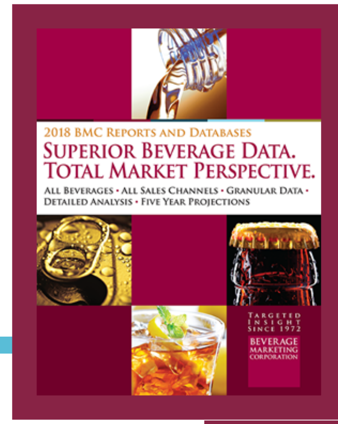
BOTTLED WATER IN THE U.S. THROUGH 2022

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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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

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
2008 — 2022(P)

Type	Year	Home	Commercial	Retail Off-Premise	Retail On-Premise	Vending	Total Growth
Non-Sparkling	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]%
	2016/17	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2017/22(P)	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Domestic Sparkling	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]%
	2016/17	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	
	2017/22(P)	[illegible]	[illegible]	**[illegible]%**	**[illegible]%**	[illegible]	
Imports	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]%
	2016/17	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	
	2017/22(P)	[illegible]	[illegible]	**[illegible]%**	**[illegible]%**	[illegible]	
Total Gallonage By Outlet	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]%
	2016/17	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2017/22(P)	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

(P) Projected

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

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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.

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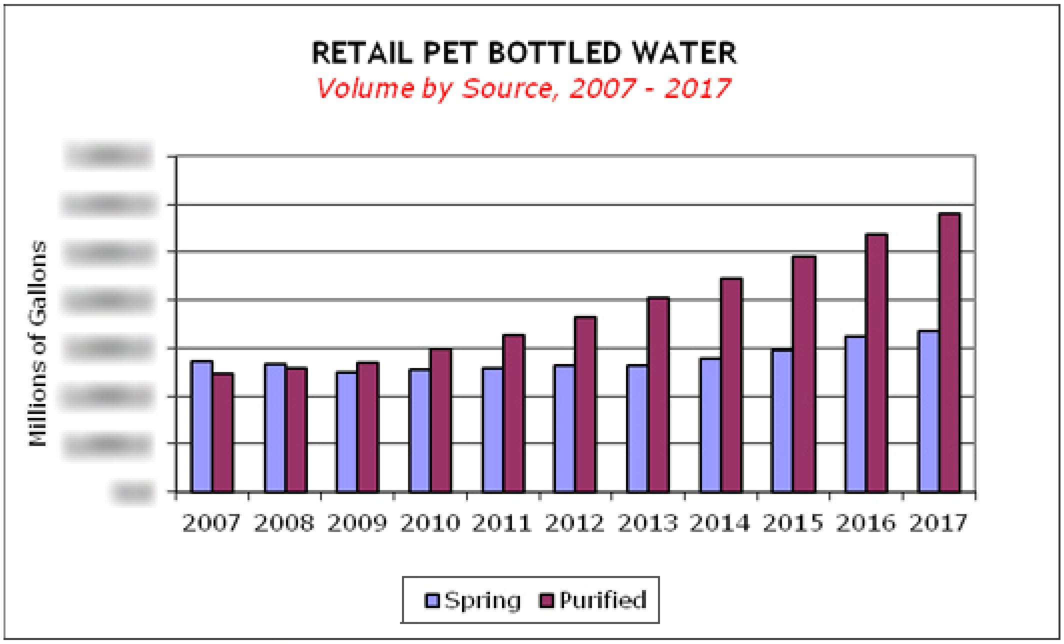

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