

Global Bottled Water Market - Forecasts from 2020 to 2025

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Abstracts

The global bottled water market is projected to grow at a CAGR of 7.18% to reach US\$172.773 billion by 2025 from US\$113.971 billion in 2019. The ever-increasing consumer awareness regarding health benefits that result from consuming bottled water is one of the drivers that is estimated to drive the market during the forecast period. Further, the emergence of beverages engineering has come along in such a manner that there are a plethora of choices at the disposals of the consumers whereby they can settle for specifically designed content beverages, such as beverages with nutritional benefits directed at both children and adults, water with energy functionalities as well as those which carries a particular flavor along with additional health-promoting factors that are derived naturally (especially pertaining water obtained from natural sources). The other aspect that is expected to drive this market is the food and beverage industry that comprises the most developed sector and accounts for a majority of spending bourn by individual consumers, as well as enterprises. Further constant investment in innovation by various companies as well as government policies conducive to the propagation of the beverage industry as a whole are also factors that are poised to drive the global bottled water to a new echelon. Further, negative externalities which arise from human-related activities such as pollution has also contributed to the profusion of bottled water during the recent time. Additionally, the increasing alteration of lifestyle coupled work stress, expanding urbanization, and increasing disposable income have all the more facilitated the increase of the number of bottled water varietals. Another factor that affects the sales of bottled water and hence the market for the same to a certain extent is the weather which in recent times as altered due to climate change consequently has driven the sales of bottled water as the global temperature continues to rise. The other aspect is that of emerging economies like that of APAC wherein the domestic players increasingly investing in bottled water and making their products available to the local customers. Further, expansion of the economy the increasing propensity of women of

the household to earn are a few of the factors contributing to the opportunities which global bottled water companies are looking forward to capitalizing, thus, enabling them to penetrate these markets.

Conversely, the space in convenience stores that is allocated to bottled water is increasingly being taken away by soft beverage products with new functionalities that is posing as one of the restraining factors hindering the growth of this market. The other such factor which is expected to hinder growth is the increasing offerings of meal-deals wherein relatively expensive soft-drinks are offered which incentivizes the consumers to settle for such deals as it is perceived as economically viable. Further, with the increasing number of water ATMs in certain countries that are acting as practical and safe water refilling stations is also an aspect to which bottled water is losing ground. Further, with an increasing proportion of value-driven consumers who are environmentally conscious are settling for reusable water bottles that allows them the conveniences of dedicating different water bottles for different activities Viz. one of the gyms, one for the office, and so on. Nevertheless, the off the shelf mineral water will remain the most frequent type of consumed water as it caters to the upkeep of the basic corporeal functions of replenishing by best meeting the requirement of bodily fluids and contributing the aspect of refreshment. Moreover, viz. brands like Pathwater, the first 100% reusable, recyclable bottled water made available in a sturdy aluminum bottle which addresses the needs of environmental consumers are leading the next generation of eco-conscious consumer packaged goods and debuted its limited-edition Made in USA bottle in May 2020, encouraging consumers to refill and reuse. It also should be noted that after four refills Pathwater's bottle becomes carbon neutral.

Therefore, as a response to the various driving factors mentioned there is an increasing number of developments that are taking place in the global bottled water undeterred by the reduced economic activities caused by COVID 19. For instance, in June 2020, Ferrarelle, which is Italy's 4th largest mineral water producer, announced that it struck a distribution deal with French food company Danone (DANO.PA), to boost its exports and increase the brand awareness among the consumers of foreign countries. Under this agreement, Danone will sell, distribute, and merchandise Ferrarelle's eponymous sparkling water in several countries abroad. In May 2020, the Alkaline Water Company Inc. (NASDAQ and CSE: WTER) announced that is the line of A88CBD™ infused ingestible products are now available on A88CBD.com, and at Pure CBD, a CBD-only dispensary with multiple retail locations in LA. The organizations a producer of premium bottled alkaline water, flavored-infused waters, and CBD infused products sold under the brand names Alkaline88®, A88 Infused™, and A88CBD™, respectively. This marks a strategic shift for the company as it opens another distribution channel for its specialty

