

Bottled Water - UK - May 2021

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This report looks at the following areas:

- The impact of COVID-19 on the bottled water market.
- The outlook for the market in the re-emergence from the pandemic and recovery up to 2025.
- The latest new product development (NPD) trends and future opportunities.
- Consumers' usage of bottled water, water filters and sparkling water makers.
- Consumer attitudes towards bottled water.

Nearly two in five (39%) people show interest in branded supplements that can add minerals to tap water, presenting bottled water brands with an intriguing new opportunity for an added revenue stream as the market faces a growing challenge from the spotlight on sustainability.

The stay-at-home edicts and on-premise closures in 2020 delivered a sharp blow to bottled water sales through the lost purchase occasions. The market is, however, expected to rebound rapidly as the vaccine rollout allows the society to reopen, this curbed somewhat by the shift to more working from home in the long term.

COVID-19 has put a spotlight on the health of the planet and Mintel expects the outbreak to fuel a heightened focus on sustainability in the medium to long term. This presents bottled water with a challenge, the category having become a poster boy for single-use plastic packaging waste over the years, its wider ecological footprint also drawn into question.

The openness from consumers to alternative packaging formats bodes well for NPD in this space to help keep water products on the menu, while interest in bottled water with functional benefits like immune health (40%) and skin health (40%) can be mined by brands to offer reasons to buy into the category.



"Concerns around sustainability gave way to the impact of COVID-19 as the biggest driving force for change in the bottled water market in 2020/21. On-premise sales were hit by the closure of hospitality venues, while the loss of impulse out-of-home occasions took its toll on retail."

– Angharad Goode, Research Analyst

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Table of Contents

OVERVIEW

- Key issues covered in this Report
- COVID-19: Market context
- Economic and other assumptions
- Products covered in this Report

EXECUTIVE SUMMARY

- **Impact of COVID-19 on bottled water**
Figure 1: Short, medium and long-term impact of COVID-19 on bottled water, 17 May 2021
- **The market**
- **On-premise sales drop drags down bottled water market value in 2020**
Figure 2: Market size and forecast for bottled water, 2015-25
- **Still unflavoured water leads in spite of big hit to sales**
Figure 3: Retail value sales of bottled water, by segment, 2018-20
- **Deposit return scheme penned for 2024**
- **Category needs to respond to ageing population**
- **Companies and brands**
- **Sparkling, flavoured and home-focused brands are least hit**
Figure 4: Leading brands' sales and shares in the UK bottled water retail market, by value and volume, 2018/19-2020/21
- **Water in cans launches and rPET continue to grow**
- **Functional claims fall following 2019 uptick**
- **Adspend drops by two thirds in 2020**
- **The consumer**
- **Usage of bottled water remains high**
Figure 5: Usage of bottled water, by type, 2018-21
- **Water filter usage remains steady**
Figure 6: Usage of water filter products at home, February 2020 and February 2021
- **One in five want less shrink wrap**
Figure 7: Concepts that would prompt buying bottled water for home, February 2021
- **Less traditional flavours warrant attention**
Figure 8: Behaviours related to bottled water, February 2021
- **Two fifths interested in immune support**
Figure 9: Interest in bottled water with functional benefits, February 2021
- **Two in five interested in branded mineral supplements**
Figure 10: Attitudes towards bottled water, February 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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ISSUES AND INSIGHTS

- **Spotlight on sustainability poses a crucial challenge to bottled water**
- **COVID-19 is set to fuel a permanent shift to more time at home**

THE MARKET – KEY TAKEAWAYS

- **On-premise sales drop drags down bottled water market value in 2020**
- **Still unflavoured water leads in spite of big hit to sales**
- **Deposit return scheme penned for 2024**
- **Category needs to respond to ageing population**

MARKET SIZE AND FORECAST

- **On-premise sales drop drags down bottled water market value in 2020**
Figure 11: Short, medium and long-term impact of COVID-19 on bottled water, 17 May 2021
- **Market value loss driven by on-premise slump**
Figure 12: Market size for bottled water, 2015–25 (prepared on 17 May 2021)
- **Strong rebound expected in 2021 and 2022**
Figure 13: UK total value and volume sales of bottled water, 2015–25 (prepared on 17 May 2021)
- **Market drivers and assumptions**
Figure 14: Key drivers affecting Mintel's market forecast, 2015–25 (prepared on 17 May 2021)
- **Learnings from the 2008/09 recession**
Figure 15: Value sales of bottled water, 2007–12
- **Forecast methodology**

