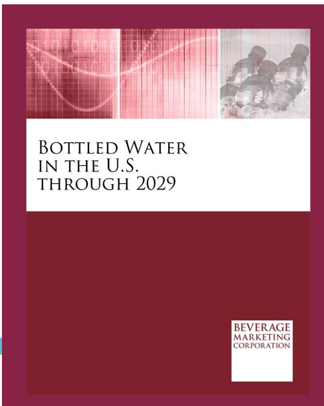
Bottled Water in the U.S. through 2029

2025 Edition (September 2025. Data through 2024. Market projections through 2029.) 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, retail and wholesale dollars and considers every aspect of this resilient category, the forces propelling its continued growth and its competitive circumstances. Total market, all-sales-channel inclusive historical and current data plus five-year forecasts ground the data driven analysis and market insight. From sparkling to 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 inflation 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. Data is provided from various vantage points from volume to retail and wholesale dollars to add perspective to this total market, all-sales-channel inclusive study of the on and off-premise bottled water industry. Meanwhile, discussion of trends and issues adds color and insight to the statistics.

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INSIDE:

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The answers you need

Bottled Water in the U.S. through 2029 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 did the various bottled water market segments perform in 2024, and how are they like to develop by 2029? What factors are driving the trends?
- Which bottled water companies and brands experienced growth in 2024, and which did not?
- Which non-sparkling water distribution channels will gain market share by 2029?
- 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?
- Which nations ship the most bottled water to the United States?
- What are the drivers of the home- and office-delivery market for bottled water?

This bottled water research report features

The most comprehensive report available, *Bottled Water in the U.S. through 2029* 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 2029 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:

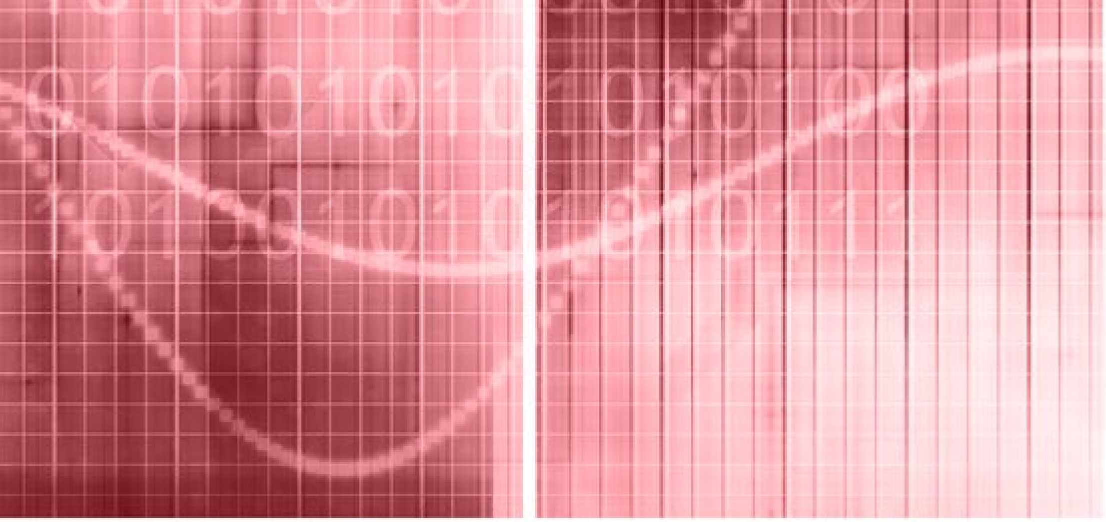
- Historical and current statistics on all facets of the bottled water market, as well as insight into current trends and market drivers. Data and analysis putting the U.S. market in context of the global perspective.
- A regional look at the U.S. bottled water marketplace, with volume and growth of non-sparkling and sparkling water over the past three decades.
- Includes profiles of Primo Brands (Primo Water and BlueTriton Brands), Nestlé USA (which handles imports such as Perrier), PepsiCo, Coca-Cola Company, 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 2029, as well as five-year volume forecasts by region, distribution channels and packaging, and more.



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Beverage Marketing Corporation

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September 2025

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 5.64

U.S. BOTTLED WATER MARKET

GROWTH BY WATER TYPE AND DISTRIBUTION

2015 — 2029(P)

				Retail			
Type	**Year**	**Home**	**Commercial**	**Off-Premise**	**On-Premise**	**Vending**	**Total Growth**
Non-Sparkling	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]%
	2019/20	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2020/21	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2021/22	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2022/23	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2023/24	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2024/29(P)	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Domestic Sparkling	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]%
	2019/20	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2020/21	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2021/22	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2022/23	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2023/24	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2024/29(P)	[illegible]	[illegible]	**[illegible]%**	**[illegible]%**	[illegible]	**[illegible]%**
Imports	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]%
	2019/20	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2020/21	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2021/22	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2022/23	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2023/24	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]	[illegible]%
	2024/29(P)	[illegible]	[illegible]	**[illegible]%**	**[illegible]%**	[illegible]	**[illegible]%**
Total Gallonage	2014/15	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
By Outlet	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]%
	2019/20	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2020/21	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2021/22	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2022/23	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2023/24	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
	2024/29(P)	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

(P) Projected

Note: The 2024/29 figures are the projected five-year compound annual growth rates.

