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India 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, FY2017-FY2031F

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Abstracts

India bottled water market has witnessed remarkable growth in recent years, driven by factors that reflect evolving consumer preferences and socio-economic changes. Increasing health consciousness, a burgeoning population with rising disposable income and concerns about water quality have collectively fueled the demand for bottled water. In the fiscal year 2023, the market reached an estimated value of USD 6.45 billion, with projections indicating a growth up to USD 14.03 billion by the fiscal year 2031. The anticipated expansion signifies a CAGR of 10.2% from FY2024 to FY2031.

The market has responded to changing habits, especially in urban areas, where convenience and portability are paramount. It reflects the broader premiumization trend, with a growing preference for enhanced and specialty waters. Government initiatives addressing water quality concerns, such as the Har Ghar Jal program, have influenced the market's trajectory.

Effective marketing campaigns by major players have played a crucial role in shaping consumer perceptions and promoting bottled water as a lifestyle choice. The

introduction of various packaging sizes and materials, including environmentally friendly options, has further expanded consumer choices and driven market growth. Moreover, trends from global markets, where bottled water is often considered a staple, have influenced consumer preferences in India. The ongoing trends of urbanization and digitalization have significantly contributed to the adoption of online shopping habits, aligning with the e-commerce model, and bolstering the growth of the bottled water market through digital channels. For instance, in July 2022, A1 Cuisines, the company behind the Malaki brand of tonic water, announced the launch of BeverageCart, India's inaugural mobile app-based beverage platform. BeverageCart, a pioneering initiative in India, addresses last-mile delivery for retailers and the HoReCa (Hotels, Restaurants, and Caterers) sector by streamlining online wholesale orders.

The interplay of these factors underscores the dynamic nature of the India bottled water market, making it a multifaceted industry that responds to changing consumer behaviors and market dynamics.

Lack of Availability of Potable Water Surges Demand

The extensive water contamination problem in India presents a formidable challenge, with 195,813 habitations across the country facing poor water quality, posing significant health threats to the population. The latest Lancet study indicates that pollution in India resulted in over 2.3 million premature deaths in 2019. Of these, nearly 1.6 million deaths were attributed to air pollution, while over half a million were caused by water pollution. The alarming statistics underscore the urgent need for comprehensive measures to address water quality issues and mitigate the country's adverse health impacts of pollution.

As a result, the demand for bottled water has surged significantly in the country. The perception that bottled water undergoes stringent purification processes and meets quality standards drives this trend. In October 2023, bottled water company Clear Premium Water announced the launch of its natural mineral water brand 'NubyClear' (NU). According to the company, NU is a range of natural mineral water sourced directly from the Himalayas and is available in four designs.

Sparkling Water Gaining Momentum

In the Indian beverage sector, there is a noticeable surge in the demand for health-conscious drinks. The evolving habits, dynamic consumer needs, and the urbanization of tier I and tier II cities drive substantial growth in the industry. Responding to this trend and drawing inspiration from Western markets, major players in the industry are venturing into various segments, notably in the sparkling water sector. Sparkling water is positioned as a wholesome alternative to traditional sodas, enriched with essential nutrients for sustained consumer vitality. Its distinctiveness lies in being a guilt-free and calorie-free substitute, free from added sugar and sodium, catering to the preferences of health-conscious consumers. The industry is aligning itself with the evolving demands of its customer base.

For instance, Bisleri International Pvt. Ltd. recently strengthened its premiumization strategy by expanding its premium spring water brand, Vedica, into the sparkling water segment. In October 2023, Vedica Himalayan Sparkling Water was introduced at INR 175 per glass bottle of 300 ml with plans to gradually introduce other packaging sizes.

Government Regulations Ensuring Product Safety and Quality

India bottled water market is subject to various government regulations to ensure product safety and quality. The Bureau of Indian Standards has established Indian Standards, IS 14543 for Packaged Drinking Water (PDW), and IS 13428 for Packaged Natural Mineral Water (PNMW), outlining quality parameters for water sold in packaged form. These standards are mandatory for BIS certification, following the Food Safety and Standards (Prohibition & Restriction on sales) (Amendment) Regulation 2011. According to this regulation, selling, manufacturing, or displaying for sale Natural Mineral Water and Packaged Drinking Water is permissible only if they adhere to the BIS Standard Mark. The Food Safety and Standards Authority of India (FSSAI) plays a pivotal role in regulating and monitoring the bottled water industry, enforcing safety standards and certifications. For instance, from January 1, 2021, revised regulations from the Food Safety Standards Authority of India (FSSAI) required all packaged water manufacturers to incorporate 20 mg of calcium and 10 mg of magnesium per liter in their packaging.

Compliance with such standards is mandatory for all bottled water manufacturers, importers, and distributors.

Impact of COVID-19

The COVID-19 pandemic significantly impacted the India bottled water market, introducing both challenges and opportunities. The initial phases saw disruptions in the supply chain, logistical issues, and a decline in consumer spending due to economic uncertainties. On the contrary, there was a surge of activity in the branded water

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segment, with startups emerging to introduce new products with a focus on health. These startups made efforts to distinguish themselves from the conventional packaged water category, which had been growing rapidly. As hygiene concerns heightened, there was a notable surge in the demand for packaged and purified water, driven by a preference for safe and convenient hydration options. The pandemic accelerated the shift towards e-commerce channels for water purchases. In June 2020, during the pandemic, the homegrown spring water brand Responsible Whatr, initially targeting the HoReCa segment, successfully pivoted to the B2C market through online channels, launching a single SKU of 500 ML.

Key Players Landscape and Outlook

India bottled water market boasts a competitive landscape with key players dominating the industry. Established brands such as Bisleri, Kinley (owned by Coca?Cola India Private Limited), Aquafina (PepsiCo India Holdings Pvt Ltd), and Himalayan (owned by NourishCo Beverages Ltd.) continue to shape the market. These companies leverage extensive distribution networks, robust marketing strategies, and a focus on product innovation to maintain their market share. The market outlook remains optimistic, driven by increasing consumer demand for safe and convenient hydration options. As health awareness rises and urbanization persists, key players are expected to capitalize on these trends, introducing new products and expanding their presence across diverse regions to meet evolving consumer preferences and fuel market growth.

In February 2023, Bisleri International Pvt. Ltd., India's leading bottled mineral water brand, established its first overseas operations in the UAE through a partnership with Nasser Abdulla Lootah Group. Manufacturing and bottling, under Emirates Drinking Water, initially planned to begin in April 2023, were further postponed till September 2023 , due to some unknown reasons. The collaboration aimed to strengthen Bisleri's presence in Dubai, Sharjah, and Abu Dhabi, offering products in 500ml and 1.5 liters sizes across various retail channels and e-commerce platforms.

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13.5. O'cean Drinks Pvt Ltd (India)
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13.9. Duhkaar Food & Beverages Pvt. Ltd. (Polka Pop)
13.10. Sheelpe Enterprises Private Limited (Aava)
*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

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