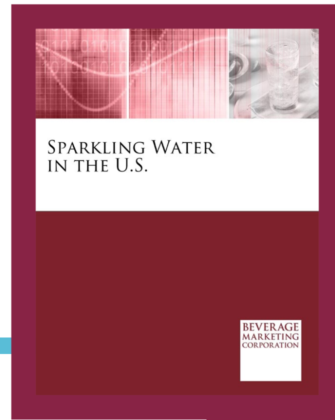
Sparkling Water in the U.S.

2025 Edition (To be published May 2025. Data through 2024. Market projections through 2029.) More than 50 pages, with extensive text analysis, graphs, charts and tables



For A Full Catalog of Reports and Databases, Go To bmcreports.com

Will the growing market for sparkling (imported and domestic) and carbonated water (seltzer and club soda) be sustained into the future?

Beverage Marketing Corporation considers the possibilities in its industry report entitled: *Sparkling Water in the U.S.* More than a decade ago, the segment's growth was considered respectable, but it certainly wasn't setting the world on fire. Shifting demographics and consumer drivers changed all that. Now that sparkling and carbonated water has become a reliable grower, it is important to consider what can be learned here for entrepreneurs and market veterans alike that can help them build on the segment's success and help them recognize future opportunities. Part of BMC's *Focus Report* series, this report offers a concise but complete executive briefing on this hot topic.

Available Format & Pricing

Direct Download
$2,995
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*

Inside:

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: 740-314-8380 Fax: 740-314-8639

The answers you need

This brief but insightful market report measures volume and wholesale dollar sales, covers top brands and discusses key issues in the sparkling and carbonated water category. BMC's exclusive five-year projections are also included. Questions answered include:

- What are the key attributes of the sparkling and carbonated water market?
- Which are the leading brands? Is the market sewn up by big companies or is there room for smaller players to capture a significant market share?
- Why has the category been so successful? How does sparkling and carbonated water relate to the carbonated soft drink market and to what extent do these categories overlap?
- How much is the sparkling and carbonated water market expected to grow in the next five years? Which segments are expected to grow the fastest? Are there any innovative sub-segments that entrepreneurs can participate in?

This sparkling and carbonated water report features

This report examines a growing segment of the CSD (carbonated soft drink) and bottled water categories in the United States. (Seltzer and club soda are considered CSDs but are included in this report as part of the carbonated water segment.) The presentation of industry research begins with an overview of the sparkling and carbonated water market. It then analyzes various brands and the companies behind them, taking note of innovations they have achieved and the marketing strategies behind them.

After outlining this context, the report describes the issues likely to determine what is next in the U.S. sparkling and carbonated water marketplace and projects market size five years into the future. In this report, readers get a thorough understanding of all facets of the sparkling and carbonated water market including:

- Wholesale dollar sales and volume of the sparkling and carbonated water market going back to 2000, as well as a breakdown of sparkling and carbonated segments and their subsegments going back to 2019.
- Discussion of the main competitors and their likely prospects, including the pending Primo/ Blue Triton deal, analysis of the strategies of the two biggest soda companies that have entered the market, as well as the largest bottled water company and a panoply of other competitors. Companies and brands covered include: Nestlé USA's S. Pellegrino and Perrier; Primo Brands' regional spring water brands (Poland Spring etc.) and premium The Mountain Valley, ORIGIN and Saratoga Spring; National Beverage Corporation's La Croix, Coca-Cola Company's Seagram's and Topo Chico; PepsiCo's bubly; Keurig Dr Pepper's Canada Dry and Schweppes; and Polar Beverages' Polar Seltzer, among others.
- All sales channel inclusive performance data for key brands including San Pellegrino, La Croix, Polar, Topo Chico, bubly, Maison Perrier, Spindrift, Waterloo, Crystal Geyser, Canada Dry, Liquid Death, Schweppes, Poland Spring, Aha!, Pure Life, Arrowhead, Cascade Ice, Deer Park, Ice Mountain, Voss, Ozarka, Zephyrhills, Vintage, Penafiel, Dasani Sparkling, Smartwater Sparkling and Aquafina Sparkling.
- Analysis of the prospects of the sparkling and carbonated water market in the next five years, with Beverage Marketing's wholesale dollar and volume category projections to 2029.

Sparkling Water in the U.S.

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.

Sparkling Water in the U.S.

July 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.

Table of Contents

Contents

TABLE OF CONTENTS

TABLE OF CONTENTS

Summary

SPARKLING WATER IN THE U.S. (cont'd)

Exhibits

Sparkling water, previously relegated to the role of mixer, began to explode, perhaps as consumers migrating to bottled water from segments like diet soda seek a bit more stimulation for their palate. That brought a surge of growth and new-brand activity.

