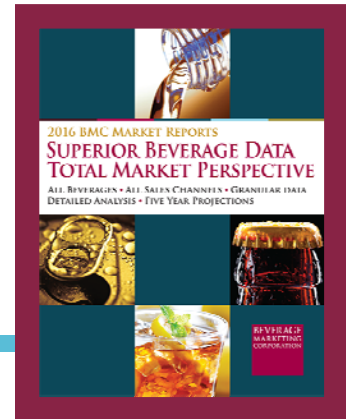


SPARKLING WATER IN THE U.S.

2016 EDITION (Published March 2017. Data through 2016. Market projections through 2020.) More than 40 pages, with extensive text analysis, graphs, charts and tables



Will the swiftly growing market for sparkling (imported and domestic) and carbonated water (seltzer and club soda) be sustained into the future?

Beverage Marketing Corporation considers the possibilities in its industry report entitled: *Sparkling Water in the U.S.* The question is an important one as this report considers a beverage type that a decade ago was considered respectable but not as setting the world on fire in terms of growth prospects. Now that sparkling and carbonated water has become a reliable double-digit grower, it is important to consider what can be learned here for entrepreneurs and market veterans alike.

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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. **5**

SAMPLE TEXT AND INFOGRAPHICS

A few examples of this report's text, data content layout and style. **7**



**HAVE
QUESTIONS?**

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THE ANSWERS YOU NEED

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

- What are the key attributes of the sparkling and carbonated 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?
- Why has the category been so successful? How does sparkling and carbonated water relate to the carbonated soft drink market and to what extent do these categories overlap?
- How much is the sparkling and carbonated water market expected to grow in the next four years? Which segments are expected to grow the fastest?

THIS SPARKLING AND CARBONATED WATER REPORT FEATURES

This report examines a rapidly growing segment of the CSD (carbonated soft drink) and bottled water categories in the United States. (Seltzer and club soda are considered CSDs but are included in this report as part of the carbonated water segment.) The presentation of industry research begins with an overview of the sparkling and carbonated 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 sparkling ice report describes the issues likely to determine what is next in the U.S. sparkling and carbonated water marketplace and projects market size four years into the future. In this report, readers get a thorough understanding of all facets of the sparkling and carbonated water market including:

- Wholesale dollar sales and volume of the sparkling and carbonated water market going back to 2000, as well as a breakdown of sparkling and carbonated segments and their subsegments going back to 2011.
- Discussion of the main competitors and their likely prospects, including analysis of the strategies of the two biggest soda companies that have entered the market, as well as the largest bottled water company and a panoply of other competitors.
- Analysis of the prospects of the sparkling and carbonated water market in the next four years, with Beverage Marketing's wholesale dollar and volume category projections to 2020.

Sparkling Water in the U.S.

March 2017



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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Contents

Table of Contents

Sparkling Water in the U.S.
TABLE OF CONTENTS

TABLE OF CONTENTS	i
INTRODUCTION	iii

Summary

SPARKLING WATER IN THE U.S.

The Sparkling Water Market	1
• Overview	1
• Wholesale Dollars and Volume	2
• Per Capita Consumption	4
• Growth	5
• Segments	6
The Sparkling Water Market by Company/Brand	9
• Overview	9
• Dollars and Volume by Brand	9
Nestlé Waters North America	12
• Overview	12
• S. Pellegrino	13
• Perrier	14
• Other Brands	17
National Beverage Corporation	19
• La Croix	19
Crystal Geyser Water Company	21
• Crystal Geyser	21
Coca-Cola Company	22
• Seagram's	22
• Dasani Sparkling Water	22
• Smartwater Carbonated	23
• Topo Chico	24
PepsiCo	25
• Aquafina Sparkling	25
Dr Pepper Snapple	27
• Canada Dry	27
• Schweppes	27
Polar Beverages	29
• Polar Seltzer	29
Other Brands	31
The Projected Sparkling Water Market	34

Sparkling Water in the U.S.
TABLE OF CONTENTS

Summary

SPARKLING WATER IN THE U.S. (cont'd)

Exhibits

1	Sparkling Water Market Estimated Wholesale Dollars and Volume 2000 – 2020 -----	38
2	Sparkling Water Market Change in Wholesale Dollars and Volume 2001 – 2020 -----	39
3	Sparkling Water Market Per Capita Consumption 2000 – 2020-----	40
4	Sparkling Water Market Compound Annual Growth 2005 – 2020 -----	41
5	Sparkling Water Market Wholesale Dollar Sales by Segment 2011 – 2020 -----	42
6	Sparkling Water Market Share of Wholesale Dollar Sales by Segment 2011 – 2020 --	43
7	Sparkling Water Market Change in Wholesale Dollar Sales by Segment 2012 – 2020	44
8	Sparkling Water Market Volume by Segment 2011 – 2020 -----	45
9	Sparkling Water Market Share of Volume by Segment 2011 – 2020-----	46
10	Sparkling Water Market Change in Volume by Segment 2012 – 2020 -----	47
11	Leading Sparkling Water Brands Estimated Wholesale Dollar Sales 2011 – 2016 -----	48
12	Leading Sparkling Water Brands Estimated Wholesale Dollar Share 2011 – 2016 ----	49
13	Leading Sparkling Water Brands Estimated Wholesale Dollar Growth 2012 – 2016 ---	50
14	Leading Sparkling Water Brands Estimated Volume 2011 – 2016-----	51
15	Leading Sparkling Water Brands Estimated Volume Share 2011 – 2016-----	52
16	Leading Sparkling Water Brands Estimated Volume Growth 2012 – 2016 -----	53

