BOTTLED WATER 2019: SLOWER BUT NOTABLE GROWTH

U.S. and International Developments and Statistics

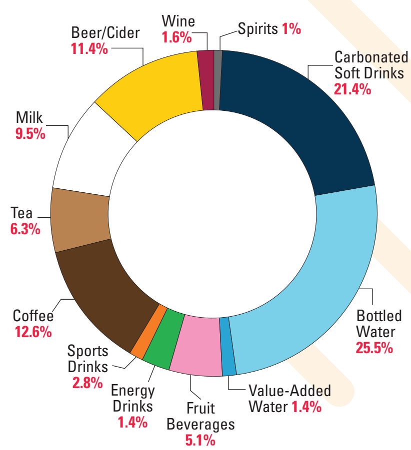
By John G. Rodwan, Jr.

In 2019, bottled water ranked as the largest beverage category by volume in the United States for the fourth consecutive year.

In 2019, the U.S. bottled water market followed a familiar script. Volume grew but did so at a slower pace than in the preceding year. Even so, it advanced at a much more vigorous rate than most other beverage categories. Currently, it's hard to say whether bottled water will stick to this script in 2020. Bottled water was certainly in great demand early in the year, as consumers stocked up so they could adhere to stay-at-home orders implemented due to the novel coronavirus pandemic. Yet if high unemployment levels persist because of the crisis, consumer behavior will certainly change, at least temporarily, as the 2008 recession demonstrated.

2019 Volume Share of Stomach By U.S. Beverage Segment

(Billions of Gallons)



Source: Beverage Marketing Corporation
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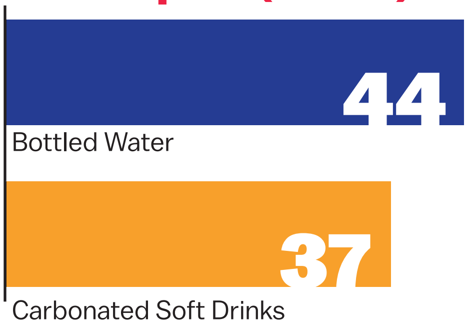
In 2019, bottled water ranked as the largest beverage category by volume in the United States for the fourth consecutive year. It enlarged its lead over the former top category, carbonated soft drinks, which once again decreased in size. Yet bottled water also saw the slowest annual growth rate in the five-year period ending with 2019, which represented the third consecutive year when volume grew at a slower rate than it had in the preceding year. Even so, bottled water volume grew from 13.8 billion gallons in 2018 to 14.4 billion gallons in 2019, an increase of 3.6 percent. This followed growth of nearly 8 percent in 2016, more than 6 percent in 2017 and close to 5 percent in 2018. Nonetheless, bottled water's growth was notable for a beverage of such considerable scale.

Bottled water transformed the U.S. beverage marketplace and continues to shape consumers' ideas about what they want from their liquid refreshment beverages. When Perrier first arrived in the 1970s, few could have guessed the heights to which bottled water would eventually ascend. Back then, it might have seemed odd to see Americans walking around carrying plastic bottles of water, or driving with them in their cars' cup holders, but now that's commonplace. A significant consequence of this change in beverage choice is that the number of calories U.S. consumers take in from beverages has declined.

Consistent Growth

Apart from a couple of small reductions in 2008 and 2009—years when most other beverage categories also contracted due to the financial crisis—bottled water volume grew every year from 1977 to 2019. This span

2019 Per Capita Consumption (Gallons)



included 17 double-digit annual volume growth spurts. Since resuming growth in 2010, bottled water volume has reliably enlarged at solid single-digit percentage rates. As a result, per capita consumption approached 44 gallons in 2019, while average intake of carbonated soft drinks dipped below 37 gallons.

Broader trends can be discerned by observing the diverging trajectories of the two biggest beverages. Bottled water's rapid rise coincided with and contributed to major changes in consumer preferences for refreshment and rehydration. As the quintessential portable and affordable beverage, bottled water prompted the formation of new habits and even new usage occasions. Suitable for consumption at any time of night or day, and not necessarily requiring to be kept ice cold, bottled water became the preferred beverage option not only for consumers aiming to reduce caloric intake or lessen artificial sweetener usage but also for consumers of all kinds. Carbonated soft drinks, of course, lacked precisely those attributes and struggled to grow, let alone sustain, their volume as a result.

