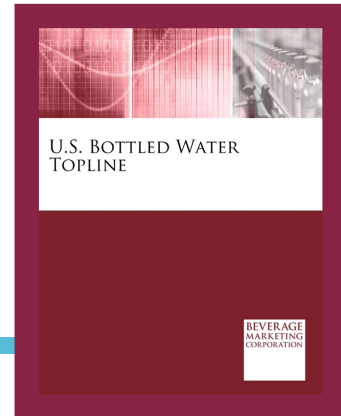


# U.S. BOTTLED WATER TOPLINE

**2025 EDITION** (To be published August 2025. Data through 2024. Market projections through 2029.) More than 25 pages, with text analysis, graphs and charts.



***E***xecutive Summary. *U.S. Bottled Water Topline* from Beverage Marketing Corporation provides a brief overview of the bottled water category with key data and five-year forecasts. Perfect for investors, entrepreneurs requiring statistics for their business plan, ad agencies preparing an account pitch or anyone who needs a quick view of the bottled water sector.

FOR A FULL CATALOG OF REPORTS AND DATABASES, GO TO [bmcreports.com](http://bmcreports.com)

## AVAILABLE FORMAT & PRICING



**Direct Download**  
Word & PDF

**\$1,495**

To learn more, to place an advance order or to inquire about additional user licenses **call: Charlene Harvey +1 212.688.7640 ext. 250** [charvey@beveragemarketing.com](mailto:charvey@beveragemarketing.com)

## 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. **6**

### SAMPLE TEXT AND INFOGRAPHICS

A few examples of this report's text, data content layout and style. **7**



**HAVE QUESTIONS?**

Contact Charlene Harvey: 212-688-7640 x 250  
[charvey@beveragemarketing.com](mailto:charvey@beveragemarketing.com)



BEVERAGE MARKETING CORPORATION  
P.O. Box 2399 | 143 Canton Road, 2<sup>nd</sup> Floor  
Wintersville, OH 43953  
Tel: 740-314-8380 Fax: 740-314-8639

## THE ANSWERS YOU NEED

*U.S. Bottled Water Topline* provides key statistics for the overall market. Questions answered include:

- How much bottled water is consumed per capita in the United States, how has this changed in recent years?
- How did the bottled water market segments perform in 2023 and 2024, and how are they like to develop in the future?
- Which are the leading home- and office-delivery bottled water companies?
- What is the volume of imported bottled water by type?
- Which companies hold the largest shares of the bottled water industry by wholesale dollar sales?

## THIS REPORT FEATURES

This report features category volume and wholesale dollar sales and per capita consumption data; leading company market shares and five-year forecast data through 2029 are also provided.



# U.S. BOTTLED WATER TOPLINE

**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 and projections through 2029 where applicable.

# U.S. Bottled Water Topline October 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.

---

Copyright © 2024 Beverage Marketing Corporation of New York, P.O. Box 2399, Wintersville, OH 43953, (212) 688-7640. All rights reserved. Reproductions in any form prohibited by law.

# Contents

## Table of Contents

---

**U.S. Bottled Water Topline**  
**TABLE OF CONTENTS**

TABLE OF CONTENTS ----- i

**Summary**

**U.S. BOTTLED WATER TOPLINE**

The National Bottled Water Market----- 1

- Overview ----- 1
- Volume ----- 2
- Per Capita Consumption----- 4
- Volume by Segment ----- 5
- Wholesale Dollar Sales ----- 7
- Prices----- 8
- Seasonality----- 8
- Quarterly Growth Trends----- 8
- The HOD Segment----- 9
- Imported Sparkling and Non-Sparkling Water ----- 10
- The Leading Companies ----- 10
- Club Soda/Seltzer ----- 11
- Bottled Water by Source ----- 11
- Bottled Water Advertising ----- 12

**Exhibits**

1 U.S. Bottled Water Market Gallonage, Growth and Per Capita Consumption  
1980 – 2028 ----- 14

2 U.S. Bottled Water Market Non-Sparkling, Sparkling & Import Gallonage 1980 – 2028 15

3 U.S. Bottled Water Market Estimated Non-Sparkling, Sparkling and Import Wholesale  
Dollars and Change 1984 – 2028 ----- 16

4 U.S. Bottled Water Market Estimated Wholesale Dollars, Gallonage and Price 2023 -- 17

5 U.S. Bottled Water Market Quarterly Volume Shares by Segment 2023 ----- 18

6 U.S. Bottled Water Market Estimated Volume, Share and Growth by Segment  
Q1 2024 ----- 19

7 The Leading HOD Bottled Water Companies Share of Estimated Water Only  
Revenues 2018 – 2023----- 20

8 U.S. Water Cooler Market Estimated Millions of Units in Operation 1990 – 2028----- 21

9 Imported Bottled Water Market Volume by Type 1994 – 2028 ----- 22

10 Leading Bottled Water Companies Share of Estimated Wholesale Dollar Sales  
2018 – 2023 ----- 23

11 Club Soda/Seltzer Estimated Volume 2018 – 2028----- 24

12 Retail PET Bottled Water Share by Source 2000 – 2028 ----- 25

13 U.S. Bottled Water Market Advertising Expenditures 1979 – 2023----- 26

**Appendix**

A. U.S. Population by Region 1983 – 2023----- 27

Bottled water has transitioned from its precocious youth to energetic adulthood. After stringing together years — indeed, decades — of exceptional growth, the category established its firmly entrenched position in the U.S. marketplace.

