

IBWA[®]

2024

PROGRESS REPORT



INTERNATIONAL BOTTLED WATER ASSOCIATION

2025 IBWA Leadership

Officers

Chair	Vice Chair	Treasurer	Immediate Past Chair	President and CEO
Doug Hidding	Eric DeVanie	Joe Bell	Hih Song Kim	Joe Doss
Blackhawk Molding, Co.	Primo Brands	Aqua Filter Fresh, Inc.	Primo Brands	IBWA
Addison, Illinois	Tampa, Florida	Pittsburgh, Pennsylvania	Stamford, Connecticut	Alexandria, Virginia

Board Members

CR Hall Hall's Culligan Water Wichita, Kansas	Henry R. Hidell, III Hidell International Hingham, Massachusetts	David Redick Steelhead, Inc. San Antonio, Texas
Tanner Hanstein Eureka Water Company Oklahoma City, Oklahoma	Dan Kelly Polymer Solutions International, Inc. Medford, New Jersey	Robert Smith Grand Springs Distribution Alton, Virginia
Ryan Heiken Crystal Clear Bottled Water Des Moines, Iowa	Lynette MacFee Oasis International Columbus, Ohio	Brad Wester Premium Waters, Inc. Minneapolis, Minnesota
Brian Hess Niagara Bottling, LLC Diamond Bar, California	Jillian Olsen Cherry Ridge Consulting Sciota, Pennsylvania	Bill Young Absopure Water Company, Inc. Plymouth, Michigan

Executive Committee

Chair Doug Hidding Blackhawk Molding, Co. Addison, Illinois	Brian Hess Niagara Bottling, LLC Diamond Bar, California	Robert Smith Grand Springs Distribution Alton, Virginia
Joe Bell Aqua Filter Fresh, Inc. Pittsburgh, Pennsylvania	Henry R. Hidell, III Hidell International Hingham, Massachusetts	Bill Young Absopure Water Company, Inc. Plymouth, Michigan
Eric DeVanie Primo Brands Tampa, Florida	Dan Kelly Polymer Solutions International, Inc. Medford, New Jersey	
CR Hall Hall's Culligan Water Wichita, Kansas	Hih Song Kim Primo Brands Stamford, Connecticut	

A Letter From the President

Reflecting on 2024, the International Bottled Water Association (IBWA) members and staff can take pride in the significant strides we made in advancing the association's mission to promote healthy hydration and provide consumers with safe, high-quality bottled water products. As always, our work is driven by a steadfast dedication to consumer well-being, environmental sustainability, and proactive leadership in meeting stringent water quality standards.

Preliminary data for the year from Beverage Marketing Corporation show that bottled water has retained its position as the No.1 packaged beverage in the United States, outpacing carbonated soft drinks (by volume) for the ninth consecutive year. Consumers' preference for our healthy hydration products is further supported by the results of a 2024 Harris Poll commissioned by IBWA that found 69% of Americans consistently choose bottled water as their preferred beverage.

We continued our efforts to add a water icon to the MyPlate nutrition graphic—a goal that aligns perfectly with our mission to emphasize water's important role in a balanced and healthy diet. Advocating for inclusion of water has strengthened our partnerships with likeminded public health organizations and policymakers, paving the way for greater awareness of water's health benefits.

IBWA has also remained a stringent advocate for the plastics used in bottled

water packaging. Our plastic containers are not only safe for food contact but also have a remarkably small environmental footprint, as highlighted by our updated Water and Energy Use Benchmark Study. Research outcomes overwhelmingly reaffirm that bottled water has the smallest water and energy use ratios among all packaged beverages and the lowest greenhouse gas emissions, reflecting our industry's commitment to sustainability and innovation.

