

# Bottled Water - UK - 2022

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## 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 2026.
- The latest new product development (NPD) trends.
- Consumers' usage and reasons for drinking bottled water.
- Consumer behaviours and attitudes towards bottled water.

Despite the overriding importance of flavour and enjoyability to any drinks choice, and the intrinsic link between people's senses of taste and smell, aroma is almost entirely overlooked in how soft drinks sell their drinking experience to consumers. Illustrating the scale of this missed opportunity, two fifths of flavoured water drinkers (39%) agree that having a stronger aroma would make flavoured water more appealing.

The category's strong value image helped to insulate the market from the last income squeeze. However, the squeeze on real incomes in 2022-23 is set to be much more severe, making the money-saving benefits of carrying refillable water bottles when out and about more persuasive. Pressure on real incomes will also slow the rebound of the embattled on-trade channel and hence dampen value growth in the market.

The rise of eco-consciousness and heightened concerns around single-use plastics, microplastics and carbon footprints will add more weight to the strong sustainability argument for ditching bottled water. Tap water usage will also be supported by the permanent shift towards at-home working and the rise in ownership of at-home soda-makers.

Energising associations are important in driving usage of bottled water, cited by a quarter of drinkers aged under 45. The addition of ingredients with links to energy provision would allow products to capitalise on this need state more



"The income squeeze and the accelerated sustainability movement will further ingrain the use of refillable bottles and severely test the resilience of the bottled water market. Added value innovation that taps into the leading usage drivers is set to be pivotal in its ability to ride out these headwinds."

– Emma Clifford, Associate Director – Food and Drink Research, May 2022

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

**Report Price: £2195 | \$2995 | €2600**

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

effectively. This can create a softer and more accessible alternative to energy drinks, with a healthier and more natural positioning.

### What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit	<a href="https://store.mintel.com">store.mintel.com</a>
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### OVERVIEW

- Key issues covered in this Report
- Market context
- Products covered in this Report

### EXECUTIVE SUMMARY

- The five-year outlook for bottled water

Figure 1: Category outlook, 2022-27

- The market
  - Market size and forecast
- Figure 2: Market forecast for value sales of bottled water, 2021-26
- More media coverage on the environmental impact of bottled water and microplastics
  - DRS beset by further delays
  - HFSS food and drink store location restrictions to come into place in 2022
  - Contamination issues in drinking water hit the headlines
  - Companies and brands
  - All leading brands benefit from the retail segment's rebound; Volvic and Evian grow their share in 2021/22

Figure 3: Leading brands' value sales in the UK bottled water retail market, 2019/20-2021/22

- A sharp rise in fortification claims; NPD activity in canned water surged in 2021
- Adspend stabilises in 2021 after plummeting in 2020
- A lack of differentiation; Evian leads on quality associations

Figure 4: Attitudes towards and usage of selected brands, 2022

- The consumer
- 70% drink bottled water, but it tends to be an occasional choice

Figure 5: Usage of bottled water, by type, by frequency, 2022

- One in three use filtration products at home; only one in 10 use sparkling water makers, despite rising ownership

Figure 6: Usage of water filter products and sparkling water makers at home, 2022

- Health and hydration are primary usage drivers; push associations with energy and focus

Figure 7: Reasons for drinking bottled water, 2022

- Vast majority think they should drink more water; lower carbonation appeals widely

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 8: Behaviours related to bottled water, 2022

- **Harness the power of aroma in flavoured water; scope to push homemade seltzers**

Figure 9: Attitudes towards bottled water, 2022

### ISSUES AND INSIGHTS

- **Harness the power of aroma in flavoured water**
- **Push the associations with energy and focus**
- **Look to lower carbonation sparkling water**
- **Embrace the popularity of at-home soda-makers**

### MARKET SIZE AND PERFORMANCE

- **Volume sales plunged by 10% in 2020**

Figure 10: UK total value and volume sales of bottled water, 2016-21

- **A strong rebound in 2021**

### MARKET FORECAST

- **The five-year outlook for bottled water**

Figure 11: Category outlook, 2022-27

- **Value growth of 24% expected over 2021-26**

Figure 12: Market forecast for value sales of bottled water, 2021-26

- **Volume sales are anticipated to stagnate**

Figure 13: Market forecast for volume sales of bottled water, 2021-26

- **Learnings from the last income squeeze**

Figure 14: UK value and volume sales of bottled water, 2009-14

- **Market drivers and assumptions**

Figure 15: Key drivers affecting Mintel's market forecast, 2016-26

- **Forecast methodology**

### CHANNELS TO MARKET

- **Retail value sales drop by 15% in 2020**
- **Retail volume sales fully recover to the pre-pandemic level in 2021**

