and more than 125 tables.



This definitive U.S. bottled water market report from Beverage Marketing Corporation looks at the largest beverage category by volume and considers every aspect of this resilient category and its competitive circumstances. Its detailed analysis of the industry covers regional and state markets as well as packaging, quarterly category growth, distribution, advertising, demographics and more.

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HAVE QUESTIONS? 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

U.S. Bottled Water through 2021 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 2016, and how are they like to develop by 2021?

- Which bottled water companies and brands experienced growth in 2016, 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 2021?

- 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 2021?

This report features

The most comprehensive report available, *U.S. Bottled Water through 2021* surveys the domestic landscape of the leading beverage category. The study provides volume, retail dollar, wholesale dollar and per capita consumption figures and provides analysis that gives true perspective to the wealth of historical, current and forecasted data it provides. An in–depth look at the leading companies and brands in the category and the drivers likely to propel consumption growth through 2021 are also provided.

Further, 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 included. Backed by Beverage Marketing's reliable, all–sales–channel–inclusive research, this authoritative report provides readers a complete and thorough understanding of the bottled water landscape 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 2021, as well as five-year volume forecasts by region, distribution channels and packaging, and more

U.S. Bottled Water through 2021

July 2017

BEVERAGE MARKETING CORPORATION

RESEARCH ● DATA ● CONSULTING

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Appendix

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Exhibit 5.63

U.S. BOTTLED WATER MARKET

GROWTH BY WATER TYPE AND DISTRIBUTION

2007 — 2021(P)

Type	Year	Home	Commercial	Retail: Off-Premise	Retail: On-Premise	Vending	Total Growth
Non-Sparkling	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]%
	2015/16	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2016/21(P)	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Domestic Sparkling	2006/07	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2007/08	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	0.4%
	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]%
	2015/16	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2016/21(P)	[illegible]	[illegible]	**[illegible]%**	**[illegible]%**	[illegible]	**[illegible]%**
Imports	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]%
	2015/16	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2016/21(P)	[illegible]	[illegible]	**[illegible]%**	**[illegible]%**	[illegible]	**[illegible]%**
Total Gallonage By Outlet	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]%
	2015/16	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2016/21(P)	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

(P) Projected

Note: The 2016/21 figures are the projected five-year compound annual growth rates.

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Even in the good times, of course, bottled water has been one of the most cluttered categories in all beverages, with hundreds of domestic and imported brands vying for retail shelf space and consumer share of stomach.

- While the mass end of the business quickly degenerated into a price-driven outpost of the cola wars once Coca-Cola and PepsiCo entered the category two decades back with their respective Dasani and Aquafina brands, players and aspirants at the superpremium end of the business took heart from the example of Fiji Water's meteoric rise earlier in the 2000s, which demonstrated decisively that the right mix of source, package and sheer mystique could get consumers to shell out big bucks, both on-premise and in retail stores.
- That, in turn, created a void in the channel, and a big business opportunity for other brands. Simply stated, distributors who did not enjoy the privilege of carrying Fiji wanted a brand just like it, while retailers exhausted by the profitless prosperity of fast-moving $3.99 24-unit cases of mass market brands were happy to try to tilt consumption back toward the high end. Fiji has allied for distribution with the Dr Pepper Snapple Group, meaning it is unavailable to independent distributors.
- Even having provenance at an actual spring, as with Nestlé Waters North America's (NWNA's) array of regional brands like Poland Spring and Zephyrhills, did not prove to be a shield against the relentless price promotion inaugurated by tap-water brands like Dasani and Aquafina (which in any case did not exactly scream out that they were tap water). Simply put, many consumers do not seem to care anymore whether their water comes from a protected aquifer or a municipal tap.
- So exhausting has that segment of the market become that even Coca-Cola and Pepsi, who started the price wars, have been steadily backing out of it in recent years. After acquiring their biggest bottlers in North America, they quickly garnered margin relief by shipping casepack water directly to retailers rather than through the bottlers, a change that likely has sealed the fate of that tier as a commodity not worth significant attention on the distribution or merchandising front.
- It should be noted that one exception has been the Glacéau Smartwater brand, acquired by Coca-Cola with its larger stablemate Vitaminwater. Although Coke severely mishandled Vitaminwater, as discussed in the section on enhanced waters, it has proved an adept steward of Smartwater, which has chugged along to steady double-digit gains in recent years and only lately begun to go in for extensive price promotion. It recently added a glass-bottle sparkling extension.

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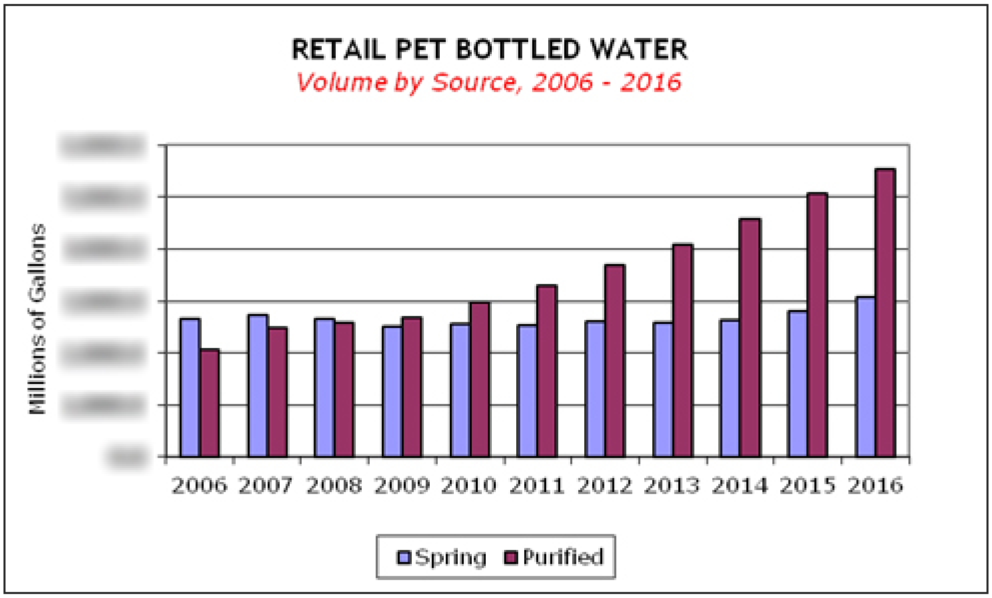

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