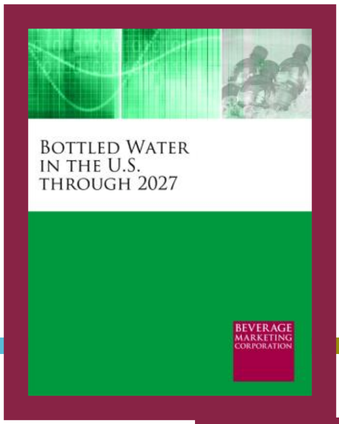
BOTTLED WATER IN THE U.S. THROUGH 2027

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.



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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:

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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:

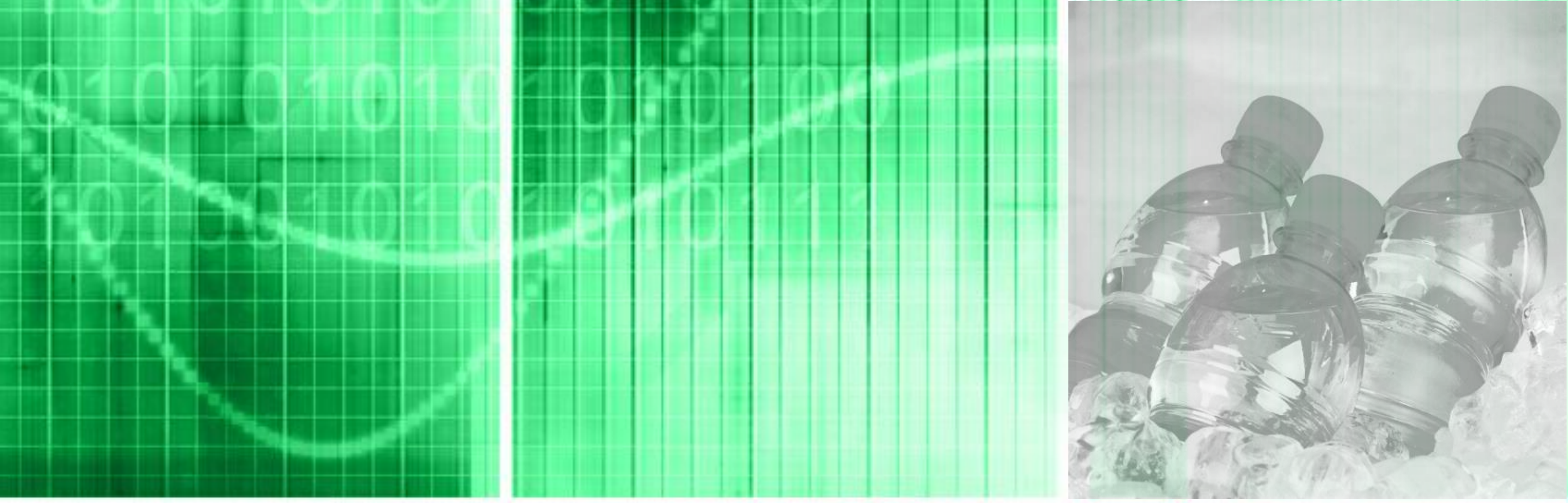
- Historical and current statistics on all facets of the bottled water market, as well as insight into current trends and market drivers including the aftermath of the covid-19 crisis. Data and analysis putting the U.S. market in context of the global perspective.
- A regional look at the U.S. bottled 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

BEVERAGE MARKETING CORPORATION

Bottled Water in the U.S. through 2027

September 2023

BEVERAGE MARKETING CORPORATION

RESEARCH ● DATA ● CONSULTING

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

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Appendix

Exhibit 5.64

U.S. BOTTLED WATER MARKET

GROWTH BY WATER TYPE AND DISTRIBUTION

2013 — 2027(P)

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

(P) Projected

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

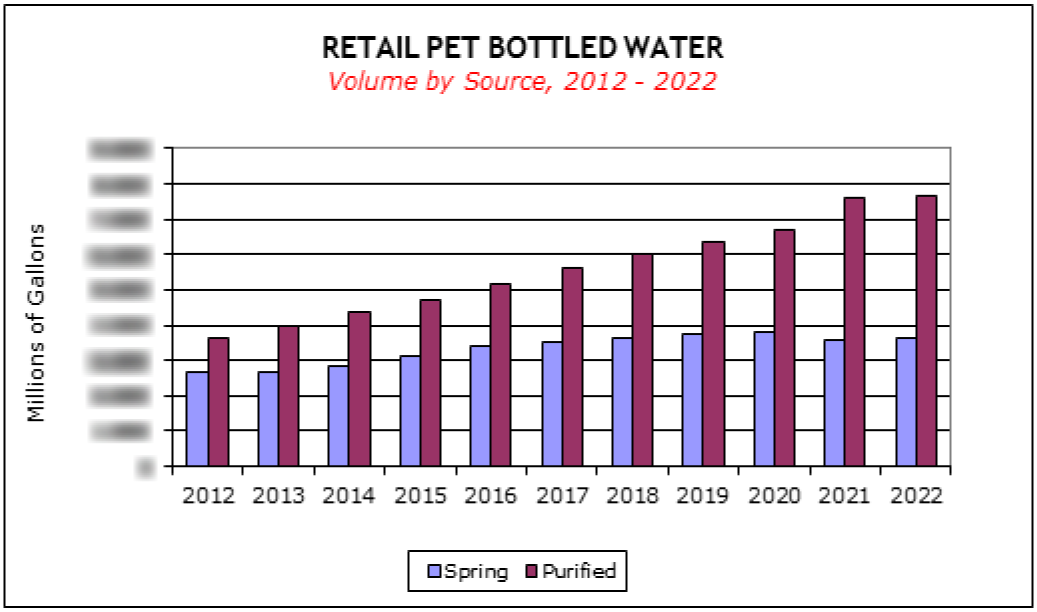
Source: Beverage Marketing Corporation

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 NWNA 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