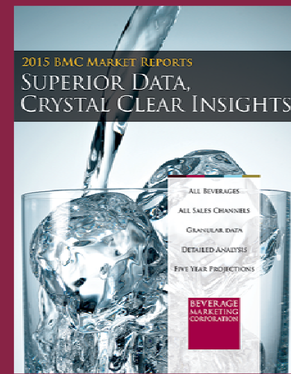
U.S. VALUE-ADDED WATER THROUGH 2019

2015 EDITION (Published November 2015. Data through 2014. Market projections through 2019.) More than 140 pages, with extensive text analysis, graphs, charts and more than 50 tables.



This report from Beverage Marketing Corporation assesses the current state of the value-added water market. It also provides an overview of the sub-segments including regular and low-calorie enhanced waters, flavored water and essence water and drivers that will propel growth to 2019. Principal competitors are identified along with small, burgeoning companies and their brands. It includes analysis of leading brands' advertising expenditures, as well as category projections.

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The answers you need

U.S. Value-Added Water through 2019 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:

- What are the leading value-added water brands, and how did they perform in 2014?
- What product types comprise the category?
- What trends and developments drive the U.S. value-added water market?
- How big is the U.S. value-added bottled water market, as measured in wholesale dollars and gallons?
- What is the likely market size for flavored, enhanced and other value-added waters in the next five years?

This report features

U.S. Value-Added Water through 2019 assesses the historical and current state of the value-added water market and provides a look forward at category expectations through 2019. Category performance is analyzed through discussion of trends as well as a look at volume, retail dollar, wholesale dollar and per capita consumption figures. The report provides an in-depth look at the leading companies and brands in the category and the drivers likely to propel consumption growth. It includes analysis of distribution channels, packaging, advertising expenditures and demographics – as well as category projections. Backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, users get a thorough understanding of all facets of the value-added water market including:

- An overview and current statistics of the overall bottled water, as well as value-added water, markets
- A drill-down into the various sub-segments of the value-added water market, with statistics on volume, per capita consumption, retail dollars and wholesale dollars by sub-segment for regular enhanced water, low-calorie enhanced water, flavored water and essence water.
- Detailed profiles and analysis of the leading companies and brands, discussions of their marketing activities and distribution strategies as well as company and brand sales volume data. Coverage includes Coca-Cola Company, PepsiCo, Sunny Delight Beverages Company, Nestlé Waters North America (NWNA), Aquahydrate, Herbal Water Inc., Hint Inc., Bai Brands, Karma Culture, Essentia Water, Soma Beverage, Avitae USA and Core Nutrition.
- Data detailing volume of value-added sub-segments by distribution channels totaling 100% of market volume
- An analysis of volume by container type, including plastic and pouches, also broken down by value-added sub-segments
- Advertising expenditures of the leading value-added water brands and a look at category spending by 18 media types (including Internet)
- Consumer demographic profiles comparing consumers of key value-added water segments
- Five-year projections for the value-added water market and its sub-segments through 2019

U.S. Value-Added Water through 2019

November 2015

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NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

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Value-added water is comprised of flavored, enhanced and essence waters – together which provide value above and beyond "just hydration." The larger single-serve water segment includes both value-added water and retail PET water.

- The segments comprising value-added water are flavored sweetened still, flavored sweetened still enhanced (with minerals and vitamins), unsweetened flavored (or unflavored) essence, oxygenated, alkaline and structured/clustered.
- Throughout this report, in the discussion of wholesale dollars, structured, oxygenated and alkaline waters are grouped with enhanced waters.
- Value-added water represents about [redacted]% of total single-serve water category revenues.
- On a volumetric basis, value-added water comprises approximately [redacted]% of total single-serve water; premium pricing makes value share much higher.

Although activity in the category has slowed somewhat recently, the last nine years has seen a majority of brand introductions in the enhanced water segment. Caffeinated and oxygenated brands were the pioneers, coming out more than a decade ago; but none ever reached critical mass (although caffeinated waters may be finally be coming of age).

- In the mid-1990s, Water Joe caffeinated water made a minor splash. Later in the decade came Clearly Canadian O+2 oxygenated water and Essentia structured water. Penta and Coral Water structured waters also debuted in the late 1990s.
- Vitamin-enhanced waters began to gain traction in 2000 with Glaceau Vitaminwater. Others emerged, such as Propel and Fruit$_2$O Plus. Other vitamin-enhanced waters from companies such as Hansen's, Baxter Healthcare and Snapple were on the market for a short while but were then discontinued, as was Fruit$_2$O Plus (although Fruit$_2$O flavored water remains on the market).
- In 2005, flavored waters such as Nestlé Pure Life, Aquafina FlavorSplash and Dasani flavors hit the market. But the flavored water segment has not seen a whole lot of activity since.

Exhibit 2.11

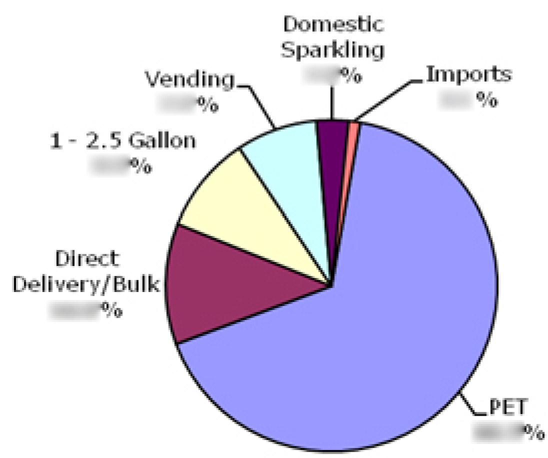
VALUE-ADDED WATER MARKET
SHARE OF VOLUME BY CATEGORY
2009 – 2019(P)

Category	2009	2010	2011	2012	2013	2014	2019(P)
Regular Enhanced Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Low-Calorie Enhanced Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal Enhanced Water	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Flavored Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Essence Water	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

(P) Projected

Source: Beverage Marketing Corporation

RETAIL PET HOLDS MAJORITY OF U.S. BOTTLED WATER
(Shares of volume by segment, 2014)



Source: Beverage Marketing Corporation