

# **Plastic-Neutral Water Market Forecasts to 2032 – Global Analysis By Product Type (Still Water, Sparkling Water, Functional Water, Flavored Water, Mineral Water, and Other Product Types), Packaging Type, Plastic-Neutral Mechanism, Price Tier, Distribution Channel, End User and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Plastic-Neutral Water Market is accounted for \$0.79 billion in 2025 and is expected to reach \$1.54 billion by 2032 growing at a CAGR of 10.0% during the forecast period. Plastic-Neutral Water is drinking water sold in packaging where the producer compensates for the plastic used by extracting an equal amount of plastic waste from the environment. The idea is to achieve balance between plastic usage and recovery through recycling, reuse, or waste management efforts. This approach supports sustainability, minimizes ecological harm, and drives companies in the bottled water sector toward circular economy practices and responsible resource management.

Market Dynamics:

Driver:

Growing consumer awareness and demand

As environmental awareness intensifies, more consumers are actively choosing products that reflect their sustainability values. Plastic-neutral water brands are benefiting from this shift, offering solutions that balance plastic use through recovery, recycling, or offset credits. Digital platforms and influencer marketing have played a key

role in educating the public about plastic waste and its long-term consequences. Younger generations, in particular, are driving demand for ethical and environmentally responsible consumption. This trend is fueling growth across retail shelves, online marketplaces, and hospitality venues. The growing emphasis on circular economy principles is further accelerating market growth and innovation.

#### Restraint:

Lack of standardized certification and green-washing concerns

Despite growing interest, the market faces hurdles due to inconsistent standards around plastic neutrality. Many companies make sustainability claims without third-party validation, leading to confusion and mistrust. Consumers are increasingly demanding clarity on how offsets are calculated and verified. Without clear benchmarks, it's difficult to assess the legitimacy of different brands' environmental impact. This lack of transparency can damage brand credibility and slow consumer adoption. Until standardized certification systems are widely implemented, skepticism may continue to hinder market growth.

#### Opportunity:

Innovation in sustainable packaging

The push for plastic neutrality is sparking innovation in packaging made from renewable and recyclable materials. Brands are exploring alternatives like bamboo fiber, compostable bioplastics, and reclaimed ocean waste to reduce their footprint. These developments not only support sustainability goals but also help products stand out in a competitive market. Smart packaging features, such as scannable codes for impact tracking, are resonating with environmentally conscious buyers. Partnerships with green tech firms and material innovators are accelerating progress. As packaging becomes a key differentiator, it opens doors for premium positioning and deeper consumer engagement.

#### Threat:

Shift to alternative packaging

While plastic-neutral water offers a transitional solution, it faces competition from packaging formats that eliminate plastic entirely. Glass bottles, aluminum cans, and

paper cartons are gaining popularity due to their recyclability and lower environmental impact. These alternatives are often viewed as more authentic and less reliant on offsetting schemes. As infrastructure for plastic-free packaging improves, consumer and retailer preferences may shift away from plastic-neutral options. This trend could challenge brands that depend heavily on offset models rather than true elimination.

#### Covid-19 Impact:

The pandemic initially disrupted supply chains and paused sustainability initiatives across the bottled water sector. Concerns over hygiene led to increased use of single-use plastics, temporarily stalling progress toward plastic neutrality. However, the crisis also highlighted the link between environmental health and public well-being. As recovery efforts gained traction, brands renewed their focus on sustainability and plastic offset programs. The rise of e-commerce during lockdowns created new opportunities for consumer education and product distribution. Post-COVID, the market is regaining momentum with stronger commitments to verified impact and circular packaging models.

The still water segment is expected to be the largest during the forecast period

The still water segment is expected to account for the largest market share during the forecast period, due to rising eco-consciousness and demand for low-impact hydration. Advances in blockchain-based traceability, biodegradable packaging, and plastic offset technologies are reshaping consumer expectations. Emerging trends include refillable bottle stations, QR-coded impact tracking, and partnerships with circular economy platforms. Key developments involve retail expansion, third-party certification, and integration with carbon-neutral logistics. These innovations are driving brand differentiation and accelerating adoption, especially among urban and health-focused consumers seeking sustainable hydration solutions.