Figure 16: UK value and volume sales of bottled water, by channel, 2016-21

### MARKET SEGMENTATION

- **Flavoured still water sees biggest volume growth in retail**
- **Sparkling water volumes slip in 2021**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 17: UK retail value and volume sales of bottled water, by segment, 2019-21

**MARKET DRIVERS**

- Sustainability continues to rise up the consumer agenda
- More media coverage on the environmental impact of bottled water
- Mixed opinions on the sustainability credentials of rPET and aluminium cans
- DRS beset by further delays
- A need to promote the benefits of the DRS
- Microplastics attract more press attention in 2022
- Contamination issues in drinking water hit the headlines
- Contamination concerns support usage of filtering devices and bottled water
- The focus on health intensifies
- HFSS food and drink store location restrictions to come into place in 2022
- New rules on the advertising of HFSS food and drink delayed to 2024
- New legislation on calorie labelling in the on-trade
- Greater emphasis on health set to endure
- The conflict in Ukraine will hurt the UK economy
- Inflation is the key concern for 2022 for consumers, brands and the economy
- Consumers’ financial wellbeing has slipped from its recent high point...

Figure 18: Household financial wellbeing index, 2016-2022

- ...and concerns over inflation are coming to the fore
- Bottled water’s resilience will be tested
- Ageing population remains a challenge

Figure 19: Trends in the age structure of the UK population, 2016-26

**MARKET SHARE**

- All leading brands benefit from the retail segment’s rebound
- Volvic and Evian grow their share in 2021/22

Figure 20: Leading brands’ sales and shares in the UK bottled water retail market, by value and volume, 2019/20-2021/22

**LAUNCH ACTIVITY AND INNOVATION**

- A sharp rise in fortification claims

**What's included**

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

**Did you know?**

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

**Buy this report now**

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 21: Share of launches in the bottled water category with functional and fortified claims, 2017-21

- **Actiph launches vitamin sparkling water drinks brand Acti-Vit**

- **Morrisons launches Nourish Vitamin Waters**

Figure 22: Launches of fortified waters, UK, 2021

- **Added B vitamins from Volvic Touch of Fruit**

Figure 23: Volvic Touch of Fruit, UK, 2019 and 2022

- **NPD activity in canned water surged in 2021**

Figure 24: Share of launches in the bottled water category, by pack type, 2017-21

- **Evian forays into canned sparkling water**

Figure 25: Evian Sparkling Carbonated Natural Mineral Water, UK, 2021

- **Highland Spring and Radnor Hill unveil fruit-flavoured water in cans**

Figure 26: Launches of flavoured sparkling water in slimline cans, UK, 2021

- **Jamu Wild Water targets kids**

- **Supermarkets roll out own-label flavoured sparkling canned water ranges**

Figure 27: M&S Food Lemon and Yuzu Flavoured Sparkling Spring Water, UK, 2021

- **Sustainability continues to drive NPD**

- **Brands are looking beyond the use of recycled plastic**

Figure 28: Share of launches in the bottled water category, by ethical claim, 2017-21

- **Evian launches Evian (re)new refillable at-home device**

Figure 29: Evian (Re)New Natural Mineral Water, 2021

- **Aqua Pura launches an eco-friendly integrated cap**

- **DrinkWell launches first fully biodegradable plastic water bottle**

- **Water in a Box relaunches**

- **Bottle Up water gains listings in Morrisons stores**

- **Feel Good Drinks become climate positive**

- **“Wonky fruit” brands expand their ranges**

- **Highland Spring launches five-litre fridge pack**

**ADVERTISING AND MARKETING ACTIVITY**

- **Adspend stabilises in 2021 after plummeting in 2020**

Figure 30: Total above-the line, online display and direct mail advertising expenditure on bottled water, 2019-22

**What's included**

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

**Did you know?**

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

**Buy this report now**

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 31: Total above-the-line, online display and direct mail advertising expenditure on bottled water, by advertiser, ordered by 2021, 2019-22

