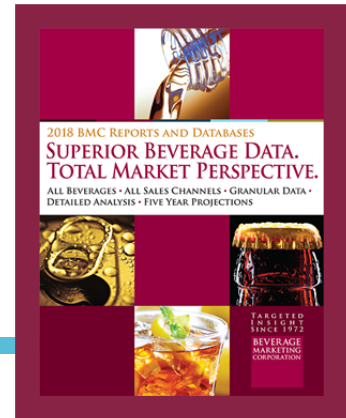


BOTTLED WATER IN THE U.S. THROUGH 2022

2018 EDITION (Published August 2018. Data through 2017. Market projections through 2022.) More than 325 pages, with extensive text analysis, graphs, charts and more than 125 tables.

This definitive U.S. bottled water market report 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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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. 6

SAMPLE TEXT AND INFOGRAPHICS

A few examples of this report's text, data content layout and style. 14



HAVE QUESTIONS?

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THE ANSWERS YOU NEED

Bottled Water in the U.S. through 2022 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 2017, and how are they like to develop by 2022?
- Which bottled water companies and brands experienced growth in 2017, 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 2022?
- 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 2022?

THIS BOTTLED WATER RESEARCH REPORT FEATURES

The most comprehensive report available, *Bottled Water in the U.S. through 2022* 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 2022 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, Primo Water Corporation 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 2022, as well as five-year volume forecasts by region, distribution channels and packaging, and more

Bottled Water in the U.S. through 2022

August 2018



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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Contents

Table of Contents

TABLE OF CONTENTS

TABLE OF CONTENTS -----	i
DEFINITIONS USED IN THIS REPORT-----	ix
INTRODUCTION -----	xi

Chapter

1. THE U.S. BOTTLED WATER MARKET

The Global Bottled Water Market -----	1
The National Bottled Water Market-----	2
• Volume -----	3
• Per Capita Consumption-----	4
• Volume by Segment -----	6
• Wholesale Dollar Sales -----	8
• Prices -----	9
• Seasonality-----	9
• Retail Dollar Sales -----	9
• Quarterly Growth Trends-----	10
• Overview & Issues-----	11

Exhibits

1.1 Global Bottled Water Market Consumption and Annual Change 1996 – 2017 -----	15
1.2 U.S. Bottled Water Market Gallonage, Growth and Per Capita Consumption 1976 – 2022-----	16
1.3 U.S. Bottled Water Market Non-Sparkling, Sparkling & Import Gallonage 1976 – 2022-----	17
1.4 U.S. Bottled Water Market Gallonage by Segment 1976 – 2022-----	18
1.5 U.S. Bottled Water Market Share of Gallonage by Segment 1976 – 2022-----	19
1.6 U.S. Bottled Water Market Change in Gallonage by Segment 1977 – 2022 -----	20
1.7 U.S. Bottled Water Market Estimated Wholesale Dollars 1984 – 2022 -----	21
1.8 U.S. Bottled Water Market Estimated Share of Wholesale Dollars 1984 – 2022 ----	22
1.9 U.S. Bottled Water Market Change in Wholesale Dollars 1985 – 2022 -----	23
1.10 U.S. Bottled Water Market Estimated Wholesale Dollars, Gallonage and Price 2017	24
1.11 U.S. Bottled Water Market Quarterly Volume Shares by Segment 2017 -----	25
1.12 U.S. Bottled Water Market Estimated Retail Dollars 2013 – 2022 -----	26
1.13 U.S. Bottled Water Market Estimated Share of Retail Dollars 2013 – 2022 -----	27
1.14 U.S. Bottled Water Market Change in Retail Dollars 2014 – 2022 -----	28
1.15 U.S. Bottled Water Market Estimated Volume, Share and Growth by Segment Q1 2018 -----	29

2. THE REGIONAL BOTTLED WATER MARKETS

Regional Bottled Water Markets -----	30
• Overview -----	30
• Non-Sparkling Water -----	33
• Sparkling Water -----	34
• Per Capita Consumption-----	36

