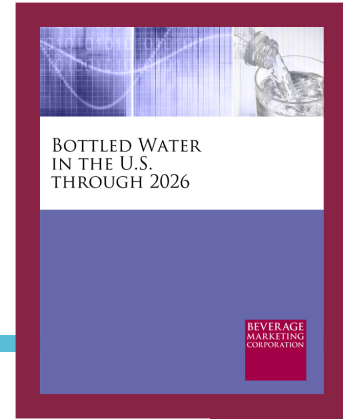


# BOTTLED WATER IN THE U.S. THROUGH 2026

2022 EDITION (Published August 2022. Data through 2021. Market projections through 2026.) More than 325 pages, with extensive text analysis, graphs, charts and more than 125 tables.



This definitive U.S. bottled water market report from Beverage Marketing Corporation looks at the largest beverage category by volume and considers every aspect of this resilient category, the forces propelling its continued growth and its competitive circumstances. Sparkling, non-sparkling, imports, HOD, branded and private label, BMC dives into the details to look at the trends — where they've been and where they're headed. 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.

## AVAILABLE FORMAT & PRICING



Direct Download.  
Word, PDF & Excel

\$4,995

To learn more, to place an advance order or to inquire about additional user licenses **call**: Charlene Harvey +1 212.688.7640 ext. 1962 [charvey@beveragemarketing.com](mailto:charvey@beveragemarketing.com)

FOR A FULL CATALOG OF REPORTS AND DATABASES, GO TO [bmcreports.com](http://bmcreports.com)

## INSIDE:

### REPORT OVERVIEW

A brief discussion of key features of this report. 2

### TABLE OF CONTENTS

A detailed outline of this report's contents and data tables. 7

### SAMPLE TEXT AND INFOGRAPHICS

A few examples of this report's text, data content layout and style. 16



HAVE QUESTIONS?

Contact Charlene Harvey: 212-688-7640 x 1962  
[charvey@beveragemarketing.com](mailto:charvey@beveragemarketing.com)

BEVERAGE  
MARKETING  
CORPORATION

BEVERAGE MARKETING CORPORATION  
P.O. Box 2399 | 143 Canton Road, 2<sup>nd</sup> Floor  
Wintersville, OH 43953  
Tel: 212-688-7640 Fax: 740-314-8639

## THE ANSWERS YOU NEED

*Bottled Water in the U.S. through 2026* 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 2021, and how are they like to develop by 2026?
- Which bottled water companies and brands experienced growth in 2021, 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 2026?

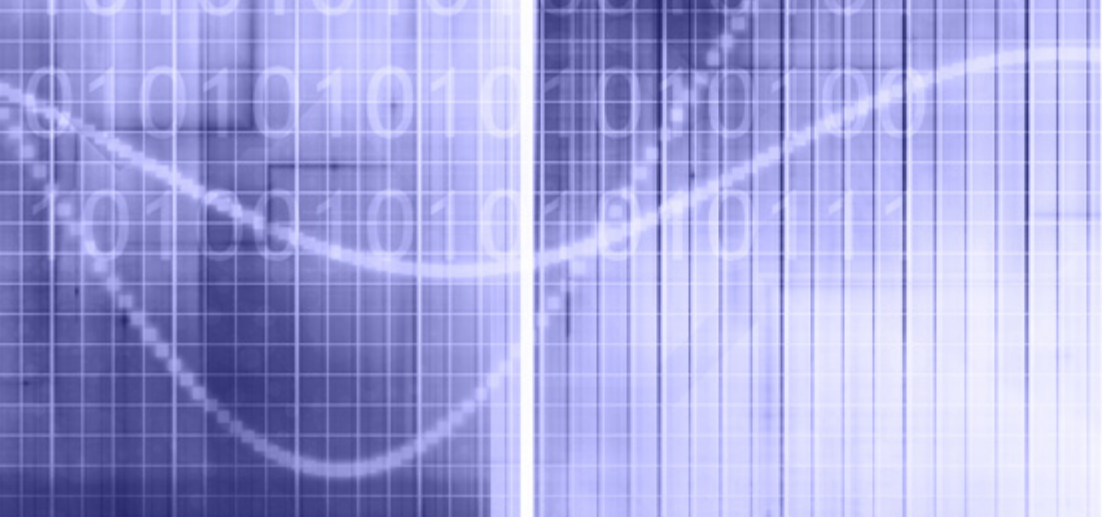
## THIS BOTTLED WATER RESEARCH REPORT FEATURES

