

Still and Sparkling Waters - US - 2022

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This report looks at the following areas:

- Market performance of still and sparkling water
- Use of and interest in powdered and liquid water enhancers
- Consumer interest in functional water claims
- Consumers' perception of water packaging formats

The water market is rising off high consumer interest in health and wellness, as consumers replace sugary drinks with still and sparkling water; 58% of consumers agree that sparkling water is a good soda substitute. From premium alkaline water to basic no-frills private label water, nearly all water segments enjoyed strong growth in 2021, as consumers returned to social activities.

Core bottled water consumers largely value bottled water for its taste, safety, and convenience; bottled water category attrition due to environmental concerns will be gradual rather than a mass category exodus. However, attrition will occur as Gen Z and Millennials (two groups that often use refillable water bottles) come to represent a greater share of the population. Water brands must invest in long-term initiatives that address younger consumers' environmental concerns.

Functional innovation will drive the water market's future growth. Brands are building upon waters' inherit health halo and transforming regular water into the ultimate functional drink, imbuing water with ingredients that support the immune system, promote gut health, and relax stressed-out consumers. Flavor innovation will also keep consumers engaged in the water market. Flavored waters represent the fastest growing segments within the market as unique flavors make water a more exciting and enjoyable beverage.



"Packaged water is a growing market within the wider beverage industry stemming from a large base of dedicated bottled water users and increased sales of premium, flavorful, and functional waters. Water's inherit healthfulness makes it an ideal platform for functional innovation."

– Caleb Bryant, Associate Director of Food and Drink Reports

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