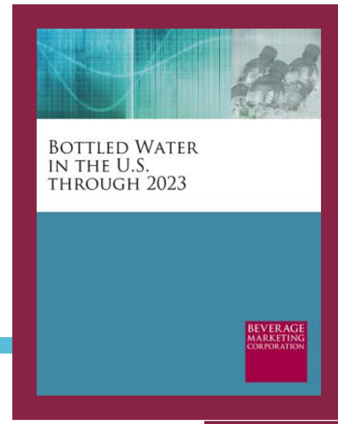
Bottled Water in the U.S. through 2023

2019 Edition (Published August 2019. Data through 2018. Market projections through 2023.) 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:

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The answers you need

Bottled Water in the U.S. through 2023 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 2018, and how are they like to develop by 2023?
- Which bottled water companies and brands experienced growth in 2018, 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 2023?
- 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 2023?

This bottled water research report features

The most comprehensive report available, *Bottled Water in the U.S. through 2023* 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 2023 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, Keurig Dr Pepper, 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 2023, as well as five-year volume forecasts by region, distribution channels and packaging, and more

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August 2019

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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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Appendix

Exhibit 5.63

U.S. BOTTLED WATER MARKET

GROWTH BY WATER TYPE AND DISTRIBUTION

2009 — 2023(P)

				Retail			
Type	**Year**	**Home**	**Commercial**	**Off-Premise**	**On-Premise**	**Vending**	**Total Growth**
Non-Sparkling	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]%
	2017/18	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2018/23(P)	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Domestic Sparkling	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]%
	2017/18	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2018/23(P)	[illegible]	[illegible]	**[illegible]%**	**[illegible]%**	[illegible]	**[illegible]%**
Imports	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]%
	2017/18	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2018/23(P)	[illegible]	[illegible]	**[illegible]%**	**[illegible]%**	[illegible]	**[illegible]%**
Total Gallonage	2008/09	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
By Outlet	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]%
	2017/18	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2018/23(P)	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

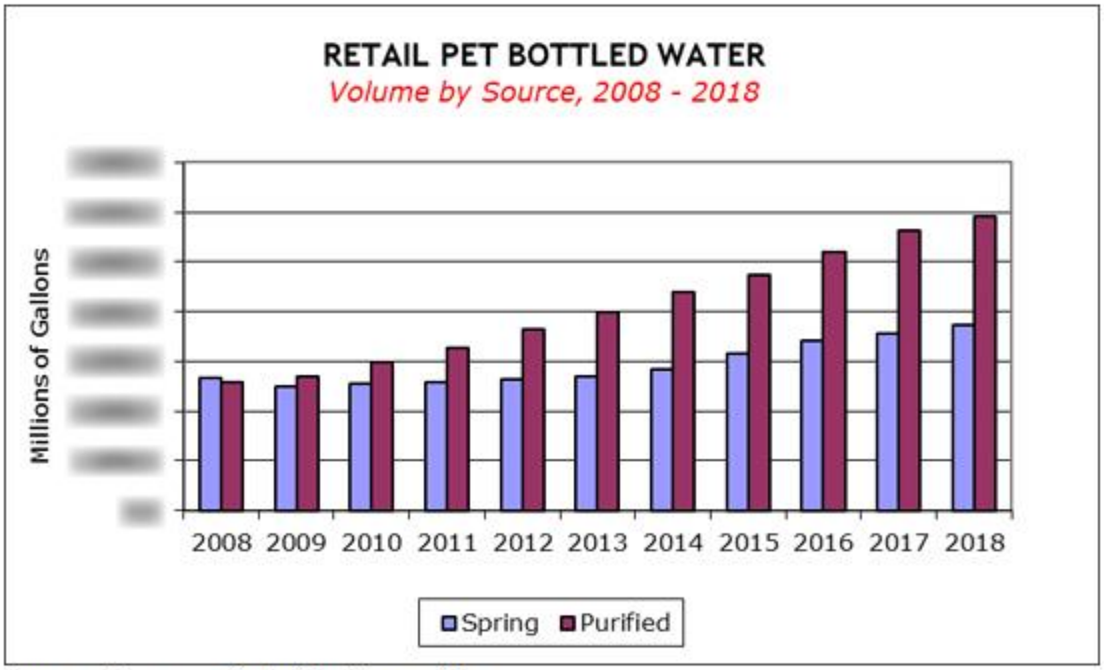
(P) Projected

Note: The 2018/23 figures are the projected five-year compound annual growth rates.

Source: Beverage Marketing Corporation

Bottled water endured a perfect storm of adversity a decade ago, when the 2008 recession combined with an environmental "green" backlash to put the category on the defensive. 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 eventually was reversed — certainly at the high end — as bottled water puts up growth numbers that lately are exceeding those of energy drinks, a flotilla of new entrants vie for a piece of the action and the big strategic companies try to figure out how to react.

- The extent of the carnage since the recession should not be forgotten, 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 also went through upheaval. Voss saw its founder depart and a seasoned executive brought in from outside the bottle-water segment to turn things around.
- Through a special set of factors, Icelandic Glacial — seemingly destined 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 capital into Icelandic bottled water imports or any 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 it scrambling for 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 hard to see when the company will obtain a return or an exit.
- 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 marketing component of 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 distribution piece, too.



Source: Beverage Marketing Corporation