The most comprehensive report available, *Bottled Water in the U.S. through 2026* 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 2026 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 aftermath of 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 BlueTriton Brands (formerly Nestlé Waters North America), Nestle USA (which continues to handle imports such as Perrier), PepsiCo, Coca-Cola Company, Primo Water Corporation, 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 2026, as well as five-year volume forecasts by region, distribution channels and packaging, and more.



# BOTTLED WATER IN THE U.S. THROUGH 2026

**BEVERAGE  
MARKETING  
CORPORATION**

# Bottled Water in the U.S. through 2026

August 2022

---

BEVERAGE  
MARKETING  
CORPORATION

RESEARCH • DATA • CONSULTING

**NOTE:** The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

---

Copyright © 2022 Beverage Marketing Corporation of New York, P.O. Box 2399, Wintersville, OH 43953, (212) 688-7640. All rights reserved. Reproductions in any form prohibited by law.

# Contents

## Table of Contents

---

**TABLE OF CONTENTS**

TABLE OF CONTENTS .....	i
DEFINITIONS USED IN THIS REPORT.....	ix
INTRODUCTION .....	xi

**Chapter**

**1. THE U.S. BOTTLED WATER MARKET**

The Global Bottled Water Market .....	1
The National Bottled Water Market.....	2
• Volume .....	3
• Per Capita Consumption.....	4
• Volume by Segment .....	6
• Wholesale Dollar Sales .....	8
• Prices .....	9
• Seasonality.....	9
• Retail Dollar Sales .....	9
• Quarterly Growth Trends.....	10
<b>Exhibits</b>	
1.1 Global Bottled Water Market Consumption and Annual Change 1996 – 2021 .....	11
1.2 U.S. Bottled Water Market Gallonage, Growth and Per Capita Consumption 1978 – 2026.....	12
1.3 U.S. Bottled Water Market Non-Sparkling, Domestic Sparkling & Import Gallonage 1978 – 2026.....	13
1.4 U.S. Bottled Water Market Gallonage by Segment 1979 – 2026.....	14
1.5 U.S. Bottled Water Market Share of Gallonage by Segment 1979 – 2026.....	15
1.6 U.S. Bottled Water Market Change in Gallonage by Segment 1980 – 2026.....	16
1.7 U.S. Bottled Water Market Estimated Non-Sparkling, Sparkling and Import Wholesale Dollars and Change 1984 – 2026 .....	17
1.8 U.S. Bottled Water Market Estimated Wholesale Dollars by Segment 2000 – 2026	18
1.9 U.S. Bottled Water Market Share of Wholesale Dollars by Segment 2000 – 2026 --	19
1.10 U.S. Bottled Water Market Change in Wholesale Dollars by Segment 2001 – 2026	20
1.11 U.S. Bottled Water Market Estimated Wholesale Dollars, Gallonage and Price 2021	21
1.12 U.S. Bottled Water Market Quarterly Volume Shares by Segment 2021 .....	22
1.13 U.S. Bottled Water Market Estimated Retail Dollars 2017 – 2026 .....	23
1.14 U.S. Bottled Water Market Estimated Share of Retail Dollars 2017 – 2026 .....	24
1.15 U.S. Bottled Water Market Change in Retail Dollars 2018 – 2026 .....	25
1.16 U.S. Bottled Water Market Estimated Volume, Share and Growth by Segment Q1 2022 .....	26

