2018 PROGRESS REPORT
INTERNATIONAL BOTTLED WATER ASSOCIATION

PET plastic water bottles, when recycled, can be made into running shoes and all kinds of quality products – including new bottles.
## 2019 IBWA BOARD OF DIRECTORS

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<tr>
<th>Position</th>
<th>Name</th>
<th>Company</th>
<th>Location</th>
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<tr>
<td>CHAIRMAN</td>
<td>Lynn Wachtmann</td>
<td>Maumee Valley Bottlers, Inc.</td>
<td>Napoleon, Ohio</td>
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<td>VICE CHAIRMAN</td>
<td>Robert Smith</td>
<td>Grand Springs Distribution</td>
<td>Alton, Virginia</td>
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<td>TREASURER</td>
<td>Brian Hess</td>
<td>Niagara Bottling, LLC</td>
<td>Ontario, California</td>
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<td>IMMEDIATE PAST CHAIRWOMAN</td>
<td>Shayron Barnes-Selby</td>
<td>DS Services of America, Inc.</td>
<td>Atlanta, Georgia</td>
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<td>PRESIDENT AND CEO</td>
<td>Joe Doss</td>
<td>International Bottled Water Association</td>
<td>Alexandria, Virginia</td>
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<td>BOARD MEMBERS</td>
<td>Joe Bell</td>
<td>Aqua Filter Fresh, Inc.</td>
<td>Pittsburgh, Pennsylvania</td>
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<td>Philippe Caradec</td>
<td>Danone Waters of America</td>
<td>White Plains, New York</td>
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<td>Nestlé Waters</td>
<td>Stamford, Connecticut</td>
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<td>Hall’s Culligan</td>
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<td>Henry R. Hidell</td>
<td>EarthRes Group</td>
<td>Pipersville, Pennsylvania</td>
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## 2019 IBWA EXECUTIVE COMMITTEE

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<td>VICE CHAIRMAN</td>
<td>Dan Kelly</td>
<td>Polymer Solutions International, Inc.</td>
<td>Medford, New Jersey</td>
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<td>BOARD MEMBERS</td>
<td>Scott Hoover</td>
<td>Roaring Spring Bottling</td>
<td>Roaring Spring, Pennsylvania</td>
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<td>Bill Young</td>
<td>Absopure Water Co., Inc.</td>
<td>Plymouth, Michigan</td>
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A LETTER FROM THE PRESIDENT

It was another very good year for the bottled water industry in 2018. For the third consecutive year, consumers have made bottled water the No.1 packaged beverage in the United States (by volume). According to the latest data from the Beverage Marketing Corporation (BMC), sales and consumption of our safe, healthy, and convenient product continued to grow. Bottled water consumption increased to 14 billion gallons in 2018, up 5.8 percent from 2017, and sales increased by 8.2 percent, now totaling $18.5 billion (wholesale dollars). Per capita consumption increased 4.1 percent, with the average American now drinking 41.9 gallons of bottled water annually.

These figures are further evidence that consumers are increasingly focused on healthy hydration and making healthy lifestyle choices. In fact, during the past 16 years, almost all of bottled water’s volume gains have been the result of decreased consumption of carbonated soft drinks. And despite the repeated efforts of bottled water critics to discourage people from drinking our products, sales and consumption continue to thrive. Consumers are making their voices heard in the marketplace, which is what counts.

As the No.1 packaged beverage product in the United States, bottled water has become an even larger target for our detractors. However, IBWA’s dedicated team of members, staff, and consultants continue to work hard to promote and defend our industry. In 2018, we again concentrated our efforts on highlighting bottled water’s stringent state and federal regulations, our members’ environmental sustainability efforts, the safety of all plastic bottled water containers, and the importance of water, including bottled water, in a healthy diet.

Our critics continued their attempts to prevent bottled water companies from siting, permitting, and re-permitting their plants—even though bottled water has the lowest environmental footprint and water use of any packaged beverage product. To counter their efforts, IBWA has developed a coordinated strategy that pushes back and presents the facts to the media, government officials, consumers, and other relevant audiences. Our 2018 efforts included developing social media and government relations toolkits and preparing a Water Stewardship Best Practices Guide.

Implementation of, and compliance with, the Food Safety Modernization Act (FSMA) regulations continues to be a very important issue for all IBWA members. As a result, we have continued our efforts to assist IBWA member companies in meeting the requirements of these new rules. In 2018, we continued to provide educational webinars and seminars, with an emphasis on the Preventive Controls and Intentional Adulteration rules, and we held several FSMA workshops around the country. IBWA continues to disseminate FSMA information to members through our publications (e.g., the News Splash e-newsletter and Bottled Water Reporter magazine) and special bulletins.

