

Sample provided by



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Global Premium Bottled Water

2013

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Methodology & definitions

Premium water

This report covers premium water within the scope of plain packaged water (in pack formats of up to 10 litres).

In order to be able to quantify the premium bottled water segment, Zenith's analysis of 'premium' is based primarily on price and positioning.

Within each individual market, Zenith has determined a 'cut-off' point whereby brands are classified as premium if their overall average value per litre falls above the pre-determined cut-off point.

For international brands, Zenith applies its definition primarily based upon a brands' global average value per litre. Therefore, a brand classified as premium remains so, throughout all markets where it is present. For example, Evian is considered premium in all markets, despite its more mainstream positioning in France. International brands classified as premium throughout this report include: Evian, Perrier, San Pellegrino, Vittel and Volvic.

From within its global bottled water database, Zenith has identified a number of key markets where premium is understood to either; a) hold a significant share of the bottled water market, b) be of significant volume in million litre terms, or c) present a growth opportunity with the bottled water market.

Other considerations

The methodology used in this report is primarily quantification by overall value per litre. However, it is important to note that price is influenced by many factors including channel distribution, pack format (size and type), origin (imports) and water type.

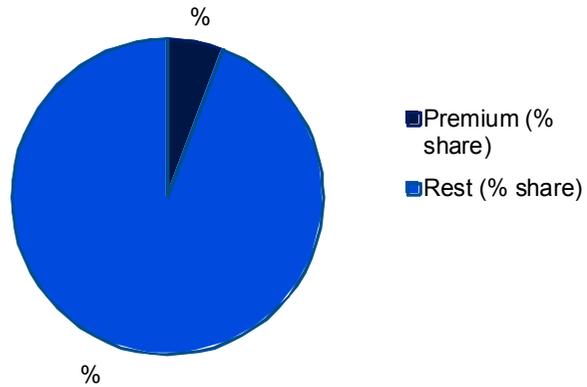
In some markets, the prevalence of sparkling water impacts the size of the premium market.

Channel dynamics within the local market also play a factor, as generally bottled water sold through horeca commands a higher value per litre than sales through modern retail outlets.

Global premium water

Market volume 2010-12

Volume % share, 2012



Volume (mln litres)	2010	2011	2012
Premium (mln litres)			
Rest (mln litres)			
Total			
Premium (% share)			
Rest (% share)			
Total	100.0	100.0	100.0

- Commentary

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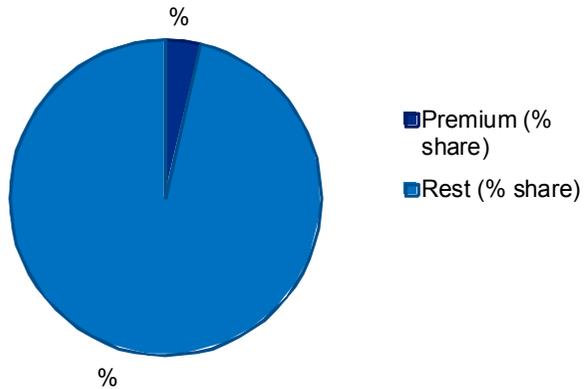
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'Country' premium water

Segment value 2010-12

Value % share, 2012



Value (mln Yuan)	2010	2011	2012
Premium (mln Yuan)			
Rest (mln Yuan)			
Total			
Premium (% share)			
Rest (% share)			
Total	100.0	100.0	100.0

- Commentary

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Perrier

Nestlé Waters

Company: Nestlé Waters. The spring was bought in 1898 by Louis Perrier, and in 1903, he sold the source to St John Harmsworth, who subsequently began exporting Perrier to England. In 1947, Gustave Leven acquired the source, and production increased significantly in the following years. In 1992 Nestlé acquired Perrier and created Nestlé Waters SA.

Product: Naturally carbonated mineral water, source Vergèze, Gard, France. Unflavoured Perrier is available in the traditional green bottle, and Eau de Perrier (launched in 2003 in France), which is in a blue bottle. In 2012, in France, Nestlé Waters introduced a lightly sparkling Perrier Fines Bulles. Volume sales of Perrier unflavoured:

Packaging: PET: 500ml, 1 litre. Glass: 200ml, 330ml, 750ml. Can: 330ml. Various multipacks. In 2013, to celebrate the 150th anniversary of Perrier, the company unveiled an Andy Warhol design.

Distribution: Domestic market, France. In 2011, the company introduced Perrier into Discounter Lidl. Sold in more than 140 countries worldwide.

Channel analysis: The brand has an extremely strong presence in horeca, but in some markets has now emerged to also be viewed as a mainstream retail brand for consumption at home.

Average pricing (France): Retail - approx €0.95/litre (1 litre bottle). In Lidl in France, Perrier retails at €0.64/litre, restaurants - approx €5.00/litre.





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