Plastic bottles in single-serving sizes became the most popular format, driving overall growth of the category and accounting for the majority of its volume. Yet most other segments, including home and office delivery (HOD), sparkling water, and imports, also registered growth in 2019. The sole exception was larger, multi-serving bottles (generally ranging in size from 1 to 2.5 gallons), which were essentially flat. Domestic sparking advanced at a double-digit rate for the sixth year in a row, driven in part by major beverage companies' efforts in the segment. Imports moved in advance of the total bottled water market, but, like sparking water, grew from a relatively small base.

Before the economic downturn at the end of the century's first decade, bottled water enjoyed a lengthy run of forceful volume growth, as documented in *U.S. Bottled Water through 2024*, Beverage Marketing Corporation's latest yearly analysis of the market. During the 2000s, bottled water volume charted double-digit percentage growth rates in two years and advanced at rates close to that level in several others. Bottled water volume grew by nearly 12 percent in 2002, and, after growing by almost 11 percent in 2005, it enlarged by 9.6 percent in 2006. Departing from the pattern of preceding years, bottled water volume declined during the Great Recession, by 1.1 percent in 2008 and then by 2.5 percent in 2009.

U.S. BOTTLED WATER MARKET

Volume, Producer Revenues, and Retail Sales
2016 – 2019

Year	Millions of Gallons	Annual % Change	Millions of Wholesale Dollars	Annual % Change	Millions of Retail Dollars	Annual % Change
2016	12,433.6	7.9%	$16,014.7	8.8%	$29,091.1	7.5%
2017	13,195.1	6.1%	17,116.2	6.9%	30,698.4	5.5%
2018	13,846.8	4.9%	18,356.0	7.2%	32,930.8	7.3%
2019	14,350.4	3.6%	19,406.4	5.7%	34,627.4	5.2%

Source: Beverage Marketing Corporation

In contrast to carbonated soft drinks, which followed a number of years of tepid growth with multiple volume reductions, bottled water demonstrated that its two consecutive losses were aberrations rather than the beginning of stagnation. (Of course, if the economic consequences of the novel coronavirus pandemic prove to be severe and long-lasting, they could certainly have an impact on the bottled water business.) When bottled water volume resumed growth in 2010, it effectively restored volume to where it had been prior to the declines. Still stronger growth ensued in subsequent years. By 2019, volume reached a new volume record—more than 5.7 billion gallons higher than it had been in 2007. Carbonated soft drinks, on the other hand, underwent their fifteenth consecutive year of volume reduction in 2019.

Bottled water producers' revenues also fell in both 2008 and 2009, and did so more dramatically than volume did, but they also recovered. Bottled water wholesale dollar sales first approached $6 billion in 2000. By 2007, they neared $11.9 billion. Category sales declined by almost 4 percent to $11.4 billion the following year and then by 5 percent to $10.9 billion in 2009. They inched upward in 2010 and 2011 and moved above $12 billion in 2012.

U.S. BOTTLED WATER MARKET

Per Capita Consumption
2009 – 2019

Year	Gallons Per Capita	Annual % Change
2009	27.2	-3.2%
2010	27.8	2.5%
2011	28.7	3.3%
2012	30.4	5.7%
2013	31.6	4.0%
2014	33.6	6.4%
2015	35.9	6.8%
2016	38.5	7.1%
2017	40.6	5.5%
2018	42.4	4.4%
2019	43.7	3.1%

Source: Beverage Marketing Corporation

In a few years, bottled water per capita consumption is predicted to climb to 50 gallons.

Wholesale dollars reached $12.7 billion in 2013 and exceeded $13.5 billion in 2014. They hit $14.7 billion in 2015, surpassed $16 billion in 2016, topped $17 billion in 2017, climbed above $18.3 billion in 2018, and exceeded $19.4 billion in 2019.

