

Bottled Water - UK - 2023

Report Price: £2195 | \$2995 | €2600

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This report looks at the following areas:

- The impact of the income squeeze on the bottled water market.
- The outlook for the market in the as household incomes regain momentum up to 2027.
- The latest new product development (NPD) trends.
- Consumers' usage of bottled water, as well as water filter systems and sparkling water makers.
- Consumer behaviours and attitudes towards bottled water, including related to sustainability and hydration.

Sustainability has taken a backseat to saving money for many people amid the income squeeze. Half of those who drink and buy bottled water also state that money concerns cause them to think less about the sustainability of bottled water. However, that this is not the case for half of users shows how important continued environmentally friendly endeavours are in this market.

2022 marked the first full year free from COVID-related restrictions, fuelling growth in out-of-home occasions which play a key role for bottled water. However, the rising cost of living curbed this rebound. It also prompted many consumers to turn to tap water instead of bottled, though also seeing some choose bottled water over other soft drinks. This led to the market posting volume growth of 7% to 2.87 billion litres, with rising prices fuelling 34% growth in value sales to £2.4 billion.

Once household incomes regain momentum, consumer concerns about sustainability are expected to become more front of mind, reaffirming their role as a pivotal threat to bottled water the industry. That half of Britons view reusable water bottles as making people look good illustrates how widely these concerns now permeate public opinion.

Promisingly for the category, however, there is ample potential for the companies' green efforts to keep consumers engaged. For example, 66% of



"Competition from tap water continues to pose a key challenge for the market. The convenience and safety of bottled water remain key usage drivers for the category, and aspects for individual brands to lean into, together with the perceived importance of hydration."

– Marine Seon, Senior Research Analyst

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people who drink and buy bottled water say that knowing the bottles are properly recycled would make them buy more of the drink.

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