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2020 IBWA EXECUTIVE COMMITTEE

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The 2019 IBWA Progress Report summarizes some of the association’s accomplishments in maintaining a favorable business, regulatory, and public affairs climate for the bottled water industry and our efforts to protect and advance the interests of all IBWA member companies.

Let’s start with some very good news. For the fourth consecutive year, consumers made bottled water the No.1 packaged beverage in the United States (by volume). Preliminary data from the Beverage Marketing Corporation (BMC) show that bottled water consumption increased to 14.3 billion gallons, up 3.6 percent from 2018, and retail sales now total $34.8 billion—a 5.8 percent increase from last year. Per capita consumption increased 2.7 percent, with the average American now drinking 43 gallons of bottled water annually.

Those figures demonstrate that consumer demand for healthy hydration remains strong. In fact, nearly all of bottled water’s volume gains for the past 17 years can be attributed to decreased consumption of carbonated soft drinks and fruit beverages. While our critics continue their misguided campaigns against bottled water, our sales and consumption continue to grow because consumers continue to make healthy lifestyle choices, which is what matters most.

In 2019, IBWA continued to defend the industry and proactively provide the facts about bottled water. We highlighted 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 efforts included introducing new advocacy and public relations tools that help IBWA members educate legislators, their customers, and the public about the safety and sustainability of bottled water. We launched a new app—VoterVoice—that enables IBWA members to send letters to elected officials and provides quick links to view key bills that may impact the industry. IBWA’s new app is your portal to important legislative and advocacy issues concerning the bottled water industry.

On the public relations front, IBWA successfully conducted two major social media campaigns for our Put It In The Bin initiative. “Can I Recycle This?” focused on which containers can and can’t be recycled, and “Plastic Facts” presented scientific information to rebut the many false statements being made about plastic containers. With the help of members and our Put It In The Bin partners—like Keep America Beautiful, the National Association of PET Container Resources (NAPCOR), and the National Association of Convenience Stores—IBWA earned our best consumer engagement numbers, to date.

IBWA actively tracked and monitored more than 1,000 pieces of state legislation and more than 250 proposed regulations that could have impacted the industry. Issues that IBWA worked on included recycled content mandate legislation, bottled water ban proposals, efforts to tax bottled water, BPA restrictions, PFAS regulations, groundwater resource management, and labeling requirements.

At the federal level, IBWA supported legislation to reduce the truck driver shortage affecting many bottled water companies, opposed a ban on the sale of bottled water in national parks, and endorsed legislation to provide financial incentives (grants and loans) for recycling infrastructure and education at the local level.

Implementation of, and compliance with, the U.S. Food and Drug Administration’s (FDA) Food Safety Modernization Act (FSMA) regulations continue to be an important issue. To assist IBWA member companies in meeting FSMA requirements, we provided educational webinars and seminars, with an emphasis on the Preventive Controls and Intentional Adulteration Rules. IBWA also prepared a detailed guidance document on the requirements of the Preventive Controls Rule. We continue to disseminate FSMA information to members through our publications (e.g., the News Splash e-newsletter and Bottled Water Reporter magazine) and special bulletins.

IBWA continued our work to ensure that the next edition of the Dietary Guidelines for Americans (DGAs), which will be issued in 2020, highlights water as a healthy hydration source. The DGAs are used by policymakers and health organizations to help Americans make healthy food and beverage choices. IBWA was successful in having the current DGAs prominently note the need for Americans to choose water instead of sugar-sweetened beverages and expressly state that calorie-free drinks—especially water—should be the primary beverages consumed. IBWA is also continuing our efforts to have water added as an icon on the MyPlate nutritional graphic (along with the current dairy icon), which is a public educational resource based on the DGAs.

Critics of bottled water persist in making false claims about our industry in an attempt to convince consumers not to drink our products. However, through the hard work of IBWA’s dedicated team of members, staff, and consultants, bottled water has maintained its position as America’s favorite package drink. I am confident that our combined efforts will ensure the continued success and growth of your companies, the bottled water industry, and IBWA.

Joe Doss
IBWA President and CEO
Still No.1 and Growing

When bottled water became America’s No.1 packaged beverage in 2016, IBWA understood that our critics would see an even bigger target on our backs. That’s proven to be true—and, in 2019, the bottled water industry faced fierce opposition. However, despite the efforts of our critics to discourage people from drinking bottled water, sales and consumption continued to grow. Preliminary figures from the Beverage Marketing Corporation (BMC) show that bottled water continued to outsell (by volume) carbonated soft drinks for a fourth year in a row. Thus, the gap between carbonated soft drinks and bottled water continues to widen significantly.

