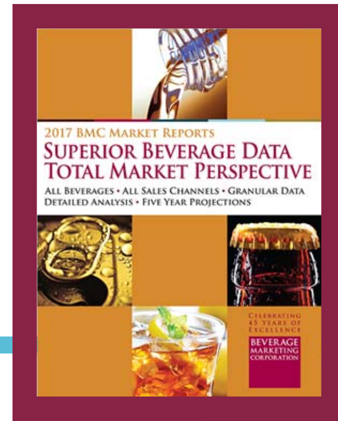
U.S. Value-Added Water through 2021

2017 Edition (Published October 2017. Data through 2016. Market projections through 2021.) More than 150 pages, with extensive text analysis, graphs, charts and more than 50 tables.



This U.S. value-added water industry research report from Beverage Marketing Corporation assesses the current state of the market. It provides an overview of the sub-segments including regular and low-calorie enhanced waters, flavored water, alkaline water and essence water. Principal competitors are identified along with small, growing companies and their brands. It includes analysis of leading brands' advertising expenditures, market drivers that will propel growth and five year market projections.

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HAVE QUESTIONS?

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The answers you need

The Value-Added Water report provides in-depth data and market analysis, shedding light on various aspects of the market through BMC's reliable data and discussions of what the numbers really mean. Questions answered in this market report include:

- What are the leading brands, and how did they perform in 2016?
- What product types comprise the category? What percentage of market share does each sub-segment hold?
- What trends and developments drive the U.S. market for vitamin enhanced and other value added waters?
- 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, alkaline and other value-added waters over the next five years?

This report features

The report assesses the historical and current state of the market and provides a look forward at category expectations through 2021. 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.

This comprehensive industry report includes analysis of distribution channels, packaging, advertising expenditures and demographics – as well as category projections. Through in-depth analysis backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, readers of this market research get a thorough understanding of all facets of the 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 market, with statistical data on volume, per capita consumption, retail dollars and wholesale dollars by sub-segment for regular enhanced water, low-calorie enhanced water, flavored water, alkaline 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, Avitae USA and Core Nutrition.
- Data detailing volume of value-added sub-segments by distribution channels.
- An analysis of volume by container type, including plastic and pouches, also broken down by value-added sub-segments.
- Advertising expenditures of the leading brands and a look at category spending by 18 media types (including Internet).
- Consumer demographic profiles comparing consumers of key segments.
- Five-year projections for the market and its sub-segments through 2021.

U.S. Value-Added Water through 2021

October 2017

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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Flavored water consumers tend to be consumers of bottled water that are looking for a variation of plain “boring” water or an alternative to CSDs. To enhanced water consumers, flavors may be important, but they are secondary to health and wellness. Structured water consumers are not concerned with flavors at all; instead, they are seeking the “purest” water possible. Not surprisingly, distribution channels for value-added waters vary.

- Flavored water is found in mainstream channels, encompassing both take-home and immediate consumption.
- Enhanced water can be found in immediate consumption channels such as drug stores, c-stores and down-the-street. Enhanced water is also available in health food stores, supermarkets, mass merchandisers and online. Club stores feature the more prominent brands like Propel and Vitaminwater.
- The essence water segment is too small to ascertain iron-clad characteristics that define its consumers, but logic dictates that it appeals to health-conscious consumers looking to avoid sweeteners of any kind, but still looking for flavors.
- Since the concept of “cellular absorption” is beyond the understanding of most consumers, structured water will continue to be available in fewer channels than flavored and enhanced water. Structured waters are found in natural food stores and online. It remains a dark horse segment.
- All types of value-added water, obviously, command a price premium to regular PET bottled water. Structured water commands the highest price point, followed by enhanced water. Even among enhanced waters, there is a sizable price variation among brands.

It should be noted that from a growth perspective, flavored water has emerged as the weak partner in the value-added water market.

- Coca-Cola and Pepsi-Cola, in particular, had harbored hopes that flavored waters might pose an escape from the low-margin ghetto that the heavily promotional conventional bottled water segment has become (thanks in large part to their own aggressive battling on price), but that has not proved to be the case.
- While those entries under brands like Dasani (Coke) and Aquafina (Pepsi) succeeded in expanding the category somewhat, at least initially, they failed to capture much of a price premium, providing a further incentive for the companies to aggressively pursue the enhanced segment, where the promise of nutritional enhancements has proved a more compelling reason for consumers to pay a premium. That being said, at least flavored water has turned its habitual volume and dollar losses into solid growth again.

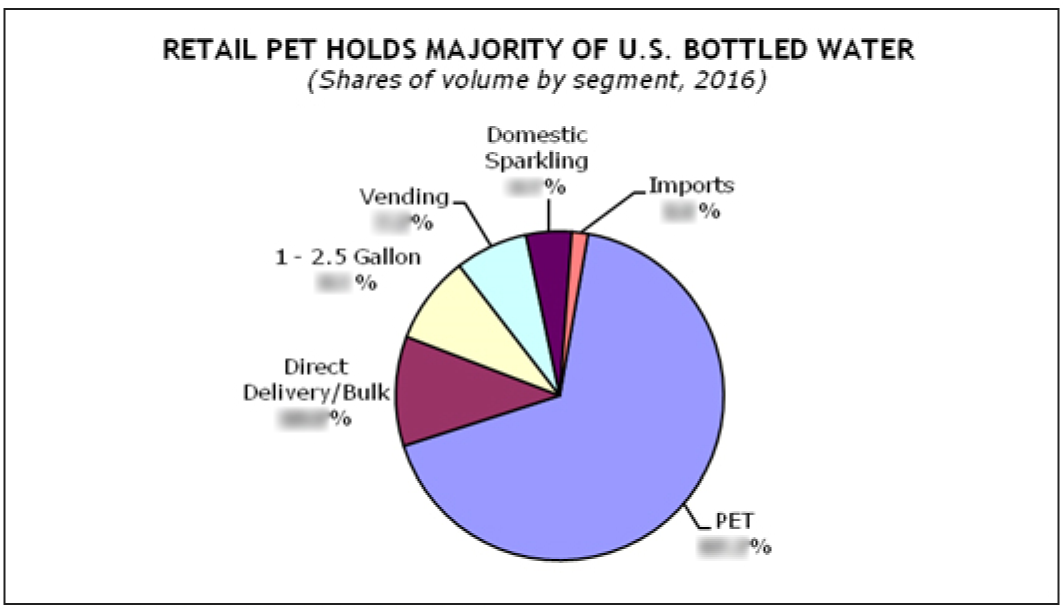
Exhibit 2.11

VALUE-ADDED WATER MARKET
SHARE OF VOLUME BY CATEGORY
2011 – 2021(P)

Category	2011	2012	2013	2014	2015	2016	2021(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]%
Alkaline 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



Source: Beverage Marketing Corporation