

# **Bottled Water Market Report by Product Type (Still, Carbonated, Flavored, Mineral), Distribution Channel (Supermarkets/Hypermarkets, Convenience Stores, Direct Sales, On-Trade, and Others), Packaging Type (PET Bottles, Metal Cans, and Others), and Region 2024-2032**

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## **Abstracts**

The global bottled water market size reached US\$ 255.1 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 455.5 Billion by 2032, exhibiting a growth rate (CAGR) of 6.5% during 2024-2032. The escalating demand for flavored water, collaborations between bottled water brands and sports and tourism industries, and the convenience of online shopping and direct-to-consumer (DTC) sales channels are some of the major factors propelling the market.

Bottled water is sourced from various origins, such as natural springs, wells, and municipal water supplies, and subjected to stringent purification processes. It is free from contaminants, such as bacteria, chemicals, and pollutants, as it undergoes rigorous filtration and purification processes to ensure its quality. It is convenient for on-the-go hydration, which makes it easily accessible in various settings, including offices, gyms, and outdoor activities. It is packed in containers made of plastic, glass, and aluminum, for commercial distribution and consumer consumption.

The escalating demand for flavored and enhanced waters, including those with natural flavors, vitamins, minerals, and electrolytes is positively influencing the market. Apart from this, the convenience of online shopping and direct-to-consumer (DTC) sales channels is facilitating access to a wide range of bottled water brands and allowing consumers to explore and purchase products more easily. Furthermore, various leading

market players are developing products with advanced hydration solutions, such as isotonic and pH-balanced water to attract a wider consumer base. Moreover, rising collaborations between bottled water brands and other industries, such as sports, tourism, and hospitality, is providing opportunities for marketing and expanding consumer reach.

#### Bottled Water Market Trends/Drivers:

##### Increasing health and wellness consciousness

The rising health and wellness consciousness among individuals represents one of the key factors catalyzing the demand for bottled water. Additionally, rising preferences for clean, safe, and calorie-free hydration is offering a favorable market outlook. Apart from this, the escalating demand for alternatives to sugary and calorie-laden beverages like soda and fruit juices is accelerating the sales of bottled water with no added sugars, artificial flavors, and preservatives. Furthermore, the growing concerns associated with tap water quality and potential contaminants are driving the demand for bottled water. Moreover, the increasing demand for alkaline and vitamin-infused water among fitness freaks is stimulating the market growth.

##### Growing environmental concerns

The growing environmental concerns among the masses are encouraging them to purchase products with eco-friendly packaging. Additionally, the rising pollution level and the increasing prevalence of numerous diseases are strengthening the growth of the market. Apart from this, many bottled water companies are taking numerous steps to reduce their environmental footprint, which includes using lighter plastic bottles, investing in recycling infrastructure, and promoting recycling programs. Moreover, bottled water companies are implementing eco-friendly production processes and experimenting with alternative packaging materials like glass, aluminum, and cardboard cartons as they are more recyclable and have a lower environmental impact compared to traditional plastic bottles.

##### Convenience and on-the-go lifestyle

Rapid urbanization and the modern, fast-paced lifestyles of individuals are other significant factors favoring the market growth. It offers a convenient and hassle-free way to stay hydrated in various settings like workplaces, fitness centers, and while traveling. The lightweight and compact nature of bottled water containers makes them easily transportable, fitting into bags, backpacks, and cup holders. Apart from this, the rising

water pollution level and the increasing prevalence of various water-borne diseases are influencing the market positively. Furthermore, various leading companies are continually innovating to cater to the convenience demands of consumers. This includes the development of resealable caps, easy-to-carry packaging, and smart dispensers that enhance the overall convenience of bottled water consumption.

#### Bottled Water Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global bottled water market report, along with forecasts at the global, regional and country levels for 2024-2032. Our report has categorized the market based on product type, distribution channel and packaging type.

#### Breakup by Product Type:

- Still
- Carbonated
- Flavored
- Mineral

Still dominates the market

The report has provided a detailed breakup and analysis of the market based on the product type. This includes still, carbonated, flavored, and mineral. According to the report, still represented the largest segment due to its flat and non-carbonated nature. Apart from this, still bottled water provides hydration and lacks the bubbles and carbonation found in sparkling water or soda, which assists in maintaining hydration levels. Additionally, the rising health consciousness among individuals is driving the demand for still bottled water. Apart from this, the increasing participation of people in sports and fitness activities is catalyzing the demand for energy drinks for post-workout rehydration, which is strengthening the growth of the market.