At the retail level, 2019 sales were $34.6 billion, up from $32.9 billion in 2018. As with both volume and wholesale dollars, this represented slower year-over-year growth than was measured one year earlier but a significant advance of 5.2 percent all the same.

No.1 in Consumption

Upward movement in per capita consumption indicates undeniable, persisting demand for a product that consumers see as a healthy alternative to other beverages. U.S. residents increased their annual consumption of bottled water by 16.5 gallons in the span of a decade, from a bit more than 27 gallons per person in 2009 to 43.7 gallons in 2019.

During the same period, per capita consumption of carbonated soft drinks dropped by more than 8 gallons. Per capita consumption of major beverage categories like milk and fruit beverages also fell. Other types, including coffee and tea, were characterized by stability, though the ready-to-drink versions of both categories made gains. Those beverages associated with beneficial properties and functional benefits—a group that includes packaged water as well as energy drinks, sports beverages, and ready-to-drink tea—were the most resilient elements of the beverage market after 2009. Even so, average intake of ready-to-drink tea and sports beverages remained fractions of bottled water's per capita consumption level. Indeed, bottled water *added* more gallons to its per-person consumption rate in 10 years than either ready-to-drink tea or sports beverages *reached* by the end of that period. (Ready-to-drink tea intake stood above 5 gallons per American in 2019, while sports beverages remained just below that level.) Bottled water proved not only to be a key component of the U.S. liquid refreshment beverage market but also on track for additional increases in per capita consumption in the future. Beverage Marketing predicts that it could climb to around 50 gallons within just a few more years.

Bottled water achieved its No.1 position by enticing consumers away from other packaged beverages.

Several attributes explain bottled water's ongoing appeal for U.S. consumers, including its associations with healthfulness, convenience, safety, and value. Varied packaging types, ranging from bulk to single-serve, facilitate a wide array of uses. Among commercial ready-to-drink beverages, bottled water is fairly inexpensive, and aggressive pricing, especially in the retail PET segment (named for its bottles made from polyethylene terephthalate), made it more and more affordable. Consumers' interest in beverages that boast benefits beyond refreshment alone also played a part in the fundamental hydrating beverage's rise in the beverage rankings. The fact that bottled water has zero calories and no artificial ingredients appeals to many consumers. Even where tap water may be safe, people may prefer bottled water, which they deem as better tasting. The ready availability of packaged water wherever beverages are sold also differentiates bottled water from tap. These qualities also explain why bottled water was so sought-after during pandemic-fueled pantry-loading during the first quarter of 2020.

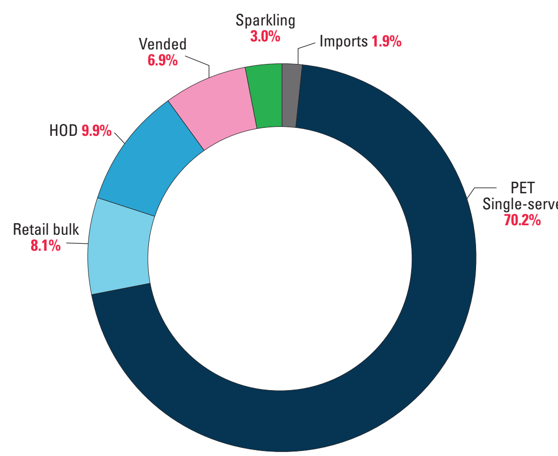
While it has sometimes been likened to tap water, bottled water achieved its position at the pinnacle of beverage standings by enticing consumers away from other packaged beverages. Some consumers may have transitioned away from regular, full-calorie sodas in favor of their diet versions, but many others opted for bottled water instead. As some consumers became leery of artificial sweeteners, they shifted away from diet sodas as well as regular counterparts.

Category Developments

As usual, domestic non-sparkling water stood as by far the biggest single segment of the U.S. packaged water business. Domestic non-sparkling water's 13.7 billion gallons represented 95.2 percent of total volume in 2019. During the recessionary years for 2008 and 2009, domestic non-sparkling saw slower volume reductions than the overall market and then outperformed it again in 2010. It moved very slightly slower than the total market in following years, including 2019.

