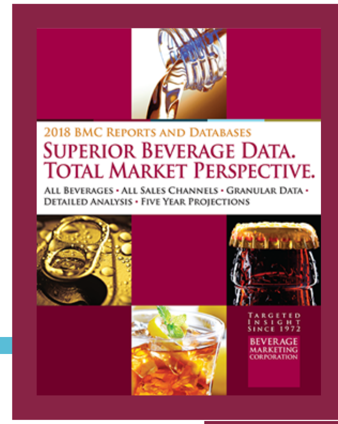
SPARKLING WATER IN THE U.S.

2018 EDITION (Published September 2018. Data through 2017. Market projections through 2022.) More than 50 pages, with extensive text analysis, graphs, charts and tables



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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. Part of BMC's Focus Report series, this report offers a concise but complete executive briefing on this hot topic.

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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, covers top brands and discusses key issues in the sparkling and carbonated water category. BMC's exclusive five-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 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 five years? Which segments are expected to grow the fastest?

This 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 report describes the issues likely to determine what is next in the U.S. sparkling and carbonated water marketplace and projects market size five 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 2012.
- 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 five years, with Beverage Marketing’s wholesale dollar and volume category projections to 2022.

Sparkling Water in the U.S.

September 2018

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.

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Sparkling water, previously relegated to the role of mixer, has been exploding more recently, perhaps as consumers migrating to bottled water from segments like diet soda seek a bit more stimulation for their palate. That has brought a surge of growth and new-brand activity.

- In the U.S., sparkling water dates back to the late 1970s, when Perrier began to penetrate the on-premise sector and then extend its hold to retail outlets.
- The high-end, glass-packed S. Pellegrino and Perrier brands marketed by Nestlé Waters North America (NWNA) had proved fairly unassailable during the good times, and have come back strongly now that fine-dining and other recession-hurt occasions have recovered.
- Also having a major impact recently has been National Beverage's unsweetened La Croix sparkling water line, and its sibling CuraTe, both mainly a direct-to-retail play.
- National Beverage's bigger soda rivals have taken ample notice of La Croix's success in the past year. Coca-Cola Company acquired Mexican sparkling water brand Topo Chico from one of its bottlers, while PepsiCo recently released an internally-developed brand called bubly sparkling water.
- Sparkling waters face competition in take-home channels from seltzer and club soda (which are not counted as part of the bottled water segment), thus preventing sparkling water marketers from exacting too stiff a premium.
- With CSD per caps continuing to decline and retail premium PET leveling off from its high-growth years, the sparkling water segment continues to attract a segment of the population that desires carbonation (for digestive or other reasons) but does not want to consume sugar or artificial sweeteners.
- Marketers are increasingly compelled to introduce less-sugary beverages due to the increase in "soda taxes" sought by cash-strapped municipalities. The biggest soft drink companies have already pledged to reduce sugar and calories: even though these promises are voluntary, none of the companies seem willing to go against their word and cede a marketing advantage to rivals.
- The U.S. government has included "added sugar" on nutrition labels, bringing the issue even more prominently to the fore in consumers' minds.

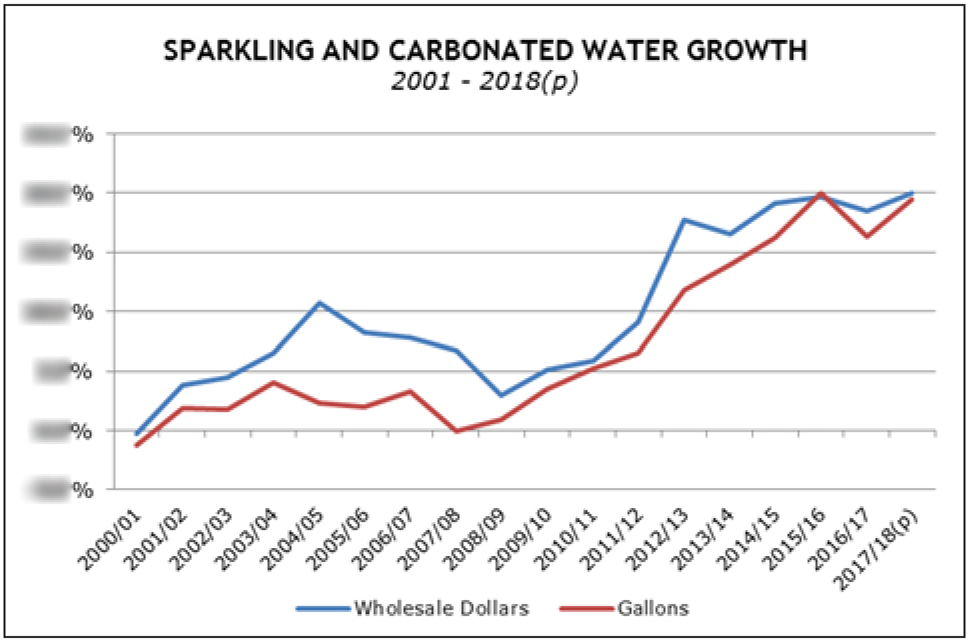
Exhibit 4

SPARKLING WATER MARKET
COMPOUND ANNUAL GROWTH (r)
2005 – 2022(P)

	Compound Annual Growth	
Year	**Wholesale $**	**Cases**
2000 – 2005	[illegible]%	[illegible]%
2001 – 2006	[illegible]%	[illegible]%
2002 – 2007	[illegible]%	[illegible]%
2003 – 2008	[illegible]%	[illegible]%
2004 – 2009	[illegible]%	[illegible]%
2005 – 2010	[illegible]%	[illegible]%
2006 – 2011	[illegible]%	[illegible]%
2007 – 2012	[illegible]%	[illegible]%
2008 – 2013	[illegible]%	[illegible]%
2009 – 2014	[illegible]%	[illegible]%
2010 – 2015	[illegible]%	[illegible]%
2011 – 2016	[illegible]%	[illegible]%
2012 – 2017	[illegible]%	[illegible]%
2013 – 2018(p)	[illegible]%	[illegible]%
2014 – 2019(P)	[illegible]%	[illegible]%
2015 – 2020(P)	[illegible]%	[illegible]%
2016 – 2021(P)	[illegible]%	[illegible]%
2017 – 2022(P)	[illegible]%	[illegible]%

(r) Revised; (p) Preliminary; (P) Projected

Source: Beverage Marketing Corporation



(p) Preliminary
Source: Beverage Marketing Corporation