TABLE OF CONTENTS

Chapter

2. THE REGIONAL BOTTLED WATER MARKETS (cont'd)***Exhibits***

2.16	U.S. Bottled Water Market Gallonage by Region 2012 – 2022 -----	41
2.17	U.S. Bottled Water Market Share of Gallonage by Region 2012 – 2022 -----	42
2.18	U.S. Bottled Water Market Change in Gallonage by Region 2013 – 2022 -----	43
2.19	U.S. Non-Sparkling Bottled Water Market Gallonage by Region 2012 – 2022-----	44
2.20	U.S. Non-Sparkling Bottled Water Market Share of Gallonage by Region 2012 – 2022-----	45
2.21	U.S. Non-Sparkling Bottled Water Market Change in Gallonage by Region 2013 – 2022-----	46
2.22	U.S. Sparkling Bottled Water Market Gallonage by Region 2012 – 2022 -----	47
2.23	U.S. Sparkling Bottled Water Market Share of Gallonage by Region 2012 – 2022 --	48
2.24	U.S. Sparkling Bottled Water Market Change in Gallonage by Region 2013 – 2022	49
2.25	U.S. Bottled Water Market Per Capita Consumption by Region 2012 – 2022 -----	50
2.26	U.S. Non-Sparkling Bottled Water Market Per Capita Consumption by Region 2012 – 2022-----	51
2.27	U.S. Sparkling Bottled Water Market Per Capita Consumption by Region 2012 – 2022-----	52

3. THE HOD WATER MARKET

Home- and Office-Delivered Bottled Water -----	53
• Overview -----	53
• Leading Companies and Brands -----	58
• Number of Coolers-----	61

Exhibits

3.28	The Leading HOD Bottled Water Companies Estimated Water Only Revenues 2012 – 2017-----	62
3.29	The Leading HOD Bottled Water Companies Share of Estimated Water Only Revenues 2012 – 2017 -----	63
3.30	The Leading HOD Bottled Water Companies Change in Estimated Water Only Revenues 2013 – 2017 -----	64
3.31	The Leading HOD Bottled Water Companies Estimated Water Only Volume 2012 – 2017-----	65
3.32	The Leading HOD Bottled Water Companies Share of Estimated Water Only Volume 2012 – 2017-----	66
3.33	The Leading HOD Bottled Water Companies Change in Estimated Water Only Volume 2013 – 2017-----	67
3.34	The Leading HOD Bottled Water Brands Estimated Water Only Revenues 2012 – 2017-----	68
3.35	The Leading HOD Bottled Water Brands Share of Estimated Water Only Revenues 2012 – 2017-----	69
3.36	The Leading HOD Bottled Water Brands Change in Estimated Water Only Revenues 2013 – 2017 -----	70
3.37	U.S. Water Cooler Market Estimated Millions of Units in Operation 1990 – 2022 ---	71

TABLE OF CONTENTS

Chapter

4. THE IMPORTED BOTTLED WATER MARKET

Imported Bottled Water-----	72
• Overview -----	72
• Volume -----	73
Volume of Imports by Origin -----	74
• Regions of Origin -----	74
• Countries of Origin -----	76
Value of Imports by Origin-----	78
• Regions of Origin -----	78
• Countries of Origin -----	79
• Dollars Per Gallon-----	80
Imported Volume by Type -----	82
• Imported Sparkling and Non-Sparkling Water -----	82

Exhibits

4.38 Imported Bottled Water Market Gallonage, Sales and Growth 1977 – 2022 -----	83
4.39 Imported Bottled Water Market Gallonage by Region 2012 – 2017-----	84
4.40 Imported Bottled Water Market Share by Region 2012 – 2017 -----	85
4.41 Imported Bottled Water Market Change by Region 2013 – 2017 -----	86
4.42 Leading Imported Water Countries Gallonage 2012 – 2017-----	87
4.43 Leading Imported Water Countries Share 2012 – 2017 -----	88
4.44 Leading Imported Water Countries Gallonage Growth 2013 – 2017 -----	89
4.45 Imported Bottled Water Market Dollar Value by Region 2012 – 2017 -----	90
4.46 Imported Bottled Water Market Dollar Share by Region 2012 – 2017-----	91
4.47 Imported Bottled Water Market Dollar Growth by Region 2013 – 2017 -----	92
4.48 Leading Imported Water Countries Dollar Value 2012 – 2017 -----	93
4.49 Leading Imported Water Countries Share of Dollar Value 2012 – 2017 -----	94
4.50 Leading Imported Water Countries Change in Dollar Value 2013 – 2017 -----	95
4.51 Leading Imported Water Countries Dollars Per Gallon 2012 – 2017 -----	96
4.52 Imported Bottled Water Market Volume by Type 1994 – 2022-----	97
4.53 Imported Bottled Water Market Share of Imports by Type 1994 – 2022 -----	98
4.54 Imported Bottled Water Market Growth by Type 1995 – 2022-----	99