The non-sparkling category includes diverse components that usually perform quite differently from one another. For several recent years in a row, all four segments grew, albeit at dissimilar rates. In 2019, however, three of the

2019 Volume Share of Stomach by Water Segment



Source: Beverage Marketing Corporation
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four grew. Throughout most of the 1990s and 2000s, the retail premium segment—consisting of still water in single-serve PET bottles—propelled the overall category's development. Indeed, the PET segment enlarged by a double-digit percentage rate 16 consecutive times through 2007. Growth slowed considerably in 2008 before it halted in 2009. Yet PET's 0.9 percent reduction was far less than the 2.5 percent loss measured for bottled water volume as a whole. Moreover, 2009 PET volume of almost 5.2 billion gallons stood more than 4.1 billion gallons higher than it had in 1999, and its share of total bottled water swelled from 24 percent to more than 61 percent during that ten-year period. In 2010, PET experienced the strongest growth of any bottled water segment, advancing

U.S. BOTTLED WATER MARKET

Volume and Growth by Segment 2017 – 2019

	Non-sparkling		Domestic Sparkling		Imports		Total	
Year	Volume*	Change	Volume*	Change	Volume*	Change	Volume*	Change
2017	12,678.9	5.5%	273.6	37.7%	242.6	9.2%	13,195.1	6.1%
2018	13,215.1	4.2%	372.9	36.3%	258.7	6.7%	13,846.8	4.9%
2019	13,654.5	3.3%	424.4	13.8%	271.5	4.9%	14,350.4	3.6%

* Millions of gallons

Source: Beverage Marketing Corporation

by 6.8 percent to 5.5 billion gallons, which boosted its share above 64 percent. Growth slowed in 2011 but remained well in advance of the total market: volume greater than 5.8 billion gallons flowed from growth of 5.3 percent, which pushed PET's share to 65 percent. In 2012, the segment saw its strongest showing since 2007, increasing by more than 8 percent to 6.3 billion gallons, which represented 66 percent of the overall market. Greater than 6 percent growth in 2013 pushed volume up to nearly 6.7 billion gallons—essentially two-thirds of the total. In 2014, the segment advanced at an even greater rate than in 2012, catapulting volume above 7.2 billion gallons and market share to 67.5 percent. Still another year of acceleration in 2015 drove PET volume to nearly 7.9 billion gallons and share to more than 68 percent. In 2016, the single-serve segment enlarged by more than 9 percent to reach 8.6 billion gallons, which gave it still more market share. PET volume slowed in 2017, but with volume of close to 9.2 billion gallons, the segment still accounted for close to 70 percent of U.S. bottled water volume, a share it held onto in 2018, when volume approached 9.7 billion gallons. In 2019, the segments share did climb above 70 percent as volume exceeded 10 billion gallons for the first time.

Retail bulk volume experienced some reversals as consumers frequently opted for convenient PET multipacks in large format retail channels instead of larger sizes. Its share fell from nearly one-quarter of the category volume at the beginning of the century to 8.1 percent by 2019, largely due to competition from PET. After several declines, the segment did grow each year from 2011 to 2018, but, in 2019, retail bulk volume saw a minute (0.1 percent) reduction in volume.

> Although starting from a small base, both imported and sparkling bottled water grew in 2019.

Like retail bulk, direct delivery faced competition from PET bottles. The segment, which was the largest of them all as recently as the mid-1990s, accounted for less than 10 percent of total volume by 2019. U.S. home and office delivery (HOD) volume slipped from close to 1.4 billion gallons in the early 2000s to around 1.2 billion gallons a few years later, but it again stood at 1.4 billion gallons again in 2019, when volume enlarged by 0.4 percent.

The comparatively small, mostly regional vending segment consisting of refillable jug containers saw some growth even when total bottled water volume did not. Its low cost during economic difficulties undoubtedly had something to do with vending's positive results. It continued to grow in 2019, but at a slower pace (0.5 percent) than the domestic still water market or the bottled water market as a whole, though it did outperform both retail bulk and HOD, and very well may do so again in 2020.

