

## Bottled Water - UK - March 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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“Out-of-home consumption underpins much of the usage of bottled water, but the market is at risk from people opting more for filling bottles with tap water. Efforts to reduce sugar have helped sales of bottled water, but concerns about plastic waste could dampen future growth.”  
**– Richard Caines, Senior Food & Drink Analyst**

This report looks at the following areas:

- Plastic packaging waste concerns are a major issue for industry
- Bottled water’s healthier image needs stretching to maintain growth
- Provenance and purity will become increasingly important

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### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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## Table of Contents

### Overview

- What you need to know
- Products covered in this Report

### Executive Summary

- The market
- Sales of bottled water continue to grow strongly
- Uncertainties ahead for bottled water
  - Figure 1: Forecast of UK value sales of bottled water, 2013-23
- Unflavoured still water accounts for two thirds of value retail sales
- Sugar concerns lead shift away from sugary drinks
- Consumers are concerned about plastic waste
- Threat to bottled water from usage of reusable bottles
- Companies and brands
- Highland Spring and Volvic outperform the market
- Nestlé Pure Life and Rubicon Spring also perform strongly
  - Figure 2: Leading brands' sales and shares in the UK bottled water retail market, by value, 2017/18\*
- Majority of new launches come from flavoured waters
- L/N/R sugar claims feature on nine in ten flavoured water launches
- Functional health claims hope to add differentiation
- Brands focusing on more sustainable packaging
- Water in cans increasing from small base
- Big bottled water brands lack differentiation
- The consumer
- Three quarters of adults drink bottled water
  - Figure 3: Frequency of drinking bottled water, by type, December 2018
- Nearly a third of adults use water filter products
- Best option out of home a reason for drinking for more than a third
- Being seen as healthier than other drinks also drives usage
  - Figure 4: Reasons for drinking bottled water, December 2018
- Efforts to reduce sugar are helping bottled water
- Bottled water at risk from people opting more for tap water
- Consumers need convincing on functional claims
  - Figure 5: Behaviours relating to bottled water, December 2018
- Concern around plastic is a major issue for industry
- Source of water and purity is important
  - Figure 6: Attitudes towards bottled water, December 2018
- What we think

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### Issues and Insights

- Plastic packaging waste concerns are a major issue for industry
  - The facts
  - The implications
- Bottled water's healthier image needs stretching to maintain growth
  - The facts
  - The implications
- Provenance and purity will become increasingly important
  - The facts
  - The implications

### The Market – What You Need to Know

- Sales of bottled water continue to grow strongly
- Move away from sugary drinks boosts sales
- Uncertainties ahead for bottled water
- Unflavoured still water two thirds of value retail sales
- Sugar concerns lead shift away from sugary drinks
- Consumers are concerned about plastic waste
- Plastic particles in water are another worry
- Threat from usage of reusable bottles
- Growth in number of older kids/teenagers

### Market Size and Forecast

- Sales of bottled water continue to grow strongly
  - Figure 7: UK value and volume sales of bottled water, 2013-23
- The future
  - Figure 8: Forecast of UK value sales of bottled water, 2013-23
  - Figure 9: Forecast of UK volume sales of bottled water, 2013-23
- Forecast methodology

### Market Segmentation

- Unflavoured still water still accounts for two thirds of value retail sales
- Flavoured sparkling sees strong growth
  - Figure 10: UK retail value and volume sales of bottled water, by segment, 2016-18
- Long run of growth for retail and on-premise sales
  - Figure 11: UK value and volume sales of bottled water, by retail and on-premise channels, 2013-18

### Market Drivers

- Soft Drinks Industry Levy came into effect in April 2018
- Levy applies from 5g of sugar per 100ml
- Healthy eating is high on consumers' radars, with sugar the top concern
- PHE and media put sugar in the spotlight

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More people strive to eat healthily  
 Sugar concerns lead shift away from sugary drinks  
 Concern around plastic poses a major issue for bottled water industry  
 Consumers are concerned about plastic waste  
 Government considers deposit return scheme and announces tax on plastic packaging with less than 30% recycled content  
 Plastic particles in water are another source of worry  
 Threat from usage of reusable bottles and free water refill stations  
 Growth in number of older kids/teenagers  
 Figure 12: Trends in the age structure of the UK population, 2013-23

