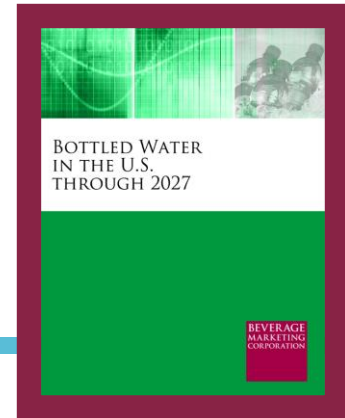


BOTTLED WATER IN THE U.S. THROUGH 2027

2023 EDITION (Published September 2023. Data through 2022. Market projections through 2027.) More than 325 pages, with extensive text analysis, graphs, charts and more than 125 tables.



This definitive U.S. bottled water market report from Beverage Marketing Corporation looks at the largest beverage category by volume and considers every aspect of this resilient category, the forces propelling its continued growth and its competitive circumstances. Sparkling, non-sparkling, imports, HOD, branded and private label, BMC dives into the details to look at the trends – where they've been and where they're headed. From discussions of the impact of the Coronavirus pandemic to detailed analysis of key companies' and brands' activities and sales results, this report covers it all. It also offers detailed analysis and data to put industry trends in perspective by covering nuances such as regional and state markets as well as packaging, quarterly category growth, distribution, advertising, demographics and more. Data is provided from various vantage points from volume to retail and wholesale dollars to add perspective to this total market, all-sales-channel inclusive study of the on and off-premise bottled water industry. Meanwhile, discussion of trends and issues adds color and insight to the statistics.

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INSIDE:

REPORT OVERVIEW

A brief discussion of key features of this report. **2**

TABLE OF CONTENTS

A detailed outline of this report's contents and data tables. **7**

SAMPLE TEXT AND INFOGRAPHICS

A few examples of this report's text, data content layout and style. **15**



HAVE QUESTIONS?

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THE ANSWERS YOU NEED

Bottled Water in the U.S. through 2027 provides in-depth data and market analysis, shedding light on various aspects of the market through reliable data and discussions of what the numbers really mean. Questions answered include:

- How did the various bottled water market segments perform in 2022, and how are they like to develop by 2027? What factors are driving the trends?
- Which bottled water companies and brands experienced growth in 2022, and which did not?
- Which non-sparkling water distribution channels will gain market share by 2027?
- How much bottled water is consumed per capita in the United States, how has this changed in recent years, and what is driving these developments?
- Which package sizes and types are hot right now and which are not?
- Which nations ship the most bottled water to the United States?
- What are the drivers of the home- and office-delivery market for bottled water?

THIS BOTTLED WATER RESEARCH REPORT FEATURES

The most comprehensive report available, *Bottled Water in the U.S. through 2027* surveys the domestic landscape of the leading beverage category. The study provides volume, retail dollar, wholesale dollar and per capita consumption figures and provides analysis that gives true perspective to the wealth of historical, current and forecasted data it provides. An in-depth look at the leading companies and brands in the category and the drivers likely to propel consumption growth through 2027 are also provided.

Further, all aspects of the bottled water market are considered, including segmentation by package size, distribution channels, water type and source. Advertising and demographic data are also included. Backed by Beverage Marketing's reliable, all-sales-channel-inclusive research, this authoritative report provides readers a complete and thorough understanding of the bottled water landscape including:

- Historical and current statistics on all facets of the bottled water market, as well as insight into current trends and market drivers including the aftermath of the covid-19 crisis. Data and analysis putting the U.S. market in context of the global perspective.
- A regional look at the U.S. bottled water marketplace, with volume and growth of non-sparkling and sparkling water over the past three decades.
- Includes profiles of BlueTriton Brands (formerly Nestlé Waters North America), Nestle USA (which continues to handle imports such as Perrier), PepsiCo, Coca-Cola Company, Primo Water Corporation, CG Roxane, Culligan International, Keurig Dr Pepper, and Niagara Bottling. Also tracks the performance of the top domestic and imported brands.
- Detailed analysis of the home- and-office delivery (HOD) segment and the leading HOD water companies.
- Data detailing sales by key on- and off-premise, as well as non-retail, distribution channels totaling 100% of market volume.
- An analysis of non-sparkling volume by container type and by size as well as sparkling volume.