Consumer demand for bottled water is statistically backed by BMC’s preliminary 2019 numbers:

- Consumption is up to 14.3 billion gallons—a 3.6 percent increase.
- Retail sales amount to $34.8 billion dollars—a 5.8 percent increase.
- Per capita consumption grew by 2.7 percent—with every American drinking, on average, 43 gallons of bottled water.
- PET volume increased by 3.8 percent (10 billion gallons).
- Home and office delivery (HOD) volume declined by -0.4 percent (1.4 billion gallons).

The volume share of bottled water is as follows:

- PET: 69.9 percent
- HOD: 9.8 percent
- 1- and 2.5-gallon: 8.2 percent
- Vended: 7.3 percent
- Domestic sparkling: 3.0 percent
- Imported bottled water: 2.0 percent.

These preliminary figures are a clear and positive sign that the bottled water industry continues to benefit from consumers’ increased focus on healthy hydration and lifestyle choices. In fact, almost all of bottled water’s gains in volume during the past 17 years have come from the decreased consumption of carbonated soft drinks and fruit drinks.

Bottled water is the No.1 beverage in United States for several very simple reasons: it tastes great, and it’s safe, healthy, and convenient. However, there is another very important reason why bottled water is the favorite packaged beverage of Americans for a fourth consecutive year: the continued hard work by IBWA members and staff.

Almost all of bottled water’s gains in volume during the past 17 years have come from the decreased consumption of carbonated soft drinks and fruit drinks.

Defending the Industry. Critics of bottled water continue to make false claims against our products in an attempt to convince consumers not to drink bottled water. They incorrectly state that bottled water is the cause of many negative environmental and social impacts, has harmful chemicals that leach from the plastic bottles, contains high amounts of microplastic particles, is a major contributor to the ocean plastic problem, and uses large amounts of water in the production process. These issues are not new, but anti-bottled water activism continues to be of vital importance and could impact the future of the bottled water industry. To date, these groups have not been very successful—but we can’t rest on our laurels.

Anti-bottled water groups are becoming more effective at spreading false information about bottled water. They use emotionally charged images and statements that grossly misrepresent our industry to consumers, the media, and elected officials. That false information may negatively influence the next generation of potential bottled water consumers.
In 2019, IBWA ramped up its defense of industry’s use of plastic by launching “Plastic Facts,” a social media campaign that broadcasts science-based facts about the plastic packaging the bottled water industry uses. Learn more at www.PutItInTheBin.org.
Therefore, it is very important for IBWA to continue to both defend and proactively provide the facts about bottled water.

The potential negative impact of single-serve plastic containers on the environment has become the central issue. Our adversaries have found a few sympathetic elected officials to help pursue their anti-bottled water objectives. Throughout 2019, IBWA saw these false claims used to support proposed legislation that would restrict or ban the sale of bottled water and impose unrealistic recycled content mandates. These actions have the potential to impact all bottlers—big and small companies, as well as both HOD and small-pack products.

As a result, IBWA has stepped up our activities to address this issue. Our coordinated strategy pushes back against bottled water critics and presents the facts about bottled water—our industry and our products. Detailed below is a summary of the efforts IBWA members, staff, and consultants made in 2019 to promote and support the bottled water industry and communicate those facts about bottled water to the media, consumers, and government officials.

**Advocacy on All Levels**

On Capitol Hill and at the state capitals, IBWA was engaged on many issues in 2019 that would benefit the bottled water industry, and we worked hard to ensure no harmful legislation was enacted. IBWA also launched several initiatives to help members more effectively engage in advocacy efforts.

**Enhanced Advocacy Tools.** To mobilize the association’s grassroots capabilities and help members better connect with both federal and state legislators, early in 2019 IBWA launched a new resource: the IBWA Grassroots Action Center. This tool, found on the Bottled Water Matters website—www.bottledwatermatters.org, under the “Take Action” tab—includes the following resources:

- a portal to find who represents you at the federal and state levels
- posts by IBWA Government Relations (GR) staff to keep you up to speed on relevant political and policy news
- event registration links for GR-related activities, including webinars and legislative fly-ins
- a legislative search engine to view proposals in Congress and all 50 states
- quick links to view key bills that impact the industry, with information on IBWA’s position and possible grassroots letters members can sign
- access to a key voting record to enable IBWA members to see what members of Congress are taking actions in support of the industry.

The new and improved IBWA Grassroots Action Center is incredibly easy to use. In fact, members can download IBWA’s app—VoterVoice—to their smartphones and link it to the action center to affect legislative change with just a few finger taps!

