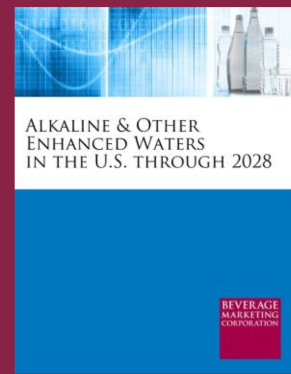
ALKALINE & OTHER ENHANCED WATERS IN THE U.S. THROUGH 2028

2024 EDITION (To be published November 2024. Data through 2023, preliminary 2024 figures and forecasts through 2028.) More than 175 pages, with extensive text analysis, graphs, charts and tables.



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More than just water. This research report on the rapidly evolving segments of the U.S. value-added water industry assesses the current state and future expectations for a market characterized by innovation and new product entries with increasingly varied ingredients and functional benefits. It provides an overview of the sub-segments including alkaline water, regular and low-calorie enhanced waters, flavored water and essence water, examining sales, growth, share, distribution channels and more. Principal competitors are identified along with small, growing companies and their brands. It includes analysis of leading brands' advertising expenditures, market drivers that will propel growth and five year market projections. It also discusses and quantifies niche water beverage segments (such as floral waters, weight management/keto waters, wine waters, detox waters, etc.) that are not included in value-added water market totals but are considered separately in a dedicated chapter. These emerging and increasingly fragmented functional benefit or ingredient-based beverage segments are quantified and discussed and their growth prospects through 2028 are forecasted. The market forces driving innovation and blurring the lines between beverage segments as interest in premium quasi-water beverages continues is also discussed and analyzed. The impact of the Coronavirus pandemic is also discussed.

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HAVE QUESTIONS? Contact Charlene Harvey: 212-688-7640 x 250
charvey@beveragemarketing.com

BEVERAGE MARKETING CORPORATION
P.O. Box 2399 | 143 Canton Road, 2nd Floor
Wintersville, OH 43953
Tel: 212-688-7640 Fax: 740-314-8639

THE ANSWERS YOU NEED

Alkaline and Other Enhanced Waters in the U.S. through 2028 provides in-depth data and market analysis, shedding light on various aspects of the market through BMC's reliable data and discussions of what the numbers really mean. Questions answered in this market report include:

- What are the leading brands, how did they perform in 2023 and what is the preliminary read on how their year-end numbers will shake out in 2024?
- What product types comprise the category? What percentage of market share does each sub-segment hold? What segments comprise the newly-added niche water beverage category?
- What trends and developments drive the U.S. market for enhanced and other value added waters? How big are the niche water beverage segments?
- How big is the U.S. value-added bottled water market, as measured in wholesale dollars and gallons?
- What is the likely market size for flavored, enhanced, alkaline and other value-added waters over the next five years? What is the likely size of the niche water beverage segment in 2028?
- There is much excitement about innovative niche segments based on function or premium ingredients. How big are the plant water, protein waters, detox waters, wine waters, flower/floral waters, spice/herbal waters, weight-management/keto waters, collagen/beauty water and rain water segments? How large are they expected to be by 2028?

THIS U.S. VALUE ADDED WATER REPORT FEATURES

The report assesses the historical and current state of the market and provides a look forward at category expectations through 2028. Category performance is analyzed through discussion of trends as well as a look at volume, retail dollar, wholesale dollar and per capita consumption figures. The report provides an in-depth look at the leading companies and brands in the category and the drivers likely to propel consumption growth.

This comprehensive industry report includes analysis of distribution channels, packaging, advertising expenditures and demographics - as well as category projections. Through in-depth analysis backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, readers of this market research get a thorough understanding of all facets of the market including:

- An overview and current statistics of the overall bottled water, as well as value-added water markets.
- A drill-down into the various sub-segments of the market, with statistical data on volume, per capita consumption and wholesale dollars by sub-segment for regular enhanced water, low-calorie enhanced water, flavored water, alkaline water and essence water.
- Detailed profiles and analysis of the leading companies and brands, discussions of their marketing activities and distribution strategies as well as company and brand sales volume data. Coverage includes Coca-Cola Company, PepsiCo, BlueTriton Brands, Nestlé USA, Alkaline Water Company, Keurig Dr Pepper (Bai and Core), Aquahydrate, Hint Inc., Evamor and Talking Rain.

- Brand volume and wholesale data, growth and market share for leading alkaline water brands including: Essentia, Core Hydration, Alkaline 88,, Re2al Alkalized Water and Aquahydrate. Detailed performance results for key essence waters including: Smartwater, Vitaminwater, Bai, Propel, Vitaminwater Zero, LIFEWTR, SoBeWater Zero, Penta, SoBeWater and Private label. Plus, in-depth sales data for flavored water brands including: Splash Blast, Capri Sun Roarin' Waters, Aquafina Splash, Fruit2O and the private label market.

- Data detailing volume of the value-added water market and its sub-segments by various on and off-premise distribution channels including foodservice. The sub-segments detailed by channel include flavored waters, enhanced waters, essence water and alkaline water.

- An analysis of volume by container type, including plastic and pouches, also broken down by value-added sub-segments.

- Discussion of the fledgling niche water beverage segment, including winners and losers to 2025 and a profile of four promising niche water beverage brands. Niche segments quantified and forecasted include: Plant Waters, Protein Waters, Detox, Fiber Water, Wine Waters, Spice (Herbal) Waters , Flower/Floral Waters, Weight Management/Keto Water, Probiotic Waters, Collagen (Beauty) Waters and Rain Waters.

