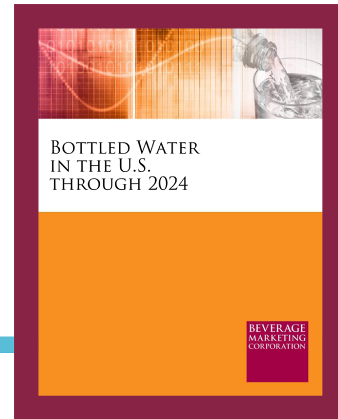
BOTTLED WATER IN THE U.S. THROUGH 2024

2020 EDITION (Published August 2020. Data through 2019. Market projections through 2024.) 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. From discussions of the impact of the Coronavirus pandemic to detailed analysis of key companies' and brands' activities and sales results, this report covers it all. It also offers detailed analysis and data to put industry trends in perspective by covering nuances such as regional and state markets as well as packaging, quarterly category growth, distribution, advertising, demographics and more.

New in 2020: *Expanded coverage of the high-end bottled water segment.*

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INSIDE:

HAVE QUESTIONS?

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The answers you need

Bottled Water in the U.S. through 2024 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 2019, and how are they like to develop by 2024?
- Which bottled water companies and brands experienced growth in 2019, and which did not?
- What are the drivers of the home- and office-delivery market for bottled water?
- Which nations ship the most bottled water to the United States?
- Which non-sparkling water distribution channels will gain market share by 2024?

This bottled water research report features

The most comprehensive report available, Bottled Water in the U.S. through 2024 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 2024 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:

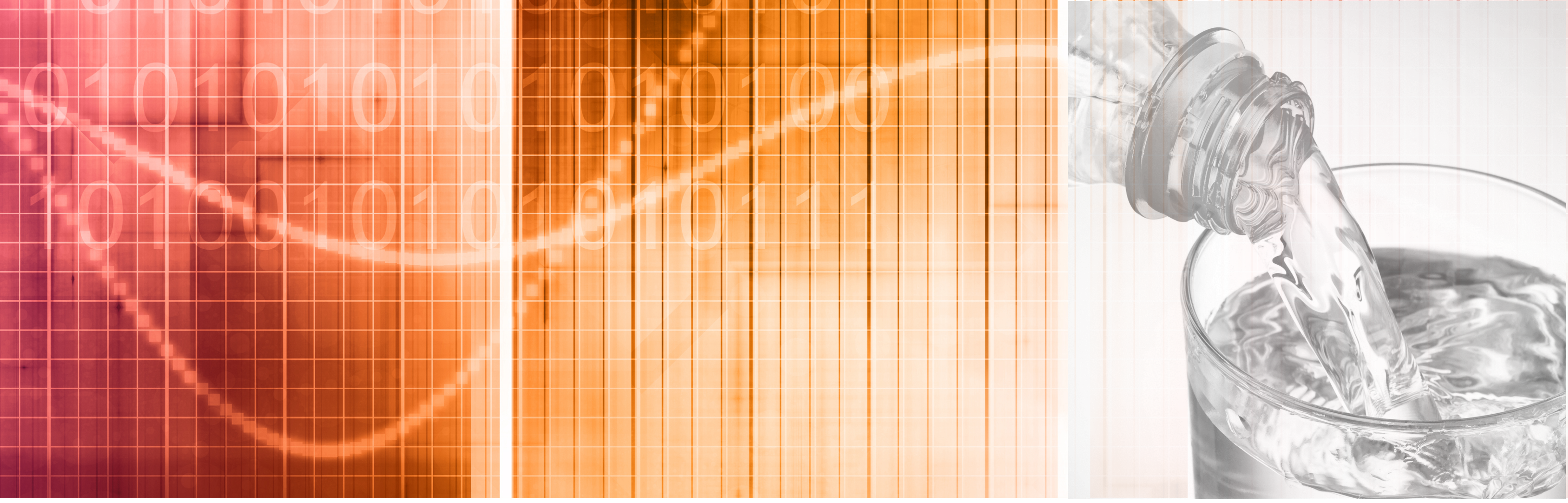
- Historical and current statistics on all facets of the bottled water market, as well as insight into current trends and market drivers including the Covid-19 crisis. Data and analysis putting the U.S. market in context of the global perspective.
- A regional look at the U.S. bottled water marketplace, 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, Primo Water Corporation (the surviving corporation after the amalgamation of Primo and Cott Corporation/DS Services of America), CG Roxane, Culligan International, Keurig Dr Pepper, and Niagara Bottling. Also tracks the performance of the top domestic and imported brands.
- Detailed analysis of the home-and-office delivery (HOD) segment 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 2024, as well as five-year volume forecasts by region, distribution channels and packaging, and more.