In alignment with our dedication to environmental stewardship, we championed federal recycling legislation, notably the Recycling and Composting Accountability Act and the Recycling Infrastructure and Accessibility Act. These initiatives aim to enhance recycling systems, reduce waste, and increase access to recycling for communities across the United States. On the global stage, we worked with the United Nations' Intergovernmental Negotiating Committee in support of a flexible, equitable global treaty that addresses the challenges of plastic waste while respecting the diverse needs and accountability levels of nations.

Recognizing emerging concerns about PFAS, IBWA took a proactive role on this matter. We revised our comprehensive, voluntary PFAS quality standards, which go beyond the Environmental Protection Agency's current regulatory requirements for PFAS in tap water. And, as an abundance of misinformation about micro- and nanoplastics (MNPs) spread to consumers, IBWA worked to keep the discussion focused on proven facts, noting



that current scientific evidence does not demonstrate that levels of MNPs detected in foods pose a health risk to humans.

The above activities offer just a glimpse of the work IBWA performed in 2024 to champion a favorable business, legislative, regulatory, and communications environment for our bottler, supplier, and distributor members. While we're proud of what we've accomplished together, there is still more to be done. As we look ahead, rest assured that IBWA is already hard at work developing and advancing an ambitious agenda for 2025—one that will continue to prioritize healthy hydration, advocacy, and environmental stewardship.

A handwritten signature in black ink that reads "Joe Doss". The signature is fluid and cursive, with the first name "Joe" being more prominent than the last name "Doss".

Joe Doss

IBWA President and CEO

About IBWA

For more than 65 years, the International Bottled Water Association (IBWA) has been the trusted authority on information about bottled water and the bottled water industry. We represent bottlers, distributors, and suppliers across the United States and around the world, and the healthy bottled water beverages they produce and deliver—including spring, mineral, purified, artesian, and sparkling waters.

Our mission is simple: Be the leading voice for the bottled water industry and its role in healthy hydration and drinking water conservation.

We do that by working hard to ensure that bottled water packaged beverages are safe, high-quality products that meet the most rigorous industry standards. We are committed to working with the U.S. Food and Drug Administration (FDA), which regulates bottled water as a food product, to establish comprehensive and stringent standards for our bottled water products. In fact, IBWA members voluntarily follow specific guidance outlined in the

IBWA Bottled Water Code of Practice, which sets additional standards and practices that in some cases are more stringent than federal and state regulations.

What sets us apart? Every IBWA member bottling plant undergoes a mandatory annual inspection by an independent third-party organization. This means we're not just talking about safety and quality—we're proving it, year after year.

Sustainability continues to be a central focus for the bottled water industry, and IBWA members are innovators that strive to lessen our already small environmental footprint. We respond to environmental challenges, but more importantly IBWA proactively works to develop solutions that balance consumer choice and convenience with ecological responsibility.

IBWA stands at the forefront of promoting healthy hydration and delivering safe, convenient drinking water while continuously improving our environmental footprint.



