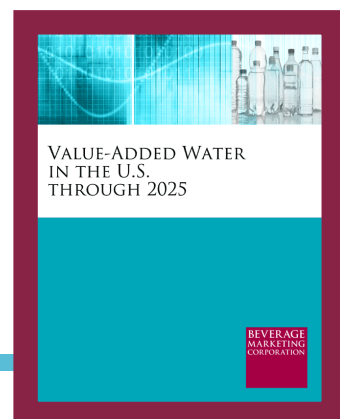


VALUE-ADDED WATER IN THE U.S. THROUGH 2025

2021 EDITION (Published December 2021. Data through 2020. Market projections through 2025.) More than 150 pages, with extensive text analysis, graphs, charts and tables.



FOR A FULL
CATALOG OF
REPORTS AND
DATABASES,
GO TO
bmcreports.com

This U.S. value-added water industry research report assesses the current state and future expectations for this rapidly evolving market characterized by innovation and new market entries with increasingly varied ingredients and functional benefits. It provides an overview of the sub-segments including regular and low-calorie enhanced waters, flavored water, alkaline water and essence water, examining growth, share, distribution channels and more. 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. It discusses niche water beverage segments that are not included in value-added water market totals, but are considered separately in a dedicated chapter. These emerging and increasingly fragmented functional benefit or ingredient-based beverage segments are quantified and discussed and their growth prospects through 2025 are forecasted. The market forces driving innovation and blurring the lines between beverage segments as interest in premium quasi-water beverages continues is also discussed and analyzed. Discussion of the impact of Coronavirus pandemic.

AVAILABLE FORMAT & PRICING



Direct Download
Word, Excel & PDF

\$3,995

*To learn more, to place an advance order or to inquire about additional user licenses **call**: Charlene Harvey +1 212.688.7640 ext. 1962 charvey@beveragemarketing.com*

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. **7**

SAMPLE TEXT AND INFOGRAPHICS

A few examples of this report's text, data content layout and style. **12**



**HAVE
QUESTIONS?**

Contact Charlene Harvey: 212-688-7640 x 1962
charvey@beveragemarketing.com

**BEVERAGE
MARKETING
CORPORATION**

BEVERAGE MARKETING CORPORATION
850 Third Avenue, 13th Floor, New York, NY 10022
Tel: 212-688-7640 Fax: 212-826-1255

THE ANSWERS YOU NEED

Value-Added Water in the U.S. through 2025 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 2020?
- What product types comprise the category? What percentage of market share does each sub-segment hold? What segments comprise the newly-added niche water beverage category?
- What trends and developments drive the U.S. market for enhanced and other value added waters? How big are the niche water beverage segments in 2021?
- 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? What is the likely size of the niche water beverage segment in 2025?
- There is much excitement about innovative niche segments based on function or premium ingredients. How big are the plant water, protein waters, detox waters, wine waters, flower/floral waters, spice/herbal waters, weight-management/keto waters, collagen/beauty water and rain water segments? How large are they expected to be by 2025?

THIS REPORT FEATURES

The report assesses the historical and current state of the market and provides a look forward at category expectations through 2025. 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 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, BlueTriton Brands (formerly Nestlé Waters North America), Nestlé USA, Alkaline Water Company, Keurig Dr Pepper (Bai and Core), Aquahydrate, Hint Inc., HyEdge, Inc., Oxigen Beverages and Talking Rain.
- Data detailing volume of the value-added water market and its sub-segments by various on and off-premise distribution channels including foodservice. The sub-segments detailed by channel include flavored waters, enhanced waters, essence water and alkaline water.

- An analysis of volume by container type, including plastic and pouches, also broken down by value-added sub-segments.
- Discussion of the fledgling niche water beverage segment, including winners and losers to 2025 and a profile of four promising niche water beverage brands. Niche segments quantified and forecasted include: — plant water, protein waters, detox waters, wine waters, flower/floral waters, spice/herbal waters, weight management/keto waters, and rain waters.
- 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 2025.



VALUE-ADDED WATER IN THE U.S. THROUGH 2025

BEVERAGE
MARKETING
CORPORATION

Value-Added Water in the U.S. through 2025

December 2021

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.

Copyright © 2021 Beverage Marketing Corporation of New York, P.O. Box 2399, Wintersville, OH 43953, (212) 688-7640. All rights reserved. Reproductions in any form prohibited by law.

Contents

Table of Contents

TABLE OF CONTENTS

TABLE OF CONTENTS -----	i
INTRODUCTION -----	vi

Chapter

1. THE U.S. BOTTLED WATER MARKET

The National Bottled Water Market-----	1
--	---

Exhibits

1.1 U.S. Bottled Water Market Gallonage by Segment 2015 – 2025 -----	5
1.2 U.S. Bottled Water Market Share of Gallonage by Segment 2015 – 2025 -----	6
1.3 U.S. Bottled Water Market Change in Gallonage by Segment 2016 – 2025 -----	7

2. THE VALUE-ADDED WATER MARKET

The Value-Added Water Market Segments -----	8
---	---

• Overview -----	8
• Enhanced Water -----	14
• Flavored Water -----	17
• Essence Water -----	20
• Alkaline Water -----	22
• Impact of Covid-19-----	23

The Niche Water Beverage Segment -----	24
--	----

Exhibits

2.4 Value-Added Water Market Dollars, Volume and Price Per Gallon 2000 – 2025 -----	25
2.5 Value-Added Water Market Per Capita Consumption 2000 – 2025 -----	26
2.6 Value-Added Water Market Retail Dollars and Growth 2000 – 2025 -----	27
2.7 Value-Added Water Market Quarterly Volume Shares 2007 – 2020 -----	28
2.8 U.S. Q1 2021 Estimated Volume, Share and Growth Value-Added Water by Segment	29
2.9 U.S. Q2 2021 Estimated Volume, Share and Growth Value-Added Water by Segment	30
2.10 U.S. 1H 2021 Estimated Volume, Share and Growth Value-Added Water by Segment	31
2.11 Value-Added Water Market Volume by Category 2015 – 2025 -----	32
2.12 Value-Added Water Market Share of Volume by Category 2015 – 2025 -----	33
2.13 Value-Added Water Market Change in Volume by Category 2016 – 2025 -----	34
2.14 Enhanced Water Market Dollars, Volume and Price Per Gallon 2000 – 2025 -----	35
2.15 Flavored Water Market Dollars, Volume and Price Per Gallon 2000 – 2025-----	36
2.16 Essence Water Market Dollars, Volume and Price Per Gallon 2006 – 2025 -----	37
2.17 Alkaline Water Market Dollars, Volume and Price Per Gallon 2014 – 2025-----	38
2.18 Value-Added Water Market Volume Comparisons Between Pre-Covid-19 and Post-Covid-19 2020 – 2025 -----	39
2.19 Value-Added Water Market Wholesale Dollar Comparisons Between Pre-Covid-19 and Post-Covid-19 2020 – 2025 -----	40
2.20 Value-Added Water Market Retail Dollar Comparisons Between Pre-Covid-19 and Post-Covid-19 2020 – 2025 -----	41
2.21 Value-Added and Niche Water Beverage Market Wholesale Dollars, Share and Growth 2020 – 2025 -----	42

TABLE OF CONTENTS

Chapter

3. VALUE-ADDED WATER DISTRIBUTION CHANNELS

Value-Added Water Distribution Channels	43
• Overview	43
• Enhanced Water	46
• Flavored Water	48
• Essence Water	51
• Alkaline Water	53

Exhibits

3.22 Value-Added Water Market Volume by Distribution Channel 2015 – 2025	57
3.23 Value-Added Water Market Share of Volume by Distribution Channel 2015 – 2025	58
3.24 Value-Added Water Market Change in Volume by Distribution Channel 2016 – 2025	59
3.25 Enhanced Water Market Volume by Distribution Channel 2015 – 2025	60
3.26 Enhanced Water Market Share of Volume by Distribution Channel 2015 – 2025	61
3.27 Enhanced Water Market Change in Volume by Distribution Channel 2016 – 2025	62
3.28 Flavored Water Market Volume by Distribution Channel 2015 – 2025	63
3.29 Flavored Water Market Share of Volume by Distribution Channel 2015 – 2025	64
3.30 Flavored Water Market Change in Volume by Distribution Channel 2016 – 2025	65
3.31 Essence Water Market Volume by Distribution Channel 2015 – 2025	66
3.32 Essence Water Market Share of Volume by Distribution Channel 2015 – 2025	67
3.33 Essence Water Market Change in Volume by Distribution Channel 2016 – 2025	68
3.34 Alkaline Water Market Volume by Distribution Channel 2015 – 2025	69
3.35 Alkaline Water Market Share of Volume by Distribution Channel 2015 – 2025	70
3.36 Alkaline Water Market Change in Volume by Distribution Channel 2016 – 2025	71

4. VALUE-ADDED WATER PACKAGING

Packaging Types	72
-----------------------	----

Exhibits

4.37 Value-Added Water Market Volume by Container Material 2015 – 2025	74
4.38 Value-Added Water Market Share by Container Material 2015 – 2025	75
4.39 Value-Added Water Market Change by Container Material 2016 – 2025	76