- **Sustainability continues to be a focus for advertising**
- **Glacéau Smartwater supports launch of new packs highlighting 100% recycled plastic**
- **Aqua Pura encourages sustainable hydration**
- **Evian supports the launch of its sparkling variant**
- **Volvic supports relaunch with 'Beyond Your Expectations' summer campaign**
- **Rubicon brought back its No Added Boring campaign**
- **Brands launch competitions centring on experiences**
- **Holiday home on offer to celebrate launch of Highland Spring's new sparkling water cans**
- **Buxton has launched its first large-scale on-pack promotion in a decade**
- **Nielsen Ad Intel coverage**

**BRAND RESEARCH**

- **Brand map**
- **A lack of differentiation, but San Pellegrino stands out most**

Figure 32: Attitudes towards and usage of selected brands, 2022

- **Key brand metrics**
- **Volvic and Evian extend their lead in usage**
- **Brand attitudes: Evian leads on quality perceptions; San Pellegrino best justifies paying more for**
- **Highland Spring is seen to offer most value**

Figure 34: Attitudes, by brand, 2022

- **Brand personality: all brands score fairly well on accessible and ethical associations**

Figure 35: Brand personality – macro image, 2022

- **San Pellegrino stands out on stylishness**

Figure 36: Brand personality – micro image, 2022

**USAGE OF BOTTLED WATER**

- **70% drink bottled water; six in 10 drink unflavoured still**

Figure 37: Usage of bottled water, by type, 2022

- **Bottled water tends to be an occasional choice**

Figure 38: Usage of bottled water, by type, by frequency, 2022

**What's included**

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

**Did you know?**

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

**Buy this report now**

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### USAGE OF WATER FILTER PRODUCTS, SPARKLING WATER MAKERS, REUSABLE WATER BOTTLES AND PUBLIC WATER REFILL POINTS

- **One in three use filtration products at home**  
Figure 39: Usage of water filter products and sparkling water makers at home, 2022
- **Only one in 10 use sparkling water makers, despite rising ownership**
- **Bottled water brands can embrace the popularity of at-home soda-makers**
- **Two thirds of adults carry a reusable water bottle**  
Figure 40: Carrying of a water bottle when out of home, by gender and age, 2022

### REASONS FOR DRINKING BOTTLED WATER

- **Taste, health and hydration are primary usage drivers**  
Figure 41: Reasons for drinking bottled water, 2022
- **Scope to push the associations with energy and focus**
- **Openness to water in the energy space**
- **Opportunities beyond caffeine**
- **Promote practices that support mental focus and emotional wellbeing**

### BEHAVIOURS RELATED TO BOTTLED WATER

- **Vast majority of adults think they should drink more water**  
Figure 42: Behaviours related to bottled water, 2022
- **Technology can also play a role...**
- **...as can enhanced hydration products**
- **A third of drinkers think bottled water with added electrolytes is worth paying more for**
- **Electrolytes should be explored in new formats**
- **Lower carbonation appeals widely**  
Figure 43: Gently sparkling carbonated soft drinks launches, UK, 2021

### ATTITUDES TOWARDS BOTTLED WATER

- **Harness the power of aroma in flavoured water**  
Figure 44: Attitudes towards bottled water, 2022
- **A focus on aroma can enhance the treat and feelgood factors, and perceptions of value**
- **Aroma can also play a key role in sugar reduction**  
Figure 45: Attitudes towards bottled water, by usage of bottled water, 2022
- **Scope to push homemade seltzers**

### What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

**APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION**

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

**APPENDIX: FORECAST METHODOLOGY**

- **Market forecast and prediction intervals**  
Figure 46: Market size and forecast for total volume and value sales of bottled water, 2016-26  
Figure 47: Market forecast and prediction intervals for total value sales of bottled water, 2021-26  
Figure 48: Market forecast and prediction intervals for total volume sales of bottled water, 2021-26
- **Market drivers and assumptions**
- **Forecast methodology**

**APPENDIX – MARKET SHARE**

Figure 49: Leading manufacturers’ sales and shares in the UK bottled water retail market, by value and volume, 2019/20-2021/22

**What's included**

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

**Did you know?**

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

**Buy this report now**

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.