



Euromonitor
International

Bottled Water in the United Kingdom

November 2025

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KEY DATA FINDINGS

2025 PERFORMANCE

Need for heathy and affordable hydration fuels strong demand for bottled water

INDUSTRY PERFORMANCE

Health concerns around tap water boost sales of bottled water in 2025
Flavoured and functional bottled water products benefit from focus on healthy indulgence

WHAT'S NEXT?

Health and sustainability set to remain a key focus of growth and innovation in bottled water
Diversified distribution and convenience trends support category expansion
UK bottled water producers face tighter controls on water sourcing, safety, and sustainability

COMPETITIVE LANDSCAPE

Nestlé Waters UK retains the lead in 2025 but faces growing competition
Affordability and value remain a key influence on the market

CHANNELS

Supermarkets and hypermarkets dominate as they continue to expand their offering
E-commerce continues to show potential as a convenient option

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EXECUTIVE SUMMARY

Sales of soft drinks rise in 2025 with the focus on health and affordability

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Ongoing price pressures push players to innovate to maintain demand
Health, wellness and sustainability prominent drivers of new product development
Guilt-free indulgence a key trend in 2025

WHAT'S NEXT?

New product development and innovation likely to remain key growth drivers
Players set to lean on digital technology in a rapidly evolving market

New and forthcoming regulation set to impact company strategies within soft drinks

COMPETITIVE LANDSCAPE

Coca-Cola retains a strong lead in soft drinks thanks to its broad brand portfolio

Monster Energy thriving while smaller players gain prominence in niche areas of the market

CHANNELS

Affordability remains a key issue as supermarkets and hypermarkets dominate sales

Foodservice playing a key role in driving retail growth and innovation

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