TABLE OF CONTENTS

Chapter

**2. THE REGIONAL BOTTLED WATER MARKETS**

Regional Bottled Water Markets -----	27
• Overview -----	27
• Non-Sparkling Water -----	30
• Sparkling Water -----	31
• Per Capita Consumption-----	33

**Exhibits**

2.17 U.S. Bottled Water Market Gallonage by Region 2016 – 2026 -----	38
2.18 U.S. Bottled Water Market Share of Gallonage by Region 2016 – 2026 -----	39
2.19 U.S. Bottled Water Market Change in Gallonage by Region 2017 – 2026 -----	40
2.20 U.S. Non-Sparkling Bottled Water Market Gallonage by Region 2016 – 2026-----	41
2.21 U.S. Non-Sparkling Bottled Water Market Share of Gallonage by Region 2016 – 2026-----	42
2.22 U.S. Non-Sparkling Bottled Water Market Change in Gallonage by Region 2017 – 2026-----	43
2.23 U.S. Sparkling Bottled Water Market Gallonage by Region 2016 – 2026 -----	44
2.24 U.S. Sparkling Bottled Water Market Share of Gallonage by Region 2016 – 2026--	45
2.25 U.S. Sparkling Bottled Water Market Change in Gallonage by Region 2017 – 2026	46
2.26 U.S. Bottled Water Market Per Capita Consumption by Region 2016 – 2026 -----	47
2.27 U.S. Non-Sparkling Bottled Water Market Per Capita Consumption by Region 2016 – 2026-----	48
2.28 U.S. Sparkling Bottled Water Market Per Capita Consumption by Region 2016 – 2026-----	49

**3. THE HOD WATER MARKET**

Home- and Office-Delivered Bottled Water -----	50
• Overview -----	50
• Recent Developments -----	56
• Leading Companies and Brands -----	57
• Number of Coolers-----	60

**Exhibits**

3.29 The Leading HOD Bottled Water Companies Estimated Water Only Revenues 2016 – 2021 -----	61
3.30 The Leading HOD Bottled Water Companies Share of Estimated Water Only Revenues 2016 – 2021 -----	62
3.31 The Leading HOD Bottled Water Companies Change in Estimated Water Only Revenues 2017 – 2021 -----	63
3.32 The Leading HOD Bottled Water Companies Estimated Water Only Volume 2016 – 2021 -----	64
3.33 The Leading HOD Bottled Water Companies Share of Estimated Water Only Volume 2016 – 2021 -----	65



## TABLE OF CONTENTS

## Chapter

**3. THE HOD WATER MARKET (cont'd)****Exhibits (cont'd)**

3.34	The Leading HOD Bottled Water Companies Change in Estimated Water Only Volume 2017 – 2021-----	66
3.35	The Leading HOD Bottled Water Brands Estimated Water Only Revenues 2016 – 2021-----	67
3.36	The Leading HOD Bottled Water Brands Share of Estimated Water Only Revenues 2016 – 2021-----	68
3.37	The Leading HOD Bottled Water Brands Change in Estimated Water Only Revenues 2017 – 2021-----	69
3.38	U.S. Water Cooler Market Estimated Millions of Units in Operation 1990 – 2026 ---	70

**4. THE IMPORTED BOTTLED WATER MARKET**

Imported Bottled Water-----	71
• Overview-----	71
• Volume-----	72
Volume of Imports by Origin-----	73
• Regions of Origin-----	73
• Countries of Origin-----	74
Value of Imports by Origin-----	76
• Regions of Origin-----	76
• Countries of Origin-----	77
• Dollars Per Gallon-----	78
Imported Volume by Type-----	80
• Imported Sparkling and Non-Sparkling Water-----	80

