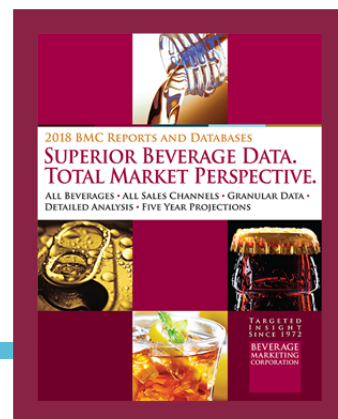


# U.S. BOTTLED WATER TOPLINE

**2018 EDITION** (Published August 2018. Data through 2017. Market projections through 2022.) More than 25 pages, with text analysis, graphs and charts.



*U.S. Bottled Water Topline* from Beverage Marketing Corporation provides a brief overview of the bottled water category with key data and five-year forecasts. Perfect for investors, entrepreneurs requiring statistics for their business plan, ad agencies preparing an account pitch or anyone who needs a quick view of the bottled water sector.

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**HAVE  
QUESTIONS?**

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## THE ANSWERS YOU NEED

*U.S. Bottled Water Topline* provides key statistics for the overall market. Questions answered include:

- How much bottled water is consumed per capita in the United States, how has this changed in recent years?
- How has the bottled water market segments performed in 2017, and how are they like to develop in the future?
- Which are the leading home- and office-delivery bottled water companies?
- What is the volume of imported bottled water by type?
- Which companies hold the largest shares of the bottled water industry by wholesale dollar sales?

## THIS REPORT FEATURES

This report features category volume and wholesale dollar sales and per capita consumption data; leading company market shares and five-year forecast data through 2022 are also provided.

# U.S. Bottled Water Topline

August 2018

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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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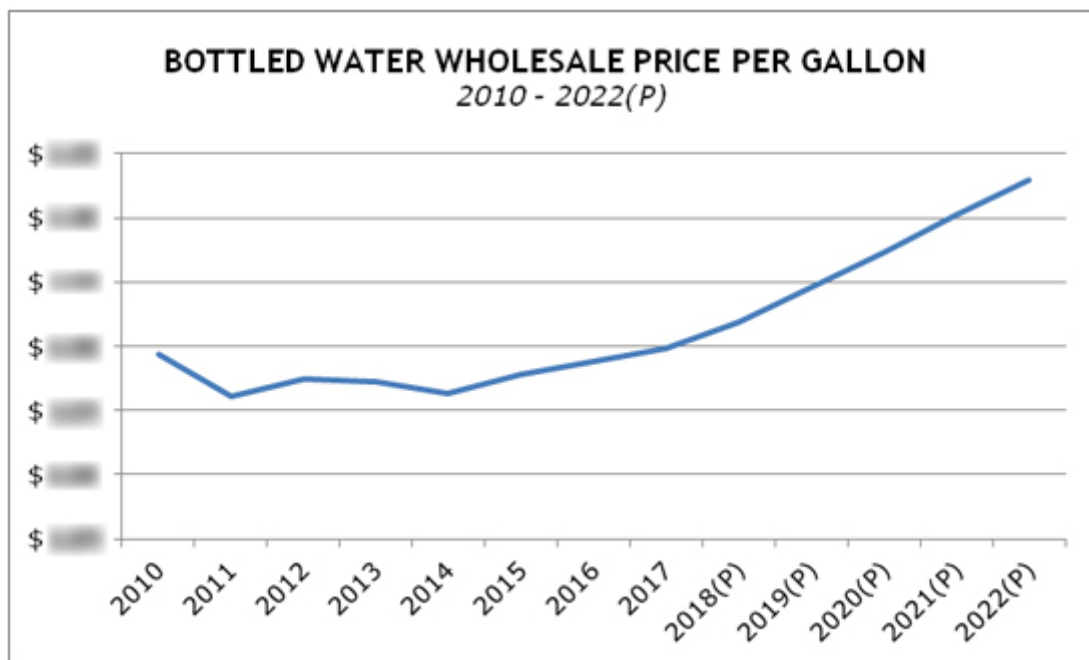
**Exhibit 4**

**U.S. BOTTLED WATER MARKET  
ESTIMATED SHARE OF WHOLESALE DOLLARS (r)  
1984 – 2022(P)**

<b>Year</b>	<b>Non- Sparkling</b>	<b>Domestic Sparkling</b>	<b>Imports</b>	<b>Total</b>
1984	%	%	%	%
1985	%	%	%	%
1986	%	%	%	%
1987	%	%	%	%
1988	%	%	%	%
1989	%	%	%	%
1990	%	%	%	%
1991	%	%	%	%
1992	%	%	%	%
1993	%	%	%	%
1994	%	%	%	%
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2010	%	%	%	%
2011	%	%	%	%
2012	%	%	%	%
2013	%	%	%	%
2014	%	%	%	%
2015	%	%	%	%
2016	%	%	%	%
2017	%	%	%	%
2018(P)	%	%	%	%
2019(P)	%	%	%	%
2020(P)	%	%	%	%
2021(P)	%	%	%	%
2022(P)	%	%	%	%

(r) Revised; (P) Projected

Source: Beverage Marketing Corporation



(P) Projected

Source: Beverage Marketing Corporation

Bottled water has transitioned from its precocious youth to energetic adulthood. After stringing together years — indeed, decades — of exceptional growth, the category established its firmly entrenched position in the U.S. marketplace.

- The sort of growth that saw it double in volume in less than a decade and become the second largest beverage category by volume while still outperforming other major beverage types no longer characterizes the category.
- Nonetheless, by any objective measure, the bottled water category has been one of the great success stories in the history of the beverage industry — and the story is far from over. Even after achieving significant size, bottled water's growth potential has not been extinguished.
- Case in point: the latest doubling in the bottled water market took 14 years (2003–2017), at the end of which it became the largest beverage category — overtaking carbonated soft drinks (CSDs). This marked a major milestone.

U.S. residents' thirst for bottled water can be attributed to several factors.

- Many consumers recognize it to be healthy, safe and convenient.
- It's a versatile product, suitable for consumption at any time of day and need not be kept cold (like soft drinks or juice) or warm (like coffee or tea).
- As far as ready-to-drink commercial beverages go, it's relatively inexpensive, and with competitive pricing it is becoming increasingly affordable for consumers.
- Various packaging types, ranging from bulk to single-serve, facilitate a variety of uses. Consumers' interest in foods and beverages that confer benefits above and beyond refreshment also contributes to the quintessential hydrating beverage's performance in recent years.
- As concern about obesity spreads and intensifies, bottled water's lack of calories appears that much more attractive to consumers.