5. BOTTLED WATER DISTRIBUTION CHANNELS AND PRICING

Bottled Water Volume by Distribution Channel-----	100
Non-Sparkling Volume by Distribution Channel -----	105
Domestic Sparkling Volume by Distribution Channel-----	108
Imported Volume by Distribution Channel-----	109
PET Water Share by Outlet -----	110
Bottled Water Dollar Sales by Distribution Channel -----	112
Bottled Water Dollar Sales by Channel & Water Type-----	114
Bottled Water Sales Average Price Per Gallon -----	115
• Non-Sparkling-----	115
• Domestic Sparkling-----	116
• Imports-----	116
• Average Price in Supermarkets -----	116

TABLE OF CONTENTS

Chapter

5. BOTTLED WATER DISTRIBUTION CHANNELS AND PRICING (cont'd)

Exhibits

5.55	U.S. Bottled Water Market Volume by Type of Distribution 2012 – 2022-----	117
5.56	U.S. Bottled Water Market Share by Type of Distribution 2012 – 2022 -----	118
5.57	U.S. Bottled Water Market Growth by Type of Distribution 2013 – 2022 -----	119
5.58	U.S. Bottled Water Market Volume by Distribution Channel 2012 – 2022 -----	120
5.59	U.S. Bottled Water Market Share of Volume by Distribution Channel 2012 – 2022	121
5.60	U.S. Bottled Water Market Change in Volume by Distribution Channel 2013 – 2022 -----	122
5.61	U.S. Bottled Water Market Gallonage by Water Type and Distribution 2007 – 2022	123
5.62	U.S. Bottled Water Market Gallonage Share by Water Type and Distribution 2007 – 2022-----	124
5.63	U.S. Bottled Water Market Growth by Water Type and Distribution 2008 – 2022 --	125
5.64	U.S. PET Water Market Volume by Distribution Channel 2012 – 2022-----	126
5.65	U.S. PET Water Market Share of Volume by Distribution Channel 2012 – 2022 ----	127
5.66	U.S. PET Water Market Change in Volume by Distribution Channel 2013 – 2022---	128
5.67	U.S. Bottled Water Market Wholesale Dollar Sales by Type of Distribution 2012 – 2022-----	129
5.68	U.S. Bottled Water Market Share of Wholesale Dollar Sales by Type of Distribution 2012 – 2022-----	130
5.69	U.S. Bottled Water Market Dollar Growth by Type of Distribution 2013 – 2022-----	131
5.70	U.S. Bottled Water Market Wholesale Dollar Sales by Water Type and Distribution 2007 – 2022-----	132
5.71	U.S. Bottled Water Market Share of Wholesale Dollar Sales by Water Type and Distribution 2007 – 2022 -----	133
5.72	U.S. Bottled Water Market Wholesale Dollar Growth by Water Type and Distribution 2008 – 2022-----	134
5.73	U.S. Bottled Water Market Average Per Gallon Wholesale Price by Water Type and Distribution 2007 – 2022 -----	135
5.74	U.S. Bottled Water Market Change in Average Per Gallon Wholesale Price 2008 – 2022-----	136
5.75	U.S. Bottled Water Market Average Price Per Unit in Grocery Stores 2012 – 2017 -	137

6. BOTTLED WATER PACKAGING

	Bottled Water Packaging Developments -----	138
	Non-Sparkling Volume by Container Type -----	141
	Non-Sparkling Volume by Container Size and Channel -----	142
	Sparkling Volume by Container Type -----	145

Exhibits

6.76	Domestic Non-Sparkling and Sparkling Water Volume by Container Material 2012 – 2022-----	146
6.77	Domestic Non-Sparkling and Sparkling Water Share by Container Material 2012 – 2022-----	147
6.78	Domestic Non-Sparkling and Sparkling Water Growth by Container Material 2013 – 2022-----	148

TABLE OF CONTENTS

Chapter

6. BOTTLED WATER PACKAGING (cont'd)

Exhibits (cont'd)