Imports and sparkling—the two segments outside the domestic non-sparkling space—grew in 2019, but both slowed down from the preceding year yet still registered faster growth than any domestic non-sparkling segment as well as the overall market. Imported water, the smallest segment of them all, is prone to fluctuations. In the 2000s, it registered double-digit percentage growth in some years, and equally sizeable contractions in others. After one of those up years in 2007, imported water's volume fell sharply in 2008 and then plummeted precipitously in 2009. It continued to shrink in 2010 before moving up again in 2011. In 2012, imports notched their first double-digit growth rate since 2007. Growth rates remained at similarly high levels for a few years until 2017, when imported volume enlarged by 9.2 percent. Growth cooled to less than 7 percent in 2018 and less than 5 percent in 2019. Sparkling water held a small share of bottled water volume but grew it at an even more explosive rate than imports, let alone retail PET, for several years, and 2019 was no exception, though the year's double-digit growth rate was much lower than 2018's.

Domestic non-sparkling water accounted for almost all per capita bottled water consumption in 2019. Sparkling water volume worked out to about 1.3 gallons per person. (With imports, the figure translated into a little more than four-fifths of a gallon per U.S. resident.) In the key PET portion, average intake moved from 16.9 gallons in 2009 to 30.7 gallons a decade later.

In terms of retail sales, single-serve PET was by far the biggest part of the business with $25.1 billion or 72.5 percent of the total. Domestic non-sparkling of all types together

GLOBAL BOTTLED WATER MARKET

Leading Countries' Consumption and Compound Annual Growth Rates
2014 – 2019

2019 Rank	Countries	Millions of Gallons 2014	Millions of Gallons 2019	CAGR* 2014/19
1	China	18,227.9	29,569.7	10.2%
2	United States	10,709.4	14,350.4	6.0%
3	Mexico	7,972.8	9,747.4	4.1%
4	Indonesia	6,102.4	8,892.9	7.8%
5	India	4,553.3	6,492.7	7.4%
6	Brazil	5,151.3	6,436.6	4.6%
7	Thailand	3,358.7	4,256.4	4.9%
8	Italy	2,826.6	3,154.2	2.2%
9	Germany	3,017.0	3,143.6	0.8%
10	France	2,329.5	2,536.1	1.7%
	Top 10 Subtotal	64,248.8	88,580.1	6.6%
	All Others	18,508.4	22,425.0	3.9%
	WORLD TOTAL	82,757.2	111,005.1	6.0%

* Compound annual growth rate

Source: Beverage Marketing Corporation

Global bottled water consumption is estimated to have surpassed **111 billion gallons** in 2019. Total consumption swelled by **4.3 percent**, and per capita consumption of **14.4 gallons** represented a gain of more than 3 gallons over the span of five years.

accounted for nearly 83 percent of retail sales. Though domestic sparkling and imports represented comparatively small portions of bottled water volume, they have outsize shares due to their higher price points. For instance, while imported volume was less than 1 percent of the total, it garnered a share of retail sales of close to 11 percent.

International Developments

Bottled water became a beverage industry phenomenon not only in the United States—which once ranked as the No.1 market in terms of volume—but also in just about every part of the world. Bottled water initially became a sizeable, mainstream commercial beverage category in Western Europe, where consumption of it has been part of many consumers' longstanding habits. It later grew into a truly global beverage. Several Asian markets achieved strong growth to become major bottled water markets during the 2000s and 2010s. In fact, Asia itself became the largest regional market in 2011, edging out North America and easily outshining Europe. After having moved ahead of Mexico to claim the No.2 position in 2012, China surpassed the United States to take the lead in 2013. By 2019, China accounted for more than one-quarter of the world's bottled water volume.

