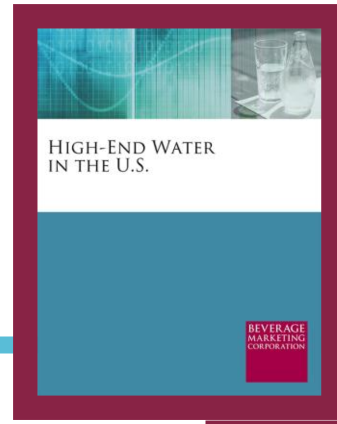
HIGH-END WATER IN THE U.S.

2019 EDITION (Published April 2019. Data through 2018. Market projections through 2023.) More than 50 pages, with extensive text analysis, graphs, charts and tables



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Will the swiftly growing high-end water market be sustained into the future?

Beverage Marketing Corporation considers the possibilities in its industry report entitled: *High-End Water in the U.S.* The question is an important one as this report considers a beverage type that a decade ago came under duress due to economic conditions, but which recovered nicely. Is it possible that a recessionary environment might hit the U.S. again and trip up high-end water's reliable double-digit growth? The answer to this question is of vital importance for entrepreneurs and market veterans alike.

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HAVE QUESTIONS?

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The answers you need

This brief but insightful market report measures volume and wholesale dollar sales by segment, covers top brands and discusses key issues in the high-end water category. BMC's exclusive five-year projections by segment are also included. Questions answered include:

- Which segment of the high-end water market has been the most successful?
- How does high-end water relate to the rest of the bottled water market?
- Which are the leading brands? Is the market sewn up by big companies or is there room for smaller players to capture a significant percentage of market share?
- How much is the high-end water market expected to grow in the next five years? What are the growth drivers going forward? Which segments will perform the best?

This report features

This report begins with an overview of the high-end water market. It then analyzes various brands and the companies behind them, taking note of innovations they have achieved and the marketing strategies behind them.

After outlining this context, the report describes the issues likely to determine what is next in the U.S. high-end water marketplace and projects market size five years into the future. In this report, readers get a thorough understanding of all facets of the high-end water market including:

- Wholesale dollar sales and volume of the high-end water market by segment going back to 2012
- Discussion of the main competitors and their likely prospects, including analysis of the strategies of the largest brands in the segment. Analyzes brands including Core, Voss, Icelandic Glacial, Essentia, Aquahydrate, Evamor, Alkaline88, Waiakea Hawaiian Volcanic Water, Hawaii Volcanic, Kona Deep, Sportwater, Avitae, BLK, FulHum, HFactor, Unify Water, Ounce Water, OxiGen, iDrink Multivitamin Water, Just Water, Proud Source, Path Water, Neo
- Quantifies select brands including Glacéau Smartwater, San Pellegrino, Fiji Water, Perrier, LIFEWTR, Essentia, Evian, Core, Natural, Topo Chico, Voss, Alkaline 88, Hint, Acqua Panna, Aquahydrate and Propel, providing volume and wholesale dollar sales, growth and market share
- Analysis of the prospects of the high-end water market by segment in the next five years, with Beverage Marketing’s wholesale dollar and volume category projections to 2023

High-End Water in the U.S.

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High-End Water in the U.S.

April 2019

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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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What are some of the other brands that have fared well lately?

- A flock of imports from Scandinavia, all playing on the environmental purity associated with the region, have fared well. Iceland Spring was an early entrant in this category and is bringing in a range of sparkling and flavored versions and stepping up its marketing under investor David Lomnitz. One focus is the health benefits flowing from its relatively high pH level, which makes it excellent accompaniment to dining.
- Another success story was Voss, a Norwegian brand founded by a party-loving young entrepreneur named Ole Sandberg that garnered a spot at the top of the superpremium pyramid thanks to an elegant package that bears some resemblance to a perfume bottle. The high margin it commands on-premise endeared it to many distributors but the brand found itself facing increasing challenges because of its high price point and also struggled in its effort to become a meaningful player in groceries and other off-premise retailers.
- The brand weathered the crisis by bringing in a new management and investment team that got the brand growing again, although things have slowed down lately.
- Another notable entry from Scandinavia is Icelandic Glacial, which managed a coup on the distribution front by landing U.S. beer giant Anheuser-Busch (A-B) as the bottled water for its fledgling non-alcoholic stable. That proved a double-edged sword when A-B was acquired by InBev and radically altered its priorities to downplay the importance of non-alcoholic brands.
- Now that A-B is showing interest in non-alcoholics again, it is possible the brand will finally get the attention it warrants.
- Icelandic Glacial's founders seem to have a knack for bringing in new investment from a wide range of sources, somewhere beyond $100 million by now.

So far, most of the sourced-water brands discussed above have been imports. That's no accident. As with domestic beers until the advent of craft brands, marketers of U.S. brands have historically found it exceedingly difficult to establish domestic brands as superpremium leaders, in segments where high-end allure is associated with imports from Europe and elsewhere.

- But a few brands are making credible efforts in that direction. Thanks to a striking cobalt-blue bottle and a residue of status and tradition associated with its Saratoga Springs, New York, origin, Saratoga Springs water has managed to stake out a lucrative niche, primarily in the eastern half of the country.

Exhibit 6

U.S. HIGH-END WATER MARKET
SHARE OF WHOLESALE DOLLAR SALES BY SEGMENT
2012 – 2023(P)

Segment	2012	2013	2014	2015	2016	2017	2018(p)	2023(P)
Imports	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Alkaline Water	[illegible]	[illegible]	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Superpremium	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%

Note: Superpremium refers to domestic superpremium waters.
(p) Preliminary; (P) Projected
Source: Beverage Marketing Corporation