- Advertising expenditures of the leading bottled water companies and a look at category spending by media type (including Internet and Spanish network TV advertising).
- Consumer demographic profiles comparing consumers of key bottled water brands.
- Overview of the seltzer and club soda market and its key players.
- Projections for the bottled water market and its sub-segments including premium PET, 1 and 2.5 gallon, bulk delivered water, imports and sparkling water through 2027, as well as five-year volume forecasts by region, distribution channels and packaging, and more.



BOTTLED WATER IN THE U.S. THROUGH 2027

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Bottled Water in the U.S. through 2027

September 2023

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NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

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Contents

Table of Contents

TABLE OF CONTENTS

TABLE OF CONTENTS -----	i
DEFINITIONS USED IN THIS REPORT-----	ix
INTRODUCTION -----	xi

Chapter

1. THE U.S. BOTTLED WATER MARKET

The Global Bottled Water Market-----	1
The National Bottled Water Market-----	2
• Volume -----	3
• Per Capita Consumption-----	4
• Volume by Segment -----	6
• Wholesale Dollar Sales -----	8
• Prices-----	9
• Seasonality-----	9
• Retail Dollar Sales -----	9
• Quarterly Growth Trends-----	10

Exhibits

1.1 Global Bottled Water Market Consumption and Annual Change 1996 – 2022 -----	11
1.2 U.S. Bottled Water Market Gallonage, Growth and Per Capita Consumption 1979 – 2027 -----	12
1.3 U.S. Bottled Water Market Non-Sparkling, Domestic Sparkling & Import Gallonage 1979 – 2027 -----	13
1.4 U.S. Bottled Water Market Gallonage by Segment 1980 – 2027 -----	14
1.5 U.S. Bottled Water Market Share of Gallonage by Segment 1980 – 2027 -----	15
1.6 U.S. Bottled Water Market Change in Gallonage by Segment 1981 – 2027 -----	16
1.7 U.S. Bottled Water Market Estimated Non-Sparkling, Sparkling and Import Wholesale Dollars and Change 1984 – 2027-----	17
1.8 U.S. Bottled Water Market Estimated Wholesale Dollars by Segment 2000 – 2027-	18
1.9 U.S. Bottled Water Market Share of Wholesale Dollars by Segment 2000 – 2027 --	19
1.10 U.S. Bottled Water Market Change in Wholesale Dollars by Segment 2001 – 2027-	20
1.11 U.S. Bottled Water Market Estimated Wholesale Dollars, Gallonage and Price 2022	21
1.12 U.S. Bottled Water Market Quarterly Volume Shares by Segment 2022-----	22
1.13 U.S. Bottled Water Market Estimated Retail Dollars 2018 – 2027-----	23
1.14 U.S. Bottled Water Market Estimated Share of Retail Dollars 2018 – 2027-----	24
1.15 U.S. Bottled Water Market Change in Retail Dollars 2019 – 2027-----	25
1.16 U.S. Bottled Water Market Estimated Volume, Share and Growth by Segment Q1 2023-----	26

TABLE OF CONTENTS

Chapter

2. THE REGIONAL BOTTLED WATER MARKETS

Regional Bottled Water Markets -----	27
• Overview -----	27
• Non-Sparkling Water -----	30
• Sparkling Water -----	31
• Per Capita Consumption-----	33

