

The Grocer

Focus On: Bottled water by Ash O'Mahony (Ashleigh.omahony@wrbm.com)

Publishing: 21 March
Advertising deadline: 6 March
Submissions deadline: 28 February

The Story

Bottled water is losing its, ahem, bottle. After years of consecutive growth, the market has fallen more than £34m. That decline is evident across all parts of the category – from plain still water to the former star player, flavoured sparkling. Bottled water players aren't taking that lying down, though. The big brands are investing in marketing, while smaller players are busy innovating with propositions ranging from high-hydrogen to alkaline waters. So what has prompted the decline in bottled water? And can these strategies manage to stop value leaking any further?

Key themes:

Promotions: To what extent has the decline in promotions affected sales – in particular the sharp fall in volume deals?

Weather: The hot summer of 2018 left shoppers thirsty. But the summer of 2019 was more of a washout. How did that impact sales?

Plastic: To what extent are shoppers being swayed by concerns over single-use plastic?

Brands: Both brands and own label have suffered this year. But some brands are managing to buck the trend. What is the secret to their success?

Marketing: What role is marketing playing in the performance of the biggest brands?

NPD: Who is innovating and what are they bringing to the category? Are there any exciting claims that could bolster the market e.g. high-hydrogen/alkaline/seawater?

Seltzers: Seltzers were tipped as an exciting new growth area for the bottled water category. Yet sparkling flavoured water sales are down by a hefty amount. So how are seltzer brands faring? And can this trend still make waves?

Innovations: We identify four new products that have ideally not appeared in The Grocer before including launch date and RSP, and a picture of each.

Kantar data: Using Kantar commentary, we explain the reasons behind the rise and fall of the different areas of the bottled water market,

Nielsen data: Using Nielsen commentary, we look at the 10 fastest-growing brands and 10 fastest-falling brands of the past year.

Shopper Intelligence: How consumers shop the bottled water category