While the next edition of the Dietary Guidelines for Americans (DGAs) won’t be published until 2020, IBWA is already working to ensure that this influential document continues to include multiple references to water as a healthy hydration source. The DGAs are used by policymakers and health organizations to help Americans make healthy food and beverage choices. They are also the foundation for many federal nutrition policies and programs. Because of IBWA’s previous work on this issue, the current guidelines (2015–2020) prominently highlight the need for Americans to choose water instead of sugar-sweetened beverages. The DGAs now expressly state that calorie-free drinks—especially water—should be the primary beverages consumed and encourage a shift to no-sugar-added beverages, such as water, in place of sugar-sweetened beverages. Our efforts to highlight the important role water plays in a healthy diet also include recommending that a water icon be added to the MyPlate nutrition graphic, which is a very prominent public resource that is based on the DGAs.

It seems obvious to most people that bottled water is the healthiest packaged beverage option. However, current U.S. Food and Drug Administration (FDA) regulations don’t allow bottlers to use the term “healthy” on their labels. To correct this situation, IBWA asked FDA to use its enforcement discretion to allow “healthy” claims for bottled water. We pointed out that these claims are intended to reflect prevailing dietary guidance and help consumers adopt more healthy eating practices. We also noted that the current DGAs and other federal dietary recommendations consistently recommend increased water consumption. Although FDA recently denied IBWA’s request for enforcement discretion to allow companies to use the word “healthy” on bottled water labels, the agency stated that IBWA’s comments will be considered when FDA issues the proposed rule on this topic in 2019.

Working on all the issues listed above—and more—means that IBWA must continually expand our outreach to federal and state legislators and governors to educate them further about the bottled water industry and gain their support. On Capitol Hill, IBWA staff and members held more than 210 meetings, with members of Congress and their staff. In the states, IBWA monitored more than 700 bills and 400 regulatory proposals concerning bottled water. Major areas of focus for states and towns continue to be bottled water sales ban proposals, recycling, water resource management, and tax issues. Meeting with lawmakers and working with strong coalitions, IBWA was able to defeat several onerous state and local proposals in 2018. IBWA also continues to work with our allies to defend the safety of bisphenol A (BPA) at both the state and federal level.

The 2018 IBWA Progress Report summarizes some of IBWA’s accomplishments in maintaining a favorable business, regulatory, and public affairs climate for the bottled water industry and in protecting and advancing the interests of all IBWA members. Our accomplishments are the result of a true team effort by our members, staff, and consultants. IBWA has made great strides in ensuring the success of the bottled water industry, and you can remain confident that we will continue to fight hard every day to defend this safe, healthy, convenient product and promote the facts about bottled water to consumers, the media, and government officials.

Joe Doss
IBWA President and CEO
STRONGER THAN EVER

There was continued good news for the bottled water industry in 2018. For the third consecutive year, consumers have made bottled water the No.1 packaged beverage in the United States, by volume. According to preliminary data from the Beverage Marketing Corporation (BMC), key bottled water statistics for 2018 included the following:

- Consumption was 14 billion gallons, a 5.8 percent increase.
- Sales were $18.5 billion (wholesale dollars), an 8.2 percent increase.
- Per capita consumption grew by 4.1 percent and is now 41.9 gallons.
- PET volume increased by 5.9 percent (9.7 billion gallons).
- HOD volume grew by 1.1 percent (1.4 billion gallons).

During the past 16 years, almost all of bottled water’s volume gains have been the result of decreased consumption of carbonated soft drinks. These figures demonstrate that, despite the efforts by bottled water critics to discourage people from drinking bottled water, sales and consumption continue to grow.

Consumers are continuing to make their voices heard in the marketplace, which is where it matters most. They are choosing bottled water because it tastes great and is safe, healthy, and convenient. In addition, the continued efforts of IBWA members and staff to communicate the facts about bottled water to the media, consumers, and government officials have also helped make bottled water America’s favorite beverage and are responsible for keeping it in the top position.

The following pages review some of the key topics the industry worked on in 2018 and provide a summary of the many activities IBWA members, staff, and consultants performed throughout the year to support the bottled water industry.

DEFENDING THE INDUSTRY’S RIGHT TO SITE AND PERMIT

Anti-bottled water groups continue their attempts to prevent bottled water companies from siting, permitting, and re-permitting their plants across the country. While their actions are usually aimed at large bottled water companies, many of their proposals would also impact small and mid-size bottlers.

The efforts of these anti-bottled water groups have targeted both groundwater and public water source bottling facilities. These bottled water critics falsely claim that our companies use excessive amounts of water, cause water shortages and droughts, acquire and sell so-called “public” or “free” water for profits, export water from the area, and cause other negative environmental and social impacts.