Exhibits

2.17 U.S. Bottled Water Market Gallonage by Region 2017 – 2027-----	38
2.18 U.S. Bottled Water Market Share of Gallonage by Region 2017 – 2027 -----	39
2.19 U.S. Bottled Water Market Change in Gallonage by Region 2018 – 2027-----	40
2.20 U.S. Non-Sparkling Bottled Water Market Gallonage by Region 2017 – 2027 -----	41
2.21 U.S. Non-Sparkling Bottled Water Market Share of Gallonage by Region 2017 – 2027 -----	42
2.22 U.S. Non-Sparkling Bottled Water Market Change in Gallonage by Region 2018 – 2027 -----	43
2.23 U.S. Sparkling Bottled Water Market Gallonage by Region 2017 – 2027 -----	44
2.24 U.S. Sparkling Bottled Water Market Share of Gallonage by Region 2017 – 2027 --	45
2.25 U.S. Sparkling Bottled Water Market Change in Gallonage by Region 2018 – 2027	46
2.26 U.S. Bottled Water Market Per Capita Consumption by Region 2017 – 2027-----	47
2.27 U.S. Non-Sparkling Bottled Water Market Per Capita Consumption by Region 2017 – 2027 -----	48
2.28 U.S. Sparkling Bottled Water Market Per Capita Consumption by Region 2017 – 2027 -----	49

3. THE HOD WATER MARKET

Home- and Office-Delivered Bottled Water -----	50
• Overview -----	50
• Recent Developments -----	56
• Leading Companies and Brands -----	57
• Number of Coolers-----	60

Exhibits

3.29 The Leading HOD Bottled Water Companies Estimated Water Only Revenues 2017 – 2022 -----	61
3.30 The Leading HOD Bottled Water Companies Share of Estimated Water Only Revenues 2017 – 2022-----	62
3.31 The Leading HOD Bottled Water Companies Change in Estimated Water Only Revenues 2018 – 2022-----	63
3.32 The Leading HOD Bottled Water Companies Estimated Water Only Volume 2017 – 2022 -----	64
3.33 The Leading HOD Bottled Water Companies Share of Estimated Water Only Volume 2017 – 2022 -----	65

TABLE OF CONTENTS

Chapter

3. THE HOD WATER MARKET (cont'd)

Exhibits (cont'd)

3.34	The Leading HOD Bottled Water Companies Change in Estimated Water Only Volume 2018 – 2022 -----	66
3.35	The Leading HOD Bottled Water Brands Estimated Water Only Revenues 2017 – 2022 -----	67
3.36	The Leading HOD Bottled Water Brands Share of Estimated Water Only Revenues 2017 – 2022 -----	68
3.37	The Leading HOD Bottled Water Brands Change in Estimated Water Only Revenues 2018 – 2022-----	69
3.38	U.S. Water Cooler Market Estimated Millions of Units in Operation 1990 – 2027 ---	70

4. THE IMPORTED BOTTLED WATER MARKET

Imported Bottled Water-----	71
• Overview -----	71
• Volume -----	72
Volume of Imports by Origin -----	73
• Regions of Origin -----	73
• Countries of Origin -----	74
Value of Imports by Origin-----	76
• Regions of Origin -----	76
• Countries of Origin -----	77
• Dollars Per Gallon-----	78
Imported Volume by Type -----	80
• Imported Sparkling and Non-Sparkling Water -----	80

Exhibits

4.39	Imported Bottled Water Market Gallonage, Sales and Growth 1979 – 2027-----	81
4.40	Imported Bottled Water Market Gallonage by Region 2017 – 2022 -----	82
4.41	Imported Bottled Water Market Share by Region 2017 – 2022 -----	83
4.42	Imported Bottled Water Market Change by Region 2018 – 2022-----	84
4.43	Leading Imported Water Countries Gallonage 2017 – 2022 -----	85
4.44	Leading Imported Water Countries Share 2017 – 2022-----	86
4.45	Leading Imported Water Countries Gallonage Growth 2018 – 2022 -----	87
4.46	Imported Bottled Water Market Dollar Value by Region 2017 – 2022-----	88
4.47	Imported Bottled Water Market Dollar Share by Region 2017 – 2022 -----	89
4.48	Imported Bottled Water Market Dollar Growth by Region 2018 – 2022-----	90
4.49	Leading Imported Water Countries Dollar Value 2017 – 2022-----	91
4.50	Leading Imported Water Countries Share of Dollar Value 2017 – 2022 -----	92
4.51	Leading Imported Water Countries Change in Dollar Value 2018 – 2022-----	93
4.52	Leading Imported Water Countries Dollars Per Gallon 2017 – 2022 -----	94