*Meeting Consumer
Demand For
Bottled Water*



*Promoting
Healthy Hydration*



*Defending The
Industry*



*Investing In
Research*



*Advocating For
Improved Recycling
Legislation And Rates*



*Monitoring
Emerging
Contaminants*



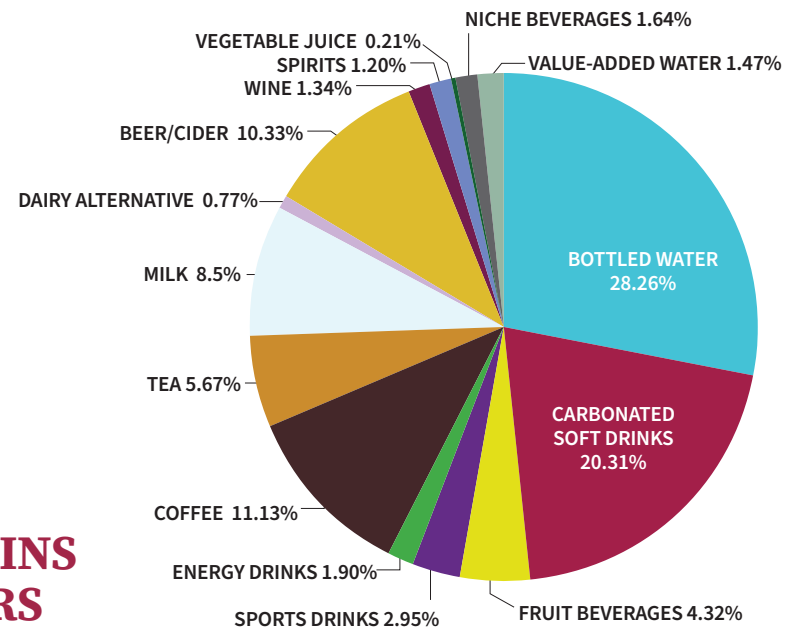
*Educating Consumers,
The Media, Legislators,
And Regulators*



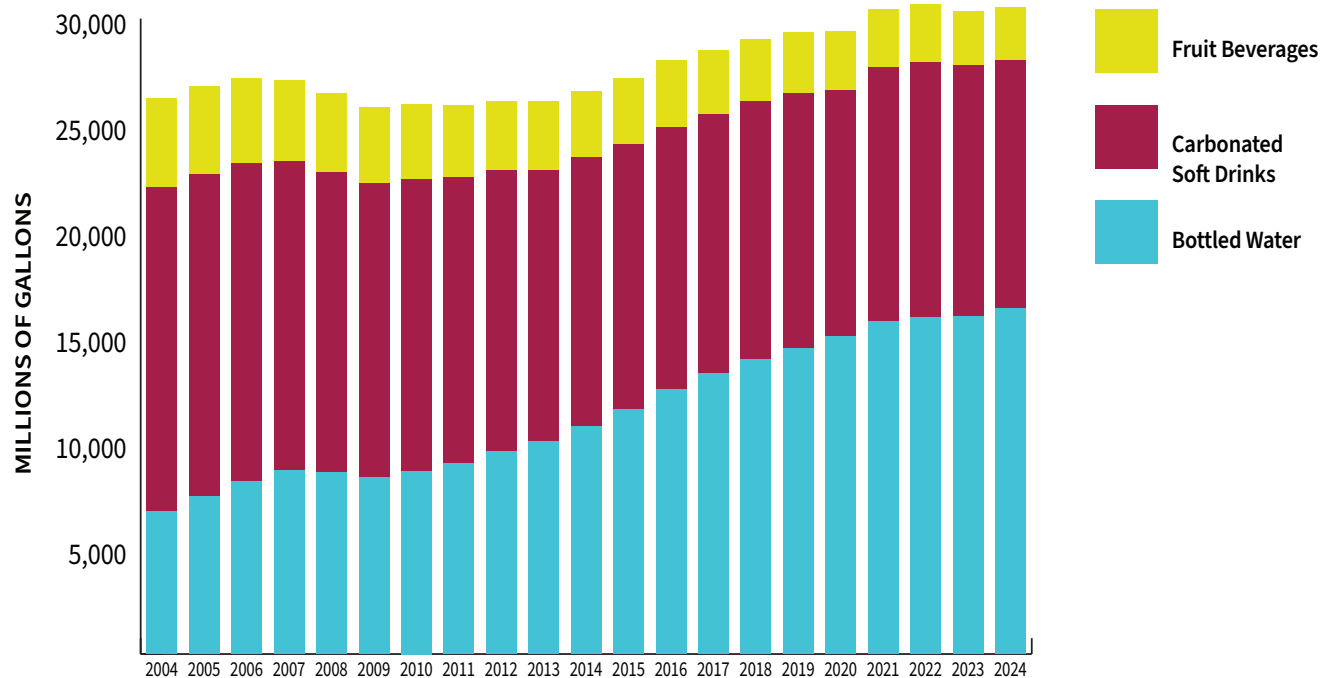
*Networking
And Building
Relationships*

“Bottled water is America’s favorite beverage – for the ninth year in a row.”