To counter their efforts, IBWA has developed a coordinated strategy that pushes back and presents the facts to the
media, government officials, consumers, and other relevant audiences. IBWA has taken the following actions to oppose state and local proposals that would prevent our members from siting, permitting, or re-permitting their plants:

- Developed social media and government relations toolkits to address specific issues raised when communities object to a bottled water plant siting or permitting. These toolkits include a series of digital images and corresponding posts for social media platforms, such as Twitter, Instagram, Facebook, and Pinterest.

- Developed a Water Stewardship Best Practices Guide, which incorporates voluntary approaches to water stewardship that play an important role in meeting local, national, and international sustainability goals.

- Continued to identify industry allies and third-party organizations that would support our efforts.

**IBWA has developed a strategy that pushes back on the efforts of anti-bottled water groups to prevent bottled water companies from siting, permitting, and re-permitting their plants and presents the facts to the media, government officials, consumers, and other relevant audiences.**

There were two important successes for the bottled water industry on this issue in 2018. After several years of fighting bottled water critics, a small IBWA member in Montana finally got approval to open its plant. And in Michigan, despite vocal opposition, an IBWA member company was able to get a permit approved to increase production at its plant.

IBWA will continue its efforts to provide assistance to our members in overcoming any attempts by bottled water critics to prevent them from siting a plant or renewing an existing permit.

INCREASING IBWA MEMBERSHIP

IBWA had yet another successful year of membership growth in 2018. IBWA added nearly 20 new members, which included both supplier and bottler companies. The membership renewal rate for bottlers, suppliers, and distributors was 98.3 percent, which was 3 percent above IBWA’s goal for 2018. This indicates that IBWA’s members continue to be satisfied with the benefits and services provided to them. To learn more about how you can join IBWA, contact IBWA’s Membership Department: cbass@bottledwater.org or 703.647.4615.
INCREASING WATER REFERENCES IN THE DIETARY GUIDELINES FOR AMERICANS

IBWA’s work to ensure that the 2020-2025 Dietary Guidelines for Americans (DGAs) include more references to water as a healthy hydration source continued in 2018. The DGAs, which are used by policymakers and health organizations, help Americans make healthy food and beverage choices and is the foundation for many federal and state nutrition policies and programs.

IBWA worked hard to ensure the current guidelines (2015-2020) supported increased access to water as a healthy beverage choice. The current guidelines expressly state that calorie-free drinks—especially water—should be the primary beverages consumed. They also encourage a shift to healthier, no-sugar-added beverages, such as water, in place of sugar-sweetened beverages. Further recognizing the importance of water, a nutrition guide located on the USDA’s website, MyPlateMyWins, specifically highlights the need to choose water instead of sugary drinks.

For the upcoming 2020-2025 DGAs, IBWA is advocating for increased positive messaging about water—including bottled water. We provided comments during the Topics and Questions development period for the upcoming DGAs, where we requested continued support for recognizing the importance of water in a healthy diet. IBWA also recommended that water be included in the MyPlate nutrition graphic, which is a very prominent public resource that stems from the DGAs.

Our goal is to have a water icon placed directly next to the dairy symbol on the MyPlate graphic. Approximately 49 other countries already include water in their nutrition guides, and we think that the United States needs to do the same. We continue to partner with the National Drinking Water Alliance (NDWA), which also supports adding a water symbol to the MyPlate nutrition guide. Others included in this broad coalition are the Nutrition Policy Institute, the Center for Science in the Public Interest, American Heart Association, American Academy of Pediatrics, and Mission Readiness.

ADDING “HEALTHY” TO BOTTLED WATER LABELS

It is hard to believe, but current U.S. Food and Drug Administration (FDA) regulations don’t allow bottled water companies to use the word “healthy” on their product labels. FDA is currently revising its definition of healthy for all foods and beverages to better reflect the evolving landscape of nutritional science. IBWA has submitted written and oral comments and met with FDA in support of revising the regulations to allow bottled water products to use the word “healthy” on product labels. However, since the regulatory process could take several years, IBWA also submitted a letter to FDA requesting that the agency use its enforcement discretion to allow “healthy” claims for bottled water. We pointed out that “healthy” claims are intended to reflect prevailing dietary guidance and help consumers adopt more healthy eating practices. We also noted that the 2015-2020 Dietary Guidelines for Americans and other federal dietary recommendations consistently recommend increased water consumption.

While FDA denied IBWA’s request for enforcement discretion, the agency stated that our comments will be considered when FDA issues the proposed rule on this topic. IBWA is considering next steps and will continue to monitor developments on this matter.
ADVOCATING ON CAPITOL HILL

In 2018, IBWA members and staff met with 210 congressional offices and held legislative fly-ins in March, June, and September. The annual June Hill Day legislative fly-in was held during the IBWA June Board and Committee meetings. Approximately 50 IBWA members participated in that event, making 55 visits with members of Congress to discuss important issues impacting the bottled water industry.