Global bottled water consumption is estimated to have surpassed 111 billion gallons in 2019, according to data

GLOBAL BOTTLED WATER MARKET

Per Capita Consumption by Leading Countries 2014 – 2019

		Gallons Per Capita	
2019 Rank	**Countries**	**2014**	**2019**
1	Mexico	64.2	73.7
2	Thailand	49.1	61.4
3	Italy	47.4	53.3
4	United States	33.6	43.7
5	France	36.3	38.7
6	Germany	37.0	38.1
7	United Arab Emirates	29.2	36.3
8	Spain	31.1	36.3
9	Belgium-Luxembourg	34.8	35.8
10	Hungary	30.3	34.3
11	Indonesia	23.9	33.0
12	Saudi Arabia	28.3	31.7
13	Korea, Republic of	22.5	30.6
14	Brazil	25.2	30.3
15	China, Hong Kong SAR	27.3	30.3
16	Poland	23.2	29.8
17	Romania	19.8	29.1
18	Greece	23.8	27.1
19	Uruguay	21.3	26.9
20	Portugal	22.7	26.3
	GLOBAL AVERAGE	11.3	14.4

Source: Beverage Marketing Corporation

Building on its remarkable history of growth, bottled water is expected to put still more distance between itself and carbonated soft drinks.

from the latest edition of Beverage Marketing's *The Global Bottled Water Market*. Total consumption swelled by 4.3 percent during the year. Per capita consumption of 14.4 gallons represented a gain of more than 3 gallons over the span of five years.

Inevitably, per capita consumption by individual country or region differs greatly from the global average. For instance, several Western European countries have per capita consumption levels far above 25 gallons, and the No.1 market had average intake of almost 74 in 2019. Simultaneously, much of the developing world, where the majority of the world's population resides, finds its per capita consumption figures still in the single-digit range.

While the global per capita consumption figure can obscure significant regional variations, bottled water's international growth indicates demand for it in all types of markets. Consumers have shown an enthusiasm for it in well developed markets, in less developed ones, and in economies in transition. Bottled water synced with various consumer trends around the globe. In developed countries, such as the United States and Canada, bottled water became a particularly dynamic major commercial beverage category by registering as an attractive option for health-conscious consumers. Marketers positioned bottled water as a virtuous alternative to carbonated soft drinks and fruit juice drinks (some of which comprise sizeable portions of their own product portfolios). In the developed world, some people viewed bottled water as not only a way of achieving hydration but also as a functional beverage. Simultaneously, bottled water serves at least a partial solution to the problem of often-unsafe water found in many economically developing countries.

North America contains two of the three largest individual bottled water markets with the United States and Mexico, which together represented close to 22 percent of the world's packaged water market in 2019. The U.S. bottled water market had been a catalyst for much of the global expansion up until the mid-2000s, and its ongoing growth continues to contribute to the overall market's enlargement. Its compound annual growth rate (CAGR) of 6 percent for the five-year period ending with 2019 was identical to the CAGR achieved by the global market in the same timeframe. Mexico alone accounted for nearly 9 percent of the global volume with 9.7 billion gallons in 2019. With a five-year CAGR of 4.1 percent, however, it grew much more slowly than either the United States or the world market.

Besides the United States, China was the only other country that could claim a double-digit share of global volume with more almost 29.6 billion gallons and a percentage of the total market higher than the combined shares of the second and third largest markets in 2019. Chinese bottled water volume enjoyed double-digit percentage growth rates for several consecutive years and did so again in the period from 2014 to 2019, when it saw a CAGR of 10.2 percent—the highest rate among the ten biggest bottled water markets. Fourth-place Indonesia moved more slowly than China but well ahead of the international market, as did India, the No.3 Asian market and No.5 overall. Thailand also ranked as a top-10 bottled water market, but it lagged the global market as well as the larger Asian ones from 2014 to 2019.

Though Europe can no longer claim to have any of the biggest bottled water markets, it does have several major ones, including three of the ten biggest. These are firmly established markets, meaning their growth tends to be slower than those where bottled water has less of a foothold. Some of the most prominent continental countries experienced only very slight growth. For example, during the five-year period ending with 2019, Italy's volume grew by a CAGR of 2.2 percent. Germany, the ninth largest bottled water market in the world, had a CAGR of just 0.8 percent, and tenth-place France recorded a CAGR of 1.7 percent. As a group, the trio of leading European bottled water markets accounted for 8 percent of the world's total volume in 2019—less than the share Indonesia held on its own.

