

Bottled Water Market Assessment, By Type [Still Water, Sparkling Water, Functional Water, Others], By Packaging [PET Bottles, Glass Bottles, Biodegradable Packaging, Metal Cans, Others], By End-user [Individual, Commercial], By Distribution Channel [Convenience Stores, Grocery Shops, Internet Retailing, Supermarkets/Hypermarkets, Others], By Region, Opportunities, and Forecast, 2016-2030F

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Abstracts

Global Bottled Water Market has experienced substantial growth, driven by changing consumer preferences, increased awareness of health and wellness, and rising concerns about tap water quality in certain regions. In 2022, the market achieved a valuation of USD 322.4 billion, with projections indicating a compound annual growth rate (CAGR) of 7.8% from 2023 to 2030. It is characterized by a diverse range of products, including still water, sparkling water, and functional or enhanced water.

Key drivers of the bottled water market include a growing emphasis on hydration as part of a healthy lifestyle, rising disposable incomes in emerging economies, and an increasing focus on convenience. Consumers are drawn to bottled water's portability, purity, and perceived safety, contributing to its widespread adoption globally.

Regional variations exist, with certain markets demonstrating higher consumption rates due to factors such as climate, urbanization, and cultural preferences. Developed regions like North America and Europe have historically been significant consumers, while emerging economies in Asia-Pacific, South America, and Africa have witnessed robust market growth.

Sustainability concerns have also influenced the market, leading to increased demand for eco-friendly packaging options and initiatives by companies to reduce the environmental impact of their products.

However, challenges exist, including the environmental impact of plastic bottles, regulatory scrutiny on the bottled water industry, and the increasing popularity of alternative beverages. The market is dynamic, with companies continually innovating to meet consumer demands, introducing new packaging solutions, and incorporating functional ingredients to differentiate their products.

Growing Awareness of the Importance of Hydration and a Healthy Lifestyle Driving the Demand

Consumers' rising tide of health and wellness consciousness significantly influences the market. As individuals increasingly prioritize healthier lifestyles, there is a growing demand for beverages that align with these preferences. Bottled water, perceived as a healthier alternative to sugary drinks, benefits from this trend. Consumers seek hydration options that quench their thirst and contribute positively to their overall well-being. The market responds with innovations such as electrolyte-infused waters, vitamin-enhanced options, and alkaline formulations, reflecting a convergence of health consciousness and beverage choices in the dynamic landscape of the global bottled water market.

In March 2023, Toronto's Diosmieau Splash Water unveiled a captivating new canned water product. Sourced from an organic, artesian spring in Eastern Ontario, Splash Water provided high-alkaline, non-carbonated spring water, encouraging consumers to ditch plastic bottles for its infinitely recyclable cans. Boasting sustainable packaging, an eye-catching design, and a playful approach, the brand aimed to revolutionize perceptions of water companies.

Asia-Pacific Emerging as a Dominant Force in the Market

The Asia-Pacific region has emerged as a dominant force in the global bottled water market, fuelled by changing consumer preferences, urbanization, and a rising focus on health and wellness. Particularly in countries like China and India, increasing disposable incomes and concerns about water quality have driven a surge in bottled water consumption. Also, countries like Vietnam encounter numerous water challenges despite an annual average rainfall of approximately 2,000 millimeters. Water availability

there is characterized by high seasonality and uneven distribution, creating a significant market for bottled water in the country. Lifestyle changes, a growing middle class, and a preference for convenient, on-the-go hydration options further propel the demand. As a result, the Asia-Pacific region plays a pivotal role in shaping the dynamics and growth trajectory of the global bottled water market.

Government Regulations/Initiatives

Government regulations and initiatives profoundly influence the global bottled water market. Stringent quality standards, labelling requirements, and environmental policies shape industry practices. Governments worldwide increasingly focus on sustainability, pushing bottled water manufacturers towards eco-friendly packaging and reduced plastic use. Compliance with these regulations is pivotal for consumer trust and market access. Moreover, public health initiatives often guide water safety standards, impacting production processes. As governments intensify efforts to address environmental concerns and promote health consciousness, their regulatory measures continue to shape the evolution of the bottled water market on a global scale.