#### Breakup by Distribution Channel:

- Supermarkets/Hypermarkets
- Convenience Stores
- Direct Sales
- On-Trade
- Others

A detailed breakup and analysis of the market based on the distribution channel has

also been provided in the report. This includes supermarkets/hypermarkets, convenience stores, direct sales, on-trade, and others.

Supermarkets/hypermarkets have large shelf space and extensive product offerings, which make them a go-to-choice for consumers seeking bottled water. Shoppers benefit from a wide variety of brands, sizes, and packaging options, creating a competitive environment that fosters innovation and consumer choice.

Convenience stores provide easy access to bottled water for consumers with busy lifestyles. Their strategic locations and extended operating hours make them convenient destinations for quick purchases of bottled water, catering to on-the-move individuals and travelers.

Direct sales channels involve manufacturers establishing a direct connection with consumers. They offer transparency, personalized customer experiences, and exclusive product offerings. They empower brands to gather valuable consumer insights and build brand loyalty.

#### Breakup by Packaging Type:

PET Bottles

Metal Cans

Others

PET bottles hold the largest market share

The report has provided a detailed breakup and analysis of the market based on the packaging type. This includes PET bottles, metal cans, and others. According to the report, PET bottles account for the largest market share as they are cost-effective, highly versatile, and adaptable to various beverage types. They come in various sizes, such as small single-serve bottles and large containers suitable for family consumption. This versatility allows beverage manufacturers to cater to different consumer preferences and packaging needs. PET bottles are also compatible with various closure types, including screw caps, flip-tops, and sports caps, enhancing convenience and consumer experience. Apart from this, these bottles are fully recyclable, which makes them an environmentally friendly choice. They can be recycled to produce new bottles and aid in reducing the demand for virgin plastics and minimizing waste.

#### Breakup by Region:

North America  
United States  
Canada  
Asia-Pacific  
China  
Japan  
India  
South Korea  
Australia  
Indonesia  
Others  
Europe  
Germany  
France  
United Kingdom  
Italy  
Spain  
Russia  
Others  
Latin America  
Brazil  
Mexico  
Others  
Middle East and Africa

Asia Pacific exhibits a clear dominance, accounting for the largest bottled water market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share due to rapid urbanization in the region. Additionally, the increasing working population and the fast-paced lifestyles in the region are strengthening the growth of the market. Apart from this, the rising health and wellness consciousness among people in the Asia Pacific region is catalyzing the demand for bottled water. Furthermore, the increasing income levels of people are allowing them to spend more on premium bottled water brands, including those offering

natural spring water or unique mineral content. Moreover, the rising prevalence of water-borne diseases in various countries of the Asia Pacific region due to increasing water pollution levels is strengthening the growth of the market.

#### Competitive Landscape:

Bottled water companies are actively working on reducing their environmental footprint by adopting sustainable packaging solutions. This includes using lighter and eco-friendly materials, such as recycled PET plastic, biodegradable plastics, glass, and aluminum to minimize the impact of single-use plastic bottles. Apart from this, they are exploring alternative packaging formats like box cartons and pouches that have a lower environmental impact and are more recyclable. Furthermore, they are focusing on differentiating their brands based on factors like source uniqueness, purification methods, and environmental sustainability. Moreover, many companies are continuously investing in distribution networks and marketing strategies tailored to local preferences and market conditions.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Bisleri International Pvt. Ltd.  
Danone S.A.  
Gerolsteiner Brunnen GmbH & Co. KG  
Nestle S.A.  
Nongfu Spring (Yangshengtang Co. Ltd.)  
Otsuka Pharmaceutical Co. Ltd.  
PepsiCo Inc.  
Primo Water Corporation  
Tata Consumer Products Limited  
The Coca-Cola Company

#### Recent Developments:

In October 2020, Primo Water Corporation announced the acquisition of Mountain Valley Water Company of Los Angeles, bringing the total number of customers to over 8,000.

In February 2023, Bisleri International Pvt. Ltd. announced its first overseas foray and partnering with Dubai-based Nasser Abdulla Lootah Group that will distribute the company's brands in Dubai, Sharjah, and Abu Dhabi.

## Key Questions Answered in This Report

1. What was the size of the global bottled water market in 2023?
2. What is the expected growth rate of the global bottled water market during 2024-2032?
3. What are the key factors driving the global bottled water market?
4. What has been the impact of COVID-19 on the global bottled water market?
5. What is the breakup of the global bottled water market based on the product type?
6. What is the breakup of the global bottled water market based on the packaging type?
7. What are the key regions in the global bottled water market?
8. Who are the key players/companies in the global bottled water market?

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