To help IBWA members further establish relationships with their members of Congress, IBWA co-sponsored two industry events on Capitol Hill in 2018: the North American Meat Institute’s Annual Hot Dog Lunch in July and the American Bakers’ Association’s “Bakers’ Dozen Awards” Reception in October. IBWA provided our Bottled Water Matters private label bottled water for both of those events. Hundreds of congressional staff and many senators and representatives were in attendance, providing IBWA yet another opportunity to educate elected officials about bottled water.

Increase Truck Weight Limits. IBWA has been actively promoting federal legislation to increase truck weight limits in the United States. The current weight limit of 80,000 lbs. on five axles was set in the 1980s. Since then, a lot has changed regarding road and truck technology. IBWA believes that increasing the allowable truck weight to 91,000 lbs. and adding a sixth axle would have several benefits, including:

• Reduce the number of trucks on the road.
• Dramatically increase their efficiency.
• Improve highway safety, since these trucks would have a reduced stopping distance.
• Reduce fuel consumption and carbon emissions.
• Help address severe driver shortages.

IBWA is a member of the Safer Hauling and Infrastructure Protection (SHIP) Coalition, which supports a voluntary 10-state pilot program that would add a sixth axle to trucks and increase weight limits to 91,000 lbs. The program would then study the impact to safety and infrastructure, allowing for the collection of data to support a truck weight increase in all 50 states.
Educate Legislators Through the IBWA PAC.

The IBWA Political Action Committee (PAC) is a vital tool that helps educate members of Congress and builds champions for the bottled water industry. Due to the generosity of IBWA members, the IBWA PAC exceeded its 2018 goal of getting $50,000 in contributions. A strong PAC is needed in order for IBWA to continue working on the many important federal issues facing the bottled water industry.

Contributions to the PAC are important because they make it possible for IBWA to support political candidates who support the bottled water industry. Members must provide IBWA with an Authorization to Solicit form in order to receive information about the PAC. IBWA also can't contact members about PAC issues without it. Submitting an Authorization to Solicit form does not obligate members to make a contribution to the IBWA PAC. It only gives IBWA permission to keep members informed of PAC activities and events.

In addition to making a personal contribution to the IBWA PAC, members may want to consider having their company become an IBWA PAC Corporate Sponsor. Donating as a corporate sponsor to IBWA will help cover costs associated with the PAC, such as fundraising events. To learn more information about the IBWA PAC, contact PAC Board Chair Robert Smith, or IBWA staff members Cory Martin or JP Toner.

EDUCATING AT THE STATE LEVEL

Work did not slow down in the state legislatures and local government bodies in 2018. IBWA monitored nearly 700 pieces of state legislation and nearly 400 state regulations that would have impacted bottled water companies. Major areas of focus for states and towns continue to be bottled water sales ban proposals, recycling, water resource management, and tax issues.

Bottled Water Sales Bans. IBWA dealt with a few sales ban proposals in Massachusetts in 2018. Three towns—Lincoln, Great Barrington, and Nantucket—enacted new laws to ban the sale of bottled water during town meetings. One town, Nantucket, went beyond bottled water and banned the sale and use of all plastic containers. These bottled water bans were enacted despite strong opposition from IBWA, the Northeast Bottled Water Association, and other food industry groups. Thus far, these bottled water sales bans have been limited to Massachusetts, but there is always the possibility that towns in other states will consider similar proposals. IBWA will continue to oppose any proposals that would ban or restrict the sale of bottled water.

Recycling. Attempts to increase beverage recycling rates continue to be a high priority in many states. In 2018, legislation was introduced that would enact new bottle deposit laws, expand existing deposit schemes,
and implement Extended Producer Responsibility and product stewardship programs.

The use of recycled content in plastic beverage containers was also a major topic in 2018 that will continue to be considered by many states in 2019 and beyond.

In 2018, IBWA monitored nearly 700 pieces of state legislation and nearly 400 state regulations that would have impacted bottled water companies.

Legislation was introduced in California in 2018 that would require all beverage containers to include a minimum amount of recycled material. Early in the process, IBWA stated that the bottled water industry supported the concept of recycled content. In fact, many IBWA members had already been using various amounts of recycled content in their products, with some using as high as 100 percent. However, IBWA made it clear that several important issues—for example, the availability and quality of the recycled material, the cost of the material, and the amount of time needed to comply with the mandate—had to be considered before any such requirement was enacted.

Ultimately, the final version of the bill included several provisions that made it impossible for IBWA to support it: a 20 percent mandate by 2020; a daily financial penalty; the potential for a charge of perjury for non-compliance; monthly reporting; and measurement based on a per container basis, not an aggregate figure for all products. IBWA and our allies therefore took action to defeat this onerous proposal. After several rounds of very close votes on the final day of the legislative session, the bill was defeated.