U.S. BEVERAGE MARKET 2024(P) VOLUME SHARE BY CATEGORY



BOTTLED WATER GAINS OVER LAST 20 YEARS 2004-2024(P)



(P) = Preliminary
Source: Beverage Marketing Corporation

Meeting Consumer Demand For Bottled Water

As consumers become increasingly mindful of their dietary choices, bottled water has emerged as the packaged beverage of choice, offering a zero-sugar, zero-calorie alternative that aligns with a health-conscious lifestyle. The switch from sugary, calorie-laden beverages to bottled water represents a powerful consumer-driven transformation in the beverage landscape.

That shift isn't a trend; it's a reflection of a deeper societal commitment to personal well-being, where consumers are actively choosing beverages that support their health goals. IBWA members, staff, and consultants have recognized and responded to this fundamental change, working diligently to meet the growing demand for healthy hydration.

The result is a remarkable success story. For more than 40 years, bottled water has had strong and steady growth, experiencing a compound annual growth rate of 5.7% since 1984, according to Beverage Marketing

Corporation (BMC). In 2016, bottled water replaced carbonated soft drinks as America's favorite packaged beverage, a title it continues to hold nine years later.

BMC's preliminary statistics for 2024 show that bottled water is one of only two categories in the liquid refreshment beverage market to achieve volume growth in 2024 (the other was energy drinks). In fact, bottled water is the biggest volume share gainer, while carbonated soft drinks have been the largest share loser in recent years. In 2024, per capita bottled water consumption (47.1 gallons) stands nearly a dozen gallons higher than carbonated soft drinks (33.8 gallons).

While single-serve plastic bottles remain by far consumers preferred packaging choice, home and office delivery (HOD) and self-serve refill (vended) categories saw volume outperform the much larger single-serve segment in 2022, 2023, and 2024, likely a response to inflation.

Promoting Healthy Hydration

Water is often taken for granted, yet it plays an essential role in maintaining health. That's why, for several years, IBWA has advocated for a water icon to be added to the U.S. nutrition guide: MyPlate. An easy-to-understand education tool, MyPlate reflects the guidance provided in the *Dietary Guidelines for Americans* and helps translate complex nutritional recommendations into practical, everyday eating advice.

In 2024, IBWA undertook several projects to forward the goal of adding water to MyPlate:

- Led an effort to get a bipartisan group of House and Senate members to send letters encouraging the U.S. Departments of Agriculture (USDA) and Health and Human Services (HHS) to include water on MyPlate.
- Formed a coalition of diverse health and industry organizations that support adding water to MyPlate: the Hydrate MyPlate Alliance. The Alliance encourages the public to submit letters to the Administration through the "Take Action" center on its website: www.hydratemyplate.org. IBWA will also submit comments to, and organize meetings with, USDA and HHS once they receive the final recommendations from the Dietary Guidelines Advisory Committee, which is expected before the end of 2024.
- Launched a social media campaign targeting residents living in the DC area to help ensure that legislators and their staff living in those zip codes saw our information. We highlighted the fact that 80 countries around the world include water on

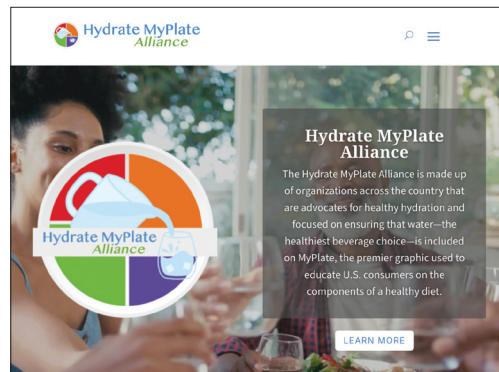
their nutrition graphics. This helps us point out that the United States is behind on this important health issue.

