

Bottled Water - UK - March 2017

Report Price: £1995.00 | \$2478.79 | €2334.35

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“That 46% of drinkers/buyers cut back when money is tight signals a warning for the market, given the economic uncertainty and threat of future inflation. An emphasis on environmental preservation offers a promising means for companies to differentiate their offering given the strong consumer interest in this area.”

Alice Baker, Research Analyst

This report looks at the following areas:

- **Strong consumer interest in the environment provides opportunities for those best able to trade on positive credentials**
- **Make-your-own flavoured water kits would cater to consumer desire for customisation**
- **Parents' strong tendency to buy bottled water provides scope for expansion in children's products**

Products covered in this Report

This Report covers sales of bottled water including:

Plain (ie unflavoured) water.

Flavoured still and sparkling waters and fortified waters which see mineral water enhanced with natural flavours, herbs, vitamins and/or sweeteners.

Carbonated water, also known as sparkling water, which is made by dissolving carbon dioxide into the water through a process of carbonation.

Data includes sales through the following outlets:

- **Retail: This includes sales through retail outlets where bottled water is purchased for the purpose of in-home consumption or for drinking on the go, comprising supermarkets, convenience stores and petrol forecourts, among others.**
- **On-premise: This includes anywhere where bottled water is bought to consume on-site, eg pubs, bars and clubs, leisure centres, hotels, restaurants, cafés, education establishment, and workplaces.**

Water for water coolers is also included in the market size.

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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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The Market – What You Need to Know

Health concerns and low prices drive sales growth over 2011-16

Soft drinks levy and economy to determine sales 2016-21

Unflavoured waters gain most from consumer sugar concerns

Greater volatility in on-premise sales

Soft drinks levy could strengthen category

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Government advises parents to limit their children's intake of sugary drinks

Changing population dynamics provide a challenge and an opportunity

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Volvic remains market leader but volume sales fall

L/N/R sugar claims for flavoured water rise in 2016

Category blurring continues into 2016

Advertising spend rises in 2016

Evian is the most trusted brand, while Glacéau is the most likely to be seen as different

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Category blurring continues into 2016

Between flavoured waters and juice drinks...

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Beacon campaign pushes out-of-home recommendations

Promoting associations with Christmas to encourage winter drinking

Danone takes multiple approaches to promoting Volvic in 2016

Sports-led focus for Volvic's plain variants

Flavoured variants portrayed as a way for people to express their individuality

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Overall usage unchanged, but flavoured sparkling usage frequency rises

Future direction of the economy influential for bottled water sales

Only a minority see bottled water as bad for the environment, but backlash risks are high

Emphasising environmental credentials is a promising means to appeal

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Only a minority drink bottled water daily

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Sugar concerns prompt switching

L/N/R sugar flavoured waters will need to strongly emphasise this attribute

Consumer suspicions of artificial sweeteners present a barrier to reformulation

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The future direction of the economy is pivotal for bottled water sales
 Flavoured water especially vulnerable to spending cutbacks
 Make-your-own flavoured water kits would cater to consumers' desire for customisation

Attitudes towards Bottled Water

Bottled water is seen as bad for the environment by a significant minority
 Figure 29: Attitudes towards bottled water, December 2016

Strong consumer interest in environmentally friendly options
 Recycled plastic bottles have strong appeal
 Demonstrating environmental commitments should provide a boost
 Need to make environmental policies more prominent
 Funding conservation projects would allow companies to demonstrate their commitment to the environment
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