Bottled Water in the U.S. through 2024

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Bottled Water in the U.S. through 2024

August 2020

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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 5.67

U.S. BOTTLED WATER MARKET

GROWTH BY WATER TYPE AND DISTRIBUTION

2010 — 2024(P)

Type	Year	Home	Commercial	Retail Off-Premise	Retail On-Premise	Vending	Total Growth
Non-Sparkling	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]%
	2018/19	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2019/24(P)	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Domestic Sparkling	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]%
	2018/19	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2019/24(P)	[illegible]	[illegible]	**[illegible]%**	**[illegible]%**	[illegible]	**[illegible]%**
Imports	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]%
	2018/19	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2019/24(P)	[illegible]	[illegible]	**[illegible]%**	**[illegible]%**	[illegible]	**[illegible]%**
Total Gallonage 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]%
	2018/19	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2019/24(P)	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

(P) Projected

Note: The 2019/24 figures are the projected five-year compound annual growth rates.

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.

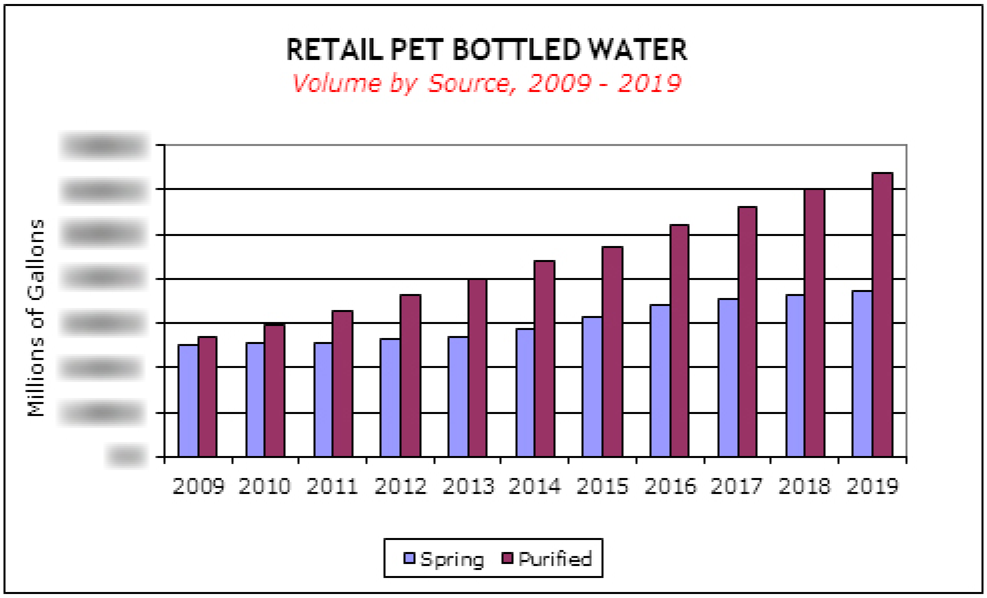
- The sort of growth that saw it double in volume in less than a decade and become the second largest beverage category by volume while still outperforming other major beverage types no longer characterizes the category.
- Nonetheless, by any objective measure, the bottled water category has been one 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), towards 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 is 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 is 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 persists, bottled water's lack of calories appears that much more attractive to consumers.

Domestic non-sparkling water is the largest and strongest part of the U.S. packaged water industry, consistently outperforming other segments.

- As it has for years, the retail premium PET segment — consisting of still water in single-serve polyethylene terephthalate bottles — still drives the overall category. As of 2019, it accounted for 70% of total volume.
- Consumers have renewed interest in sparkling waters, causing strong growth in that segment.



Source: Beverage Marketing Corporation