- In the United States, sparkling water dates to the late 1970s, when Perrier began to penetrate the on-premise sector and then extend its hold to retail outlets.
- The high-end, glass-packed S. Pellegrino and Perrier brands marketed by Nestlé Waters North America (NWNA) had proved fairly unassailable during the good times and came back strongly in the 2010s when fine-dining and other occasions recovered from the Great Recession of the late 2000s.
- Having a major impact has been National Beverage's unsweetened La Croix sparkling water line, and its sibling Cúrate, both mainly a direct-to-retail play.
- National Beverage's bigger soda rivals took ample notice of La Croix's success. Coca-Cola Company acquired Mexican sparkling water brand Topo Chico from one of its bottlers, while PepsiCo released an internally developed sparkling water brand called bubly. In addition, Coca-Cola introduced a domestic sparkling water brand to rival bubly called AHA that couldn't sustain its early success.
- Sparkling waters face competition in take-home channels from seltzer and club soda (which are not counted as part of the bottled water segment), thus preventing sparkling water marketers from exacting too stiff a premium.
- With CSD consumption continuing to decline and retail premium PET leveling off from its high-growth years, the sparkling water segment continued to attract a segment of the population that desired carbonation (for digestive or other reasons) but did not want to consume sugar or artificial sweeteners.
- Marketers were increasingly compelled to introduce less-sugary beverages due to the increase in "soda taxes" sought by cash-strapped municipalities. The biggest soft drink companies have already pledged to reduce sugar and calories: even though these promises are voluntary, none of the companies seem willing to go against their word and cede a marketing advantage to rivals.
- The U.S. government has included "added sugar" on nutrition labels, bringing the issue even more prominently to the fore in consumers' minds.
- That being said, higher prices from inflation has dampened the growth — at least for now — of sparkling water.

Exhibit 6

SPARKLING WATER MARKET

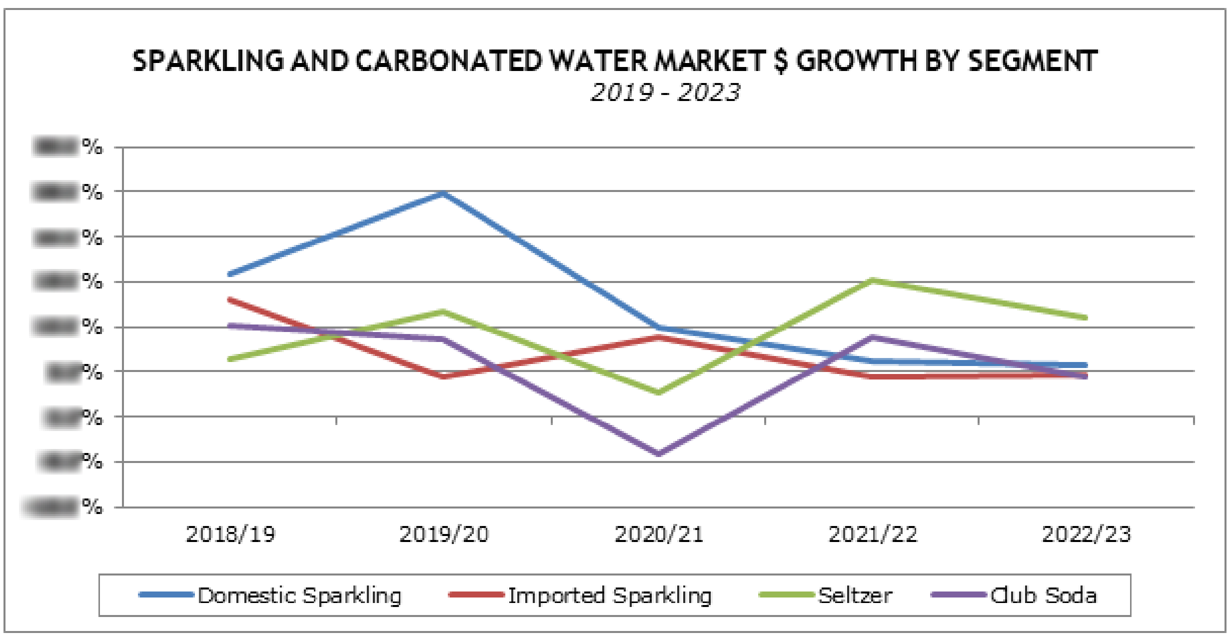
SHARE OF WHOLESALE DOLLAR SALES BY SEGMENT

2018 – 2028(P)

Segment	2018	2019	2020	2021	2022	2023	2028(P)
Sparkling Water							
Domestic Sparkling	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Imported Sparkling	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Subtotal Sparkling	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Carbonated Water							
Seltzer	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Club Soda	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Subtotal Carbonated	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
TOTAL	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%

(P) Projected

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation