Global Bottled Water Market - Growth, Trends, and Forecasts (2016 - 2021)

Description: Market Insights

The demand for bottled water has been growing during the last decade, owing to health and wellness concerns. Beverage companies are improving their packaging due to environmental concerns. Coca-Cola has reduced its cap size in bottles that are 24 ounces or smaller in order to reduce the plastic intake by the company. The bottled water industry was valued at USD 185 billion in 2015 and is expected to reach USD 330 billion by 2021, growing at an 8.5% CAGR during the forecast period 2016-2021.

Market Dynamics

The bottled water industry is driven by health concerns regarding drinking water. Changing lifestyles, preference for vitamin and minerals rich drinking water, and ease of handling and portability of bottled water are some of the factors driving the market. However, there are a few restraints slowing down the pace of the industry, such as the environmental pollution through plastic bottles and lack of awareness regarding the health issues associated with low-cost tap water. The major opportunities identified for the bottled water industry are innovative products with minimum environmental and health hazards and penetration in developing markets.

Market Segmentation

The bottled water market can be segmented by product types, distribution channel, and geography. By product type, the bottled water market is sub-segmented into still water, carbonated water, flavored water, and functional water. Still water is the largest sub-segment of bottled water, accounting for more than 65% of the demand, followed by carbonated water. Product innovation in terms of flavor and packaging has triggered the flavored water demand. According to distribution channel types, this market can be segmented into hypermarkets, supermarkets, convenience stores, departmental stores, specialty stores, and online purchases.

Regional Analysis

Asia-Pacific is the largest market in terms of revenue and total consumption, accounting for 33% market share. It is also the fastest growing market for bottled water, covering more than one-thirds of the market demand, supported by the large population, high demand, untapped market and demography, and rapid urbanization. As a result, there is business expansion by almost all the big players in the market. Led by China and India, Asia-Pacific is expected to register the highest CAGR during the forecast period. Europe is the second largest market, with 28% market share. Other regions like North America, South America, and Africa have a significant share of the bottled water market. North America is a saturated market with steady demand and the highest per capita water consumption currently.

Competitive Environment

The bottled water market is fragmented due to the presence of a large number of private label brands and local bottlers. More than 60% of the global market is covered by regional and national level players. The competition is reported to be huge mostly in North America and Europe, where the markets are saturated with slow growth and steady demand. The growing demand for thirst crunching products, health and hygienic concerns, multiple market distribution channels, and social acceptance of bottled water are expected to help the market grow at a good pace. Multiple product launches, innovative product packaging, healthy and hygienic items, huge marketing & promotional activities, and mergers & acquisitions with smaller level players have been strong business strategies for market growth in the region.

The top players in the bottled water market are:

Ajegroup SA

CG Roxane, LLC
Coca-Cola Company
Fonti Di Vinadio S.P.A.
Groupe Danone
HassiaWaters International GmbH & Co. KG
Nestle Waters
PepsiCo, Inc.

Key Deliverables in the Study

Market analysis for the bottled water market, with region-specific assessments and competition analysis on the global and regional scale.

Market definition along with the identification of key drivers and restraints.

Identification of factors instrumental in changing the market scenario, rising prospective opportunities, and identification of key companies that can influence this market on a global and regional scale.

Extensively researched competitive landscape section with profiles of major companies along with their market share.

Identification and analysis of the macro and micro factors that affect the bottled water market on the global and regional scale.

A comprehensive list of key market players along with the analysis of their current strategic interests and key financial information.

A wide-ranging knowledge and insights about the major players in this industry and the key strategies adopted by them to sustain and grow in the studied market.

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2.2 Research Designs

2.3 Study Timelines

2.4 Study Phases

2.4.1 Secondary Research

2.4.2 Discussion Guide

2.4.3 Market Engineering and Econometric Modelling

2.4.4 Expert Validation

3. Key Findings

4. Market Dynamics

4.1 Drivers

4.1.1 Changing Lifestyles and Health Concerns

4.1.2 Consumer Preference for Vitamin and Minerals Rich Drinking Water

4.1.3 Ease of Handling and Portability of Bottled Water

4.2 Restraints

4.2.1 Environment Pollution Concern Through Plastic Bottles

4.2.2 Lack of Awareness Regarding Health Issues Through Low-Cost Tap Water

4.3 Opportunities

4.3.1 Innovative Products with Minimum Environment and Health Hazards

4.3.2 Penetration in Developing Market

4.4 Porter's Five Forces Analysis

4.4.1 Bargaining Power of Suppliers

4.4.2 Bargaining Power of Buyers

4.4.3 Threat of New Entrants

4.4.4 Threat of Substitute Products and Services

4.4.5 Degree of Competition

5. Market Segmentation

5.1 By Product Types

5.1.1 Still water

5.1.2 Carbonated water

5.1.3 Flavored water

5.1.4 Functional water
5.1.5 Others

5.2 By Distribution Channel
   5.2.1 Speciality Stores
   5.2.2 Online Store
   5.2.3 Supermarkets/ Hypermarkets
   5.2.4 Convenience Stores
   5.2.5 Departmental Stores
   5.2.6 Others

5.3 By Geography
   5.3.1 North America
      5.3.1.1 U.S.
      5.3.1.2 Canada
      5.3.1.3 Mexico
      5.3.1.4 Others
   5.3.2 Europe
      5.3.2.1 Germany
      5.3.2.2 U.K.
      5.3.2.3 France
      5.3.2.4 Spain
      5.3.2.5 Italy
      5.3.2.6 Russia
      5.3.2.7 Others
   5.3.3 Asia-Pacific
      5.3.3.1 China
      5.3.3.2 Japan
      5.3.3.3 India
      5.3.3.4 Australia
      5.3.3.5 Others
   5.3.4 South America
      5.3.4.1 Brazil
      5.3.4.2 Argentina
      5.3.4.3 Others
5.3.5 Africa
5.3.5.1 South Africa
5.3.5.2 Others

6. Competitive Landscape
7. Company Profiles
7.1 Ajegroup SA
7.2 CG Roxane, LLC
7.3 Coca-Cola Company
7.4 Groupe Danone
7.5 Fonti Di Vinadio S.P.A.
7.6 HassiaWaters International GmbH & Co. KG
7.7 Hangzhou Wahaha Group Co., Ltd.
7.8 Grupo Vichy Catalan
7.9 Icelandic Water Holdings ehf.
7.10 Mountain Valley Spring Company, LLC
7.11 Nestle Waters
7.12 PepsiCo, Inc.
7.13 Suntory Beverage & Food Ltd
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