### Companies and Brands – What You Need to Know

Highland Spring and Volvic outperform the market  
 Nestlé Pure Life and Rubicon Spring also perform strongly  
 Majority of new launches come from flavoured waters  
 L/N/R sugar claims feature on nine in ten flavoured water launches  
 Functional health claims hope to add differentiation  
 Brands focus on more sustainable packaging  
 Water in cans increasing from small base  
 Flavoured waters take larger share of advertising  
 Big bottled water brands lack differentiation  
 Glaceau Smartwater seen as the most innovative

### Market Share

Highland Spring and Volvic outperform the market  
 Nestlé Pure Life and Rubicon benefit from children’s and flavoured offering  
 Figure 13: Leading brands’ sales and shares in the UK bottled water retail market, by value and volume, 2016/17 and 2017/18

### Start-ups and Disruptors – Case Studies

CanO Water  
 What is it?  
 Founded:  
 Company mission statement:  
 Founder’s story:  
 Mintel analyst view  
 Mintel Trends  
 Why it could succeed  
 Why it could fail  
 The verdict  
 Product information  
 Figure 14: CanO Water, product list, February 2019  
 Media profile

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### Social media metrics

Figure 15: Social media metrics for CanO Water as of February 2019

#### The brand's view

Sources of funding and support:

Target audience:

What consumer needs does the range meet?

Product stockists

Looking to the future

Aqua Esse

What is it?

Founded:

Company mission statement:

Founder's story:

Mintel analyst view

Mintel Trends

Why it could succeed

Why it could fail

The verdict

### Product information

Figure 16: Aqua Esse, February 2019

#### Media profile

### Social media metrics

Figure 17: Social media metrics for Aqua Esse as of February 2019

#### The brand's view

Sources of funding and support:

Target audience:

What consumer needs does the range meet?

Product stockists:

Looking to the future:

## Launch Activity and Innovation

Majority of new launches come from flavoured waters

Less sweet flavours attract activity

Brand extension and category blurring continues

Figure 18: New product launches in the UK bottled water retail market, by segment, 2014-18

Flavoured waters seen as more tasty and exciting than unflavoured

Marked variation between perception of individual products

Figure 19: Perception map of attribute performance of flavoured bottled water in comparison to bottled water in the UK bottled water market, April 2018-March 2019

L/N/R sugar claims feature on nine in ten flavoured water launches

Figure 20: Share of flavoured bottled water launches featuring L/N/R sugar claims, 2014-18

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### Functional health claims hope to add differentiation

Figure 21: Share of flavoured and unflavoured bottled water launches featuring functional claims, 2014-18

### Waters tap into interest in protein

### Number of other new launches promoting health and wellbeing benefits

Figure 22: Examples of new products making functional claims in bottled water, 2018

### Addressing concerns about plastic

### Brands focusing on more sustainable packaging

Figure 23: Examples of new water products in more sustainable packaging, 2018

### Water in cans increasing from small base

Figure 24: Share of new product launches in the UK bottled water retail market in cans, 2014-18

Figure 25: Examples of new water products in cans, 2018

### Sparkling water launches now dominated by flavoured

Figure 26: New sparkling product launches in the UK bottled water market, by segment, 2014-18

Figure 27: Examples of new flavoured products in sparkling bottled water, 2018 and 2019

## Advertising and Marketing Activity

### Flavoured waters taking larger share of advertising

Figure 28: Total above-the line, online display and direct mail advertising expenditure on bottled water, by type, 2015-18

### Britvic Soft Drinks is the biggest spender in water

Figure 29: Total above-the line, online display and direct mail advertising expenditure on bottled water, by advertiser, 2015-18