VoterVoice, a portal to key legislative and advocacy related issues in the bottled water industry, enables members to use IBWA advocacy tools and get important information on their phones. The app provides detailed information on upcoming and past IBWA advocacy events, such as fly-ins and member-hosted plant tours. Members can download VoterVoice from their app store by searching for “IBWA” and then following the instructions.

**Tariffs.** Imposing tariffs on Chinese water coolers, which are used by many IBWA members, would significantly increase the cost of doing business and have a negative impact on HOD bottled water sales. In late 2018, the bottled water industry received very welcome news that a 25 percent tariff would not be imposed on bottled water coolers made in China. This was the direct result of IBWA and several of our members petitioning the U.S. Trade Representative for an exclusion from the tariffs. Those exclusions were effective for one year and expired on December 28, 2019. At press time, IBWA was seeking to renew exclusions by the deadline of November 30. IBWA will continue to work on this important issue and seek to have the exclusions extended.

**DRIVE-Safe Act.** To help reduce the truck driver shortage that affects many member companies, IBWA met with several congressional offices in Washington, DC, to encourage passage of the DRIVE-Safe Act (H.R. 1374/S. 569). Currently, 18- to 20-year-olds can drive commercial trucks hundreds of miles within a single state, but they are not allowed to drive across a state line. This is a big problem for companies that do business in multiple states.
Face-to-Face Advocacy

On June 5, 2019, IBWA members met with members of Congress during the Annual Hill Day fly-in. Almost 50 IBWA members participated in this annual event and met with more than 60 Capitol Hill offices. IBWA also held five state fly-ins in 2019, including three in Harrisburg, Pennsylvania, and one each in Sacramento, California, and Albany, New York.

While in-person meetings in Washington, DC, or state capitals are always important, plant tours also play a critical role in helping to ensure good policy outcomes. Policymakers can see firsthand how legislative proposals may impact the industry and your companies when they are in your plant. In 2019, IBWA members hosted multiple plant tours with members of Congress, state legislators, and local city and county leaders. If you are interested in hosting a tour of your plant, please let IBWA know. We will be glad to help schedule it with your legislators.
To help fix this problem, IBWA is an active supporter of the DRIVE-Safe Act, which would allow 18- to 20-year-olds who have a commercial driver's license (CDL) to go through a rigorous, 400-hour apprenticeship program to be able to drive across state lines. IBWA actively lobbied on behalf of this legislation and has been responsible for several members of Congress co-sponsoring the bill.

RECOVER Act. IBWA is an active member of a coalition supporting the introduction and passage of the bipartisan RECOVER Act (H.R. 5115). This bill seeks to incentivize state and local recycling efforts by offering $500 million in grants and low-interest loans to improve infrastructure and support consumer education efforts, all with the intended result of increasing recycling rates. When IBWA met with legislators in 2019, we noted that the bottled water industry has been at the forefront of producing products that are 100 percent recyclable and that many IBWA members use significant amounts of recycled plastic material in their bottles. If states and localities struggle to implement recycling programs and cannot supply adequate recycled content feedstock, bottlers and other plastic product manufacturers will also struggle to meet environmental and sustainability goals. The bill has a good chance of moving through both the House and Senate in 2020.

In 2020, IBWA may be called before the House Natural Resources Committee to testify on the proposed sales ban of bottled water at national parks.

Second, Corporate Accountability International, along with the Sierra Club, persuaded a handful of House Democrats to introduce a bill that would codify the 2011 NPS bottled water sales ban (H.R. 4236). This new bill currently has 20 co-sponsors (all Democrats) and has been referred to the House Natural Resources Committee for consideration. There is a very real chance that IBWA will be called before the committee to testify in 2020 on the proposed ban.

IBWA has been actively meeting with both Republicans and Democrats to communicate our industry’s position on this issue. While there is a chance that
this bill will move forward in the House in 2020, we are conservatively optimistic that a similar bill will not be considered in the Senate.

It is important to note that a ban on the sale of bottled water in national parks would not significantly impact the industry’s sales figures. However, it would set a very bad precedent and would be used by bottled water critics to support efforts to ban the sale of our products in cities, airports, zoos, and other public places. IBWA will therefore continue to strongly oppose these measures.

**Advancing State Issues**

In the state legislatures and various state government agencies, 2019 was by far one of the busiest years ever. Nearly every state addressed bottled water issues, which resulted in IBWA tracking and monitoring more than 1,000 pieces of legislation and more than 250 proposed regulations that could impact the industry. There was continued action at the local level to restrict or ban all types of products made from plastic—and some of these proposals only target plastic bottled water containers. Many of these bills and rules will continue to see action in 2020.

