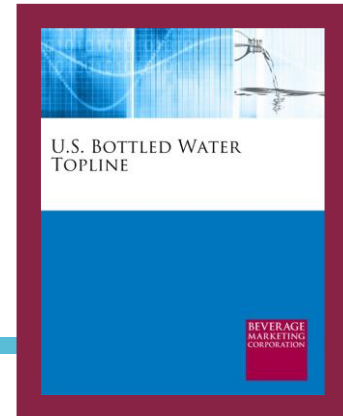


# U.S. BOTTLED WATER TOPLINE

**2024 EDITION** (Published October 2024. Data through 2023. Market projections through 2028.) More than 25 pages, with text analysis, graphs and charts.



**E**xecutive Summary. *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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MARKETING  
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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 did the bottled water market segments perform in 2022 and 2023, 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 2028 are also provided.



# U.S. BOTTLED WATER TOPLINE

**BEVERAGE  
MARKETING  
CORPORATION**

# U.S. Bottled Water Topline

## October 2024

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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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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.

Exhibit 12

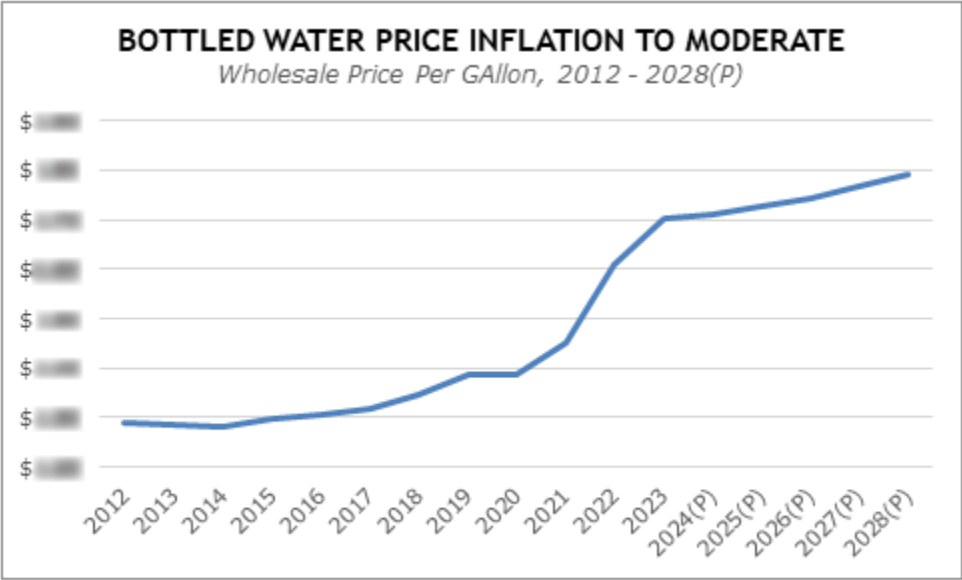
**RETAIL PET BOTTLED WATER  
SHARE BY SOURCE  
2000 – 2028(P)**

Year	Spring	Purified	Total
2000	100%	0%	100%
2001	100%	0%	100%
2002	100%	0%	100%
2003	100%	0%	100%
2004	100%	0%	100%
2005	100%	0%	100%
2006	100%	0%	100%
2007	100%	0%	100%
2008	100%	0%	100%
2009	100%	0%	100%
2010	100%	0%	100%
2011	100%	0%	100%
2012	100%	0%	100%
2013	100%	0%	100%
2014	100%	0%	100%
2015	100%	0%	100%
2016	100%	0%	100%
2017	100%	0%	100%
2018	100%	0%	100%
2019	100%	0%	100%
2020	100%	0%	100%
2021	100%	0%	100%
2022	100%	0%	100%
2023	100%	0%	100%
2028(P)	100%	0%	100%

(P) Projected

Source: Beverage Marketing Corporation





(P) Projected  
Source: Beverage Marketing Corporation