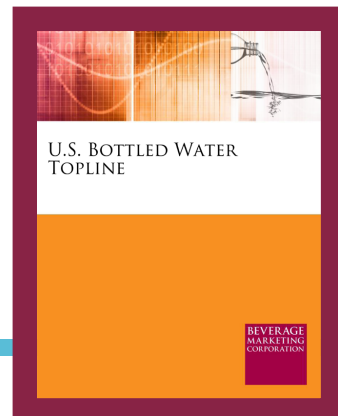


U.S. BOTTLED WATER TOPLINE

2020 EDITION (Published October 2020. Data through 2019.
Market projections through 2024.) 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. Includes a brief overview of key trends including discussion of the impact of the covid-19 pandemic.

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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 2019 and 2020, 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 2024 are also provided.



U.S. BOTTLED WATER TOPLINE

BEVERAGE
MARKETING
CORPORATION

U.S. Bottled Water Topline

October 2020

BEVERAGE
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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 – 2024(P)

Year	Non-Sparkling	Domestic Sparkling	Imports	Total
1984	1%	1%	1%	3%
1985	1%	1%	1%	3%
1986	1%	1%	1%	3%
1987	1%	1%	1%	3%
1988	1%	1%	1%	3%
1989	1%	1%	1%	3%
1990	1%	1%	1%	3%
1991	1%	1%	1%	3%
1992	1%	1%	1%	3%
1993	1%	1%	1%	3%
1994	1%	1%	1%	3%
1995	1%	1%	1%	3%
1996	1%	1%	1%	3%
1997	1%	1%	1%	3%
1998	1%	1%	1%	3%
1999	1%	1%	1%	3%
2000	1%	1%	1%	3%
2001	1%	1%	1%	3%
2002	1%	1%	1%	3%
2003	1%	1%	1%	3%
2004	1%	1%	1%	3%
2005	1%	1%	1%	3%
2006	1%	1%	1%	3%
2007	1%	1%	1%	3%
2008	1%	1%	1%	3%
2009	1%	1%	1%	3%
2010	1%	1%	1%	3%
2011	1%	1%	1%	3%
2012	1%	1%	1%	3%
2013	1%	1%	1%	3%
2014	1%	1%	1%	3%
2015	1%	1%	1%	3%
2016	1%	1%	1%	3%
2017	1%	1%	1%	3%
2018	1%	1%	1%	3%
2019	1%	1%	1%	3%
2020(P)	1%	1%	1%	3%
2021(P)	1%	1%	1%	3%
2022(P)	1%	1%	1%	3%
2023(P)	1%	1%	1%	3%
2024(P)	1%	1%	1%	3%

(r) Revised; (P) Projected

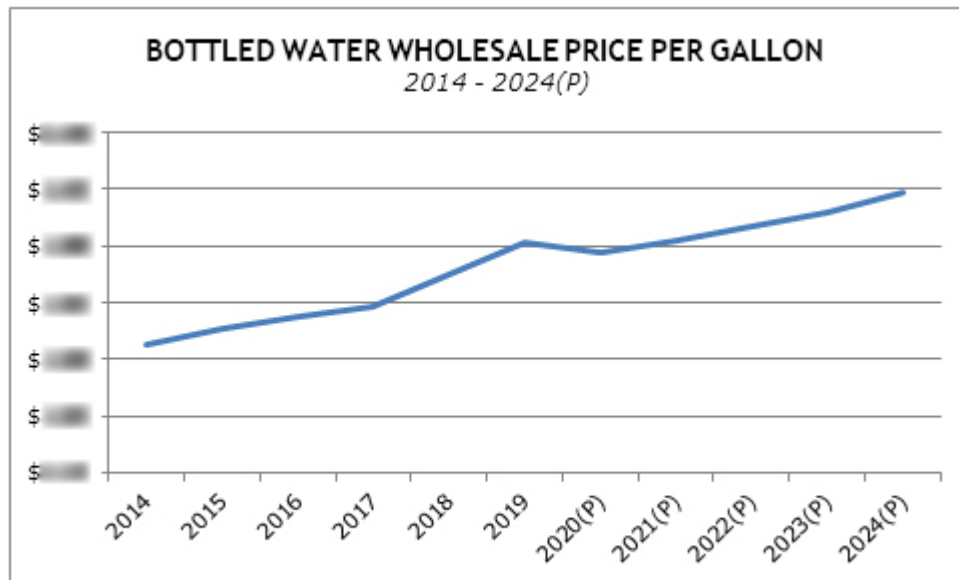
Source: Beverage Marketing Corporation

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), 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.



(P) Projected

Source: Beverage Marketing Corporation