However, the bill will be reintroduced in 2019, and IBWA is already working with our allies to help shape any future legislation to address the bottled water industry’s concerns.

IBWA also opposed California legislation that would have required the caps for plastic beverage containers to be tethered to the bottle. IBWA met with several lawmakers about the issue, and we worked with a strong coalition of partners to ultimately defeat the proposal.

Other State Issues. IBWA worked on many other state legislative and regulatory issues in 2018, including proposals to require testing and labeling for per- and polyfluoroalkyl substances (PFAS), microplastic monitoring and testing proposals, and bisphenol A (BPA) restrictions.

PARTNERING FOR INCREASED OUTREACH

IBWA continued to work with industry and state government groups in 2018 to share the facts about bottled water with key decision makers and allies. We actively participated in several important meetings, including the National Conference of State Legislature’s Legislative Summit and the Council of State Government West annual meeting. IBWA also works with groups such as the State Government Affairs Council and the Council of State Retail Associations to discuss best practices for working in the states.

IBWA also established strong partnerships with NGOs to increase recycling awareness and expand the reach of our educational efforts. IBWA continues to be proud sponsors of two leading national organizations that promote increased recycling—Keep America Beautiful and The Recycling Partnership. IBWA is also a member of the Florida and Michigan Recycling Partnerships, and the Northeast Recycling Council.
Since 2016, bottled water continues to be the No.1 packaged beverage in the United States.

Bottled water sales increased by 8.2% over 2017 numbers (wholesale dollars).

Volume of bottled water produced in the United States, up 5.8%.

Beverage Marketing Corporation’s latest research shows that each American consumed, on average, 41.9 gallons of bottled water in 2018.

Bottled water containers make up 53.9% of the PET plastic collected in curbside programs. (Soft drinks make up 20.4% of items collected in curbside.)

In 2018, IBWA launched its podcast—“H2O In The Know”—to reach a wider audience with pro-bottled water messaging.
IBWA members and staff met with 210 congressional offices.

MILLIONS OF LITERS
Bottled water companies delivered millions of liters of water to those in need after 2018 natural disasters, including Hurricanes Frances and Michael and the California wildfires.

IBWA’s Put It In The Bin recycling campaign reached nearly 1 million people on social media.

$50,000+
Due to the generosity of IBWA members, the IBWA PAC surpassed its 2018 goal of $50,000.

IBWA reviewed and monitored more than 700 pieces of state legislation and 400 state regulatory proposals.

20,000/MONTH
More than 20,000 people visited IBWA’s flagship website—www.bottledwater.org—each month in 2018.

www.bottledwater.org

210
MILLION
REACHED
IBWA’s Put It In The Bin recycling campaign reached nearly 1 million people on social media.

1 MILLION
REACHED

www.bottledwater.org

20,000/MONTH

700 + 400
MILLIONS OF LITERS
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IBWA continues to aggressively defend and proactively communicate the facts about bottled water to counter the efforts of activists and bottled water critics who make false and misleading statements about bottled water products and the industry. To reach numerous audiences—media, consumers, legislators, regulators, social influencers, and other opinion leaders—IBWA uses a variety of methods to get our messages across: social media toolkits, traditional newspapers and magazines articles, news websites, blogs, Facebook, Twitter, Instagram, YouTube, and Pinterest.

Effective communication, brand identity, and media awareness are vital for having an online presence. Thus, IBWA anchors our online communication activities with two influential websites: bottledwater.org and bottledwatermatters.com. Both websites allow visitors to quickly and easily get up-to-date facts, stories, economic data, and other useful information about bottled water.

Each month, approximately 20,000 people visit bottledwater.org. IBWA tracks data and statistics about how people use the website, which enables us to refine topics and navigation based on user demand. This also helps IBWA remain at the top of search engine results, an important tool for ensuring that IBWA is the first source for bottled water information on the internet. IBWA also monitors other websites, news outlets, Facebook, Twitter, and blogs that mention bottled water and then actively engages in online discussions to help ensure bottled water facts are available. To help counter the abundance of misinformation about bottled water found online, IBWA interacts with key bloggers and influencers in targeted demographics (environmentalists, parents, millennials, educators, etc.).