**Exhibits**

4.39	Imported Bottled Water Market Gallonage, Sales and Growth 1978 – 2026 -----	81
4.40	Imported Bottled Water Market Gallonage by Region 2016 – 2021-----	82
4.41	Imported Bottled Water Market Share by Region 2016 – 2021-----	83
4.42	Imported Bottled Water Market Change by Region 2017 – 2021-----	84
4.43	Leading Imported Water Countries Gallonage 2016 – 2021-----	85
4.44	Leading Imported Water Countries Share 2016 – 2021-----	86
4.45	Leading Imported Water Countries Gallonage Growth 2017 – 2021-----	87
4.46	Imported Bottled Water Market Dollar Value by Region 2016 – 2021-----	88
4.47	Imported Bottled Water Market Dollar Share by Region 2016 – 2021-----	89
4.48	Imported Bottled Water Market Dollar Growth by Region 2017 – 2021-----	90
4.49	Leading Imported Water Countries Dollar Value 2016 – 2021-----	91
4.50	Leading Imported Water Countries Share of Dollar Value 2016 – 2021-----	92
4.51	Leading Imported Water Countries Change in Dollar Value 2017 – 2021-----	93
4.52	Leading Imported Water Countries Dollars Per Gallon 2016 – 2021-----	94

TABLE OF CONTENTS

Chapter

**4. THE IMPORTED BOTTLED WATER MARKET (cont'd)**

***Exhibits (cont'd)***

4.53	Imported Bottled Water Market Volume by Type 1994 – 2026 -----	95
4.54	Imported Bottled Water Market Share of Imports by Type 1994 – 2026-----	96
4.55	Imported Bottled Water Market Growth by Type 1995 – 2026-----	97

**5. BOTTLED WATER DISTRIBUTION CHANNELS AND PRICING**

	Bottled Water Volume by Distribution Channel-----	98
	Non-Sparkling Volume by Distribution Channel -----	104
	Domestic Sparkling Volume by Distribution Channel-----	107
	Imported Volume by Distribution Channel-----	108
	PET Water Share by Outlet -----	109
	Bottled Water Dollar Sales by Distribution Channel -----	111
	Bottled Water Dollar Sales by Channel & Water Type-----	113
	Bottled Water Sales Average Price Per Gallon -----	114
	• Non-Sparkling -----	114
	• Domestic Sparkling-----	115
	• Imports-----	115
	• Average Price in Supermarkets -----	115

***Exhibits***

5.56	U.S. Bottled Water Market Volume by Type of Distribution 2016 – 2026-----	116
5.57	U.S. Bottled Water Market Share by Type of Distribution 2016 – 2026 -----	117
5.58	U.S. Bottled Water Market Growth by Type of Distribution 2017 – 2026-----	118
5.59	U.S. Bottled Water Market Volume by Distribution Channel 2016 – 2026-----	119
5.60	U.S. Bottled Water Market Share of Volume by Distribution Channel 2016 – 2026-	120
5.61	U.S. Bottled Water Market Change in Volume by Distribution Channel 2017 – 2026-----	121
5.62	U.S. Bottled Water Market Gallonage by Water Type and Distribution 2011 – 2026	122
5.63	U.S. Bottled Water Market Gallonage Share by Water Type and Distribution 2011 – 2026-----	123
5.64	U.S. Bottled Water Market Growth by Water Type and Distribution 2012 – 2026 --	124
5.65	U.S. PET Water Market Volume by Distribution Channel 2016 – 2026-----	125
5.66	U.S. PET Water Market Share of Volume by Distribution Channel 2016 – 2026 ----	126
5.67	U.S. PET Water Market Change in Volume by Distribution Channel 2017 – 2026---	127
5.68	U.S. Bottled Water Market Wholesale Dollar Sales by Type of Distribution 2016 – 2026-----	128
5.69	U.S. Bottled Water Market Share of Wholesale Dollar Sales by Type of Distribution 2016 – 2026-----	129
5.70	U.S. Bottled Water Market Dollar Growth by Type of Distribution 2017 – 2026 ----	130
5.71	U.S. Bottled Water Market Wholesale Dollar Sales by Water Type and Distribution 2011 – 2026-----	131