TABLE OF CONTENTS

Chapter

4. THE IMPORTED BOTTLED WATER MARKET (cont'd)

Exhibits (cont'd)

4.53	Imported Bottled Water Market Volume by Type 1994 – 2027 -----	95
4.54	Imported Bottled Water Market Share of Imports by Type 1994 – 2027 -----	96
4.55	Imported Bottled Water Market Growth by Type 1995 – 2027 -----	97

5. BOTTLED WATER DISTRIBUTION CHANNELS AND PRICING

Bottled Water Volume by Distribution Channel-----	98
Non-Sparkling Volume by Distribution Channel -----	104
Domestic Sparkling Volume by Distribution Channel-----	107
Imported Volume by Distribution Channel-----	108
PET Water Share by Outlet -----	109
Bottled Water Dollar Sales by Distribution Channel -----	111
Bottled Water Dollar Sales by Channel & Water Type-----	113
Bottled Water Sales Average Price Per Gallon -----	114
• Non-Sparkling -----	114
• Domestic Sparkling-----	115
• Imports-----	115
• Average Price in Supermarkets -----	115

Exhibits

5.56	U.S. Bottled Water Market Volume by Type of Distribution 2017 – 2027 -----	116
5.57	U.S. Bottled Water Market Share by Type of Distribution 2017 – 2027-----	117
5.58	U.S. Bottled Water Market Growth by Type of Distribution 2018 – 2027 -----	118
5.59	U.S. Bottled Water Market Volume by Distribution Channel 2017 – 2027 -----	119
5.60	U.S. Bottled Water Market Share of Volume by Distribution Channel 2017 – 2027 -	120
5.61	U.S. Bottled Water Market Change in Volume by Distribution Channel 2018 – 2027 -----	121
5.62	U.S. Bottled Water Market Gallonage by Water Type and Distribution 2012 – 2027	122
5.63	U.S. Bottled Water Market Gallonage Share by Water Type and Distribution 2012 – 2027 -----	123
5.64	U.S. Bottled Water Market Growth by Water Type and Distribution 2013 – 2027---	124
5.65	U.S. PET Water Market Volume by Distribution Channel 2017 – 2027 -----	125
5.66	U.S. PET Water Market Share of Volume by Distribution Channel 2017 – 2027-----	126
5.67	U.S. PET Water Market Change in Volume by Distribution Channel 2018 – 2027 ---	127
5.68	U.S. Bottled Water Market Wholesale Dollar Sales by Type of Distribution 2017 – 2027 -----	128
5.69	U.S. Bottled Water Market Share of Wholesale Dollar Sales by Type of Distribution 2017 – 2027 -----	129
5.70	U.S. Bottled Water Market Dollar Growth by Type of Distribution 2018 – 2027-----	130
5.71	U.S. Bottled Water Market Wholesale Dollar Sales by Water Type and Distribution 2012 – 2027 -----	131

TABLE OF CONTENTS

Chapter

5. BOTTLED WATER DISTRIBUTION CHANNELS AND PRICING (cont'd)

Exhibits (cont'd)

5.72	U.S. Bottled Water Market Share of Wholesale Dollar Sales by Water Type and Distribution 2012 – 2027 -----	132
5.73	U.S. Bottled Water Market Wholesale Dollar Growth by Water Type and Distribution 2013 – 2027 -----	133
5.74	U.S. Bottled Water Market Average Per Gallon Wholesale Price by Water Type and Distribution 2012 – 2027-----	134
5.75	U.S. Bottled Water Market Change in Average Per Gallon Wholesale Price 2013 – 2027 -----	135
5.76	U.S. Bottled Water Market Average Price Per Unit in Grocery Stores 2017 – 2027 -	136