- Advertised in the congressional publication *Roll Call* (shown at right) on the same day as IBWA's Capitol Hill meetings in June to further highlight the important role water plays in ensuring we get the full benefits from the other food groups on MyPlate.

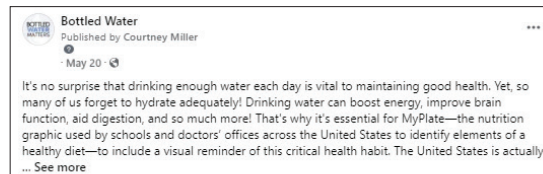
Advocating to add "healthy" to bottled water labels

On December 19, 2024, FDA made a significant update to its labeling regulations, allowing companies to now include the word "healthy" on their bottled water products. This ruling aligns with FDA's broader initiative to modernize "healthy" nutrient content claim regulations, helping consumers more easily identify foods and beverages that form the foundation of a nutritionally sound diet in accordance with dietary recommendations.

For several years, IBWA has advocated for this change, submitting comments of support when the rule was proposed in 2022 and working with Congress to gain its backing on this issue. As a result of our efforts, several members of Congress sent a letter to FDA asking the agency to allow bottled water products to include the word "healthy" on the label. In addition, IBWA met with staff at the White House Office of Management and Budget and FDA to encourage quick review and approval of the final rule to allow bottled water to be labeled as "healthy."



“In 2024, IBWA implemented new strategies to highlight the benefits of healthy hydration to policymakers.”



“The continued growth in consumption and sales show that—despite the efforts by our critics to discourage people from drinking bottled water—consumers are focused on making healthy hydration and lifestyle choices.”

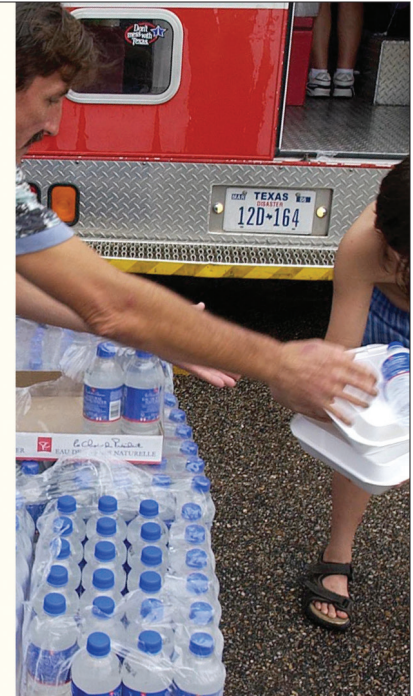


BOTTLED WATER SAVES LIVES

In times of **NATURAL DISASTERS** and **EMERGENCIES**, **bottled water** is *always* there when **YOU** need it.

BOTTLEDWATERMATTERS.ORG

♡ ♫ 📌
Share this post with a friend who needs to **drink more water!**



CONSUMPTION:
16.2 billion
gallons – a
2% increase
over 2023

RETAIL SALES:
\$49.9 billion
dollars – a
2.4% increase
over 2023



Defending The Industry

The HOD segment has shown particular resilience, with volume outperforming even the single-serve market in recent years—a testament to the category's adaptability and consumer trust. To help ensure that growth continues, IBWA extols HOD's sustainable practices and communicates to legislators, regulators, and consumers the segment's commitment to science-based safety standards.

One critical area of defense has been addressing potential concerns about bisphenol A (BPA). Backed by regulatory agencies around the world confirming the safety of BPA, including FDA, IBWA consistently maintains that polycarbonate 3- and 5-gallon containers pose no health risk to consumers. This evidence-based approach extends to our advocacy efforts, where IBWA members, staff, and consultants carefully navigate potential legislative challenges that could impact product safety and consumer choice. Moreover, IBWA works to ensure that HOD refillable containers are not included in recycled content regulations, recognizing their unique role in delivering safe, quality water to consumers.