TABLE OF CONTENTS

Chapter

**5. BOTTLED WATER DISTRIBUTION CHANNELS AND PRICING (cont'd)**

**Exhibits (cont'd)**

5.72	U.S. Bottled Water Market Share of Wholesale Dollar Sales by Water Type and Distribution 2011 – 2026 -----	132
5.73	U.S. Bottled Water Market Wholesale Dollar Growth by Water Type and Distribution 2012 – 2026-----	133
5.74	U.S. Bottled Water Market Average Per Gallon Wholesale Price by Water Type and Distribution 2011 – 2026 -----	134
5.75	U.S. Bottled Water Market Change in Average Per Gallon Wholesale Price 2012 – 2026-----	135
5.76	U.S. Bottled Water Market Average Price Per Unit in Grocery Stores 2016 – 2021 -	136

**6. BOTTLED WATER PACKAGING**

	Bottled Water Packaging Developments -----	137
	Non-Sparkling Volume by Container Type -----	140
	Non-Sparkling Volume by Container Size and Channel -----	141
	Sparkling Volume by Container Type -----	144

**Exhibits**

6.77	Domestic Non-Sparkling and Sparkling Water Volume by Container Material 2016 – 2026-----	146
6.78	Domestic Non-Sparkling and Sparkling Water Share by Container Material 2016 – 2026-----	147
6.79	Domestic Non-Sparkling and Sparkling Water Growth by Container Material 2017 – 2026-----	148
6.80	Domestic Non-Sparkling Water Volume by Container Material 2016 – 2026 -----	149
6.81	Domestic Non-Sparkling Water Share by Container Material 2016 – 2026-----	150
6.82	Domestic Non-Sparkling Water Growth by Container Material 2017 – 2026 -----	151
6.83	Domestic Non-Sparkling Water Volume by Container Size 2016 – 2026 -----	152
6.84	Domestic Non-Sparkling Water Share by Container Size 2016 – 2026 -----	153
6.85	Domestic Non-Sparkling Water Growth by Container Size 2017 – 2026 -----	154
6.86	Domestic Sparkling Water Volume by Container Material 2016 – 2026 -----	155
6.87	Domestic Sparkling Water Share by Container Material 2016 – 2026 -----	156
6.88	Domestic Sparkling Water Growth by Container Material 2017 – 2026-----	157

**7. THE LEADING BOTTLED WATER COMPANIES AND THEIR BRANDS**

	The Leading Companies and Their Brands -----	158
	<b>BlueTriton Brands</b> -----	161
	• Poland Spring -----	169
	• Arrowhead -----	174
	• Deer Park -----	178
	• Ozarka-----	179
	• Zephyrhills -----	180

## TABLE OF CONTENTS

## Chapter

## 7. THE LEADING BOTTLED WATER COMPANIES AND THEIR BRANDS (cont'd)

**BlueTriton Brands (cont'd)**

- Ice Mountain ----- 181
- Nestlé Pure Life ----- 183
- Saratoga Spring ----- 187

**Nestlé USA ----- 188**

- Perrier ----- 190
- San Pellegrino ----- 193

**PepsiCo, Inc. ----- 194**

- Aquafina ----- 194
- bubly ----- 200

**Coca-Cola Company ----- 202**

- Dasani ----- 203
- AHA ----- 208
- Topo Chico ----- 208

**Primo Water Corporation ----- 210****Danone Waters North America ----- 226**

- Evian ----- 227

**CG Roxane LLC ----- 232**

- Alpine Spring ----- 232

**Culligan International ----- 234****Keurig Dr Pepper ----- 237****Niagara Bottling, LLC ----- 239**

## The PET Water Market ----- 242

## The Leading Imported Bottled Water Brands ----- 243

- Evian ----- 243
- Fiji ----- 243
- San Pellegrino ----- 248
- Perrier ----- 248
- Volvic ----- 248
- Acqua Panna ----- 249
- Voss ----- 250
- Icelandic Glacial ----- 252