6. BOTTLED WATER PACKAGING

	Bottled Water Packaging Developments -----	137
	Non-Sparkling Volume by Container Type -----	140
	Non-Sparkling Volume by Container Size and Channel -----	141
	Sparkling Volume by Container Type -----	144

Exhibits

6.77	Domestic Non-Sparkling and Sparkling Water Volume by Container Material 2017 – 2027 -----	146
6.78	Domestic Non-Sparkling and Sparkling Water Share by Container Material 2017 – 2027 -----	147
6.79	Domestic Non-Sparkling and Sparkling Water Growth by Container Material 2018 – 2027 -----	148
6.80	Domestic Non-Sparkling Water Volume by Container Material 2017 – 2027 -----	149
6.81	Domestic Non-Sparkling Water Share by Container Material 2017 – 2027 -----	150
6.82	Domestic Non-Sparkling Water Growth by Container Material 2018 – 2027-----	151
6.83	Domestic Non-Sparkling Water Volume by Container Size 2017 – 2027-----	152
6.84	Domestic Non-Sparkling Water Share by Container Size 2017 – 2027 -----	153
6.85	Domestic Non-Sparkling Water Growth by Container Size 2018 – 2027-----	154
6.86	Domestic Sparkling Water Volume by Container Material 2017 – 2027-----	155
6.87	Domestic Sparkling Water Share by Container Material 2017 – 2027-----	156
6.88	Domestic Sparkling Water Growth by Container Material 2018 – 2027 -----	157

7. THE LEADING BOTTLED WATER COMPANIES AND THEIR BRANDS

	The Leading Companies and Their Brands -----	158
	BlueTriton Brands -----	161
	• Poland Spring -----	169
	• Arrowhead -----	173
	• Deer Park -----	177
	• Ozarka-----	178
	• Zephyrhills -----	178

TABLE OF CONTENTS

Chapter

7. THE LEADING BOTTLED WATER COMPANIES AND THEIR BRANDS (cont'd)

BlueTriton Brands (cont'd)	
• Ice Mountain -----	179
• Pure Life-----	181
• Saratoga Spring -----	185
Nestlé USA-----	186
• Perrier -----	188
• San Pellegrino -----	191
PepsiCo, Inc.-----	192
• Aquafina-----	192
• bubly -----	198
Coca-Cola Company-----	200
• Dasani-----	201
• AHA-----	205
• Topo Chico -----	206
Primo Water Corporation -----	208
Danone Waters North America -----	224
• Evian -----	225
CG Roxane LLC -----	230
• Alpine Spring-----	230
Culligan International -----	233
Keurig Dr Pepper -----	236
Niagara Bottling, LLC-----	238
The PET Water Market -----	241
The Leading Imported Bottled Water Brands -----	242
• Evian -----	242
• Fiji -----	242
• San Pellegrino -----	247
• Perrier-----	247
• Volvic-----	247
• Acqua Panna -----	248
• Voss -----	249
• Icelandic Glacial -----	251
Exhibits	
7.89 Leading Bottled Water Companies Estimated Wholesale Dollar Sales 2017 – 2022 -	253
7.90 Leading Bottled Water Companies Share of Estimated Wholesale Dollar Sales 2017 – 2022 -----	254
7.91 Leading Bottled Water Companies Change in Estimated Wholesale Dollar Sales 2018 – 2022 -----	255
7.92 Leading Bottled Water Companies Estimated Volume 2017 – 2022-----	256
7.93 Leading Bottled Water Companies Share of Estimated Volume 2017 – 2022-----	257

TABLE OF CONTENTS

Chapter

7. THE LEADING BOTTLED WATER COMPANIES AND THEIR BRANDS (cont'd)

Exhibits (cont'd)