**California.** Everyone is looking for a way to handle the growing concerns about plastic pollution—and they are turning their attention to single-serve products and the overall reduction in plastic use and waste. Thus, more bills are being introduced on bottle deposit programs, extended producer responsibility, and recycled content mandates. For the better part of 2019, IBWA was heavily focused on legislation in California requiring the use of recycled content for all plastic beverage containers, including bottled water. With exceptional leadership and hard work by many IBWA members—particularly DS Services, Nestlé Waters, and Niagara Bottling—we were able to get several important changes in the final bill that was passed by the California legislature.

The original bill would have required all plastic beverage containers to have 100 percent recycled content by 2035. The final legislation would have required a minimum of 10 percent recycled plastic by 2021, 25 percent by 2025, and 50 percent by 2030.

In addition to the changes in the recycled content rates and effective dates, the bottled water industry was able to secure additional amendments that made positive changes in the penalty amounts, safeguards, reporting requirements, and local preemption provisions. While we didn’t love the final bill, we were able to prevent the legislation from being a whole lot worse. Unfortunately, Governor Gavin Newsom thought that too many concessions were made, so he vetoed the legislation. Thus, the mandatory recycled content issue will be considered again by the California legislature in 2020. We are already working to make sure our concerns are addressed in whatever bill is enacted.

As the saying goes, what happens in California is often copied by other states. Therefore, we expect to see this issue considered in many state legislatures in 2020.

**Pennsylvania.** IBWA was successful in having legislation introduced in Pennsylvania that will dramatically improve the regulation of bottled water. Currently, depending on the size of the product produced, bottlers in the state can be subject to regulation by two different state agencies: the Pennsylvania Department of Agriculture (PDA) and the Department of Environmental Protection (DEP). That creates a duplicative and inefficient system, and it has also caused a loss in growth opportunities for bottled water companies.

The new legislation will move all oversight of bottled water to the PDA, which regulates food products, instead of the DEP, which regulates tap water. All bottled water products would then be treated as food products, which is in line with federal regulations. IBWA anticipates that committee hearings will be held on the legislation, and, as this report goes to press, it might pass in the House before the end of 2019.
<table>
<thead>
<tr>
<th>Category</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bottled water as favorite</td>
<td>Bottled water has been the favorite packaged beverage of Americans since 2016.</td>
</tr>
<tr>
<td>Volume of bottled water produced in the United States</td>
<td>14.3 Billion Gallons</td>
</tr>
<tr>
<td>Average consumption per person</td>
<td>43 Gallons</td>
</tr>
<tr>
<td>Retail sales increase</td>
<td>$34.8 Billion Dollars</td>
</tr>
<tr>
<td>Share of the U.S. beverage market</td>
<td>25.2%</td>
</tr>
<tr>
<td>Bottled water gains</td>
<td>Most gains come from soft drinks and fruit beverages.</td>
</tr>
<tr>
<td>Podcast episodes</td>
<td>10 Episodes</td>
</tr>
<tr>
<td>Launch year</td>
<td>2019</td>
</tr>
<tr>
<td>Podcast availability</td>
<td>On iTunes and SoundCloud.</td>
</tr>
<tr>
<td>Legislative tool</td>
<td>IBWA’s VoterVoice app is a game-changing legislative resource.</td>
</tr>
</tbody>
</table>
55% vs. 18%

Bottled water containers make up nearly 55% of the PET plastic collected in curbside systems; soft drink bottles make up only 18%.

21%

Average percentage of recycled PET (rPET) contained in bottles using rPET now stands at 21%.

1,000+

IBWA reviewed and tracked more than 1,000 pieces of legislation and more than 250 proposed regulations.

1 Million Views

IBWA’s YouTube channel has almost 1 million views on its 44 YouTube videos.

1,300 Attendees/168 Exhibitors

More than 1,300 people attended the 2019 IBWA Annual Business Conference and NAMA’s Coffee, Tea, & Water Show, with 168 exhibitors.

5 PPT/10 PPT

IBWA established a standard of quality for PFAS in member company bottled water products: 5 parts per trillion (ppt) for one PFAS; 10 ppt for more than one PFAS.

$50k+

IBWA’s Political Action Committee (PAC) exceeded its contribution goal of $50,000.

Capitol Hill Offices

During IBWA’s Annual Hill Day fly-in, members met with more than 60 legislators and congressional staff in Washington, DC.
High-Quality Recycled Content. The need for more high-quality recycled content material throughout the United States has developed an increased focus on bottle deposit legislation in the states. To drive the conversation on this issue, IBWA established a working group to address the association’s position on bottle deposit programs.

