

Australia Bottled Water Market By Product Type (Spring Water, Purified Water, Mineral Water, Distilled Water, Sparkling Water, Others), By Distribution Channel (Departmental Stores, Hypermarket/ Supermarket, Online, Others), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

The Australia Bottled Water Market was valued at USD 1.24 Billion in 2024 and is expected to reach USD 1.85 Billion by 2030 with a CAGR of 6.96% during the forecast period. Bottled water comes in various types, including groundwater, purified water, mineral water, hydrogen water, and more. Through rigorous filtration and purification processes, it is free from chemicals, microorganisms, and other contaminants, ensuring a clean experience. Its convenience makes it ideal for outdoor activities, as well as office and gym use. The growing demand for purity is a key driver behind the expansion of Australia's bottled water market. Additionally, the increasing need for bottled water as a reliable source of potable water, along with its high mineral content and nutritional benefits, contributes to the market's growth, particularly driven by health-conscious consumers.

In 2024, the Australian Government announced its commitment to renewing the National Water Initiative (NWI). The new National Water Agreement (NWA) will build on the NWI's strengths to tackle both current and future water challenges. It aims to ensure sustainable water planning in the face of climate change, enhance the influence of Aboriginal and Torres Strait Islander Peoples in water management, and uphold existing water access rights. The agreement will focus on promoting a flexible management approach that adapts to evolving conditions, ensures reliable water supplies for growing urban areas and remote communities, and supports the irrigated agriculture sector,

which is particularly vulnerable to climate change impacts.

Key Market Drivers

Health and Wellness Trends

Health and wellness trends have been a significant driver of the growth in the Australian bottled water market. As consumers become more health-conscious, many are shifting away from sugary beverages and carbonated soft drinks, which are linked to obesity, diabetes, and other health issues. Bottled water, being a calorie-free, sugar-free, and hydration-focused option, has gained popularity as a healthier alternative. The growing awareness of the importance of proper hydration also plays a role. Health experts frequently emphasize the benefits of drinking enough water, which helps with digestion, skin health, and cognitive performance. As Australians increasingly prioritize wellness in their daily routines, bottled water becomes an easy, convenient solution to maintain adequate hydration levels, especially for on-the-go individuals.

The increasing awareness surrounding water-borne diseases is a significant concern that has prompted a heightened emphasis on water quality and safety measures. According to the World Counts, an alarming 3,575,000 individuals succumb to water-related diseases each year. Shockingly, the majority of these victims are children, totaling 2.2 million. In Australia, the residential sector stands as a prominent consumer of water softeners, reflecting a societal shift towards prioritizing clean water.

Convenience and On-the-Go Consumption

Convenience is another major factor fueling the growth of the Australian bottled water market. Modern, fast-paced lifestyles require easy access to hydration, especially for busy urbanites and those constantly on the move. Bottled water offers a simple, portable solution for staying hydrated, whether in the office, at the gym, or during outdoor activities. The availability of small, single-serve bottles makes it easy to carry water throughout the day without the need for refills or bulky containers. Moreover, bottled water is widely accessible at convenience stores, supermarkets, vending machines, and other retail outlets, which further boosts its popularity. The ease of grabbing a bottle while shopping or running errands aligns with consumers' increasing preference for products that fit seamlessly into their hectic routines. In addition to convenience, single-use bottled water is often perceived as more hygienic compared to refillable containers, especially in public spaces.

Environmental Awareness and Sustainability Initiatives

Environmental concerns have increasingly influenced consumer behavior, even in the bottled water market. As more Australians become aware of the environmental impact of single-use plastics, many bottled water brands have taken steps to improve sustainability practices. The move toward eco-friendly packaging, such as bottles made from recycled PET (rPET) or biodegradable materials, has helped align bottled water products with consumers' growing environmental consciousness. Companies that focus on environmental initiatives, such as reducing carbon footprints or supporting water conservation projects, appeal to environmentally aware consumers who prioritize sustainable choices. This environmental awareness is further driving demand for bottled water brands that offer transparent and responsible sourcing practices.

For instance, Sydney Water aims to introduce recycled water into its drinking supply by 2032, focusing on gaining public acceptance. The initiative involves rigorous testing to ensure the water meets safety standards. While the plan faces challenges, such as public perception and trust, Sydney Water emphasizes the benefits of reducing environmental impact and securing a sustainable water supply. The strategy will also involve educating the public about the quality and safety of recycled water.

Key Market Challenges

Environmental Impact and Plastic Waste

One of the most significant challenges faced by the Australian bottled water market is the environmental impact of plastic waste. Bottled water is typically packaged in single-use plastic bottles, which contribute to pollution, particularly in landfills and oceans. With increasing awareness about the environmental consequences of plastic waste, many consumers and advocacy groups are calling for more sustainable practices within the industry. Plastic bottles, if not properly recycled, can take hundreds of years to decompose, leading to long-term ecological damage. Despite efforts to introduce recyclable and biodegradable alternatives, the vast majority of bottled water is still packaged in plastic. This has led to a growing backlash from environmentally conscious consumers who are seeking eco-friendly alternatives, such as reusable water bottles or sustainably packaged products. Additionally, the high carbon footprint associated with the production and transportation of bottled water adds to the overall environmental burden of the market. In response to these concerns, some bottled water companies are beginning to adopt eco-friendly practices, such as using recycled materials for bottles, investing in reusable packaging, and reducing plastic waste through take-back

schemes or incentives for recycling.

