

Bottled Water in the US

December 2022

Table of Contents

Bottled Water in the US - Category analysis

KEY DATA FINDINGS

2022 DEVELOPMENTS

Sparkling flavoured bottled water maintains growth
On-trade sales recover, while at-home consumption changes
Functional bottled water sees a permanent boost

PROSPECTS AND OPPORTUNITIES

Sustainability concerns will force producers to rethink packaging
Supply chain and inflationary pressures likely to remain pronounced

CATEGORY DATA

Table 1 - Off-trade Sales of Bottled Water by Category: Volume 2017-2022
Table 2 - Off-trade Sales of Bottled Water by Category: Value 2017-2022
Table 3 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2017-2022
Table 4 - Off-trade Sales of Bottled Water by Category: % Value Growth 2017-2022
Table 5 - NBO Company Shares of Off-trade Bottled Water: % Volume 2018-2022
Table 6 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2019-2022
Table 7 - NBO Company Shares of Off-trade Bottled Water: % Value 2018-2022
Table 8 - LBN Brand Shares of Off-trade Bottled Water: % Value 2019-2022
Table 9 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2022-2027
Table 10 - Forecast Off-trade Sales of Bottled Water by Category: Value 2022-2027
Table 11 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2022-2027
Table 12 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2022-2027

Soft Drinks in the US - Industry Overview

EXECUTIVE SUMMARY

Soft drinks in 2022: The big picture
2022 key trends
Competitive landscape
Retailing developments
Foodservice vs retail split
What next for soft drinks?

MARKET DATA

Table 13 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2017-2022
Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2017-2022
Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2017-2022
Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2017-2022
Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2021
Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2021
Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2021
Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2021
Table 21 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2017-2022
Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2017-2022
Table 23 - Off-trade Sales of Soft Drinks by Category: Value 2017-2022
Table 24 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2017-2022
Table 25 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2017-2022
Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2017-2022
Table 27 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2018-2022
Table 28 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2019-2022

Table 29 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2018-2022

Table 30 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2019-2022

Table 31 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2018-2022

Table 32 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2022

Table 33 - NBO Company Shares of Off-trade Soft Drinks: % Value 2018-2022

Table 34 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2019-2022

Table 35 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2017-2022

Table 36 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2017-2022

Table 37 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2017-2022

Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2022

Table 39 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2022-2027

Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2022-2027

Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2022-2027

Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2022-2027

Table 43 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2022-2027

Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2022-2027

Table 45 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2022-2027

Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2022-2027

Table 47 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2022-2027

Table 48 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2022-2027

APPENDIX

Fountain sales in the US

Trends

DISCLAIMER

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/bottled-water-in-the-us/report.