After several months of review, IBWA’s working group reached a consensus on components the bottled water industry would like to see in any newly proposed bottle bills and ways to improve existing programs. Our efforts focused on several key issues: preventing fraud, reducing contamination, reasonable handling fees, unclaimed deposits, and overall program management. Those recommendations provide an opportunity for the industry to be a proactive partner with states as they address recycling and waste issues. It is a good way to ensure that both the states and industry can be supportive of deposit programs that are efficient and effective. IBWA’s board of directors unanimously accepted the working group’s recommendations during its November 2019 meeting.

PFAS Activity. While a large portion of the 2019 state legislative sessions was spent on recycling, the latter part of the year saw a significant increase in activity on per- and polyfluoroalkyl substances (PFAS). PFAS are chemicals used as fire retardants and have also been used in non-stick cookware. They continue to be applied to certain types of food packaging—but not bottled water bottles.

Although the U.S. Environmental Protection Agency (EPA) has established a Drinking Water Health Advisory Level for two PFAS—PFOA and PFOS—of 70 parts per trillion (ppt), there are no federal PFAS standards for any food product or water, including public drinking water and bottled water. The EPA is developing a maximum contaminant level (MCL), but it will likely be a few years until a proposed rule is published.

In the absence of any federal standards, although not mandated by law, as of January 1, 2019, IBWA requires its members to test for PFAS in all the products they sell using EPA Method 537. This action underscores the commitment of IBWA members to always provide consumers with the safest and highest quality bottled water products. Testing for PFAS provides consumers, local and state governments, and disaster and emergency relief personnel further assurance that bottled water is a safe and convenient product for everyday use and in times of need when tap water is compromised.

IBWA’s PFAS Code of Practice Bulletin recommends protocols to be employed by IBWA bottler members and their testing laboratories.

In addition to requiring product testing, IBWA has established the following standard of quality for PFAS in member company bottled water products: 5 ppt for one PFAS; 10 ppt for more than one PFAS. IBWA’s standard of quality for PFAS are substantially below the EPA’s health advisory level of 70 ppt.

IBWA has published a “Code of Practice Bulletin on PFAS” that is intended to recommend protocols to be employed by IBWA bottler members and their testing laboratories. Due to an increased focus by government and the media on PFAS, if not already completed, IBWA members are encouraged to test their bottled water products sooner rather than later for PFAS compounds. To obtain a copy of the PFAS Code of Practice Bulletin, IBWA members can contact IBWA Vice President of Education, Science, and Technical Relations Bob Hirst: bhirst@bottledwater.org.

Many states are adopting PFAS standards of their own; however, no two states address the issue in the same way. There are many instances of states requiring different limits, testing techniques, and timelines. For public water systems operating in one state, the impact of non-uniform PFAS standards is minimal. However, for companies that make and sell bottled water in multiple states, those new state requirements are burdensome and expensive. For example, Vermont requires testing of bottled water sources and finished products in all package sizes, while New York State and Connecticut are requiring only source testing. The states are also requiring the use of different test methods. Laboratory capacities have been stretched due to short turnaround times for deadlines and competing with public water systems for lab analysis.

More than a quarter of the states took action on PFAS in 2019 or are planning to in 2020—and we expect many others to follow suit. Even with IBWA’s new standard of quality for PFAS, this will be a major focus for bottled water in the states for 2020.

While PFAS and recycling/waste issues got a lot of attention in the states in 2019, we still faced many other legislative and regulatory threats, including bottled water taxes, efforts to ban containers with bisphenol-A (BPA), bottled water labeling requirements, and groundwater management proposals.
Driving the Message

Because the public gets its information about bottled water from various sources—and because activists and bottled water critics continue to make false and misleading statements about our products—it is imperative that IBWA aggressively defends and pro-actively communicates the facts about bottled water. Influencing the opinions of the media, consumers, legislators, regulators, and others involves promoting bottled water facts via a variety of methods—including social media (such as Facebook, Twitter, Instagram, YouTube, and Pinterest), traditional newspapers and magazines, news websites, and podcasts.

Strong Online Presence. For effective communication, brand identity, and media awareness, it is imperative that IBWA continues to build upon its influential online presence. We anchor our pro-bottled water messaging around two websites: bottledwater.org and bottledwatermatters.org. More than 20,000 people visit IBWA’s websites each month for science-backed bottled water facts, stories, economic data, and other useful industry information.