Water Scarcity and Sourcing Issues

Another challenge confronting the Australian bottled water market is the increasing concern over water scarcity and the ethical implications of sourcing water for bottling. Australia, particularly in certain regions, has been facing periods of drought and water shortages, which has led to questions about the sustainability and fairness of extracting large volumes of water for commercial use. The notion of 'water privatization' and the extraction of water from natural reserves for profit has sparked public debate, especially when local communities may face restrictions on water use during times of drought. In some cases, bottled water companies have been accused of depleting water resources or over-extracting from local aquifers, contributing to long-term environmental degradation. Moreover, concerns over water pricing and the environmental cost of transporting water across vast distances further exacerbate the situation. This has prompted calls for greater regulation and transparency in how water resources are managed and used by the bottled water industry.

Key Market Trends

Shift Toward Premium and Functional Waters

One of the most prominent trends in the Australian bottled water market is the growing demand for premium and functional waters. Consumers are increasingly seeking bottled water that offers more than just basic hydration. This trend is driven by a shift toward health-conscious living and the desire for added health benefits. As a result, premium waters such as mineral water, spring water, and alkaline water are gaining popularity. These products are marketed as offering additional health benefits, such as higher mineral content, electrolytes for hydration, or an alkalizing effect that may help balance the body's pH levels. Functional waters, such as enhanced waters infused with vitamins, antioxidants, electrolytes, or herbs, are also becoming a significant part of the market. These waters often claim to offer additional benefits such as improved digestion, energy boosts, or enhanced immunity. For example, some brands are incorporating ingredients like coconut water, collagen, or CBD into their bottled water products, capitalizing on the growing consumer interest in natural wellness products. Consumers are willing to pay a premium for these waters, viewing them not just as a beverage but as part of a broader wellness routine.

Rise in Bottled Water Consumption in Health-Conscious Segments

The increasing health consciousness among Australians is fueling the rise in bottled water consumption, particularly within health-conscious segments of the population. As more people embrace fitness, wellness, and overall healthy living, bottled water has become an essential part of their daily routine. Consumers are choosing bottled water over sugary sodas, energy drinks, and other high-calorie beverages, which are seen as contributing to various health issues, including weight gain and metabolic disorders. This trend is particularly noticeable among younger Australians, including millennials and Generation Z, who are more likely to prioritize health and fitness in their lifestyles. Many of these consumers prefer bottled water for its purity and low-calorie nature, using it as a hydration source during workouts, at the office, or on-the-go. The shift toward bottled water also corresponds with the rise of fitness culture and the popularity of health-focused influencers, who often advocate for proper hydration and clean eating. Additionally, there is a growing trend of consumers seeking bottled water options that align with their specific health needs.

Segmental Insights

Product Type Insights

The purified water segment holds the largest share in the Australian bottled water market due to its broad appeal and affordability. Purified water is essentially tap water that undergoes filtration processes, such as reverse osmosis or distillation, to remove impurities, chemicals, and minerals, offering consumers a clean and neutral taste. This segment is popular among price-sensitive consumers because purified water tends to be more affordable compared to other premium bottled water options, such as mineral or spring water. Additionally, its widespread availability in supermarkets, convenience stores, and vending machines makes it a convenient choice for consumers seeking hydration on the go. Purified water's appeal is further enhanced by its perceived safety and purity, which aligns with increasing consumer concerns about water quality. As Australians become more conscious of contaminants and pollutants in tap water, purified water provides a trusted alternative. This has led to significant growth in demand, particularly among households, offices, and public spaces.

Regional Insights

Queensland is the dominating region in the Australian bottled water market, contributing significantly to the overall demand. This is largely due to the state's warm climate, which drives high consumption of bottled water throughout the year. With hot

temperatures and frequent outdoor activities, particularly in coastal areas and tropical regions, the need for hydration is a key factor in the region's dominance. Queensland's tourism industry also plays a crucial role in driving bottled water sales. The state's major tourist destinations, such as the Great Barrier Reef, Gold Coast, and Cairns, attract millions of visitors annually, many of whom purchase bottled water for convenience and to stay hydrated during their travels. As a popular tourist hub, Queensland experiences a surge in bottled water demand, especially in the hospitality and retail sectors. Additionally, the increasing health-consciousness among Queensland residents, along with the rising trend of outdoor activities and fitness, has further boosted bottled water consumption.

Key Market Players

The Coca-Cola Company

Asahi Holdings (Australia) Pty Ltd.

Fruit Splash

Beloka Water Pty Limited

Neverfail Springwater Proprietary Limited

Fiji Water Company LLC

West Coast Spring Water Pty Ltd.

Eneco Refresh Limited

Endeavour Group Limited

Three Bays

Report Scope:

In this report, the Australia Bottled Water Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Australia Bottled Water Market, By Product Type:

Spring Water

Purified Water

Mineral Water

Distilled Water

Sparkling Water

Others

Australia Bottled Water Market, By Distribution Channel:

Departmental Stores

Hypermarket/ Supermarket

Online

Others

Australia Bottled Water Market, By Region:

New South Wales

Victoria

Queensland

South Australia

Western Australia

Tasmania

Northern Territory

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Australia Bottled Water Market.

Available Customizations:

Australia Bottled Water Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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