**Exhibits**

- 7.89 Leading Bottled Water Companies Estimated Wholesale Dollar Sales 2016 – 2021 254
- 7.90 Leading Bottled Water Companies Share of Estimated Wholesale Dollar Sales  
2016 – 2021 ----- 255
- 7.91 Leading Bottled Water Companies Change in Estimated Wholesale Dollar Sales  
2017 – 2021 ----- 256
- 7.92 Leading Bottled Water Companies Estimated Volume 2016 – 2021 ----- 257
- 7.93 Leading Bottled Water Companies Share of Estimated Volume 2016 – 2021 ----- 258

TABLE OF CONTENTS

Chapter

**7. THE LEADING BOTTLED WATER COMPANIES AND THEIR BRANDS (cont'd)**

***Exhibits (cont'd)***

7.94	Leading Bottled Water Companies Change in Estimated Volume 2017 – 2021 -----	259
7.95	Leading Bottled Water Companies Estimated Wholesale Dollar Sales by Brand 2016 – 2021-----	260
7.96	Leading Bottled Water Companies Estimated Share of Wholesale Dollar Sales by Brand 2016 – 2021 -----	262
7.97	Leading Bottled Water Companies Estimated Change in Wholesale Dollar Sales by Brand 2017 – 2021 -----	264
7.98	Leading Bottled Water Brands Wholesale Dollar Sales 2016 – 2021 -----	266
7.99	Leading Bottled Water Brands Share of Wholesale Dollar Sales 2016 – 2021-----	267
7.100	Leading Bottled Water Brands Change in Wholesale Dollar Sales 2017 – 2021 -----	268
7.101	PET Water Market in the U.S. Estimated Volume by Company 2016 – 2021 -----	269
7.102	PET Water Market in the U.S. Volume Share by Company 2016 – 2021 -----	270
7.103	PET Water Market in the U.S. Change in Volume by Company 2017 – 2021-----	271
7.104	The Leading Imported Water Brands Estimated Volume 2016 – 2021-----	272
7.105	The Leading Imported Water Brands Share of Estimated Volume 2016 – 2021 ----	273
7.106	The Leading Imported Water Brands Volume Growth 2017 – 2021-----	274

**8. THE U.S. CLUB SODA AND SELTZER WATER MARKET**

Club Soda and Seltzer Water -----	275
• Overview -----	275
• Volume -----	275
Club Soda and Seltzer Water Companies and Brands-----	278
• Overview -----	278
• Polar-----	279
• Schweppes-----	281
• Canada Dry -----	281
• Vintage-----	282
• Seagram -----	283

***Exhibits***

8.107	Club Soda/Seltzer Estimated Volume 2016 – 2026 -----	284
8.108	Club Soda/Seltzer Estimated Volume Share 2016 – 2026-----	285
8.109	Club Soda/Seltzer Estimated Volume Growth 2017 – 2026 -----	286
8.110	Club Soda/Seltzer Estimated Volume by Brand 2016 – 2021 -----	287
8.111	Club Soda/Seltzer Estimated Share by Brand 2016 – 2021 -----	288
8.112	Club Soda/Seltzer Estimated Growth by Brand 2017 – 2021-----	289

**9. BOTTLED WATER BY SOURCE**

Purified and Spring Water -----	290
• Overview -----	290
• Volume -----	291

TABLE OF CONTENTS

Chapter

**9. BOTTLED WATER BY SOURCE (cont'd)**

*Exhibits*

9.113 Retail PET Bottled Water Volume by Source 2000 – 2026----- 293  
 9.114 Retail PET Bottled Water Share by Source 2000 – 2026----- 294  
 9.115 Retail PET Bottled Water Growth by Source 2001 – 2026 ----- 295

**10. BOTTLED WATER ADVERTISING EXPENDITURES**

Bottled Water Advertising----- 296  
 • Overview ----- 296  
 • Domestic Brands----- 298  
 • Imported Brands----- 300  
 Bottled Water Advertising by Media ----- 302