6.79	Domestic Non-Sparkling Water Volume by Container Material 2012 – 2022 -----	149
6.80	Domestic Non-Sparkling Water Share by Container Material 2012 – 2022 -----	150
6.81	Domestic Non-Sparkling Water Growth by Container Material 2013 – 2022 -----	151
6.82	Domestic Non-Sparkling Water Volume by Container Size 2012 – 2022 -----	152
6.83	Domestic Non-Sparkling Water Share by Container Size 2012 – 2022 -----	153
6.84	Domestic Non-Sparkling Water Growth by Container Size 2013 – 2022 -----	154
6.85	Domestic Sparkling Water Volume by Container Material 2012 – 2022 -----	155
6.86	Domestic Sparkling Water Share by Container Material 2012 – 2022 -----	156
6.87	Domestic Sparkling Water Growth by Container Material 2013 – 2022 -----	157

7. THE LEADING BOTTLED WATER COMPANIES AND THEIR BRANDS

The Leading Companies and Their Brands -----	158
Nestlé Waters North America, Inc. -----	161
• Poland Spring -----	167
• Arrowhead -----	171
• Deer Park -----	176
• Ozarka -----	177
• Zephyrhills -----	177
• Ice Mountain -----	178
• Nestlé Pure Life -----	179
• Perrier -----	184
• resource -----	187
PepsiCo, Inc. -----	189
• Aquafina -----	189
• LIFEWTR -----	195
• bubly -----	196
Coca-Cola Company -----	198
• Dasani -----	199
• Topo Chico -----	206
DS Services of America, Inc. -----	207
Danone Waters North America -----	218
• Evian -----	219
CG Roxane LLC -----	223
• Alpine Spring -----	223
Culligan International -----	225
Dr Pepper Snapple Group, Inc. -----	228
Crystal Rock -----	230
Glacier Water Services, Inc. -----	238
Niagara Bottling, LLC -----	241
The PET Water Market -----	243

TABLE OF CONTENTS

Chapter

7. THE LEADING BOTTLED WATER COMPANIES AND THEIR BRANDS (cont'd)

The Leading Imported Bottled Water Brands ----- 244

- Evian ----- 244
- Fiji ----- 244
- San Pellegrino ----- 249
- Perrier ----- 250
- Volvic ----- 250
- Acqua Panna ----- 251
- Apollinaris ----- 251
- Voss ----- 252
- Iceland Spring ----- 253
- Icelandic Glacial ----- 254
- Himalayan Natural Mineral Water----- 254