- Advertising expenditures of the leading brands and a look at category spending by 18 media types (including Internet).

- Consumer demographic profiles comparing consumers of key segments.

- Five-year projections for the market and its sub-segments through 2028.

Alkaline & Other Enhanced Waters in the U.S. through 2028

BEVERAGE MARKETING CORPORATION

NOTE: The 2024 edition of this report has not yet been published. The dates on tables of contents/exhibits and sample data reflect information from last year's edition of this report.

The 2024 edition you receive will have updated data through 2023 and projections through 2028 where applicable.

Alkaline & Other Enhanced Waters in the U.S. through 2027

December 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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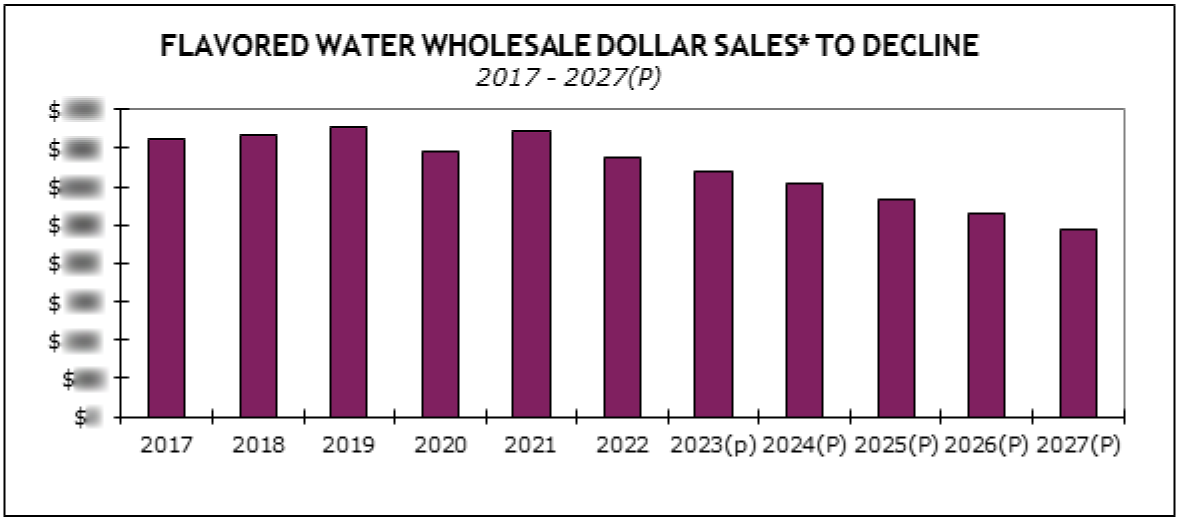
Flavored water consumers tend to be consumers of bottled water that are looking for a variation of plain "boring" water or an alternative to CSDs. To enhanced water consumers, flavors may be important, but they are secondary to health and wellness. Structured water consumers are not concerned with flavors at all; instead, they are seeking the "purest" water possible. Not surprisingly, distribution channels for value-added waters vary.

- Flavored water is found in mainstream channels, encompassing both take-home and immediate consumption.
- Enhanced water can be found in immediate consumption channels such as drug stores, c-stores and down-the-street. Enhanced water is also available in health food stores, supermarkets, mass merchandisers and online. Club stores feature the more prominent brands like Propel and Vitaminwater.
- The essence water segment is beginning to emerge as a viable segment. Logically, it appeals to health-conscious consumers looking to avoid sweeteners of any kind but are still looking for flavors.
- Since the concept of "cellular absorption" is beyond the understanding of most consumers, structured water will continue to be available in fewer channels than flavored and enhanced water. Structured waters are found in natural food stores and online. It remains a dark horse segment. Other space age waters that may have been ahead of their time, particularly oxygenated and hydrogen waters, could find at least a sizeable niche audience in the 2020s.
- All types of value-added water, obviously, command a price premium to regular PET bottled water. Structured water commands the highest price point, followed by enhanced water. Even among enhanced waters, there is a price variation among brands.

It should be noted that from a growth perspective, flavored water has emerged as the weak partner in the value-added water market.

- Coca-Cola and Pepsi-Cola had harbored hopes that flavored waters might pose an escape from the low-margin ghetto that the heavily promotional conventional bottled water segment had become (thanks in large part to their own aggressive battling on price), but that did not prove to be the case.
- While flavored water brands under Dasani (Coke) and Aquafina (PepsiCo) succeeded in expanding the category somewhat, at least initially, they failed to capture much of a price premium, providing a further incentive for the companies to focus on the enhanced segment instead, where the promise of nutritional enhancements proved a more compelling reason for consumers to pay a premium. Although flavored water was able to turn its habitual volume and dollar losses into growth again, Splash Blast (formerly, Nestlé Splash) and Capri Sun Roarin' Waters have been the only major brands to perform respectably lately.



** In millions*
(p) Preliminary; (P) Projected
Source: Beverage Marketing Corporation

Exhibit 2.13

VALUE-ADDED WATER MARKET
SHARE OF VOLUME BY CATEGORY
2017 – 2027(P)

Water Category	2017	2018	2019	2020	2021	2022	2023(p)	2027(P)
Regular Enhanced	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Low-Calorie Enhanced	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal Enhanced	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
Alkaline	[illegible]	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Essence	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Flavored	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

(p) Preliminary; (P) Projected

Source: Beverage Marketing Corporation