7.94	Leading Bottled Water Companies Change in Estimated Volume 2018 – 2022 -----	258
7.95	Leading Bottled Water Companies Estimated Wholesale Dollar Sales by Brand 2017 – 2022 -----	259
7.96	Leading Bottled Water Companies Estimated Share of Wholesale Dollar Sales by Brand 2017 – 2022 -----	261
7.97	Leading Bottled Water Companies Estimated Change in Wholesale Dollar Sales by Brand 2018 – 2022 -----	263
7.98	Leading Bottled Water Brands Wholesale Dollar Sales 2017 – 2022 -----	265
7.99	Leading Bottled Water Brands Share of Wholesale Dollar Sales 2017 – 2022 -----	266
7.100	Leading Bottled Water Brands Change in Wholesale Dollar Sales 2018 – 2022 -----	267
7.101	PET Water Market in the U.S. Estimated Volume by Company 2017 – 2022 -----	268
7.102	PET Water Market in the U.S. Volume Share by Company 2017 – 2022 -----	269
7.103	PET Water Market in the U.S. Change in Volume by Company 2018 – 2022 -----	270
7.104	The Leading Imported Water Brands Estimated Volume 2017 – 2022 -----	271
7.105	The Leading Imported Water Brands Share of Estimated Volume 2017 – 2022 -----	272
7.106	The Leading Imported Water Brands Volume Growth 2018 – 2022 -----	273

8. THE U.S. CLUB SODA AND SELTZER WATER MARKET

Club Soda and Seltzer Water -----	274
• Overview -----	274
• Volume -----	274
Club Soda and Seltzer Water Companies and Brands -----	277
• Overview -----	277
• Polar -----	278
• Schweppes -----	280
• Canada Dry -----	281
• Vintage -----	281
• Seagram -----	282

Exhibits

8.107	Club Soda/Seltzer Estimated Volume 2017 – 2027 -----	283
8.108	Club Soda/Seltzer Estimated Volume Share 2017 – 2027 -----	284
8.109	Club Soda/Seltzer Estimated Volume Growth 2018 – 2027 -----	285
8.110	Club Soda/Seltzer Estimated Volume by Brand 2017 – 2022 -----	286
8.111	Club Soda/Seltzer Estimated Share by Brand 2017 – 2022 -----	287
8.112	Club Soda/Seltzer Estimated Growth by Brand 2018 – 2022 -----	288

9. BOTTLED WATER BY SOURCE

Purified and Spring Water -----	289
• Overview -----	289
• Volume -----	290

TABLE OF CONTENTS

Chapter

9. BOTTLED WATER BY SOURCE (cont'd)

Exhibits

9.113 Retail PET Bottled Water Volume by Source 2000 – 2027 ----- 292
 9.114 Retail PET Bottled Water Share by Source 2000 – 2027 ----- 293
 9.115 Retail PET Bottled Water Growth by Source 2001 – 2027 ----- 294

10. BOTTLED WATER ADVERTISING EXPENDITURES

Bottled Water Advertising----- 295
 • Overview ----- 295
 • Domestic Brands----- 297
 • Imported Brands----- 299

Bottled Water Advertising by Media ----- 300

Exhibits

10.116 U.S. Bottled Water Market Advertising Expenditures 1979 – 2022 ----- 302
 10.117 U.S. Domestic Bottled Water Advertising Expenditures 1979 – 2022 ----- 303
 10.118 Imported Bottled Water Advertising Expenditures 1979 – 2022----- 304
 10.119 Leading Domestic Brands by Advertising Expenditures 2017 – 2022 ----- 305
 10.120 Leading Domestic Brands by Share of Advertising Expenditures 2017 – 2022 ----- 306
 10.121 Leading Domestic Brands Change in Advertising Expenditures 2018 – 2022 ----- 307
 10.122 Leading Imported Brands by Advertising Expenditures 2017 – 2022 ----- 308
 10.123 Leading Imported Brands by Share of Advertising Expenditures 2017 – 2022 ----- 309
 10.124 Leading Imported Brands Change in Advertising Expenditures 2018 – 2022 ----- 310
 10.125 Estimated Advertising Expenditures for All Bottled Water Brands by Media
 2017 – 2022 ----- 311
 10.126 Estimated Share of Advertising Expenditures for All Bottled Water Brands by
 Media 2017 – 2022----- 312
 10.127 Estimated Change in Advertising Expenditures for All Bottled Water Brands by
 Media 2018 – 2022----- 313