Exhibits

7.88 Leading Bottled Water Companies Estimated Wholesale Dollar Sales 2012 – 2017 256

7.89 Leading Bottled Water Companies Share of Estimated Wholesale Dollar Sales
2012 – 2017----- 257

7.90 Leading Bottled Water Companies Change in Estimated Wholesale Dollar Sales
2013 – 2017----- 258

7.91 Leading Bottled Water Companies Estimated Volume 2012 – 2017 ----- 259

7.92 Leading Bottled Water Companies Share of Estimated Volume 2012 – 2017 ----- 260

7.93 Leading Bottled Water Companies Change in Estimated Volume 2013 – 2017 ----- 261

7.94 Leading Bottled Water Companies Estimated Wholesale Dollar Sales by Brand
2012 – 2017----- 262

7.95 Leading Bottled Water Companies Estimated Share of Wholesale Dollar Sales
by Brand 2012 – 2017 ----- 264

7.96 Leading Bottled Water Companies Estimated Change in Wholesale Dollar Sales
by Brand 2013 – 2017 ----- 266

7.97 Leading Bottled Water Brands Dollar Sales 2012 – 2017 ----- 268

7.98 Leading Bottled Water Brands Share of Dollar Sales 2012 – 2017----- 269

7.99 Leading Bottled Water Brands Change in Dollar Sales 2013 – 2017 ----- 270

7.100 PET Water Market in the U.S. Estimated Volume by Company 2012 – 2017 ----- 271

7.101 PET Water Market in the U.S. Volume Share by Company 2012 – 2017 ----- 272

7.102 PET Water Market in the U.S. Change in Volume by Company 2013 – 2017 ----- 273

7.103 The Leading Imported Water Brands Estimated Volume 2012 – 2017----- 274

7.104 The Leading Imported Water Brands Volume Growth 2013 – 2017----- 275

8. THE U.S. CLUB SODA AND SELTZER WATER MARKET

Club Soda and Seltzer Water ----- 276

- Overview ----- 276
- Volume ----- 276

Club Soda and Seltzer Water Companies and Brands----- 279

- Overview ----- 279
- Polar ----- 280
- Schweppes ----- 281

TABLE OF CONTENTS

Chapter

8. THE U.S. CLUB SODA AND SELTZER WATER MARKET (cont'd)	
Club Soda and Seltzer Water Companies and Brands (cont'd)	
• Canada Dry -----	282
• Vintage -----	283
• Seagram -----	283
Exhibits	
8.105 Club Soda/Seltzer Estimated Volume 2012 – 2022 -----	285
8.106 Club Soda/Seltzer Estimated Volume Share 2012 – 2022 -----	286
8.107 Club Soda/Seltzer Estimated Volume Growth 2013 – 2022 -----	287
8.108 Club Soda/Seltzer Estimated Volume by Brand 2012 – 2017 -----	288
8.109 Club Soda/Seltzer Estimated Share by Brand 2012 – 2017 -----	289
8.110 Club Soda/Seltzer Estimated Growth by Brand 2013 – 2017-----	290
9. BOTTLED WATER BY SOURCE	
Purified and Spring Water -----	291
• Overview -----	291
• Volume -----	292
Exhibits	
9.111 Retail PET Bottled Water Volume by Source 2000 – 2022 -----	294
9.112 Retail PET Bottled Water Share by Source 2000 – 2022-----	295
9.113 Retail PET Bottled Water Growth by Source 2001 – 2022 -----	296
10. BOTTLED WATER ADVERTISING EXPENDITURES	
Bottled Water Advertising-----	297
• Overview -----	297
• Domestic Brands-----	299
• Imported Brands-----	301
Bottled Water Advertising by Media -----	303
Exhibits	
10.114 U.S. Bottled Water Market Advertising Expenditures 1979 – 2017 -----	305
10.115 U.S. Domestic Bottled Water Advertising Expenditures 1979 – 2017-----	306
10.116 Imported Bottled Water Advertising Expenditures 1979 – 2017 -----	307
10.117 Leading Domestic Brands by Advertising Expenditures 2012 – 2017 -----	308
10.118 Leading Domestic Brands by Share of Advertising Expenditures 2012 – 2017-----	309
10.119 Leading Domestic Brands Change in Advertising Expenditures 2013 – 2017 -----	310
10.120 Leading Imported Brands by Advertising Expenditures 2012 – 2017 -----	311
10.121 Leading Imported Brands by Share of Advertising Expenditures 2012 – 2017-----	312
10.122 Leading Imported Brands Change in Advertising Expenditures 2013 – 2017 -----	313
10.123 Estimated Advertising Expenditures for All Bottled Water Brands by Media 2012 – 2017-----	314
10.124 Estimated Share of Advertising Expenditures for All Bottled Water Brands by Media 2012 – 2017 -----	315
10.125 Estimated Change in Advertising Expenditures for All Bottled Water Brands by Media 2013 – 2017 -----	316

TABLE OF CONTENTS

Chapter

11. DEMOGRAPHICS OF THE BOTTLED WATER CONSUMER

Users of Bottled Waters in the U.S. -----	317
• Overview -----	317
• Comparative Demographics of Bottled Water Brands -----	321
Exhibits	
11.126 Demographics of the Bottled Water Consumer 2017 -----	325
11.127 Demographics of the Poland Spring Consumer 2017 -----	327
11.128 Demographics of the Evian Consumer 2017-----	329
11.129 Demographics of the Aquafina Consumer 2017 -----	331
11.130 Demographics of the Dasani Consumer 2017 -----	333