Staying at the top of search engine results is important because IBWA should be the first source for bottled water information on the internet. Thus, we track data and statistics about how visitors use our websites, so we can refine topics based on user demand. We also continuously monitor other websites, news outlets, blogs, and social media accounts that mention bottled water and engage in online conversations in targeted demographics (environmentalists, parents, millennials, educators, etc.) to help ensure online discussions include bottled water facts.

Traditional PR work. IBWA communicates with and submits letters to traditional and online news outlets requesting corrections on inaccurate information and images used online and in print and broadcast. The ability to engage with the media and supporters, critics, and consumers in real time is vital and can directly impact the perception of our industry and our products. IBWA continues to be seen as the leading media resource for bottled water information.

IBWA works hard at getting information to reporters in a timely fashion so that the industry’s 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 people. In 2019, IBWA sent formal letters to the editor, issued press releases, and prepared detailed position statements on several key issues. Members can find copies of our correction letters and media statements on IBWA’s website: www.bottledwater.org/newsroom.

Member Toolkits and Campaigns. IBWA’s monthly social media toolkits provide posts members can use on their social media platforms to educate customers, legislators, friends, and family about bottled water facts. The toolkit template underwent a redesign in 2019, and the new, user-friendly design enables members to quickly download images and copy text for posts. IBWA’s toolkits enable the membership to speak with one voice on issues important to our industry and amplifies the reach of our pro-bottled water messages.

Put It In The Bin. IBWA continues to support efforts to increase consumer awareness on why they should recycle. We are actively involved in helping educate consumers about the importance of keeping our products out of landfills. IBWA’s “Put It In The Bin” campaign and website (www.putitinthebin.org) harness the social media of our partners to vastly expand our messaging reach. The campaign targets millennials because research shows they don’t recycle as often as other generations. We encourage all members to take part in helping to amplify the messaging of our twice-yearly Put It In The Bin campaigns.

Can You Recycle This? In 2019, recycling contamination made headlines, and it is a major issue that is crippling recycling programs across the country. As this story developed, IBWA created “Can you recycle this?”—a Put It In The Bin campaign that focused on recycling contamination. "Can you recycled this?” launched on Facebook and Instagram to educate consumers about the most common items that do not belong in a recycling bin.
IBWA’s Social Media
Presence and Reach

Bottled Water Matters
7,632 followers
233 followers

@BottledWaterOrg
1,848 followers

@BottledH2OBabe
3,257 followers

@BWMatters
715 followers

Bottled Water Matters
491 followers

Bottled Water Matters
4,100 monthly viewers

You Tube
2019’s Most Popular Videos

44 Videos | Views 939,224 | 1,853 Subscribers

1| The Water Song (234,149 all-time views)
2| Recycling Empty Plastic Bottles (208,203)
3| Inner Workings of Bottled Water Plant (107,586)
4| Bottled Water: Always There When You Need It (18,052)
5| Recycled Holiday Wreath (101,860)
6| Bottled Water: Small Water Use, Big Health Benefits (28,999)

New in 2019
What Is RPET?
What Is HDPE?

Web Traffic
Unique Visitors

bottledwater.org
223,463 visitors

bottledwater.org
16,057 visitors

Bottled Water Reporter Magazine
Digital Edition (Lifetime Statistics)

392,686 Impressions | 51,406 Reads
424 Shares | 88 Followers

CELEBRATES ITS 60TH ANNIVERSARY IN 2020!
Due to strong consumer engagement, the “Can you recycle this?” campaign had the highest organic reach IBWA has ever seen since we launched our Facebook profile in 2007. Campaign posts were also promoted by our Put It In The Bin partners, which include IBWA members, Keep America Beautiful, the National Association of PET Container Resources (NAPCOR), and the National Association of Convenience Stores.

**Plastic Facts.** IBWA’s fall 2019 Put It In The Bin campaign—“Plastic Facts”—addressed plastics in the environment. The campaign used facts to tell the “transparent truth about plastics” and countered misinformation circulating on the internet. The posts educated consumers, the media, and elected officials by using industry information that is often ignored by mainstream and social media. Facts we highlighted included industry’s efforts to reduce the weight of bottled water containers, bottled water’s small environmental footprint, industry’s use of recycled content, the fact that bottled water containers are not a significant source of ocean plastic, and the fact that consumers want bottled water available where other drinks are sold.

**Progress Through Partnerships**

IBWA has established strong partnerships with other groups to expand the reach of our healthy hydration educational efforts and increase recycling awareness.