products. In May 2020, Bottled water brand Vittel launched Vittel UP Pamplemousse – a grapefruit-flavored variety – in France. The water which mixes Vittel’s natural mineral water with a touch of fruit and a pinch of certified organic cane sugar is after the launch of UP peach and UP lemon-lime in 2019. UP Pamplemousse is made available in 1L and 4x50cl bottles, which are made from 50% rPET. Vittel is also expected to launch UP peach in a 33cl children’s format.

Future innovations in bottled water packaging are expected to drive further sales of bottled water as evidenced by the London-based start-up Notpla (formerly known as Skipping Rocks Lab) which has been engaged in developing and fine-tuning its edible water bottle, known as Ooho. These bubbles of water are encased within a transparent, edible membrane, made from algae and calcium chloride. The process of making the Ooho involves dipping frozen balls of liquid into the algae mixture. When the ice melts the membrane forms a watertight seal around it. The Ooho capsules, which can either be eaten in their entirety or bitten into and sipped from, are fully biodegradable and serve as a sustainable alternative to plastic bottles. The capsules degrade within 4 to 6 weeks if not consumed, as a result, they aren’t intended for use in long supply chains or to be displayed in supermarkets.

Segmentation

By Type

Still Water

Sparkling Water

Functional Water

By Flavor

Flavored

Non-Flavored

By Packaging

PET Bottles

Glass Bottles

Others

By Distribution Channel

Online

Offline

By Geography

North America

USA

Canada

Mexico

South America

Brazil

Argentina

Colombia

Ecuador

Peru

Others

Europe

Austria

Belgium

Bulgaria

Czech Republic

Denmark

Finland

France

Germany

Hungary

Ireland

Italy

Netherlands

Poland

Portugal

Slovenia

Spain

Sweden

UK

Others

The Middle East and Africa

Saudi Arabia

Israel

UAE

Ethiopia

Turkey

Morocco

Egypt

Others

Asia Pacific

China

India

Japan

South Korea

Australia

Philippines

Others

Contents

1. INTRODUCTION

- 1.1. Market Definition
- 1.2. Market Segmentation

2. RESEARCH METHODOLOGY

- 2.1. Research Data
- 2.2. Assumptions

3. EXECUTIVE SUMMARY

- 3.1. Research Highlights

4. MARKET DYNAMICS

- 4.1. Market Drivers
- 4.2. Market Restraints
- 4.3. Porters Five Forces Analysis
 - 4.3.1. Bargaining Power of Suppliers
 - 4.3.2. Bargaining Power of Buyers
 - 4.3.3. The threat of New Entrants
 - 4.3.4. Threat of Substitutes
 - 4.3.5. Competitive Rivalry in the Industry
- 4.4. Industry Value Chain Analysis

5. GLOBAL BOTTLED WATER MARKET ANALYSIS, BY TYPE

- 5.1. Introduction
- 5.2. Still Water
- 5.3. Sparkling Water
- 5.4. Functional Water