Packaging preference. Plastic packaging is preferred over glass in almost every country. Even in Germany and other countries, such as the United Kingdom, where glass has a strong presence, PET is the most dynamic and rapidly growing segment. HOD still accounts for a minority of global bottled water sales. Yet it is a vital segment in many countries, such as Mexico, where it accounts for a majority of the volume.

Per capita consumption. Mexico regularly leads the world in bottled water per capita consumption, and that remained the case even after China surpassed it (and all other countries) in absolute volume. Average intake in Mexico went from 64.2 gallons in 2014 to 73.7 gallons five years later. Per capita consumption in China stood significantly lower, at 20.8 gallons, in 2019. The former leader in average intake, Italy, consumed the equivalent of 53.3 gallons per person in 2019, which put in third place behind Thailand, which in 2014 consumed the equivalent of 49.1 gallons per person but had upped average intake to 61.4 gallons by 2019.

Some Middle Eastern markets rank exceptionally high in per capita bottled water consumption. With the equivalent of more than 31.7 gallons for each resident in 2019, Saudi Arabia had the twelfth highest level of bottled water consumption in the world. In addition to Saudi Arabia, the Middle East region had the United Arab Emirates in the top 20 in per capita bottled water consumption. At slightly more than 20 gallons per resident, both Kuwait and Lebanon also consume bottled water at rates greater than the global average, though neither made it onto the 2019 top-20 list.

Although Europe no longer held the top spot in volume per capita, nearly half of the top 20 bottled water consumers on a per person basis were European countries as of 2019. The consumers of the combined market of Belgium-Luxembourg imbibed more than 35 gallons each, a rate that tended to inch upward over the years. Germany, France, Spain, Hungary, and Italy were the other European countries with per capita consumption greater than 30 gallons. French consumers quaffed 2.4 gallon more bottled water in 2019 than they had five years earlier. In 2019, Germany and Spain had per capita consumption rates of 38.1 gallons and 36.3 gallons, respectively, putting them in sixth and eighth place in terms of average bottled water intake. Like France, both Germany and Spain consumed more bottled water per person in 2019 than they had five years before. Hungary, which ranked tenth, also increased its bottled water consumption. Other European markets among the top 20 were Greece, Portugal, Romania, and Poland.

Though Asian nations attained prominence among the world's bottled water markets when measured in total volume, the most populous countries generally do not have high per-person intake levels. The Chinese special administrative region (SAR) of Hong Kong made the list for the first time as its average intake approached 22 gallons in 2009 and continued to increase per capita consumption subsequently, climbing to 30.3 gallons in 2019. Despite its position as the largest market, mainland China did not rank among the top-20 markets in per capita consumption in 2019, although intake had climbed above the global norm by that point.

Americans' 2019 per capita bottled water consumption put the United States in the No.4 position among the countries of the world, right behind Italy but ahead of France.

Looking Ahead

Beverage Marketing anticipates that bottled water will continue reshaping the U.S. multiple beverage marketplace, enlarging its market share in the process. The overall amount of liquid Americans annually drink will remain steady, resulting in total volume growth in line with population increases. Bottled water is on track to grow faster (though more slowly than it did in recent years), unlike carbonated soft drinks or fruit beverages, which will, in all probability, lose share points. Other major beverage categories, such coffee and tea, are expected to grow but do so more slowly than bottled water. Building on its remarkable history of growth, bottled water will likely put still more distance between itself and carbonated soft drinks, the former leading category. Of course, uncertainty characterizes the immediate future, as the full magnitude of the havoc caused by the COVID-19 crisis remains unknown. **BWR**

John G. Rodwan, Jr., is editorial director at Beverage Marketing Corporation and editor of its bi-weekly newsletter The Beverage Strategist. Beverage Marketing, a New York-based research, consulting, and financial services firm dedicated to the global beverage industry, publishes numerous market reports on bottled water and other beverages.