*Exhibits*

10.116 U.S. Bottled Water Market Advertising Expenditures 1979 – 2021 ----- 304  
 10.117 U.S. Domestic Bottled Water Advertising Expenditures 1979 – 2021----- 305  
 10.118 Imported Bottled Water Advertising Expenditures 1979 – 2021 ----- 306  
 10.119 Leading Domestic Brands by Advertising Expenditures 2016 – 2021 ----- 307  
 10.120 Leading Domestic Brands by Share of Advertising Expenditures 2016 – 2021----- 308  
 10.121 Leading Domestic Brands Change in Advertising Expenditures 2017 – 2021 ----- 309  
 10.122 Leading Imported Brands by Advertising Expenditures 2016 – 2021 ----- 310  
 10.123 Leading Imported Brands by Share of Advertising Expenditures 2016 – 2021----- 311  
 10.124 Leading Imported Brands Change in Advertising Expenditures 2017 – 2021 ----- 312  
 10.125 Estimated Advertising Expenditures for All Bottled Water Brands by Media  
 2016 – 2021----- 313  
 10.126 Estimated Share of Advertising Expenditures for All Bottled Water Brands by  
 Media 2016 – 2021 ----- 314  
 10.127 Estimated Change in Advertising Expenditures for All Bottled Water Brands by  
 Media 2017 – 2021 ----- 315

**11. DEMOGRAPHICS OF THE BOTTLED WATER CONSUMER**

Users of Bottled Waters in the U.S. ----- 316  
 • Overview ----- 316  
 • Comparative Demographics of Bottled Water Brands ----- 320

*Exhibits*

11.128 Demographics of the Bottled Water Consumer 2021 ----- 324  
 11.129 Demographics of the Evian Consumer 2021----- 326  
 11.130 Demographics of the Aquafina Consumer 2021 ----- 328  
 11.131 Demographics of the Dasani Consumer 2021 ----- 330

Appendix

A. U.S. Population by Region 1981 – 2021----- 332

**U.S. BOTTLED WATER MARKET  
GROWTH BY WATER TYPE AND DISTRIBUTION  
2012 – 2026(P)**

Type	Year	Home	Commercial	Retail		Vending	Total Growth
				Off-Premise	On-Premise		
<b>Non-Sparkling</b>	2011/12	10%	10%	10%	10%	10%	10%
	2012/13	10%	10%	10%	10%	10%	10%
	2013/14	10%	10%	10%	10%	10%	10%
	2014/15	10%	10%	10%	10%	10%	10%
	2015/16	10%	10%	10%	10%	10%	10%
	2016/17	10%	10%	10%	10%	10%	10%
	2017/18	10%	10%	10%	10%	10%	10%
	2018/19	10%	10%	10%	10%	10%	10%
	2019/20	10%	10%	10%	10%	10%	10%
	2020/21	10%	10%	10%	10%	10%	10%
	<b>2021/26(P)</b>	10%	10%	10%	10%	10%	10%
<b>Domestic Sparkling</b>	2011/12	10%	10%	10%	10%	10%	10%
	2012/13	10%	10%	10%	10%	10%	10%
	2013/14	10%	10%	10%	10%	10%	10%
	2014/15	10%	10%	10%	10%	10%	10%
	2015/16	10%	10%	10%	10%	10%	10%
	2016/17	10%	10%	10%	10%	10%	10%
	2017/18	10%	10%	10%	10%	10%	10%
	2018/19	10%	10%	10%	10%	10%	10%
	2019/20	10%	10%	10%	10%	10%	10%
	2020/21	10%	10%	10%	10%	10%	10%
	<b>2021/26(P)</b>	10%	10%	10%	10%	10%	10%
<b>Imports</b>	2011/12	10%	10%	10%	10%	10%	10%
	2012/13	10%	10%	10%	10%	10%	10%
	2013/14	10%	10%	10%	10%	10%	10%
	2014/15	10%	10%	10%	10%	10%	10%
	2015/16	10%	10%	10%	10%	10%	10%
	2016/17	10%	10%	10%	10%	10%	10%
	2017/18	10%	10%	10%	10%	10%	10%
	2018/19	10%	10%	10%	10%	10%	10%
	2019/20	10%	10%	10%	10%	10%	10%
	2020/21	10%	10%	10%	10%	10%	10%
	<b>2021/26(P)</b>	10%	10%	10%	10%	10%	10%
<b>Total Gallonage By Outlet</b>	2011/12	10%	10%	10%	10%	10%	10%
	2012/13	10%	10%	10%	10%	10%	10%
	2013/14	10%	10%	10%	10%	10%	10%
	2014/15	10%	10%	10%	10%	10%	10%
	2015/16	10%	10%	10%	10%	10%	10%
	2016/17	10%	10%	10%	10%	10%	10%
	2017/18	10%	10%	10%	10%	10%	10%
	2018/19	10%	10%	10%	10%	10%	10%
	2019/20	10%	10%	10%	10%	10%	10%
	2020/21	10%	10%	10%	10%	10%	10%
	<b>2021/26(P)</b>	10%	10%	10%	10%	10%	10%