6. GLOBAL BOTTLED WATER MARKET ANALYSIS, BY FLAVOR

- 6.1. Introduction
- 6.2. Still Flavored

6.3. Non-Flavored

7. GLOBAL BOTTLED WATER MARKET ANALYSIS, BY PACKAGING

7.1. Introduction

7.2. PET Bottles

7.3. Glass Bottles

7.4. Others

8. GLOBAL BOTTLED WATER MARKET ANALYSIS, BY DISTRIBUTION CHANNEL

8.1. Introduction

8.2. Online

8.3. Offline

9. GLOBAL BOTTLED WATER MARKET ANALYSIS, BY GEOGRAPHY

9.1. Introduction

9.2. North America

9.2.1. North America Bottled Water Analysis, By Type

9.2.2. North America Bottled Water Analysis, By Flavor

9.2.3. North America Bottled Water Analysis, By Packaging

9.2.4. North America Bottled Water Analysis, By Distribution Channel

9.2.5. By Country

9.2.5.1. United States

9.2.5.1.1. By Type

9.2.5.1.2. By Flavor

9.2.5.1.3. By Packaging

9.2.5.1.4. By Distribution Channel

9.2.5.2. Canada

9.2.5.2.1. By Type

9.2.5.2.2. By Flavor

9.2.5.2.3. By Packaging

9.2.5.2.4. By Distribution Channel

9.2.5.3. Mexico

9.2.5.3.1. By Type

9.2.5.3.2. By Flavor

9.2.5.3.3. By Packaging

9.2.5.3.4. By Distribution Channel

9.3. South America

9.3.1. South America Bottled Water Analysis, By Type

9.3.2. South America Bottled Water Analysis, By Flavor

9.3.3. South America Bottled Water Analysis, By Packaging

9.3.4. South America Bottled Water Analysis, By Distribution Channel

9.3.5. By Country

9.3.5.1. Brazil

9.3.5.1.1. By Type

9.3.5.1.2. By Flavor

9.3.5.1.3. By Packaging

9.3.5.1.4. By Distribution Channel

9.3.5.2. Argentina

9.3.5.2.1. By Type

9.3.5.2.2. By Flavor

9.3.5.2.3. By Packaging

9.3.5.2.4. By Distribution Channel

9.3.5.3. Colombia

9.3.5.3.1. By Type

9.3.5.3.2. By Flavor

9.3.5.3.3. By Packaging

9.3.5.3.4. By Distribution Channel

9.3.5.4. Ecuador

9.3.5.4.1. By Type

9.3.5.4.2. By Flavor

9.3.5.4.3. By Packaging

9.3.5.4.4. By Distribution Channel

9.3.5.5. Peru

9.3.5.5.1. By Type

9.3.5.5.2. By Flavor

9.3.5.5.3. By Packaging

9.3.5.5.4. By Distribution Channel

9.3.5.6. Others

9.4. Europe

9.4.1. Europe Bottled Water Analysis, By Type

9.4.2. Europe Bottled Water Analysis, By Flavor

9.4.3. Europe Bottled Water Analysis, By Packaging

9.4.4. Europe Bottled Water Analysis, By Distribution Channel

9.4.5. By Country

9.4.5.1. Austria

- 9.4.5.1.1. By Type
- 9.4.5.1.2. By Flavor
- 9.4.5.1.3. By Packaging
- 9.4.5.1.4. By Distribution Channel
- 9.4.5.2. Belgium
 - 9.4.5.2.1. By Type
 - 9.4.5.2.2. By Flavor
 - 9.4.5.2.3. By Packaging
 - 9.4.5.2.4. By Distribution Channel
- 9.4.5.3. Bulgaria
 - 9.4.5.3.1. By Type
 - 9.4.5.3.2. By Flavor
 - 9.4.5.3.3. By Packaging
 - 9.4.5.3.4. By Distribution Channel
- 9.4.5.4. Czech Republic
 - 9.4.5.4.1. By Type
 - 9.4.5.4.2. By Flavor
 - 9.4.5.4.3. By Packaging
 - 9.4.5.4.4. By Distribution Channel
- 9.4.5.5. Denmark
 - 9.4.5.5.1. By Type
 - 9.4.5.5.2. By Flavor
 - 9.4.5.5.3. By Packaging
 - 9.4.5.5.4. By Distribution Channel
- 9.4.5.6. Finland
 - 9.4.5.6.1. By Type
 - 9.4.5.6.2. By Flavor
 - 9.4.5.6.3. By Packaging
 - 9.4.5.6.4. By Distribution Channel
- 9.4.5.7. France
 - 9.4.5.7.1. By Type
 - 9.4.5.7.2. By Flavor
 - 9.4.5.7.3. By Packaging
 - 9.4.5.7.4. By Distribution Channel
- 9.4.5.8. Germany
 - 9.4.5.8.1. By Type
 - 9.4.5.8.2. By Flavor
 - 9.4.5.8.3. By Packaging
 - 9.4.5.8.4. By Distribution Channel

