

# SPOTLIGHT ON LEADING COMPANIES: LEADING BOTTLED WATER COMPANIES IN THE U.S.

2014 EDITION (Published August 2014. Data through 2013.)  
More than 100 pages, with text and charts.



**B**everage Marketing proudly announces a new line of reports. While its exhaustive U.S. Category Reports examine all facets of particular beverage types, the company's Spotlight Reports illuminate specific aspects of major industry segments; in this case, shining a spotlight on the leading bottled water companies and brands operating in the U.S. market.

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HAVE QUESTIONS?

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## THE ANSWERS YOU NEED

- What market share does the leading producer hold?
- Which brands are posting growth and which are declining?
- How have various market players evolved to meet new market challenges?
- How do the various brands rank against each other and against other brands in the corporate portfolio?
- What percentage of sales is accounted for by beverage giants vs. independent players?

## THIS REPORT FEATURES

*Spotlight on Leading Companies: Leading Bottled Water Companies in the U.S.* looks at the leading bottled water companies in the United States and their brands, quantifying the market and discussing the activities of the market leaders and the ways they are shaping the marketplace. Coverage includes:

- Extensive discussion of the leading companies' operations including marketing, leadership, strategies and more
- Data quantifying the historical and current market size for the leading companies, providing their wholesale dollar volume, growth and market share
- Analysis of brands within the leading companies' portfolios, showing brand size, growth and share of portfolio
- Size, market share, rank and growth patterns for key brands in the category

*Spotlight Report:*  
**Leading Bottled  
Water Companies  
in the U.S.**

2014 Edition  
August 2014

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

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NOTE: To follow are samples of the type of data contained in the various *Spotlight on Leading Companies Reports*. Your report will focus solely on the beverage category you select.

Your report will contain data through 2013.

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#### Overview (cont'd)

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- National picked up one-tenth of a share point to 1.1% in 2008. Share enlarged to 1.2% in 2009 and 1.3% in 2010. In 2011, share remained at 1.3% before climbing to 1.4% in 2012. The fifth largest CSD company's relatively modest market share highlights the distance between the top two giants and everybody else.

A couple of smaller, key regional companies saw growth in 2012.

- Big Red volume enlarged by 1.1% to 11.1 million gallons in 2012. The company's share of industry volume remained at 0.1% from 2000 to 2009. Share inched up to 0.1% in 2010, where it stayed in 2011 and 2012. Gary Smith, a former Red Bull executive, acquired Big Red in summer 2007, soon after buying the All Sport sports beverage from Monarch.
- In the five years prior to 2009, Carolina Beverage achieved substantial growth. In 2009, volume was flat. In 2010, it declined by 1.1%. In 2011, volume rose by 1.1% to 11.1 million gallons. Volume raced up by 1.1% to 11.1 million gallons in 2012. Carolina Beverage represents just 0.1% of U.S. CSD volume, but that is sufficient to make the company the seventh largest in the market.

Coca-Cola's CSD volume decreased for the 10<sup>th</sup> year in a row in 2012. The company has declined slightly less than the overall market since 2007.

- Brand Coke has declined in volume for at least 12 years. Because of the declining overall market, its share has increased slightly in the past five years, from 17.4% in 2007 to 17.5% in 2011.
- Sprite's volume has dipped in four of the last five years. Nonetheless, Sprite has actually seen a slight volume rise since 2009, enabling the brand to achieve a 1.1% share in 2012 – up from 1.0% in 2007.

Coca-Cola's slate of diet CSDs have not performed much better than the regular CSDs, excepting a single brand.

- After modest growth for four straight years, Diet Coke has given up all of its gains with a 1.1% absolute decline since 2007.

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**COCA-COLA COMPANY BRANDS**  
**Gallonage, Share of Market and Change**  
**2011 - 2012**

Brands	Millions of Gallons		Share of Volume		Change
	2011	2012	2011	2012	2011/12
<b>Coca-Cola Classic</b>	1,000.0	1,000.0	100%	100%	100%
<b>Diet Coke</b>	1,000.0	1,000.0	100%	100%	100%
<b>Sprite</b>	1,000.0	1,000.0	100%	100%	100%
<b>Coke Zero</b>	1,000.0	1,000.0	100%	100%	100%
<b>Fanta</b>	1,000.0	1,000.0	100%	100%	100%
<b>Caffeine Free Diet Coke</b>	1,000.0	1,000.0	100%	100%	100%
<b>Barq's</b>	1,000.0	1,000.0	100%	100%	100%
<b>Cherry Coca-Cola</b>	1,000.0	1,000.0	100%	100%	100%
<b>Pibb Xtra</b>	1,000.0	1,000.0	100%	100%	100%
<b>Mello Yello</b>	1,000.0	1,000.0	100%	100%	100%
<b>All Other Coca-Cola</b>	1,000.0	1,000.0	100%	100%	100%
<b>COCA-COLA SUBTOTAL</b>	1,000.0	1,000.0	100%	100%	100%
<b>Energy*</b>	1,000.0	1,000.0	100%	100%	100%
<b>Total Carbonates</b>	1,000.0	1,000.0	100%	100%	100%
<b>All Others</b>	1,000.0	1,000.0	100%	100%	100%
<b>TOTAL U.S.</b>	1,000.0	1,000.0	100%	100%	100%

\* Includes Full Throttle and NOS Energy.

Source: Beverage Marketing Corporation