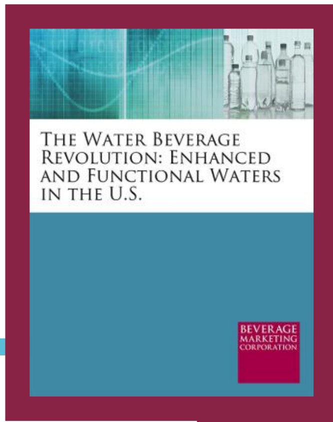
The Water Beverage Revolution: Enhanced and Functional Waters in the U.S.

2019 Edition (Published November 2019. Data through 2018. Market projections through 2023.) More than 150 pages, with extensive text analysis, graphs, charts and tables.



This U.S. value-added water industry research report assesses the current state and future expectations for this rapidly evolving market characterized by revolutionary 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. New in 2019 is a discussion of niche water beverage segments that are not included in value-added water market totals, but are considered separately in a dedicated chapter.

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The answers you need

The Water Beverage Revolution 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 2018?
- 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 2019?
- 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 2023?
- 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 2023?

This report features

The report assesses the historical and current state of the market and provides a look forward at category expectations through 2023. 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, Harvest Hill Company, Nestlé Waters North America (NWNA), Alkaline Water Company, Keurig Dr Pepper (Bai and Core), Herbal Water Inc., Hint Inc., Karma Culture, Essentia Water 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 2023 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 2023.

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BEVERAGE MARKETING CORPORATION

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November 2019

BEVERAGE MARKETING CORPORATION

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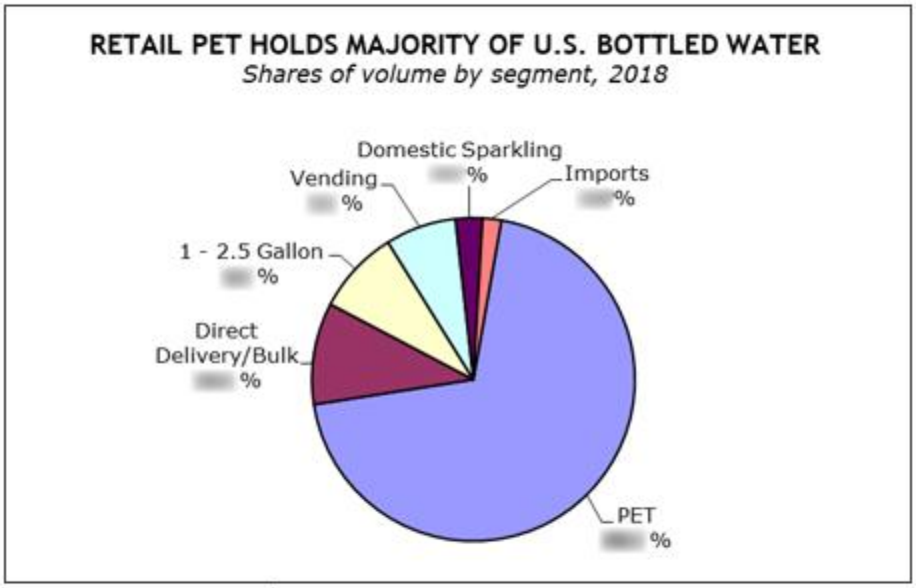
Value-added water is comprised of flavored, enhanced, essence and alkaline waters, together which provide value above and beyond "just hydration." The larger single-serve water segment includes both value-added water and retail PET water.

- 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 about 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 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.



Source: Beverage Marketing Corporation

Exhibit 2.12

VALUE-ADDED WATER MARKET

SHARE OF VOLUME BY CATEGORY

2013 – 2023(P)

Category	2013	2014	2015	2016	2017	2018	2023(P)
Regular Enhanced Water	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %
Low-Calorie Enhanced Water	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %
Subtotal Enhanced Water	**[redacted] %**	**[redacted] %**	**[redacted] %**	**[redacted] %**	**[redacted] %**	**[redacted] %**	**[redacted] %**
Alkaline Water	[redacted]	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %
Flavored Water	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %
Essence Water	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %	[redacted] %
TOTAL	**[redacted] %**	**[redacted] %**	**[redacted] %**	**[redacted] %**	**[redacted] %**	**[redacted] %**	**[redacted] %**

(P) Projected

Source: Beverage Marketing Corporation