**National Drinking Water Alliance.** IBWA continues to be an active member of the National Drinking Water Alliance. This group of health and consumer organizations and academics supports policies that promote access to safe and nutritious drinking water. In October, IBWA organized meetings between the Alliance and congressional offices to discuss the need to add a water symbol, alongside the dairy icon, to the MyPlate nutritional graphic, which is the main educational tool used by the U.S. government to promote a healthy lifestyle. Several members of Congress enthusiastically signed on to a group letter addressed to the U.S. Department of Agriculture and U.S. Department of Health and Human Services to urge them to add water to MyPlate.

**Keep America Beautiful.** Because recycling education has always been important to the bottled water industry, IBWA is a national sponsor of Keep America Beautiful’s America Recycles Day, which is held annually on November 15. Bottled water is the No.1 beverage in the United States (by volume), and bottled water is the most recycled product in curbside recycling systems. In fact, bottled water containers make up nearly 55 percent of the PET plastic collected in curbside systems throughout the United States. Soda bottles make up only 18 percent. Through our partnership with Keep America Beautiful, we work to help ensure that our consumers continue to do the right thing and recycle their empty containers.

**The Recycling Partnership.** IBWA is also a sponsor of The Recycling Partnership, a leading national organization promoting curbside and increased local recycling. The Recycling Partnership utilizes public-private collaborations to help local governments get the most out of their recycling programs by increasing resident participation and tonnage collected.

In addition to The Recycling Partnership, IBWA is a member of the Florida and Michigan Recycling Partnerships, and the Northeast Recycling Council.
The implementation of the U.S. Food and Drug Administration’s (FDA) Food Safety Modernization Act (FSMA) continues to be a very important issue for all bottled water companies. Since September 2018, the FDA Preventive Controls Rule has been effective for all bottled water plants, and IBWA has assisted in implementing the new rule through the IBWA audit program. We also prepared a detailed guidance document on the requirements of the FSMA Preventive Controls Rule. That document, combined with the audit check sheets, are the best tools available from IBWA to help companies prepare for an FDA inspection. In addition, IBWA’s counsel, Hogan Lovells, made available to members a guidance document on how to prepare for an FDA inspection.

The FDA Intentional Adulteration (IA) Rule exempts companies with annual sales under $10 million. However, while only large companies are required to comply with this regulation, the IBWA board voted to require all member companies—large and small—to continue to comply with the food defense program that IBWA adopted in 2004. Food defense is now a separate section on the IBWA audit checklist.

Through webinars, in-person seminars, Splash e-newsletter and Bottled Water Reporter magazine articles, and special member bulletins, IBWA continues to provide FSMA implementation and compliance guidance to our members.

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 practice (GMP) regulations concerning groundwater sources and updated the agency about a study on ozone residual in the bottle after filling, which could broaden the allowable use of ozone in FDA’s GMP rules.

The focus of our 2020 meeting will be to continue the conversation about the effectiveness of ozone as a disinfectant at various concentrations and times of exposure, the need for FDA to adopt a PFAS regulation for bottled water that would preempt state rules, improvements we would like to see to the FDA groundwater rule, and, in particular, urging FDA to harmonize treatment options with some state regulations.

In 2019, FDA approved IBWA’s request for an exemption from the new fluoride labeling regulations. The exemption will allow bottled water products with fluoride added to continue to use a label statement expressed in milligrams per liter instead of the rule’s proposed milligrams per serving listing requirement. FDA has also granted an extension for current sodium labeling practices, indicating that the agency will address sodium labeling in bottled water in future regulations.

IBWA formed a Microplastics Working Group in 2019 to review the strengths and weaknesses of available microplastics testing methods based on publicly available studies. The Working Group identified two detection methods for analysis of microplastics that are very effective for bottled water. They are micro-Raman spectroscopy and micro-FTIR spectroscopy.

The Working Group has been coordinating its efforts with the European Federation of Bottled Waters (EFBW), which also focused on the same two detection methods to identify microplastics in bottled water. The EFBW is now working with the academic community to develop laboratory protocols for conducting testing from sampling through to reporting of the results. The Working Group will review the EFBW laboratory protocols when they are issued.
Learning and Celebrating Together

The 2019 IBWA Annual Business Conference was held in Anaheim, California, on November 18-21, and was once again held in conjunction with NAMA’s Coffee, Tea, and Water Show. More than 1,300 bottled water and coffee professionals came together for the event. The 2019 trade show successfully showcased 168 exhibiting bottled water and coffee suppliers and vendors on the trade show floor. The educational portion of the 2019 conference offered 25 sessions on business and technical topics related to bottled water, coffee, and tea. A total of 15.5 continuing education credits were available to certified plant operators (CPOs) seeking to keep their certification current.
In August of 2019, the World Health Organization (WHO) released a report on microplastics in drinking water that supports IBWA’s position. The WHO report states, under conclusions and recommendations: “There are no studies on the impacts of ingested microplastics on human health and there are only a limited number of animal studies of questionable reliability and relevance.”