Appendix

A. U.S. Population by Region 1978 – 2017 -----	335
--	-----

**U.S. BOTTLED WATER MARKET
GROWTH BY WATER TYPE AND DISTRIBUTION
2008 – 2022(P)**

Type	Year	Home	Commercial	Retail		Vending	Total Growth
				Off-Premise	On-Premise		
Non-Sparkling	2007/08	10%	10%	10%	10%	10%	10%
	2008/09	10%	10%	10%	10%	10%	10%
	2009/10	10%	10%	10%	10%	10%	10%
	2010/11	10%	10%	10%	10%	10%	10%
	2011/12	10%	10%	10%	10%	10%	10%
	2012/13	10%	10%	10%	10%	10%	10%
	2013/14	10%	10%	10%	10%	10%	10%
	2014/15	10%	10%	10%	10%	10%	10%
	2015/16	10%	10%	10%	10%	10%	10%
	2016/17	10%	10%	10%	10%	10%	10%
	2017/22(P)	10%	10%	10%	10%	10%	10%
Domestic Sparkling	2007/08	10%	10%	10%	10%	10%	10%
	2008/09	10%	10%	10%	10%	10%	10%
	2009/10	10%	10%	10%	10%	10%	10%
	2010/11	10%	10%	10%	10%	10%	10%
	2011/12	10%	10%	10%	10%	10%	10%
	2012/13	10%	10%	10%	10%	10%	10%
	2013/14	10%	10%	10%	10%	10%	10%
	2014/15	10%	10%	10%	10%	10%	10%
	2015/16	10%	10%	10%	10%	10%	10%
	2016/17	10%	10%	10%	10%	10%	10%
	2017/22(P)	10%	10%	10%	10%	10%	10%
Imports	2007/08	10%	10%	10%	10%	10%	10%
	2008/09	10%	10%	10%	10%	10%	10%
	2009/10	10%	10%	10%	10%	10%	10%
	2010/11	10%	10%	10%	10%	10%	10%
	2011/12	10%	10%	10%	10%	10%	10%
	2012/13	10%	10%	10%	10%	10%	10%
	2013/14	10%	10%	10%	10%	10%	10%
	2014/15	10%	10%	10%	10%	10%	10%
	2015/16	10%	10%	10%	10%	10%	10%
	2016/17	10%	10%	10%	10%	10%	10%
	2017/22(P)	10%	10%	10%	10%	10%	10%
Total Gallonage By Outlet	2007/08	10%	10%	10%	10%	10%	10%
	2008/09	10%	10%	10%	10%	10%	10%
	2009/10	10%	10%	10%	10%	10%	10%
	2010/11	10%	10%	10%	10%	10%	10%
	2011/12	10%	10%	10%	10%	10%	10%
	2012/13	10%	10%	10%	10%	10%	10%
	2013/14	10%	10%	10%	10%	10%	10%
	2014/15	10%	10%	10%	10%	10%	10%
	2015/16	10%	10%	10%	10%	10%	10%
	2016/17	10%	10%	10%	10%	10%	10%
	2017/22(P)	10%	10%	10%	10%	10%	10%

(P) Projected

Note: The 2017/22 figures are the projected five-year compound annual growth rates.

Source: Beverage Marketing Corporation

Bottled water endured a perfect storm of adversity several years back, when the 2008 recession combined with a green backlash to put the category on the defensive. And yes, perceptions lingered for quite some time that the segment's best years might be behind it as consumers and restaurants alike turned to the tap for their bottled water needs. But that perception has definitively been reversed lately — certainly at the high end — as bottled water puts up growth numbers that lately are exceeding those of energy drinks, and a flotilla of new entrants vie for a piece of the action. True, memories of 2008 linger, just as it does in the business community at large, but bottled water once again has become a growth star in the beverage firmament.

- Although it is about a decade ago now, the extent of the carnage since the recession hit in 2008 should not be minimized, as its chastening influence accounts for much of the marketing activity we see now that seeks to neutralize green concerns while playing up products' distinctiveness from what can be obtained from the tap.
- One-time juggernaut Fiji Water was thrown back on its heels, enduring extensive layoffs and an exodus of key executives amid plummeting demand.
- Other players and would-be players went through upheaval. Voss saw its founder depart and a seasoned executive brought in from outside the bottled-water segment to turn things around.
- Through a special set of factors, Icelandic Glacial — seemingly set to cruise once it inked an investment and distribution partnership with brewing giant Anheuser-Busch (A-B) — saw its strategy fray when A-B was acquired by Belgium's InBev, whose strategy did not include sinking further capital into Icelandic bottled water imports or any of its non-alcoholic ventures for that matter. By then, Icelandic Water Holdings already had spent the A-B investment on a state-of-the-art bottling plant at the Olfus Springs, leaving the company scrambling for the money with which to actually market the brand. As noted below, founder Jon Olafsson succeeded brilliantly at the task, although with over \$100 million invested in the enterprise to date, it is still hard to see when the company will obtain a return.
- Even Danone, whose French import Evian wrote the playbook on elegant marketing in the segment but cannot be said to have enjoyed much momentum this past decade, underwent a sweeping shift, first ending the brand's unhappy alliance with Coca-Cola Company on the sales and marketing fronts and, when that failed to exert a meaningful effect on the brand's fortunes, unwinding the remaining component of the alliance, distribution of the brand via Coke's red trucks. That has proved a slower rebuilding process but there have been a few bright spots in the natural channel and other areas.



Source: Beverage Marketing Corporation