5. THE LEADING VALUE-ADDED WATER COMPANIES AND BRANDS

Leading Value-Added Water Brands	77
• Enhanced Water	77
• Flavored Water	79
• Alkaline Water	80

Coca-Cola Company

• Glacéau	81
-----------------	----

PepsiCo

• Propel	89
• LIFEWTR	93
• SoBeWater	94

Alkaline Water Company

• Alkaline88	97
--------------------	----

TABLE OF CONTENTS

Chapter

5. THE LEADING VALUE-ADDED WATER COMPANIES AND BRANDS (cont'd)

BlueTriton Brands

- Nestlé Splash ----- 99

Nestlé Waters North America

- Essentia ----- 100

Aquahydrate

- Aquahydrate ----- 102

Hint, Inc.

- Hint Water ----- 104

Keurig Dr Pepper

- Bai ----- 107
- Core Water ----- 111

HyEdge, Inc.

- HFactor ----- 114

Oxigen Beverages

- OxiGen ----- 115

Other Value-Added Water Brands ----- 116

Exhibits

- 5.40 Enhanced Water Market Estimated Wholesale Dollars by Brand 2015 – 2021 ----- 118
- 5.41 Enhanced Water Market Share of Estimated Wholesale Dollars by Brand
2015 – 2021 ----- 119
- 5.42 Enhanced Water Market Change in Estimated Wholesale Dollars by Brand
2016 – 2021 ----- 120
- 5.43 Enhanced Water Market Estimated Volume by Brand 2015 – 2021 ----- 121
- 5.44 Enhanced Water Market Share of Estimated Volume by Brand 2015 – 2021 ----- 122
- 5.45 Enhanced Water Market Change in Estimated Volume by Brand 2016 – 2021 ----- 123
- 5.46 Flavored Water Market Estimated Wholesale Dollars by Brand 2015 – 2021 ----- 124
- 5.47 Flavored Water Market Share of Estimated Wholesale Dollars by Brand 2015 – 2021 ----- 125
- 5.48 Flavored Water Market Change in Estimated Wholesale Dollars by Brand
2016 – 2021 ----- 126
- 5.49 Flavored Water Market Estimated Volume by Brand 2015 – 2021 ----- 127
- 5.50 Flavored Water Market Share of Estimated Volume by Brand 2015 – 2021 ----- 128
- 5.51 Flavored Water Market Change in Estimated Volume by Brand 2016 – 2021 ----- 129
- 5.52 Alkaline Water Market Estimated Wholesale Dollars by Brand 2015 – 2021 ----- 130
- 5.53 Alkaline Water Market Share of Estimated Wholesale Dollars by Brand 2015 – 2021 ----- 131
- 5.54 Alkaline Water Market Change in Estimated Wholesale Dollars by Brand
2016 – 2021 ----- 132
- 5.55 Alkaline Water Market Estimated Volume by Brand 2015 – 2021 ----- 133
- 5.56 Alkaline Water Market Share of Estimated Volume by Brand 2015 – 2021 ----- 134
- 5.57 Alkaline Water Market Change in Estimated Volume by Brand 2016 – 2021 ----- 135

TABLE OF CONTENTS

Chapter

6. THE NICHE WATER BEVERAGE MARKET

Niche Water Beverages Brands -----	136
• Overview -----	136
• Protein2O -----	138
• Trimino Protein Infused Water -----	140
• Treo Fruit & Birch Water -----	141
• True Nopal Cactus Water -----	143
• Caliwater -----	144

Exhibits

6.58 Niche Water Beverage Market Estimated Wholesale Dollars by Category 2018 – 2025 -----	145
6.59 Niche Water Beverage Market Share of Estimated Wholesale Dollars by Category 2018 – 2025 -----	146
6.60 Niche Water Beverage Market Change in Estimated Wholesale Dollars by Category 2019 – 2025 -----	147
6.61 Niche Water Beverage Market Estimated Volume by Category 2018 – 2025 -----	148
6.62 Niche Water Beverage Market Share of Estimated Volume by Category 2018 – 2025	149
6.63 Niche Water Beverage Market Change in Estimated Volume by Category 2019 – 2025 -----	150

7. VALUE-ADDED WATER ADVERTISING EXPENDITURES

Value-Added Water Advertising Expenditures -----	151
• Expenditures by Brand -----	151
• Expenditures by Media -----	152

