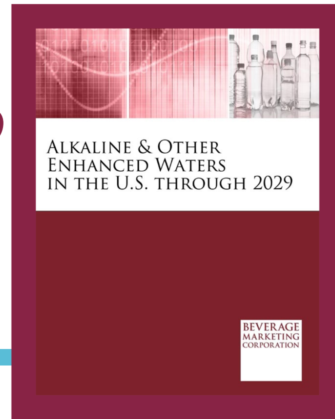
Alkaline & Other Enhanced Waters in the U.S. through 2029

2028 Edition (To be published November 2025. Data through 2024, preliminary 2025 figures and forecasts through 2029.) More than 175 pages, with extensive text analysis, graphs, charts and tables.



Water with many twists. 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, plant waters, protein waters, fiber waters, spice (herbal) waters, probiotic waters, collagen (beauty) waters and rain waters) that are not included in value-added water market totals but are considered separately in a dedicated chapter providing details on each segment's gallonage, wholesale dollar and retail dollar size, growth and market share. These emerging and increasingly fragmented functional benefit or ingredient-based beverage segments are quantified and discussed and their growth prospects through 2029 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.

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The answers you need

Alkaline and Other Enhanced Waters in the U.S. through 2029 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 2024 and what is the preliminary read on how their year-end numbers will shake out in 2025?
- 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 2029?
- 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 2029?

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 2029. 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, Keurig Dr Pepper (Bai and Core), Aquahydrate, Hint Inc., Evamor, Eternal 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: Capri Sun Roarin' Waters, Nestle Pure Life Splash, Aquafina Splash, Fruit2O, Dasani 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 2029 and a profile of several 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 2029.

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BEVERAGE MARKETING CORPORATION

NOTE: The 2025 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 2025 edition you receive will have updated data through 2024, preliminary 2025 figures and projections through 2029 where applicable.

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December 2024

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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Value-added water is comprised of flavored, enhanced, essence and alkaline waters, together which provide value above and beyond "just hydration." The larger single-serve water segment includes both value-added water and retail PET water.

- The segments comprising value-added water are flavored sweetened still, flavored sweetened still enhanced (with minerals and vitamins), unsweetened flavored (or unflavored) essence, oxygenated, alkaline and structured/clustered.
- Throughout this report, in the discussion of wholesale dollars, structured and oxygenated waters are grouped with enhanced waters. Alkaline waters have been broken out as a separate item.
- Value-added water represents about 21% of total wholesale dollars for the single-serve water category.
- On a volumetric basis, value-added water comprises approximately 7% of total single-serve water; premium pricing makes value share much higher.

Much of the new-product activity in the category has been in the enhanced water segment. Caffeinated and oxygenated brands were the pioneers, coming out more than 25 years ago; but none ever reached critical mass.

- In the mid-1990s, Water Joe caffeinated water made a minor splash. Later in the decade came Clearly Canadian O+2 oxygenated. Penta and Coral Water structured waters also debuted in the late 1990s.
- Vitamin-enhanced waters began to gain traction in 2000 with Glacéau Vitaminwater, which was later acquired by Coca-Cola Company. Others emerged, such as Propel, which continues to be a good revenue source for PepsiCo.
- In 2005, flavored waters such as Nestlé Pure Life, Aquafina FlavorSplash and Dasani flavors hit the market. But the flavored water segment has not seen a whole lot of activity since.
- Flavored water, comprised of a few brands, is a more mainstream targeted segment, without specific functional benefits beyond hydration. Large beverage corporations such as Sunny Delight (now owned by buyout firm Brynwood Partners), Kraft Heinz, Coca-Cola, PepsiCo and BlueTriton dominated this segment.

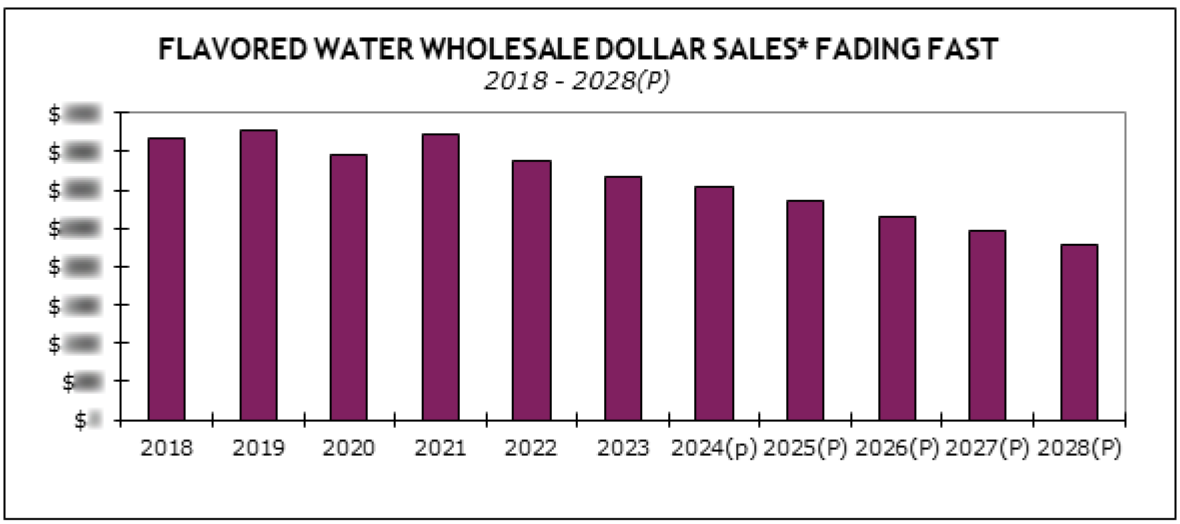
Exhibit 2.13

VALUE-ADDED WATER MARKET
SHARE OF VOLUME BY CATEGORY
2018 – 2028(P)

Water Category	2018	2019	2020	2021	2022	2023	2024(p)	2028(P)
Regular Enhanced	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Low-Calorie Enhanced	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Subtotal Enhanced	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**
Alkaline	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Essence	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Flavored	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
TOTAL	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**

(p) Preliminary; (P) Projected

Source: Beverage Marketing Corporation



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