Reporting on rPET
With assistance from BMC, IBWA updated our recycled PET (rPET) content report for the bottled water industry, which found the following:

- The percentage of bottled water packages containing some amount of rPET has steadily climbed—from 3.3 percent in 2008 to 18.2 percent in 2017.
- Between 2008 and 2017, the average rPET content for all bottled water packaging (that includes bottles that don’t use any rPET) grew from 0.2 to 3.8 percent.
- The average percentage of rPET contained in bottles using rPET rose from 6.4 to 21 percent.

IBWA revised its “Best Practices for Water Stewardship Guide” in 2019. This document incorporates voluntary approaches to water stewardship that can play an important role in helping companies meet local, national, and international sustainability goals. The guide was updated to incorporate changes by the Alliance for Water Stewardship (AWS) in version 2 of its Alliance for Water Stewardship standard. IBWA also developed a companion checklist to support members in developing a water stewardship program and to seek outside certification directly through the AWS global standard.

Updating the Dietary Guidelines for Americans
IBWA was successful in making sure that the 2015 Dietary Guidelines for Americans (DGAs) supported increased access to water as a healthy beverage choice. The 2015 guidelines expressly state that calorie-free drinks—especially water—should be the primary beverages consumed. The DGAs also encourage a shift to healthier, no-sugar-added beverages, such as water, in place of sugar-sweetened beverages.

NAPCOR notes that producing new products from rPET uses two-thirds less energy than what is required to make products from raw virgin materials. It also reduces greenhouse gas emissions. The revised rPET study demonstrates the bottled water industry’s continued environmental stewardship efforts in this area.

Revising Best Practices Water Stewardship Guide

IBWA supports adding water, in addition to the current dairy icon, to the MyPlate nutrition graphic because water is critical to good health. Alongside of the National Drinking Water Alliance, the Center for Science in the Public Interest, the American Heart Association, and the American Academy of Pediatrics, we will continue to work to ensure that the benefits of drinking water are not only recognized in the 2020 Dietary Guidelines for Americans, but that water is included in the MyPlate nutrition graphic.
2020 and Beyond

In 2019, IBWA had a lot of success—and the key to any of our achievements can be summed up in two words: member involvement. IBWA is a stronger association when our members are actively meeting with elected officials to educate them about the bottled water industry, testifying at hearings, conducting plant tours, sharing our communications campaigns on social media, attending educational sessions at our conference, and participating on IBWA committees.

While we have accomplished a great deal, there is still plenty more for us to do. Because bottled water is the No.1 beverage product, we are a more visible target for our detractors. In the next several years, there will be many opportunities for us to promote our great-tasting, safe, healthy, and convenient products that consumers enjoy and depend on. And you can remain confident that IBWA will continue to fight hard to defend your businesses every day. And with our talented team of members, consultants, and staff, IBWA will be able to ensure the continued success and growth of our member companies, the bottled water industry, and this association.

Future IBWA Meeting Dates

IBWA offers members several opportunities each year to meet face-to-face with their bottled water industry peers. Mark your calendars with the dates below, and start planning now to attend these IBWA meetings.

**February 25-27, 2020**
2020 Winter IBWA Board of Directors and Committee Meetings*
Meetings will be conducted via conference calls.
Meetings begin at 11:00 am on Tuesday, February 25; end at 3:45 pm on Thursday, February 27.

**June 1-4, 2020**
2020 June IBWA Board of Directors and Committee Meetings and Capitol Hill Appointments*
Hilton Old Town, Alexandria, Virginia
Meetings begin at 3:00 pm on Monday, June 1; end 10:30 am Thursday, June 4.

**November 9-12, 2020**
2020 IBWA Annual Business Conference and Co-Location with NAMA Coffee, Tea, & Water Show
Hyatt Regency, Orlando, Florida
Meetings begin at 10:00 am on Monday, November 9; end 11:00 am Thursday, November 12.

**June 7-10, 2021**
2021 June IBWA Board of Directors and Committee Meetings and Capitol Hill Appointments*
Hilton Old Town, Alexandria, Virginia
Meetings begin at 3:00 pm on Monday, June 7; end 10:30 am Thursday, June 10.

*Open to IBWA members only.

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**IBWA VISION**

The International Bottled Water Association will be the leading voice for healthy hydration and the bottled water industry.

**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.
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.