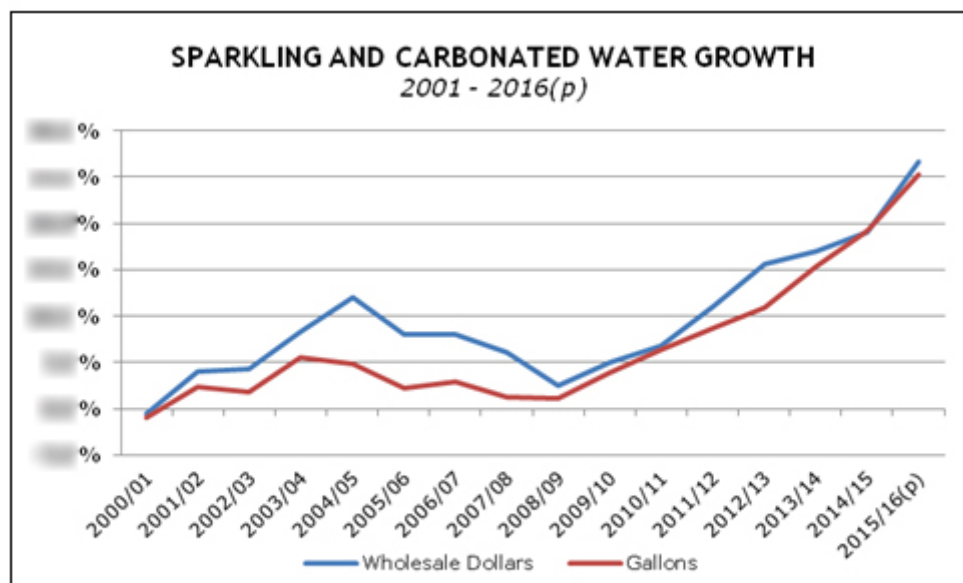
**SPARKLING WATER MARKET
CHANGE IN WHOLESALE DOLLAR SALES BY SEGMENT
2012 – 2020(P)**

Segment	2011/12	2012/13	2013/14	2014/15	2015/16(p)	2015/20(P)*
Sparkling Water						
Domestic Sparkling	1.2%	1.1%	1.3%	1.4%	1.5%	1.6%
Imported Sparkling	1.1%	1.2%	1.4%	1.5%	1.6%	1.7%
Subtotal Sparkling	1.2%	1.2%	1.4%	1.5%	1.6%	1.7%
Carbonated Water						
Seltzer	1.1%	1.2%	1.3%	1.4%	1.5%	1.6%
Club Soda	1.2%	1.3%	1.4%	1.5%	1.6%	1.7%
Subtotal Carbonated	1.2%	1.3%	1.4%	1.5%	1.6%	1.7%
TOTAL	1.2%	1.3%	1.4%	1.5%	1.6%	1.7%

* 5-year compound annual growth rate

(p) Preliminary; (P) Projected

Source: Beverage Marketing Corporation



(p) Preliminary

Source: Beverage Marketing Corporation

The sparkling water market going forward will continue to be fueled by a continuing decline in carbonated soft drinks (CSDs) as consumers seek healthier beverage options and so-called “clean labels”.

- According to NWNA, it takes about a week for the soda consumer to get used to the absence of sugar in their carbonated drinks. There are still many people that have yet to go through that learning curve to realize they can get the digestive benefit of bubbly water without the deleterious effect of consuming an excess of sugar or high-fructose corn syrup. Some consumers may take an intermediate step in their journey, transitioning initially to sweetened sparkling brands like Sparkling ICE or exotic sparklers such as NWNA’s own San Pellegrino Sparkling Fruit Beverages.
- About a decade ago, many of these consumers would have just switched to diet CSDs (Sparkling ICE notwithstanding). But the clean label trend has shunted the modern consumer into sparkling waters instead. The expected renaissance of the diet CSD segment via the use of natural sweeteners has not panned out at all. What’s more, the consumers that do not care about clean labels or natural sweeteners might be shunning diet CSDs because of studies suggesting a link between artificial sweetener consumption and weight gain.
- With CSDs on the long-term decline, Israel-based do-it-yourself beverage manufacturer SodaStream International has pivoted from marketing home soda-makers to home sparkling water makers. However, the carbon dioxide cartridges that create the sparkling effect are just expensive enough for SodaStream not to position its machines as alternatives to inexpensive packaged seltzers and sparkling waters. Instead, it has opted to attack soda on its perceived unhealthiness, although it continues to inveigh against wasteful packaging from time to time.
- As a result, SodaStream is not expected to negatively affect the packaged sparkling/carbonated water market to any large extent, and in fact a rising tide may lift all boats, as the saying goes.
- Some who are struggling with their core lines in other beverage categories have sought to get a lift from “sparkling healthy hydration” extensions, as with organic energy player Guru with Guru Organic Sparkling Energy Water (which seems to mimic its rival HiBall’s own longstanding sparkling water entries). In 2016, Zevia, one of the few “naturally sweetened” CSD brands to make an impact, diversified its portfolio to include stevia-sweetened Zevia Sparkling Water.