- The sort of growth that saw it double in volume in less than a decade and become the second largest beverage category by volume while still outperforming other major beverage types no longer characterizes the category.
- Nonetheless, by any objective measure, the bottled water category has been the greatest success story in the history of the beverage industry — and the story is far from over. Even after achieving significant size, bottled water’s growth potential has not been extinguished.
- Case in point: the bottled water market doubled in a 14-year span (2003–2017), towards the end of which it became the largest beverage category — overtaking carbonated soft drinks (CSDs). This marked a major milestone.

U.S. residents’ thirst for bottled water can be attributed to several factors.

- Many consumers recognize it to be healthy, safe and convenient.
- It is a versatile product, suitable for consumption at any time of day and need not be kept cold (like soft drinks or juice) or warm (like coffee or tea).
- As far as ready-to-drink commercial beverages go, it is relatively inexpensive, and with competitive pricing it is becoming increasingly affordable for consumers.
- Various packaging types, ranging from bulk to single-serve, facilitate a variety of uses. Consumers’ interest in foods and beverages that confer benefits above and beyond refreshment also contributes to the quintessential hydrating beverage’s performance in recent years.
- As concern about obesity persists, bottled water’s lack of calories appears that much more attractive to consumers.

---

Exhibit 12

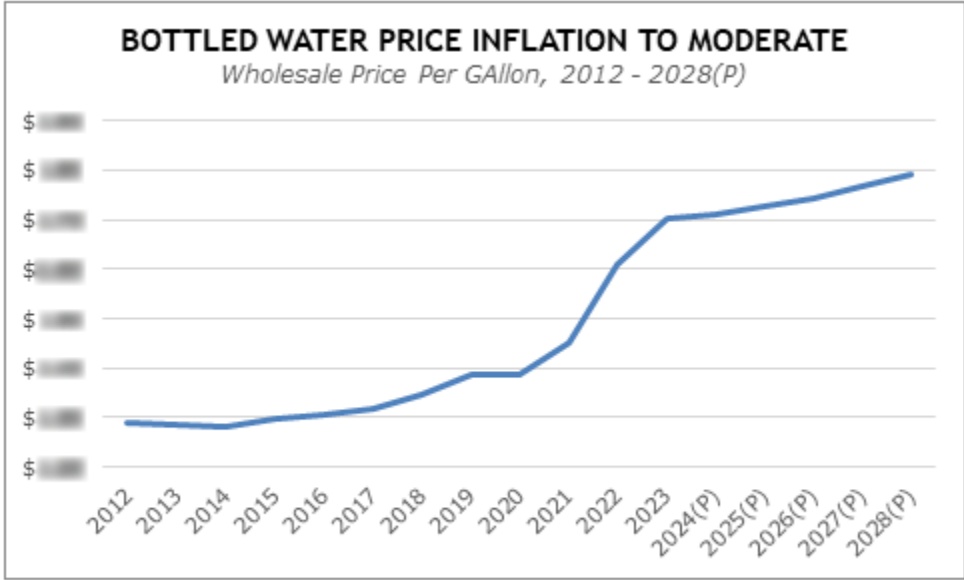
**RETAIL PET BOTTLED WATER  
SHARE BY SOURCE  
2000 – 2028(P)**

<b>Year</b>	<b>Spring</b>	<b>Purified</b>	<b>Total</b>
2000	85%	15%	100%
2001	85%	15%	100%
2002	85%	15%	100%
2003	85%	15%	100%
2004	85%	15%	100%
2005	85%	15%	100%
2006	85%	15%	100%
2007	85%	15%	100%
2008	85%	15%	100%
2009	85%	15%	100%
2010	85%	15%	100%
2011	85%	15%	100%
2012	85%	15%	100%
2013	85%	15%	100%
2014	85%	15%	100%
2015	85%	15%	100%
2016	85%	15%	100%
2017	85%	15%	100%
2018	85%	15%	100%
2019	85%	15%	100%
2020	85%	15%	100%
2021	85%	15%	100%
2022	85%	15%	100%
2023	85%	15%	100%
2028(P)	85%	15%	100%

*(P) Projected*

*Source: Beverage Marketing Corporation*





(P) Projected

Source: Beverage Marketing Corporation