(P) Projected

Note: The 2021/26 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 the greatest success story 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 bottled water market doubled in a 14-year span (2003–2017), towards the end of which it became the largest beverage category — overtaking carbonated soft drinks (CSDs). This marked a major milestone.

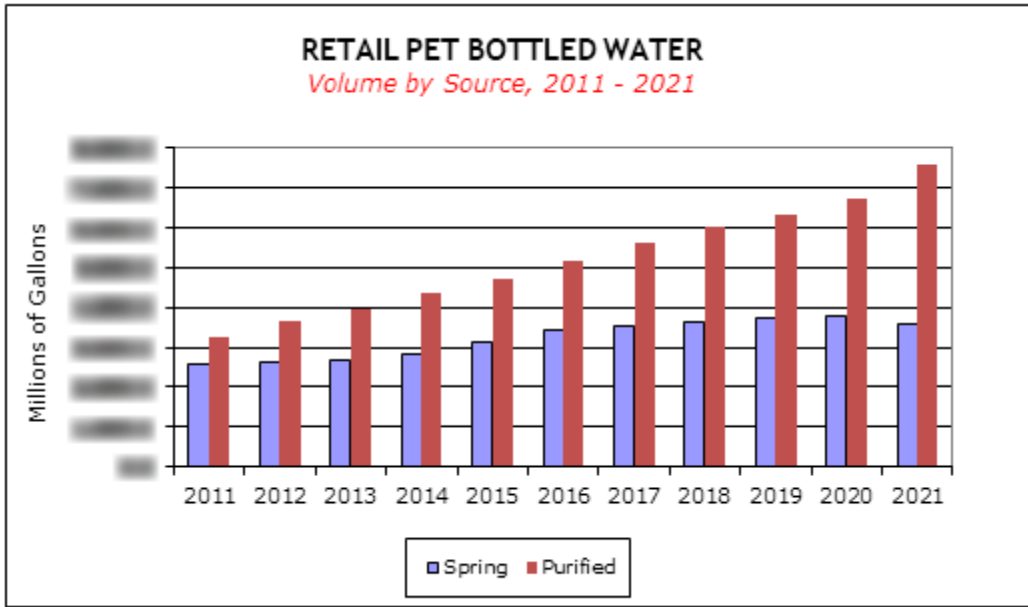
U.S. residents' thirst for bottled water can be attributed to several factors.

- 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 2021, it accounted for more than 70% of total volume.
- Consumers have renewed interest in sparkling waters, causing strong growth in that segment.
- After declining in the late 2000s, imports have grown for the past 11 years.





Source: Beverage Marketing Corporation