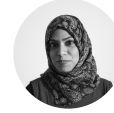


A YEAR OF INNOVATION IN BOTTLED WATER, 2022

Sustainable packaging continues to be a key theme in water innovation, along with flavours, energy-boosting ingredients and sugar reduction.



Amrin Walji, Senior
Innovation Analyst



Report Content



- What we have seen
- Our pick of the most innovative launches in this review
- Other innovative launches
- Innovation opportunities in...

EUROPE, MIDDLE EAST & AFRICA (EMEA)

- EMEA retail market overview: bottled water, 2022

Europe: bottled water innovation continues to focus around the plastic pollution problem

- Sustainable packaging is important to consumers
- Planet-friendly packaging claims record a jump among bottled water launches
 - Graph 1: bottled water launches, by share of select ethical claims, 2017-22
- Brands employ different tactics to convey a more environmentally friendly image
- Brand renovation/innovation: Thalheim's medicinal water reminds consumers that minerals are the original electrolytes

Europe: functionality remains a thriving innovation theme in bottled water

- Consumers place their faith in the benefits of fortified water
- Bottled water with functional and plus claims see an uptick in launch activity
 - Graph 2: bottled water launches, by share of functional and plus claims, 2017-22
- Bottled water launches offer a variety of functional wellness benefits

The Middle East & Africa (MEA)

- Ethical and environmentally friendly claims continue to rise in MEA bottled water launches

ASIA PACIFIC (APAC)

- APAC retail market overview: bottled water, 2022

Asia: canned water cements its position as the format of choice for consumers seeking fizzy refreshments

- Flavoured sparkling water is an attractive choice for consumers who want a better-for-you alternative to CSDs
- Water launches in canned formats record an increase in activity
 - Graph 3: water launches, by share of package type, 2020-22
- Canned waters demonstrate an innovative and forward-looking approach to flavour and functionality

Asia: water brands strengthen their focus on sugar-free innovation

- Chinese consumers want to see sugar-free claims in bottled water more than in any other drink
- Sugar-free flavoured waters record a rise in launch activity

A year of innovation in bottled water, 2022

- Graph 4: bottled water launches, by share of sugar-free claims, 2017-22
- Water brands are zeroing in on sugars and calories

Australia and New Zealand

- Australian brands promote local water sources

THE AMERICAS

- The Americas retail market overview: bottled water, 2022

North America: water launches target consumer need for energy and productivity

- Caffeinated sparkling waters appeal to consumers who are seeking to boost energy levels
- North America records a sharp rise in water launches with energy and cognitive enhancing benefits
 - Graph 5: bottled water launches, by share of select functional claims, 2020-22
- Brands formulate with caffeine and nutrients to elevate energy and concentration levels
- Brand renovation/innovation: Daydream introduces sparkling waters with hemp extract and adaptogens to help one 'dream more and create more'

North America: alkaline waters continue to make inroads

- The popularity of alkaline water is based on consumer perceptions of flavour and health
- Innovation in alkaline water remains modest in North America
- Brands highlight the reported benefits of alkaline water and pH level

Latin America: appealing to consumers' health needs

- Clean-label flavoured waters help consumers to achieve their holistic health goals
 - Graph 6: flavoured water launches, by share of select clean label claims, 2020-22
- Flavoured waters strip out sugar and artificial content to reassure consumers

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