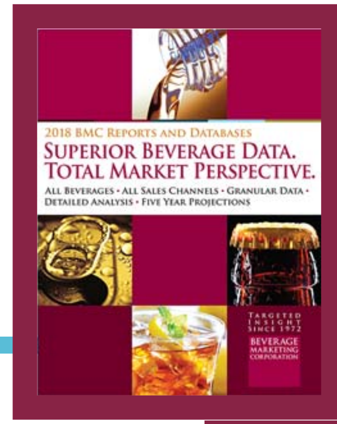
Value-Added Water in the U.S. through 2022

2018 Edition (Published December 2018. Data through 2017. Market projections through 2022.) More than 150 pages, with extensive text analysis, graphs, charts and more than 50 tables.



This U.S. value-added water industry research report 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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Inside:

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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 2017?
- 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 2022. 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 2022.

Value-Added Water in the U.S. through 2022

December 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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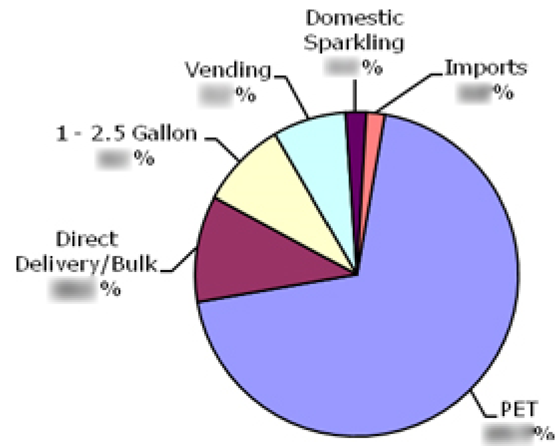
Much of the new-product activity in the category has been in the enhanced water segment. Caffeinated and oxygenated brands were the pioneers, coming out more than 15 years ago; but none ever reached critical mass.

- 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 Glacéau 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.
- Flavored water, comprised of a few brands, is a more mainstream targeted segment, without specific functional benefits beyond hydration. Large beverage corporations such as Sunny Delight (now owned by buyout firm Brynwood Partners), Kraft Heinz, Coca-Cola, PepsiCo and Nestlé dominate this segment.
- The enhanced water segment is more fragmented. In 2006, PepsiCo — which had Propel — bowed SoBe Lifewater, its new enhanced water line. In 2007, Pepsi and Coke introduced Aquafina Alive and Dasani Plus, respectively.
- The latter two products have since been discontinued, but in 2007, Coca-Cola Company acquired Glacéau Vitaminwater, the leader in the value-added water market. In 2007 and 2008, PepsiCo put major marketing dollars behind a healthily-growing SoBe Lifewater while Propel started to show weakness for the first time. Vitaminwater introduced successful extensions — first Vitaminwater10 and then Vitaminwater Zero (in 2010) — to cushion the fall of the core Vitaminwater.
- Meanwhile, SoBe Lifewater has faltered badly since 2009, although SoBe Lifewater Zero vaulted past its regular calorie counterpart in 2014. Despite declining in the past seven years, SoBeWater Zero remains much bigger than SoBeWater. (The regular and diet products are now amalgamated under the SoBeWater name.)
- Although Coke has arguably mishandled Glacéau Vitaminwater, it has proved a more adept steward of stablemate Glacéau Smartwater, which has surpassed Vitaminwater in recent years. To maintain its solid double-digit growth momentum, Coke added a sparkling extension to the Smartwater trademark. But even Smartwater declined in 2017.

RETAIL PET HOLDS MAJORITY OF U.S. BOTTLED WATER
(Shares of volume by segment, 2017)



Source: Beverage Marketing Corporation

Exhibit 2.11

VALUE-ADDED WATER MARKET
SHARE OF VOLUME BY CATEGORY
2012 – 2022(P)

Category	2012	2013	2014	2015	2016	2017	2022(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]%**
Alkaline 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