The institutional segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the institutional segment is predicted to witness the highest growth rate, as corporates, hotels, and universities align with ESG mandates and sustainability goals. Innovative solutions like IoT-enabled dispensers, reusable bulk systems, and digital offset tracking tools are streamlining operations. Emerging trends span green procurement policies, LEED-aligned hydration stations, and co-branded sustainability campaigns. Recent developments include partnerships with zero-waste

logistics providers and integration into CSR reporting frameworks, driving adoption across sectors seeking measurable environmental impact and reputational value.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, due to breakthroughs in compostable packaging, aluminum bottle formats, and smart water monitoring technologies. Regulatory crackdowns on single-use plastics are pushing companies toward eco-friendly alternatives and digital infrastructure. Trends like refillable dispensers, boxed water, and blockchain-based supply chain tracking are gaining traction. Notable policy actions such as India's smart leakage initiatives and Australia's National Plastic Plan are reshaping the landscape, aligning sustainability goals with consumer demand and driving innovation across the hydration ecosystem.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, driven by advanced technologies like AI-powered leak detection, recycled PET solutions, and smart metering systems. Rising environmental regulations and shifting consumer expectations are encouraging adoption of refillable formats, sustainable packaging for functional beverages, and blockchain-enabled transparency. Major policy reforms and infrastructure upgrades are accelerating innovation, positioning plastic-neutral hydration as both a compliance necessity and a strategic advantage in the region's increasingly eco-conscious water market.

Key players in the market

Some of the key players in Plastic-Neutral Water Market include Nestle Waters, CanO Water, Danone, Nordaq, PepsiCo, Reign Water, The Coca-Cola Company, BlueTriton Brands, JUST Water, Booster Water, Liquid Death, Svalbar?i, Boxed Water Is Better, VOSS Water, Flow Hydration, Ethos Water, PATH Water, and Open Water.

Key Developments:

In July 2025, The Confederation of African Football (CAF) and Danone have announced an agreement, making Danone an Official Partner of the TotalEnergies CAF Africa Cup of Nations, Morocco 2025 and the TotalEnergies CAF Women's Africa Cup of Nations. This partnership strengthens Danone's commitment to promoting health through food across the African continent, where both sports and nutrition play an essential role at

every stage of life.

In July 2025, PepsiCo is proud to introduce Pepsi® Prebiotic Cola, the evolution of cola created to reflect the tastes and values of today's cola lovers. This innovation includes 5 grams of cane sugar, has 30 calories, and contains no artificial sweeteners. It delivers the classic crisp, refreshing taste of Pepsi with the added functional ingredient of 3 grams of prebiotic fiber.

In June 2023, OL Reign announced a two-year renewal of its partnership with Everybody Water, a purpose-driven brand focused on sustainability and equity. As the Official Water Supplier of OL Reign, Everybody Water will provide water for the club's training and matchday needs.

#### Product Types Covered:

Still Water

Sparkling Water

Functional Water

Flavored Water

Mineral Water

Other Product Types

#### Packaging Types Covered:

Percent Recycled Content Tier (Rpet)

Aluminum cans

Carton

Glass

Biodegradable Plastics

## Compostable Pouches

### Plastic-Neutral Mechanisms Covered:

Plastic Credit Purchase

Insetting

Extended Producer Responsibility (EPR)

Direct Collection & Recycling Programs

Third-Party Certification

### Price Tiers Covered:

Economy

Mid-range

Premium

Ultra-premium

### Distribution Channels Covered:

Supermarkets & Hypermarkets

Convenience & Forecourt

Foodservice

Direct-to-Consumer

Refill Stations & Vending Models

Online Retail

End Users Covered:

Commercial

Residential

Institutional

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

## Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

## South America

Argentina

Brazil

Chile

Rest of South America

## Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

#### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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