MARKET SEGMENTATION

- **On-premise closures and loss of out-of-home retail buys drag down sales**
Figure 16: UK value and volume sales of bottled water, by retail and on-premise channel, 2015–20
- **Still unflavoured water leads in spite of big hit to sales**
Figure 17: UK retail value and volume sales of bottled water, by segment, 2018–20

MARKET DRIVERS

- **Deposit return scheme penned for 2024**
- **Plastic pollution remains a high concern, water refill network grows**

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- **Government steps up focus on health**
- **Overseas brands stand to feel the impacts of Britain's new trade relations**

- **Category needs to respond to ageing population**

Figure 18: Trends in the age structure of the UK population, 2015-20 and 2020-25

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Sparkling and home-focused brands are least hit**
- **Water in cans launches and rPET continue to grow**
- **Functional claims fall following 2019 uptick**
- **Adspend drops by two thirds in 2020**

MARKET SHARE

- **Sparkling, flavoured and home-focused brands are least hit**

Figure 19: Leading brands' sales and shares in the UK bottled water retail market, by value and volume, 2018/19-2020/21

LAUNCH ACTIVITY AND INNOVATION

- **Water in cans launches continue to grow**

Figure 20: New product launches in the UK bottled water market, by packaging type, 2016-20

- **Highland Spring and Aldi expand into cans**
- **One Water launches reusable bottles, Highland Spring a 10-litre water bag-in-box**

Figure 21: Examples of recent water launches in metal packaging, 2020-21

- **Brands continue to push plastic innovation**

Figure 22: Product launches in the bottled water category with selected ethical claims, 2016-20

Figure 23: Selected product launches in the bottled water category highlighting sustainability, 2020-21

- **Leading players continue with wider sustainability initiatives**
- **Nestlé looks to close the loop with Biffa**
- **Danone Waters achieves B Corp status**
- **Feel Good Drinks and One offer rare examples of charity focus**

Figure 24: Product launches in the bottled water category with a charity claim, 2020-21

- **Functional claims fall following 2019 uptick**

Figure 25: Product launches in the bottled water category with functional and fortified claims, 2016-21

- **Buxton and Voss explore natural elements in fortification**
- **Volvic and Radnor look to vitamins for added health**

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Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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Figure 26: Recent product launches in the bottled water category with fortification, 2020-21

ADVERTISING AND MARKETING ACTIVITY

- **Adspend drops by two thirds in 2020**

Figure 27: Total above-the-line, online display and direct mail advertising expenditure on bottled water, by month, 2019 and 2020

- **Nestlé and Coca-Cola lead spending**

- **Glacéau focuses on recycled plastic**

Figure 28: Total above-the-line, online display and direct mail advertising expenditure on bottled water, by advertiser, ordered by 2020, January 2019-April 2021

- **Buxton gets new look and campaign**
- **S.Pellegrino and Highland Spring go digital**
- **Highland Spring launches 10-glass challenge and sustainability push**
- **2020 campaign puts spotlight on sustainability**
- **The Natural 10 Challenge sets a 10 glasses a day target**
- **Evian launches 'Drink True' in early 2021**
- **Primetime TV ad for Perfectly Clear**
- **Nielsen Ad Intel coverage**

BRAND RESEARCH

- **Brand map**

Figure 29: Attitudes towards and usage of selected brands, March 2021

- **Key brand metrics**

Figure 30: Key metrics for selected brands, March 2021

- **Brand attitudes: Glacéau Smartwater seen as most innovative**

Figure 31: Attitudes, by brand, March 2021

- **Brand personality: S.Pellegrino top for exclusivity**

Figure 32: Brand personality – macro image, March 2021

- **Buxton and Highland Spring seen as most traditional**

Figure 33: Brand personality – micro image, March 2021

- **Brand analysis**

- **S.Pellegrino most widely seen as an exclusive brand**

Figure 34: User profile of S.Pellegrino, March 2021

- **Volvic jointly leads the group on image as pure**

Figure 35: User profile of Volvic, March 2021

- **Evian seen as trustworthy by half**

Figure 36: User profile of Evian, March 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