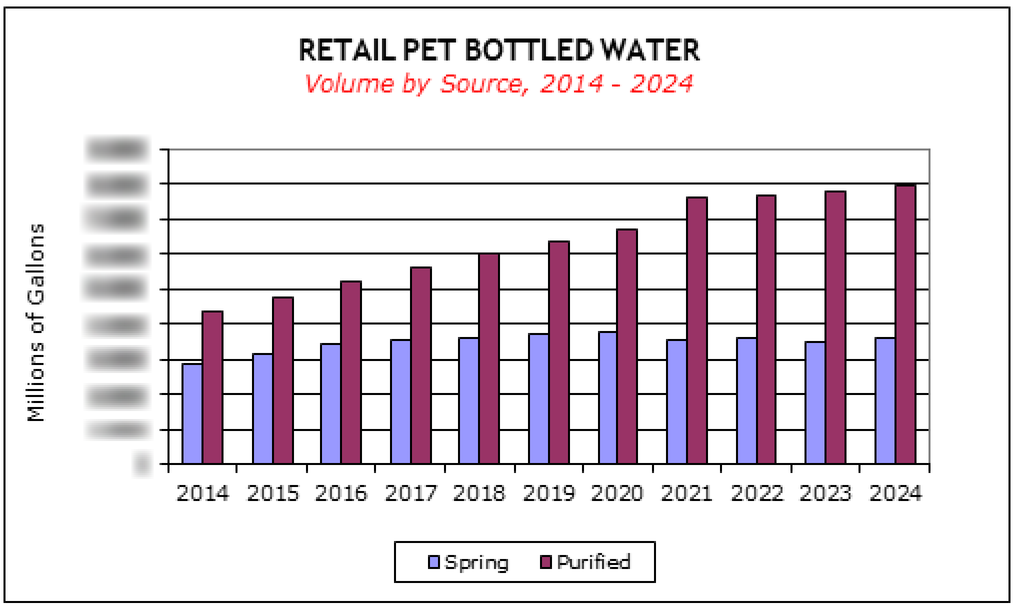
Source: Beverage Marketing Corporation

The normally staid HOD water sector has undergone uncharacteristic churn in the past several years.

- NWNA announced a strategic review in which it would look to divest many of its bottled water assets in the U.S. and Canada, including regional spring water brands such as Poland Spring and Arrowhead, as well as (of relevance here) its U.S. HOD water business, ReadyRefresh. These HOD assets ended up in the hands of BlueTriton Brands, the operating company of One Rock Capital Partners.
- In 2018 and 2019, retail dollar sales growth in the U.S. HOD sector greatly exceeded volume growth, which was due to uncharacteristic price increases that may have been counterproductive in the longer term.
- Meanwhile, rival DS Services had been even more active on the M&A front, including itself being acquired by Cott Corporation in 2014. In 2018, Cott acquired Crystal Rock, which was the third largest HOD company in the U.S., as well as The Mountain Valley, an eminent spring water brand based in Arkansas.
- The complexity did not end there: Cott sold its private label beverage and contract packing assets to Netherlands-based giant Refresco in early 2018. In early 2020, Cott acquired Primo Water Corporation, adopting the latter as its corporate name….
- HOD is primarily five-gallon jugs for water coolers and generally viewed as a tap water replacement. But increasingly bottled water companies have viewed HOD as an alternative delivery system and included a range of other water products like single-serve PET as well as other products like coffee on their routes. This had been the strategy of both Primo and NWNA and continued to be the case even after NWNA ceased being in charge of its HOD business. At the time, the HOD unit ended up not in Primo's hands; thus, it was assumed that with the acquisitions it had already made, Primo was optimistic about the increased opportunity to cross-sell and up-sell new water services to existing customers and the better economics afforded by greater route density.
- The above did not preclude Primo Water from acquiring the former NWNA HOD businesses later. (As a private equity player, it was assumed One Rock Capital Partners would look for an eventual exit.) Although DS Services had wider coverage of the U.S. than NWNA, that coverage was not always very deep.

Indeed that is what transpired. In 2024, Primo Water and BlueTriton Brands announced they would merge into a new company. The transaction closed late in the year — more quickly than anticipated.

- Relevant to this discussion on HOD, the new company was christened Primo Brands, combining Primo Water's Water Direct division with BlueTriton's ReadyRefresh. It now owns well over half of U.S. HOD water volume and dollars.
- Since Primo Water had exited the retail PET business in 2022, there were no anticompetitive concerns regarding its combination with BlueTriton in that regard. However, regulators could have raised concerns about the dominance the combined company would hold over the HOD water segment. But instead the deal was approved without a hitch.
- With overlapping territories and brands, the post-merger company necessarily undertook measures, such as shuttering manufacturing plants, to eliminate redundancies. But these cost-cutting measures seem to have been too aggressive, resulting in logistics and capacity snafus — particularly in markets where both Primo Water and BlueTriton had competed, such as Texas and California — that lopped off about two percentage points from industry HOD volume growth in the second quarter of 2025.



Note: In millions of gallons.
Source: Beverage Marketing Corporation