IBWA continues to be the leading media resource for bottled water information. We retain that title by swiftly correcting misinformation about bottled water in the news and using science and third-party sources to support our positions. IBWA’s standard practice is to respond immediately to online articles critical of bottled water, giving priority to major influencers such as CNN, Huffington Post, the New York Times, and the Washington Post. We also employ the traditional approach of sending letters to online news outlets requesting corrections whenever inaccurate information and images are used online. Engaging with the media, critics, consumers, and bottled water supporters in real time is vital and can directly impact the perception of the bottled water industry and our products.
To help ensure bottled water facts are communicated to the younger generation, particularly millennials, IBWA launched a podcast in 2018: “H2O In The Know.” If you haven’t listened to “H2O In The Know” yet, give it a try! We think you’ll be delightfully surprised at how informative the episodes are—and how easy the podcast is to listen to. In addition, IBWA invites you to post about the “H2O In The Know” episodes on your social media platforms to help us share bottled water facts and educate the listening public. Currently, we have nine episodes uploaded to iTunes and SoundCloud: “Bottled Water 101,” “Healthy Hydration,” “PET and Recycling,” “The Berkeley Springs International Water Tasting and Its Origins,” “Water Resource Management for Bottled Water,” “Judging at a Water Tasting,” “How Bottled Water Became America’s Favorite Drink,” “The Effects of Hydration on the Body,” and “Littering, Recycling, and Beautification With Keep America Beautiful.” Listen on iTunes [apple.co/2LS0Afv] and SoundCloud [bit.ly/2tcg0DE].
PRESENTING THE FACTS; CORRECTING MISINFORMATION

Keeping in contact with the media is an important part of communications, and IBWA works hard at getting accurate information to reporters in a timely fashion so that our position is included in relevant stories. And when it’s not, IBWA sends letters to news outlets seeking corrections and additions to articles that misinform the public. In 2018, IBWA continued our approach of immediately responding with bottled water facts to online news articles and blog posts that misrepresent the industry. We also continued to send formal letters to the editor, issue press releases, and prepare detailed position statements on several key issues. Copies of these correction letters and media statements can be found on bottledwater.org, within the “Newsroom” tab, to use, share, and reference as needed.

ENCOURAGING CONSUMERS TO “PUT IT IN THE BIN”

Recycling education has always been important to the bottled water industry. Bottled water is the No.1 packaged beverage, and it is important to encourage consumers to do the right thing and recycle their empty containers. In an effort to promote the benefits of recycling, IBWA launched PutItInTheBin.org and its corresponding social media campaign. This initiative seeks to increase recycling rates by bring together like-minded partners who can harness the power of social media to educate consumers about the value of always putting recyclables in the bin.

In 2018, IBWA produced a #FastFacts social media campaign, which can be found online at www.bottledwater.org/fastfacts. The 23 #FastFacts graphics present evergreen facts that members can use to complement their current efforts on social media to educate consumers and others about bottled water.

Two great attributes of the #FastFasts campaign:
(1) Members are able to access the digital posters anytime online. Such easy access will come in handy if you are trying to update your social media profiles regularly but are having a hard time thinking of new ideas for posts. Members can quickly go to the IBWA website and download a post and use it that day.
(2) IBWA staff will be able to continuously add new #FastFacts to this campaign. Members are invited to let staff know if they have a recommended fact they’d like to see included in the online archive of posters.

IBWA will continue to include #FastFact graphics in our Social Media Communications Toolkits. Each month, IBWA develops a social media toolkit to help promote positive stories and news items about the bottled water industry. A copy of the toolkit is sent to those individuals who have been identified as responsible for their company’s social media platforms. If you currently don’t receive the monthly toolkit but would like to, please email someone on the IBWA Communications team.
LEARNING HOW TO COMPLY WITH FSMA REGULATIONS

Due to the importance of new Food Safety Modernization Act (FSMA) regulations to all bottled water companies, IBWA continues to provide FSMA implementation and compliance guidance to our members. This is done through webinars, in-person seminars, Splash e-newsletter articles, Bottled Water Reporter magazine articles, and special member bulletins. In addition, IBWA offered FSMA education sessions during the 2018 IBWA Annual Business Conference, which was held November 12-15 in New Orleans, and more will be offered in 2019 through webinars and live seminars.

The Preventive Controls Rule became effective on September 17, 2018 for very small companies (<$1 million in gross annual sales). It had previously become effective on September 19, 2016, for large companies (>500 full-time employee equivalents) and September 18, 2017, for small companies (<500 full-time employee equivalents).

Two additional final FSMA rules will affect many bottled water companies: the safe food transportation regulation, which will impact how bulk water is hauled to bottling facilities from remote sources, and the Intentional Adulteration (IA) rule, which addresses the defense of the nation’s food supply. The IA rule exempts companies with annual sales under $10 million. However, even though only large companies are required to comply with the FDA IA rule, the IBWA Board of Directors voted to require all member companies, regardless of size, to continue with the food defense program IBWA adopted in 2004. In 2018, IBWA partnered with its outside counsel, Hogan Lovells, to present an educational webinar about the IA rule to help IBWA members prepare their food defense plans.

