

SOUTH AFRICAN BOTTLED WATER MARKET INSIGHTS REPORT

PUBLISHED: OCTOBER 2024

COMPANY OVERVIEW



Insight Survey is a boutique South African market research agency with over 15 years of experience, specialising in Business-to-Business (B2B) and Industry research to ensure smarter, more-profitable business decisions are made with reduced investment risk.

We offer **B2B market research solutions** to help you to successfully improve or expand your business, enter new markets, launch new products or better understand your internal and external environment.

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QUESTIONS WE HELP ANSWER

- What is the current and future market size?
- What are the latest global and local trends impacting on the market?
- Who are your key competitors and what is their offering in terms of products, services, pricing and branding?



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Company website analysis



Governmental held records

OUR FOOD AND BEVERAGE EXPERIENCE

We are a proudly South African company that have provided market research solutions and Intelligence reports to local and global brands. We have worked with some of the greatest companies and brands in their industries.



REPORT OVERVIEW

The **South African Bottled Water Market Insights Report (67 pages)** provides a dynamic synthesis of industry research, examining the local and global **Bottled Water industry** from a uniquely holistic perspective, with detailed insights into the entire value chain – market size, industry trends, innovation and technology, industry drivers and challenges.

SOME KEY QUESTIONS THE REPORT WILL HELP YOU TO ANSWER:

For the Global Bottled Water Industry Section:

- What are the current market dynamics (market size, imports and exports trade) of the Global Bottled Water industry?
- What is the value and growth of key regional markets within the Global Bottled Water industry?
- What are the latest industry trends, innovation and technology, drivers, and challenges?

For the South African Bottled Water Industry Section:

- What are the current market dynamics (market size, market value, market volumes, imports and exports trade): 2018-2023 Actual, 2024-2028 Forecasts, and distribution channels?
- What are the latest industry trends, innovation and technology, drivers, and challenges?

67-page report filled with detailed charts, graphs, and insights

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In 2024*, the global Bottled Water market is expected to reach an estimated value of approximately US\$360.0 billion. In addition, the market is forecast to grow at a compound annual growth rate (CAGR) of 3.6% from 2024* to 2029, to reach approximately US\$430.0 billion in 2029**, as illustrated in the adjacent graph.**

- The growth in the global Bottled Water market is being driven by the introduction of sustainable packaging as both consumers and market players place an increased emphasis on environmental concerns and sustainability. The introduction of these eco-friendly Bottled Water packaging options is meeting these rising demands from environmentally conscious consumers, thereby increasing sales and fuelling market growth.
- Furthermore, the growth in the tourism and hospitality sector globally is proving to be a significant driver of the Bottled Water market, due to the increased demand for these products in hotels, restaurants, and bars. This is likely to increasingly drive the market as the hospitality and tourism sector continues to grow post-pandemic.
- Additionally, concerns regarding the safety and availability of publicly available drinking water, such as tap water, are also fuelling demand for Bottled Water and driving the market as contamination concerns grow. These concerns are leading to an increasing reliance of consumers on Bottled Water as a safe and dependable alternative to public drinking water amongst consumers globally.

- However, growth of the market is being challenged by several factors, including the proliferation of fake Bottled Water products in the market, reducing consumer trust in these products and reducing demand. At the same time, safety concerns regarding Bottled Water products also pose a challenge, due to a lack of regulatory oversight, as well as the presence of contaminants, such as microplastics.
- Finally, environmental concerns are also challenging the market in terms of the impact of plastic waste generated by the global Bottled Water industry which is contributing to environmental pollution.
- In terms of segmentation, the global Bottled Water market can be segmented by product type into Still, Carbonated, Flavoured, and Mineral, with the Still category dominating due to its ability to provide effective rehydration. The market is further segmented by packaging type into PET Bottles, Metal Cans, and Others, of which the PET segment held the largest share in 2023.



* Estimated value

** Forecast

Tethered Bottle Caps Trend in the Local Market

- The South African Bottled Water market is witnessing a rising trend in the adoption of alternative packaging solutions, driven by a growing emphasis on sustainability within the industry. This shift has led to the increasing popularity of 'tethered caps' across the country, making this a notable trend.
- More specifically, although plastic bottle caps are small, they constitute a significant source of pollution due to their large quantities and the challenges associated with recycling them. These plastics have a profound environmental impact because they decompose very slowly, and as they break down into microplastics, they can persist in the environment for hundreds of years.
- As a result, several players have begun making use of tethered caps for Bottled Water products. The use of integrated caps markedly decreases plastic waste by preventing the loss of caps. This method not only reduces environmental pollution but also improves the overall recyclability of bottles, making this increasingly popular amongst environmentally-conscious consumers.
- As an example, Polyoak Packaging, a leader in food and beverage packaging and a founding member of the South African Plastics Pact, has introduced tethered closures for polyethylene terephthalate (PET) bottles to address the problem of litter from small plastic items. These closures remain attached to the bottle after opening, thereby reducing litter and enhancing recycling efforts.
- Similarly, aQuellé introduced tethered caps for its 500ml Still Natural Spring Water Bottles, a first in South Africa. Designed to combat plastic pollution, the cap remains securely attached to the Water Bottle, even after opening. According to the company, this simple, yet effective, solution assists in reducing litter, safeguarding the environment, and simplifying the recycling process.
- As a further example, Designer Water, a local manufacturer of alkaline Bottled Water products, recently launched tethered caps for its alkaline Bottled Water range. According to Designer Water, this new design minimises the possibility of the caps being discarded, thereby aiming to prevent plastic litter.
- Therefore, the incorporation of tethered caps in Bottled Water packaging is a trend that is likely to continue, particularly due to the growing emphasis on sustainability within the local Bottled Water industry.



SAMPLE FROM REPORT

SA INDUSTRY INNOVATION AND TECHNOLOGY

aQuellé Introduces Several New Products and Product Improvements

- Over the past year, aQuellé has introduced several innovative Bottled Water products and ranges, as well as announced product enhancements for existing products. These included the following:
 - ✓ **Limited-Edition Aluminium Bottle:** In December 2023, aQuellé celebrated its 25th year in business, and marked the occasion with the introduction of its limited-edition reusable aluminium bottle. The 470ml bottle contained aQuellé's Natural Spring Water and was available in selected stores across South Africa.
 - ✓ Moreover, each limited-edition bottle purchase contributed to enhancing water security in underprivileged South African communities. The initiative resulted in the installation of 25 aQuellé water tanks across the country, improving lives and providing refreshing access to clean water.
 - ✓ **New aQuellé 'Splash' Range:** In January 2024, aQuellé introduced a new range of Bottled Waters called 'Splash', which contain the brand's still, natural spring water. The new range is positioned as a smart alternative to sugary drinks for children.
 - ✓ In addition, each of the eight different 'Splash' bottles features a different and engaging animal on the packaging, allowing children to collect each bottle. The bottles also contain a spill-proof cap which effectively prevents leaks when the bottle is shaken or turned upside down, making it ideal for lunch boxes and road trips.

- ✓ **Tethered Caps:** In January 2024, aQuellé introduced innovative tethered caps on its 500ml Still Natural Spring Water Bottles, a first in South Africa. Designed to combat plastic pollution, the cap remains securely attached to the Water Bottle, even after opening.
- ✓ This simple yet effective solution assists in reducing litter, safeguarding the environment, and simplifying the recycling process. Furthermore, consumers are able to purchase aQuellé's new tethered cap products exclusively at Checkers and Shoprite stores.



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