

# Packaged Bottled Water Market in India, 2013 - 2018

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## Abstracts

ValueNotes presents a research report on the packaged bottled water industry in India. This industry report covers intelligence on the market size, growth, industry trends, industry attractiveness, and Porter's analysis. The report covers fiscal years 2013 through 2018.

Rising safety and hygiene awareness, following incidents of waterborne diseases in major cities across India has boosted the growth of the packaged bottled water industry in India. This exponential growth has amplified the per capita consumption of bottled water to more than 20 liters, while it was only 4-5 liters in the late 1990's.

### Key findings:

The packaged bottled water industry in India is currently valued at INR 60bn (~USD 1billion) in FY 2013 and has been growing at ~15% for the last three years. ValueNotes estimates that the industry will be worth approximately INR 160bn (~USD 2.67billion) by FY 2018, growing at CAGR of ~22%.

The packaged bottled water industry is segmented into:

**Packaged drinking water:** Packaged drinking water means water derived from any source of potable water and subjected to various treatments to meet the prescribed standard before being packed in a plastic or glass container

**Natural mineral water:** Water containing less than 250ppm of total dissolved solids are defined as natural mineral water

Packaged drinking water, which holds about 85% of the market, is witnessing

strong growth owing to various factors such as changes in life style, increase in Foreign Tourist Arrivals (FTAs), health awareness, etc. Natural mineral water on the other hand, which falls under the premium water segment and is primarily consumed by the urban populace owing to its high cost, will witness growth that will be restricted to urban consumers.

The Bureau of Indian Standards (BIS) had formulated Indian Standard (IS) for packaged drinking water (PDW) and packaged natural mineral water (PNMW) under mandatory BIS certification as per Food Safety and Standards Regulation (FSS). This implementation led major players to acquire ISI and BIS certifications to avoid any cancellation of licenses.

The increase in the number of domestic and foreign tourists in the past years, and in the years to come, is expected to be a major driver for bottled water sales in India

The report includes profiles of the top 5 players with a brief overview about their service offerings, key financial ratios, expansion strategies, etc.

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## About

The shortage of drinking water supply and contamination of water bodies have paved the path for the bottled water industry to boom in India in the last few years. A majority of households in the country either use boiled water or have water purifiers installed for accessing safe drinking water. But when traveling or eating out, bottled water has become a necessity. This need has given rise to the emergence of companies in the bottled water industry.

Currently the packaged bottled water industry accounts for ~25% of the non-aerated beverages sector, and was valued at about INR 60bn in FY 2013. The industry is expected to grow at a CAGR of 22% until 2018 to reach INR 160bn. This high boost is due to the rise in disposable income, an influx of tourists, a shortage of potable water, lifestyle changes, increasing health consciousness among Indian consumers, etc.

The bottled water industry is segmented into the following categories:

- Natural mineral water

- Spring water

- Premium natural mineral water

- Packaged drinking water

The packaged drinking water contributes to about 85% of the total market, while natural mineral water 15%. The natural mineral water falls under the premium segment and is mostly consumed by the urban population, due to its high cost. This segment is expected to gain popularity based on the aggressive promotion of the players exhibiting it as natural spring water. It is further fueled by international tourists who opt for natural mineral water along with local consumers who have experienced the same on travel abroad.

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