IBWA has published a detailed guidance document on the requirements of the FSMA Preventive Controls Rule. The document, combined with the draft audit check sheets, are the best tools IBWA can provide to member bottlers to help them prepare for an FDA inspection. Hogan Lovells also offers IBWA members its guidance document to prepare for FDA inspections. IBWA is making significant changes to its annual inspection program for 2019 to accommodate the new preventive controls rule.

IBWA continued to offer Preventive Controls Qualified Individual (PCQI) workshops around the country in 2018. In the past three years, IBWA held 16 PCQI workshops and issued nearly 300 PCQI certificates. The workshops will continue in 2019, as needed.

MEETING AND DISCUSSING KEY ISSUES WITH FDA

IBWA annually meets with FDA officials from its Center for Food Safety and Applied Nutrition (CFSAN), which provides an excellent opportunity to discuss key issues with those who regulate the bottled water industry. In previous meetings, IBWA successfully submitted suggestions for modifications to FDA’s bottled water good manufacturing practices (GMP) regulations concerning groundwater sources. FDA is now implementing those suggestions on a case-by-case basis.

For the 2019 meeting with FDA, IBWA will continue to discuss needed updates to FDA’s GMP requirements for container sanitization, discuss a study to validate bottle washer sanitization, and update FDA about a study on ozone residual in the bottle after filling. This would broaden the allowable use of ozone in FDA’s GMP rules.

DEFENDING BPA

Bisphenol A (BPA) continues to be a very important issue for IBWA members. FDA and regulatory agencies in several countries, including Health Canada and the European Food Safety Authority (EFSA), have ruled favorably on the safety of BPA. The consensus among these international regulatory agencies is that the current levels of exposure to BPA through food packaging do not pose a health risk.

On February 23, 2018, a draft study was published that reaffirmed the safety of BPA. The study, conducted by the National Toxicology Program (NTP), was part of an effort called the Consortium Linking Academic and Regulatory Insights on BPA Toxicity (Clarity-BPA). The NTP, National Institute of Environmental Health Sciences (NIEHS), and FDA developed this consortium-based research program to link more effectively a variety of hypothesis-based research investigations and guideline-compliant safety testing.
with BPA. In a statement on the draft study, FDA noted, “Our initial review supports our determination that currently authorized uses of BPA continue to be safe for consumers. The report also builds upon the already extensive data collected in the FDA’s 2014 assessment of the safety of BPA.”

Nevertheless, news outlets continue to promote misinformation about BPA. They report on misleading research studies that provide scary headlines and continuously publish images of popular food containers that are not made with BPA with those stories. IBWA continues to strongly defend the safety of BPA and works with allied organizations (e.g., the Grocery Manufacturers Association and American Chemistry Council) to educate legislators, regulators, and the media about the safety of BPA. Members looking for materials they can use to educate their consumers, local media, and legislators about BPA can turn to IBWA for talking points, position papers, online educational tools (e.g., a “Safety of BPA” Pinterest board), and News Splash e-newsletter and Bottled Water Reporter magazine articles.

DISASTER AND EMERGENCY RELIEF EFFORTS

IBWA members always quickly respond to the need for bottled water during and after natural disasters and emergency situations. In 2018, IBWA members responded to the call for bottled water following Hurricanes Frances and Michael. In preparation for those severe weather events, IBWA participated in daily briefings with the U.S. Federal Emergency Management Agency (FEMA) and other federal, state, and territorial authorities and private sector organizations to identify where the areas of need would be located. IBWA then disseminated critical information to IBWA members, who responded by delivering millions of liters of water. Bottled water is always there when it is needed to provide safe drinking water to those affected by natural disasters and emergencies when tap water is compromised or unavailable. IBWA members continue to provide bottled water in Flint, Michigan, and other U.S. cities where the public water supplies are contaminated with lead, PFAS, and other harmful substances.

RESEARCHING THE INDUSTRY’S WATER AND ENERGY USE

IBWA recently released its latest Water and Energy Use Benchmarking Study, which was independently conducted by the Antea Group. The new water use ratio figure for bottled water is 1.39 liters per liter, including the liter that is consumed. Bottled water continues to have the lowest water use ratio of all packaged beverage products. The latest energy use ratio figure for bottled water is .21 megajules per liter. The trends in this study demonstrate that investments in efficiency measures and process improvements can lead to positive results in water, energy, and cost savings, while the industry experiences sustainable growth.
ANNUAL BUSINESS CONFERENCE AND INDUSTRY AWARDS

The 2018 IBWA Annual Business Conference was held in New Orleans, Louisiana, on November 12-15, and was once again held in conjunction with NAMA’s Coffee, Tea, and Water Show. More than 1,100 bottled water and coffee professionals came together for the event. The 2018 trade show successfully showcased 168 exhibiting bottled water and coffee suppliers and vendors on the trade show floor.