- 9.4.5.9. Hungary
 - 9.4.5.9.1. By Type
 - 9.4.5.9.2. By Flavor
 - 9.4.5.9.3. By Packaging
 - 9.4.5.9.4. By Distribution Channel
- 9.4.5.10. Ireland
 - 9.4.5.10.1. By Type
 - 9.4.5.10.2. By Flavor
 - 9.4.5.10.3. By Packaging
 - 9.4.5.10.4. By Distribution Channel
- 9.4.5.11. Italy
 - 9.4.5.11.1. By Type
 - 9.4.5.11.2. By Flavor
 - 9.4.5.11.3. By Packaging
 - 9.4.5.11.4. By Distribution Channel
- 9.4.5.12. Netherlands
 - 9.4.5.12.1. By Type
 - 9.4.5.12.2. By Flavor
 - 9.4.5.12.3. By Packaging
 - 9.4.5.12.4. By Distribution Channel
- 9.4.5.13. Poland
 - 9.4.5.13.1. By Type
 - 9.4.5.13.2. By Flavor
 - 9.4.5.13.3. By Packaging
 - 9.4.5.13.4. By Distribution Channel
- 9.4.5.14. Portugal
 - 9.4.5.14.1. By Type
 - 9.4.5.14.2. By Flavor
 - 9.4.5.14.3. By Packaging
 - 9.4.5.14.4. By Distribution Channel
- 9.4.5.15. Slovenia
 - 9.4.5.15.1. By Type
 - 9.4.5.15.2. By Flavor
 - 9.4.5.15.3. By Packaging
 - 9.4.5.15.4. By Distribution Channel
- 9.4.5.16. Spain
 - 9.4.5.16.1. By Type
 - 9.4.5.16.2. By Flavor
 - 9.4.5.16.3. By Packaging

- 9.4.5.16.4. By Distribution Channel
- 9.4.5.17. Sweden
 - 9.4.5.17.1. By Type
 - 9.4.5.17.2. By Flavor
 - 9.4.5.17.3. By Packaging
 - 9.4.5.17.4. By Distribution Channel
- 9.4.5.18. UK
 - 9.4.5.18.1. By Type
 - 9.4.5.18.2. By Flavor
 - 9.4.5.18.3. By Packaging
 - 9.4.5.18.4. By Distribution Channel
- 9.4.5.19. Others
- 9.5. The Middle East and Africa
 - 9.5.1. Middle East and Africa Bottled Water Analysis, By Type
 - 9.5.2. Middle East and Africa Bottled Water Analysis, By Flavor
 - 9.5.3. Middle East and Africa Bottled Water Analysis, By Packaging
 - 9.5.4. Middle East and Africa Bottled Water Analysis, By Distribution Channel
 - 9.5.5. By Country
 - 9.5.5.1. Saudi Arabia
 - 9.5.5.1.1. By Type
 - 9.5.5.1.2. By Flavor
 - 9.5.5.1.3. By Packaging
 - 9.5.5.1.4. By Distribution Channel
 - 9.5.5.2. Israel
 - 9.5.5.2.1. By Type
 - 9.5.5.2.2. By Flavor
 - 9.5.5.2.3. By Packaging
 - 9.5.5.2.4. By Distribution Channel
 - 9.5.5.3. UAE
 - 9.5.5.3.1. By Type
 - 9.5.5.3.2. By Flavor
 - 9.5.5.3.3. By Packaging
 - 9.5.5.3.4. By Distribution Channel
 - 9.5.5.4. Ethiopia
 - 9.5.5.4.1. By Type
 - 9.5.5.4.2. By Flavor
 - 9.5.5.4.3. By Packaging
 - 9.5.5.4.4. By Distribution Channel
 - 9.5.5.5. Turkey