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- **Highland Spring seen as one of the most accessible brands**
Figure 37: User profile of Highland Spring, March 2021
- **Buxton holds joint lead on authentic image**
Figure 38: User profile of Buxton, March 2021
- **Glacéau Smartwater seen as most innovative in the group**
Figure 39: User profile of Glacéau Smartwater, March 2021
- **Reading word clouds**

THE CONSUMER – KEY TAKEAWAYS

- **Usage of bottled water remains high**
- **Water filter usage remains steady**
- **One in five want less shrink wrap**
- **Less traditional flavours warrant attention**
- **Two fifths interested in immune support**
- **Two in five interested in branded mineral supplements**

IMPACT OF COVID-19 ON CONSUMER BEHAVIOUR

- **Sustainable packaging a focus for a quarter of people in 2021**
- **COVID-19 restrictions hit out-of-home sales**
- **Hygiene concerns curb public refills**
- **A third of users and buyers order larger quantities online**
Figure 40: Selected consumer shopping behaviours since the COVID-19/coronavirus outbreak, 4 February–6 May 2021
- **A heightened focus on the nation's health**
Figure 41: Healthy eating as a priority since the COVID-19 outbreak, by gender and age, 4–12 February 2021

USAGE OF BOTTLED WATER

- **Usage of bottled water remains high**
Figure 42: Usage of bottled water, by type, 2018–21
- **One in five drink unflavoured still water on a daily basis**
Figure 43: Usage of bottled water, by type, by frequency, February 2021

USAGE OF WATER FILTER PRODUCTS AND SPARKLING WATER MAKERS

- **Water filter usage remains steady**
Figure 44: Usage of water filter products at home, February 2020 and February 2021
- **One in 10 use a sparkling water maker**
Figure 45: Usage of sparkling water makers at home, February 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

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CONCEPTS THAT WOULD PROMPT BUYING BOTTLED WATER FOR HOME

- **One in five want less shrink wrap**
Figure 46: Concepts that would prompt buying bottled water for home, February 2021
Figure 47: Soft drinks multipacks in cardboard packaging, 2019-20
- **Water bag-in-a-box interests one in 10**
- **One in six eye up large glass bottles**
Figure 48: Examples of bottled water launches in large, glass bottle packaging, 2020

BEHAVIOURS RELATED TO BOTTLED WATER

- **Less traditional flavours warrant attention**
Figure 49: Behaviours related to bottled water, February 2021
- **Two fifths think flavoured water is too sweet**

INTEREST IN BOTTLED WATER WITH FUNCTIONAL BENEFITS

- **Two fifths interested in immune support**
Figure 50: Interest in bottled water with functional benefits, February 2021
Figure 51: Product launches in the bottled water market with immunity support claims, 2020-21
- **Skin health attracts equal interest to immunity**
Figure 52: Drink product launches with skin-related functional benefit claims, 2020-21

ATTITUDES TOWARDS BOTTLED WATER

- **Half show faith in green credentials of glass bottles**
Figure 53: Attitudes towards bottled water, February 2021
- **Two in five interested in water in cartons**
Figure 54: Examples of water and juice product launches in cartons, 2020
- **Two in five interested in branded mineral supplements**

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

APPENDIX – MARKET SIZE AND FORECAST

- **Forecast methodology**
Figure 55: UK value sales of bottled water, best- and worst-case forecast, 2020-25

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

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Figure 56: UK volume sales of bottled water, best- and worst-case forecast, 2020-25

APPENDIX – MARKET SHARE

Figure 57: Leading manufacturers' sales and shares in the UK bottled water retail market, by value and volume, 2018/19-2020/21

APPENDIX – LAUNCH ACTIVITY AND INNOVATION

Figure 58: New product launches in the UK bottled water market, by launch type, 2016-21

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

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