The educational portion of the 2018 conference offered 32 sessions on business and technical topics related to bottled water, coffee, and tea. A total of 19 continuing education credits were available to certified plant operators (CPOs) seeking to keep their certification current.

During the IBWA general session, IBWA held its awards ceremony, when the following award winners were announced:

- IBWA/SELBY ADVOCACY AWARD: Louis F. Vittorio, Jr., P.G.
- PLANT MANAGER OF THE YEAR: Josh Schlemme
- BOTTLED WATER HALL OF FAME: Shayron Barnes-Selby and Philippe Caradec

TOURING STATE-OF-THE-ART WATER TREATMENT FACILITIES

On October 2, 2018, a group of IBWA members and staff participated in a one-day tour of state-of-the-art water, wastewater, and potable reuse treatment facilities in the Orange County and Carlsbad areas of California. Tour participants learned about the importance of wastewater treatment in protecting public health and the environment and how highly treated wastewater that would have previously been discharged into the Pacific Ocean is transformed into water that meets or exceeds all state and federal drinking water standards. This is done by using a three-step treatment process consisting of microfiltration, reverse osmosis, and ultraviolet light with hydrogen peroxide. Participants also learned about the desalination process and how one plant has the capability to deliver more than 50 million gallons of fresh, desalinated drinking water per day, which is enough to serve approximately 400,000 people in San Diego County.
announced: The 2018 Plant Manager of the Year is Josh Schlemme, CPO, PCQI, of K&S H2O Inc., (dba Culligan of Davenport, Iowa). The 2018 Route Salesperson of the Year is Michael Richards, an employee of DS Services of America, Inc., serving Phoenix, Arizona. And IBWA Board member Louis F. Vittorio, Jr., PG., of the EarthRes Group, received the IBWA/Selby Advocacy Award.

Two very worthy IBWA members were inducted into the Bottled Water Hall of Fame for their years of work and dedication to the bottled water industry: Shayron Barnes-Selby, vice president of government affairs and quality services at DS Services of America, Inc., and Philippe Caradec, vice president, public affairs and sustainable development at Danone Waters of America. Both have been very active in IBWA over the years, serving on many IBWA committees and task forces. They are both current members of IBWA’s Executive Committee, and both have served as the chairwoman/chairman of IBWA.

Following the awards presentations, attendees learned about leadership through the personal stories of former IBWA Chairman Charlie Norris and former NBA player and coach Byron Scott. The long-time friends were the keynote speakers for the General Session, and together have co-authored the business management and leadership book, Slam-Dunk Success: Leading From Every Position on Life’s Court. Norris is a former CEO and president of McKesson Water and Deer Park Spring Water, and he currently has an investment portfolio of five companies where he plays an active board role. Scott, currently an analyst for ESPN, won three championships as a player with the “Showtime” Los Angeles Lakers during the 1980s, and coached the New Jersey Nets to two NBA Finals (2002, 2003).

**PROMOTING GROWTH AND CONQUERING CHALLENGES**

IBWA accomplished a lot in 2018, but there is still much work to do in the coming years. BMC predicts that bottled water will continue its reign as the No.1 packaged beverage product in the United States, which means bottled water will likely become a larger target for our detractors. Bottled water’s popularity also means that we will face new challenges in the coming years, but we will also have new opportunities to take the industry to even greater success.

IBWA members should be proud to be at the forefront of the beverage industry by producing great-tasting, safe, healthy, and convenient products that consumers enjoy and depend on. In 2019, IBWA’s primary goal will be to continue serving the interests of our members by fighting hard to create a favorable business, legislative, public affairs, and technical climate for the bottled water industry. Working together, IBWA members, consultants, and staff will help ensure continued success and growth for the bottled water industry, our member companies, and the association.
IBWA MISSION
To serve our members and the public by championing bottled water and other healthy hydration choices, while promoting an environmentally responsible and sustainable industry.

IBWA VISION
The International Bottled Water Association will be the leading voice for healthy hydration and the bottled water industry.
The International Bottled Water Association (IBWA) is the authoritative source of information about all types of bottled waters, including spring, mineral, purified, artesian, and sparkling. Founded in 1958, IBWA’s membership includes U.S. and international bottlers, distributors, and suppliers. IBWA is committed to working with the U.S. Food and Drug Administration (FDA), which regulates bottled water as a packaged food product, to establish comprehensive and stringent standards for safe, high-quality bottled water.

In addition to FDA regulations, IBWA member bottlers must adhere to the IBWA Bottled Water Code of Practice, which mandates additional standards and practices that in some cases are more stringent than federal and state regulations. A key feature of the IBWA Bottled Water Code of Practice is a mandatory annual plant inspection by an independent, third-party organization.