- 9.5.5.5.1. By Type
- 9.5.5.5.2. By Flavor
- 9.5.5.5.3. By Packaging
- 9.5.5.5.4. By Distribution Channel
- 9.5.5.6. Morocco
 - 9.5.5.6.1. By Type
 - 9.5.5.6.2. By Flavor
 - 9.5.5.6.3. By Packaging
 - 9.5.5.6.4. By Distribution Channel
- 9.5.5.7. Egypt
 - 9.5.5.7.1. By Type
 - 9.5.5.7.2. By Flavor
 - 9.5.5.7.3. By Packaging
 - 9.5.5.7.4. By Distribution Channel
- 9.5.5.8. Others
- 9.6. Asia Pacific
 - 9.6.1. Asia Bottled Water Analysis, By Type
 - 9.6.2. Asia Bottled Water Analysis, By Flavor
 - 9.6.3. Asia Bottled Water Analysis, By Packaging
 - 9.6.4. Asia Bottled Water Analysis, By Distribution Channel
 - 9.6.5. By Country
 - 9.6.5.1. China
 - 9.6.5.1.1. By Type
 - 9.6.5.1.2. By Flavor
 - 9.6.5.1.3. By Packaging
 - 9.6.5.1.4. By Distribution Channel
 - 9.6.5.2. India
 - 9.6.5.2.1. By Type
 - 9.6.5.2.2. By Flavor
 - 9.6.5.2.3. By Packaging
 - 9.6.5.2.4. By Distribution Channel
 - 9.6.5.3. Japan
 - 9.6.5.3.1. By Type
 - 9.6.5.3.2. By Flavor
 - 9.6.5.3.3. By Packaging
 - 9.6.5.3.4. By Distribution Channel
 - 9.6.5.4. South Korea
 - 9.6.5.4.1. By Type
 - 9.6.5.4.2. By Flavor

- 9.6.5.4.3. By Packaging
- 9.6.5.4.4. By Distribution Channel
- 9.6.5.5. Australia
 - 9.6.5.5.1. By Type
 - 9.6.5.5.2. By Flavor
 - 9.6.5.5.3. By Packaging
 - 9.6.5.5.4. By Distribution Channel
- 9.6.5.6. Philippines
 - 9.6.5.6.1. By Type
 - 9.6.5.6.2. By Flavor
 - 9.6.5.6.3. By Packaging
 - 9.6.5.6.4. By Distribution Channel
- 9.6.5.7. Others

10. COMPETITIVE ENVIRONMENT AND ANALYSIS

- 10.1. Major Players and Strategy Analysis
- 10.2. Emerging Players and Market Lucrativeness
- 10.3. Mergers, Acquisitions, Agreements, and Collaborations
- 10.4. Vendor Competitiveness Matrix

11. COMPANY PROFILES

- 11.1. Bai
- 11.2. Bisleri International Pvt Ltd
- 11.3. Carlsberg Breweries A/S
- 11.4. Danone S.A.
- 11.5. evamor Products, LLC
- 11.6. FIJI Water Company LLC
- 11.7. Gerolsteiner Brunnen GmbH & Co. KG
- 11.8. GEROLSTEINER BRUNNEN GMBH & CO. KG
- 11.9. Groupe Spadel
- 11.10. Icelandic Glacial
- 11.11. Mountain Valley Spring Water
- 11.12. Nestl?
- 11.13. Nongfu Spring
- 11.14. Otsuka Holdings Co., Ltd.
- 11.15. PepsiCo
- 11.16. Reignwood Group

11.17. SUNTORY BEVERAGE & FOOD LIMITED

11.18. The Coca-Cola Company

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