### Volvic focuses on health and lifestyle messages

### Glaceau Smartwater announces new UK brand ambassador

### San Pellegrino takes viewers on a journey

### Robinsons emphasises real fruit and spring water combination

### Rubicon Spring uses animated humour

### Fit Water focuses on New Year resolutions and exercise

### SodaStream launches local advertising campaign

Figure 30: SodaStream Facebook sponsored post, February 2019

### Nielsen Ad Intel coverage

## Brand Research

### Brand map

Figure 31: Attitudes towards and usage of selected brands, January 2019

### Key brand metrics

Figure 32: Key metrics for selected brands, January 2019

### Brand attitudes: Evian is the most trusted brand

Figure 33: Attitudes, by brand, January 2019

### Brand personality: San Pellegrino seen as less accessible than other brands

Figure 34: Brand personality – Macro image, January 2019

### Highland Spring seen as most traditional

Figure 35: Brand personality – Micro image, January 2019

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### Brand analysis

More than four in ten see Volvic as refreshing

Figure 36: User profile of Volvic, January 2019

Evian is the most trusted brand

Figure 37: User profile of Evian, January 2019

Highland Spring seen as good value more than other brands

Figure 38: User profile of Highland Spring, January 2019

Glaceau Smartwater is seen as the most innovative brand

Figure 39: User profile of Glaceau Smartwater, January 2019

Nestlé Pure Life lacks strong associations

Figure 40: User profile of Nestlé Pure Life, January 2019

San Pellegrino seen as more sophisticated and stylish than others

Figure 41: User profile of San Pellegrino, January 2019

### The Consumer – What You Need to Know

Three quarters of adults drink bottled water

Younger people are the biggest bottled water drinkers

Nearly a third of adults use water filter products

Best option out of home reason for drinking for a third

Being seen as healthier than other drinks also drives usage

Efforts to reduce sugar are helping bottled water

Bottled water at risk from people opting more for tap water

Consumers need convincing on functional claims

Concern around plastic is a major issue for industry

Source of water and purity is important

### Usage of Bottled Water

Three quarters of adults drink bottled water

Figure 42: Usage of bottled water, by type, December 2016-18

Unflavoured still is the most popular type of water

Figure 43: Frequency of drinking bottled water, by type, December 2018

Younger people are the biggest bottled water drinkers

### Usage of Water Filter Products and Reusable Water Bottles

Nearly a third of adults use water filter products

Figure 44: Usage of water filter products at home, December 2018

More than half of adults carry reusable water bottles

Figure 45: Carrying of reusable water bottles out of home, December 2018

### Reasons for Drinking Bottled Water

Bottled water is seen as best option out of home by more than a third

Figure 46: Reasons for drinking bottled water, December 2018

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Bottled water being deemed good for hydration is a big reason for drinking it  
Being seen as a healthier drinks option also drives bottled water usage

### Behaviours Relating to Bottled Water

People's efforts to reduce sugar are helping bottled water  
Figure 47: Behaviours relating to bottled water, December 2018

Bottled water at risk from people opting more for tap water  
Consumers need convincing on functional claims

### Attitudes towards Bottled Water

Concern around plastic is a major issue for the industry  
Figure 48: Attitudes towards bottled water, December 2018

Cartons and cans appeal widely as alternatives to plastic bottles  
Source of water is important, microplastics are widely seen as concern

### Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations  
Consumer research methodology

### Appendix – Market Size and Forecast

Forecast methodology  
Figure 49: Best- and worst-case forecast of total UK retail value sales of bottled water, 2018-23  
Figure 50: Best- and worst-case forecast of total UK retail volume sales of bottled water, 2018-23

### Appendix – Market Drivers

EFSA low-sugar threshold undercuts the SDIL threshold

### Appendix – Market Share

Figure 51: Leading manufacturer's sales and shares in the UK bottled water retail market, by value and volume, 2016/17 and 2017/18

### Appendix – Launch Activity and Innovation

Figure 52: Share of new product launches in the UK bottled water retail market, by brands and private label, 2014-18  
Figure 53: Share of new product launches in the UK bottled water retail market, by top 25 claims, 2014-18  
Figure 54: Share of new product launches in the UK bottled water retail market, by package type, 2014-18  
Figure 55: Share of new product launches in the UK bottled water retail market that are 'sparkling', 2014-18  
Figure 56: Attribute performance of flavoured bottled waters in comparison to unflavoured bottled waters in the UK bottled water market, April 2018-March 2019

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