11. DEMOGRAPHICS OF THE BOTTLED WATER CONSUMER

Users of Bottled Waters in the U.S. ----- 314
 • Overview ----- 314
 • Comparative Demographics of Bottled Water Brands ----- 318

Exhibits

11.128 Demographics of the Bottled Water Consumer 2022----- 322
 11.129 Demographics of the Evian Consumer 2022 ----- 324
 11.130 Demographics of the Aquafina Consumer 2022 ----- 326
 11.131 Demographics of the Dasani Consumer 2022----- 328

Appendix

A. U.S. Population by Region 1981 – 2022 ----- 330

**U.S. BOTTLED WATER MARKET
GROWTH BY WATER TYPE AND DISTRIBUTION
2013 – 2027(P)**

Type	Year	Home	Commercial	Retail		Vending	Total Growth
				Off-Premise	On-Premise		
Non-Sparkling	2012/13	10%	10%	10%	10%	10%	10%
	2013/14	10%	10%	10%	10%	10%	10%
	2014/15	10%	10%	10%	10%	10%	10%
	2015/16	10%	10%	10%	10%	10%	10%
	2016/17	10%	10%	10%	10%	10%	10%
	2017/18	10%	10%	10%	10%	10%	10%
	2018/19	10%	10%	10%	10%	10%	10%
	2019/20	10%	10%	10%	10%	10%	10%
	2020/21	10%	10%	10%	10%	10%	10%
	2021/22	10%	10%	10%	10%	10%	10%
	2022/27(P)	10%	10%	10%	10%	10%	10%
Domestic Sparkling	2012/13	10%	10%	10%	10%	10%	10%
	2013/14	10%	10%	10%	10%	10%	10%
	2014/15	10%	10%	10%	10%	10%	10%
	2015/16	10%	10%	10%	10%	10%	10%
	2016/17	10%	10%	10%	10%	10%	10%
	2017/18	10%	10%	10%	10%	10%	10%
	2018/19	10%	10%	10%	10%	10%	10%
	2019/20	10%	10%	10%	10%	10%	10%
	2020/21	10%	10%	10%	10%	10%	10%
	2021/22	10%	10%	10%	10%	10%	10%
	2022/27(P)	10%	10%	10%	10%	10%	10%
Imports	2012/13	10%	10%	10%	10%	10%	10%
	2013/14	10%	10%	10%	10%	10%	10%
	2014/15	10%	10%	10%	10%	10%	10%
	2015/16	10%	10%	10%	10%	10%	10%
	2016/17	10%	10%	10%	10%	10%	10%
	2017/18	10%	10%	10%	10%	10%	10%
	2018/19	10%	10%	10%	10%	10%	10%
	2019/20	10%	10%	10%	10%	10%	10%
	2020/21	10%	10%	10%	10%	10%	10%
	2021/22	10%	10%	10%	10%	10%	10%
	2022/27(P)	10%	10%	10%	10%	10%	10%
Total Gallonage By Outlet	2012/13	10%	10%	10%	10%	10%	10%
	2013/14	10%	10%	10%	10%	10%	10%
	2014/15	10%	10%	10%	10%	10%	10%
	2015/16	10%	10%	10%	10%	10%	10%
	2016/17	10%	10%	10%	10%	10%	10%
	2017/18	10%	10%	10%	10%	10%	10%
	2018/19	10%	10%	10%	10%	10%	10%
	2019/20	10%	10%	10%	10%	10%	10%
	2020/21	10%	10%	10%	10%	10%	10%
	2021/22	10%	10%	10%	10%	10%	10%
	2022/27(P)	10%	10%	10%	10%	10%	10%

(P) Projected

Note: The 2022/27 figures are the projected five-year compound annual growth rates.