Bottled water products packaged in PET plastic bottles use less water, emit fewer greenhouse gases, and generate less waste than aluminum, glass, or cardboard containers. Despite those facts, a strong anti-plastic movement is increasing calls for bottled water sales ban across the United States. Thus, in 2024 IBWA once again opposed bills and proposals that targeted single-serve plastic water bottles.

At the **local level**, small towns in Massachusetts considered bottled water sales bans, and New

York City is attempting to codify existing executive orders that prohibit the purchase of bottled water in single-serve plastic containers for government agencies, although similar efforts at the state level failed. In Los Angeles, the city's Department of Sanitation provided the city council's Energy and Environment Committee recommendations on how the city can reduce single-use product waste, including a ban on the sale of non-refillable single-serve plastic bottled water products. IBWA continues to work with other groups as the process in Los Angeles moves forward and meet with council members to educate them about our issues.

At the **state level**, Hawaii sought a complete ban on the sale of bottled water in single-serve plastic containers, and California and Rhode Island wanted to prevent the use of state funds to purchase bottled water in single-serve plastic containers. IBWA opposed all of those proposals, and none were enacted.

At the **national level**, IBWA has been working with the National Park Service (NPS) concerning efforts by its parent agency, the U.S. Department of the Interior (DOI), to phase out single-use plastics. Although IBWA members don't sell a lot of bottled water in national parks, a ban on the sale of our products by a U.S. government agency would set a bad precedent that anti-bottled water activists could use to support their efforts in other places. IBWA continues to meet with both organizations and members of Congress to educate them on how bottled water has the least impact on the environment compared to other packaged beverages.

Defending The Industry (continued)



THE IBWA PAC

IBWA's Political Action Committee is a vital tool that helps us educate members of Congress and build champions for the bottled water industry. PAC contributions make it possible for IBWA to support political candidates who support the bottled water industry. During the 2023-2024 election cycle, the IBWA PAC contributed to 24 candidates from both parties. The vast majority of candidates that IBWA supported won their election campaigns.

To receive information about the IBWA PAC, members need only to fill out an Authorization-to-Solicit form for their company. Under federal law, IBWA cannot contact you about PAC issues unless we have that form. As a reminder, submitting this form does NOT obligate you to contribute to the IBWA PAC. It just gives us permission to let you know about PAC activities and events.

If you want to receive information about the IBWA PAC, please contact IBWA Director of Government Relations J.P. Toner: jtoner@bottledwater.org.

The association also offered to assist DOI with its efforts to develop waste-collection mechanisms in the parks.

At the **global level**, IBWA has been educating United Nations (U.N.) policymakers as they work to negotiate a worldwide plastics treaty. At meetings with the U.S. Department of State (the lead negotiator for the United States) and several other agencies, we've noted the bottled water industry's concerns about any potential bans or taxes on plastic use and support for various concepts in the treaty, including

designing for recyclability, increasing collection rates, and improving recycling infrastructure.

Working with our partner, the National Association of PET Container Resources (NAPCOR), members and staff from IBWA and NAPCOR met with U.S. government officials in September to discuss the treaty and the importance of plastic containers to consumers. IBWA and NAPCOR co-sponsored receptions for U.N. delegates at the U.N.'s fourth and fifth negotiating sessions held in Ottawa, Canada, last April and Busan, South Korea, in November, respectively.