Exhibits

7.64 Leading Value-Added Water Brands Advertising Expenditures 2015 – 2020 -----	154
7.65 Leading Value-Added Water Brands Share of Advertising Expenditures 2015 – 2020-	155
7.66 Leading Value-Added Water Brands Change in Advertising Expenditures 2016 – 2020 -----	156
7.67 Estimated Advertising Expenditures for Value-Added Water Brands by Media 2015 – 2020 -----	157
7.68 Estimated Share of Advertising Expenditures for Value-Added Water Brands by Media 2015 – 2020 -----	158
7.69 Estimated Change in Advertising Expenditures for Value-Added Water Brands by Media 2016 – 2020 -----	159

8. DEMOGRAPHICS OF THE VALUE-ADDED WATER CONSUMER

The Value-Added Water Consumer -----	160
• Enhanced Water -----	160
• Flavored Water -----	164
• Comparative Demographics of Enhanced Water Brands -----	168

TABLE OF CONTENTS

Chapter

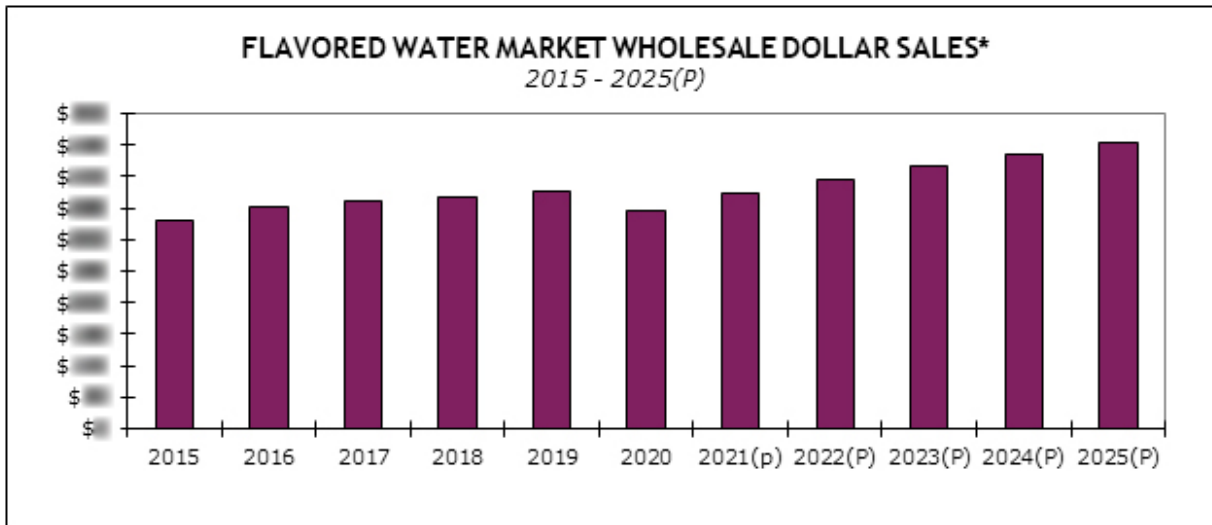
8. DEMOGRAPHICS OF THE VALUE-ADDED WATER CONSUMER (cont'd)	
<i>Exhibits</i>	
8.70 Demographics of the Enhanced Water Consumer 2020 -----	172
8.71 Demographics of the Flavored Water Consumer 2020 -----	174
8.72 Demographics of the Glacéau Vitaminwater Consumer 2020 -----	176
8.73 Demographics of the Glacéau Smartwater Consumer 2020-----	178

Value-added water is comprised of flavored, enhanced, essence and alkaline 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 and oxygenated waters are grouped with enhanced waters. Alkaline waters have been broken out as a separate item.
- Value-added water represents about 21% of total wholesale dollars for the single-serve water category.
- On a volumetric basis, value-added water comprises approximately 7% of total single-serve water; premium pricing makes value share much higher.

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 20 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. 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, which continues to be a good revenue source for PepsiCo.
- 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.



(p) Preliminary; (P) Projected

* In millions

Source: Beverage Marketing Corporation

Exhibit 2.12

**VALUE-ADDED WATER MARKET
SHARE OF VOLUME BY CATEGORY
2015 – 2025(P)**

Water Category	2015	2016	2017	2018	2019	2020	2021(P)	2025(P)
Regular Enhanced	33%	33%	33%	33%	33%	33%	33%	33%
Low-Calorie Enhanced	33%	33%	33%	33%	33%	33%	33%	33%
Subtotal Enhanced	66%	66%	66%	66%	66%	66%	66%	66%
Alkaline	33%	33%	33%	33%	33%	33%	33%	33%
Essence	33%	33%	33%	33%	33%	33%	33%	33%
Flavored	33%	33%	33%	33%	33%	33%	33%	33%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%

(P) Projected

Source: Beverage Marketing Corporation