Biodegradable Packaging Gaining Popularity

The market is experiencing a transformative shift with the increasing integration of biodegradable packaging. For instance, in September 2022, Dubai successfully reduced more than 3.5 million 500ml single-use plastic water bottles through the citywide sustainability movement, Dubai Can. Launched on February 15, 2022, the movement achieved remarkable success, as evidenced by the consumption of water from the Dubai Can water fountains installed across the city. As environmental concerns heighten, consumers seek sustainable alternatives, prompting bottled water companies to adopt eco-friendly materials. In another example, in June 2023, the Malaysian bottled water provider, Spritzer introduced bottles without labels for its silica-rich Natural Mineral Water product. The company opted for 100% recyclable bottles that were label-free for packaging its Natural Mineral Water in 1.25-liter and 550ml ranges.

This shift caters to eco-conscious consumer preferences and complies with government sustainability regulations. The adoption of biodegradable packaging is increasingly vital in shaping the market, creating a more sustainable industry landscape in response to growing demand for eco-friendly practices.

Rising Obesity Rate Driving the Demand for Flavoured and Functional Water

In nearly every region, the number of individuals experiencing obesity is more than those who are underweight, and if this trend persists, up to 1 billion adults, constituting 12% of the global population, are projected to be living with obesity by the year 2025. Bottled water companies are responding to the heightened concerns about increasing obesity rates by increasingly introducing flavoured and functional water options. With the recognition that carbonated water may contribute to problems like digestive issues, weight gain, and heartburn, consumers are transitioning towards healthier alternatives such as low-calorie flavoured water and functional water. This trend reflects a shift in consumer preferences towards beverages that align with wellness goals, prompting bottled water companies to introduce a variety of innovative products to meet the rising demand for more health-conscious hydration choices.

For example, in July 2023, UK-based Marlish Waters, a sustainable soft drinks producer, broadened its selection of canned-at-source flavoured spring waters by introducing the Sparkling Pink Grapefruit variant. This new offering was presented in a 330ml can. It was devoid of artificial flavours and preservatives, with each can containing fewer than seven calories.

Impact of COVID-19

The COVID-19 pandemic has significantly impacted the global bottled water market. While the initial stages of the crisis saw a surge in demand for bottled water due to concerns about water safety and a preference for packaged goods, the market later experienced disruptions. Lockdowns, economic uncertainties, and changes in consumer behaviour led to shifts in consumption patterns. The hospitality and travel sectors, major consumers of bottled water, faced substantial setbacks. On the positive side, there has been an increased focus on health and wellness, potentially boosting demand for functional and enhanced waters. The industry is adapting to these changes by emphasizing e-commerce channels and sustainable packaging to navigate the evolving market landscape.

Key Players Landscape and Outlook

The market is characterized by the presence of key players that contribute to its dynamic landscape. Leading global players include Nestlé S.A., The Coca-Cola Company, PepsiCo, Inc., and Danone S.A. These companies drive innovation, introducing flavoured, functional, and sustainable water products to meet changing consumer preferences. The outlook for the bottled water market remains optimistic, fuelled by increasing health consciousness and a shift towards healthier beverage

choices. With a growing emphasis on sustainable practices, players also invest in eco-friendly packaging solutions. The market is expected to witness continued growth, driven by strategic collaborations, product diversification, and a focus on meeting evolving consumer demands for convenient, healthy hydration options. In September 2023, PepsiCo, Inc. expanded its Gatorade beverage range by adding water to it. The company stated that the 'premium', alkaline water aligns with its commitment to delivering 'all-day nutrition' through the Gatorade brand. Described as 'electrolyte-infused', Gatorade Water will be made available in the United States in the first quarter of the next year.

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