

Still and Sparkling Waters - US - 2023

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This report looks at the following areas:

- Impact of rising inflation on the bottled water market
- Consumers' perception of premium bottled water
- Consumer interest in sustainable bottled water
- Still versus sparkling water occasions
- Functional water opportunities

Packaged water sales are on the rise despite increased economic uncertainty as consumers prioritize their health and wellness and return to prepandemic events and activities. 83% of consumers agree that staying hydrated is one of their most important health goals.

Increased sales of regular bottled water accounted for much of the category's growth with consumers increasingly gravitating toward both ends of the water price spectrum. Private label water sales soared in 2022, indicating strong loyalty among category consumers and reflecting consumers' view of bottled water as a household necessity. 73% of consumers say they always keep bottled water stocked at home at all times. Premium lifestyle water brands also experienced strong growth driven by consumer interest in water as a personal luxury. Premium water's expansion suggests new opportunities for water brands that reflect consumers' personal interests and aspirations.

Younger consumers' interest in sustainability along with growing concerns surrounding water conservation and home water filtration innovations may challenge the packaged water category's future as more consumers opt for home-sourced water. Water product sustainability claims will retain younger category purchasers and represent an area of opportunity given the strong overlap between sustainability and luxury within the bottled water category.



"Rising financial uncertainty has not dampened bottled water demand as bottled water remains a core household necessity among engaged category loyalists."
- Caleb Bryant, Associate Director of Food and Drink Reports

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