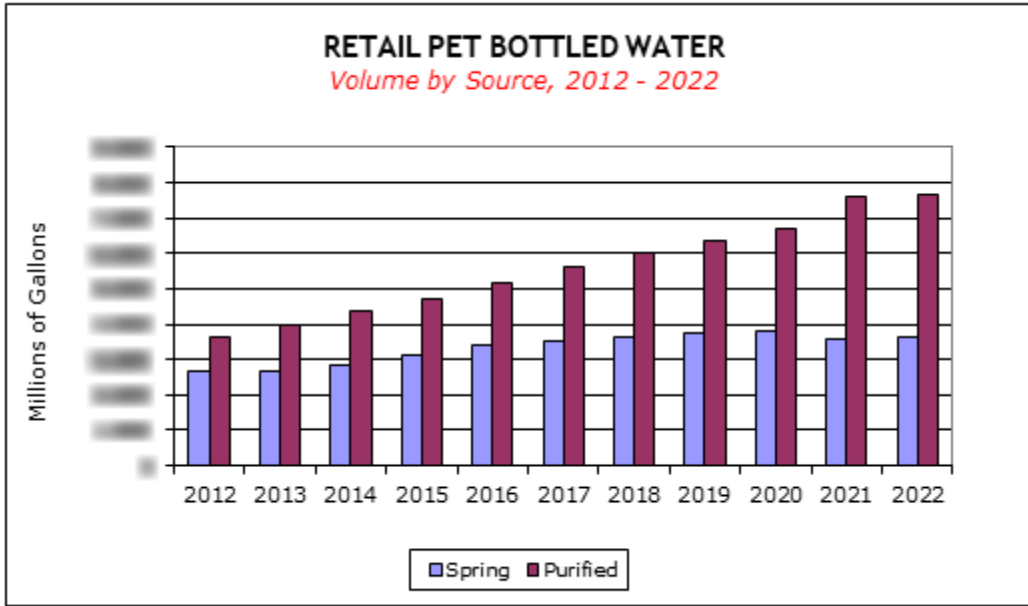
Source: Beverage Marketing Corporation

The cost of distribution is a key factor in the HOD water segment.

- This is particularly the case when gas prices are high. Driving trucks becomes a very expensive proposition, whether it is delivering beer, HOD water or some other product. Thus, the price of HOD water to the customer has gone up and the days of “free” delivery of HOD water are over.
- Although one way for HOD companies to absorb the higher costs is to charge more for their delivered water, customers will not accept large price increases given the relatively cheap price of PET and HDPE water at retail — particularly in markets where there is strong competition among HOD water companies.
- Also, in most cases, HOD water is the only beverage purchase that shows up on an individual’s monthly statement. If money is in short supply in the household, the delivered water service will likely be judged an unnecessary luxury.
- Companies have come up with a way to hold the price on HOD water while still raising prices: the fuel surcharge. A fuel surcharge is indexed to the price of oil. For example, in fiscal 2010, Crystal Rock’s fuel surcharge increased by 26%.
- Higher oil prices also increase resin costs, which are critical to bottle production, and heating costs for HOD bottling facilities.
- As an example, Crystal Rock reported that “fees that are charged to offset energy costs for delivery and freight, raw materials, and bottling operations” comprised 3% of its total sales in fiscal 2016 and 2017, up from 2% in FY2015.
- Another way in which HOD companies bring in revenues is through late fees. However, in August 2011, a consumer in New Jersey sued NWN in federal court, alleging that it charges an immediate hefty late fee in disregard of its own enumerated 10-day grace period for tardy payments.

HOD water companies relied more heavily on cooler rentals in the 1980s and 1990s.

- Water cooler rentals accounted for an estimated 40% of revenues and 60% of profits of HOD companies. The reason is that coolers could be refurbished easily (and thus last a long time), and companies could charge monthly rental fees well above the coolers’ depreciation and amortization costs. Unlike delivery of water bottles, which entails labor and fuel costs, there are no significant costs associated with water coolers — except the cost of reclaiming them from former customers and for occasional repairs.
- Cooler rental contracts also served to lock customers into HOD water service. Some customers would elect to continue receiving deliveries rather than deal with the hassle of staying home from work and waiting for a driver to pick up the cooler from the home.



Source: Beverage Marketing Corporation