Strategic, focused advocacy in the states

In 2024, nearly 350 bills and 200 regulations were introduced in the states that could have impacted bottled water companies, including the following important state issues:

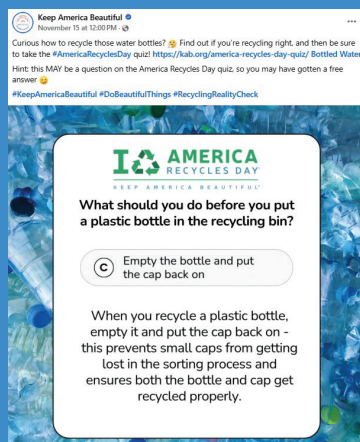
- Impose or increase taxes and fees on bottled water products and water extraction
- Require bottled water labels to include warnings or statements about various substances
- Control access to groundwater resources
- Various other drinking water regulations, including testing requirements for emerging contaminants.

IBWA closely monitored all of these state issues, and, when necessary, engaged in targeted lobbying efforts to challenge proposed legislation that would hinder our members from providing consumers with healthy hydration products. We also worked with industry allies to develop messaging and communications materials that educate legislators and regulators about bottled water's minimal environmental impact (especially compared to other packaged drinks) and the health benefits of bottled water consumption.



“The IBWA PAC is a vital tool in educating members of Congress about bottled water and building champions for our industry.”





The Benefits of IBWA Membership

At the heart of the bottled water industry lies a vibrant community of dedicated professionals united by passion, stewardship, and a commitment to delivering one of life's most essential resources. For us, IBWA is more than just a trade group—it's a dynamic network of industry pioneers who are driving positive change and celebrating our individual and collective achievements.

Whether you're a seasoned industry veteran or an emerging professional, IBWA offers unparalleled networking and advocacy opportunities, professional development resources, policy and regulatory insights, communications materials, and a platform to showcase your innovations. If you are not currently an IBWA member, we invite you to join our team to help us shape the future of hydration. Learn more at bottledwater.org/membership.



(From left) Eric DeVanie, CR Hall, and Tanner Hanstein advocate for adding water to MyPlate on Capitol Hill.



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In times of **NATURAL DISASTERS** and **EMERGENCIES**, **bottled water** is *always* there when **YOU** need it.

BOTTLEDWATERMATTERS.ORG



Share this post with a friend who needs to **drink more water!**





IBWA PAC members enjoy an Escape Room competition.



(From left) Fabiola Iniguez (Niagara), Matt Kelly (Ready Fresh), Hih Song Kim (Primo Brands), Caron Koll (Antea Group), and Valerie Bradley (Primo Brands) at the conference Welcome Reception.



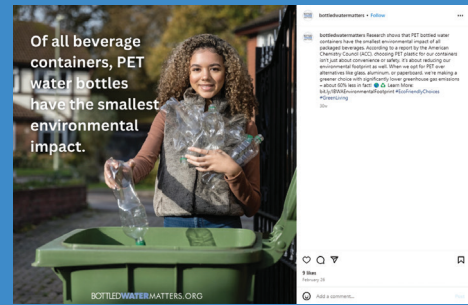
Shawn Hendricks (Primo Brands), IBWA's 2024 Route Salesperson of the Year, with his wife, Nikki.



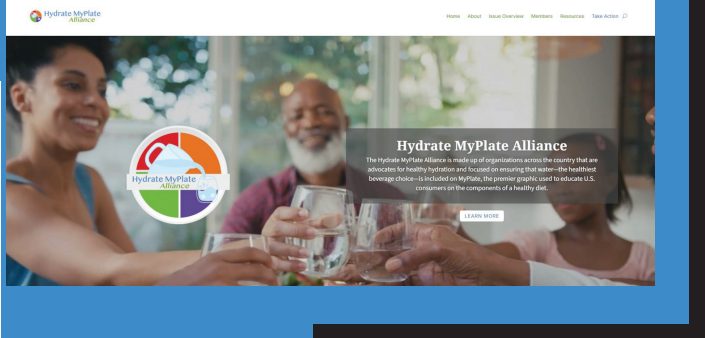
Gary Hemphill (Beverage Marketing Corporation) led the sales trends education session.



The Polymer Solutions International team pose with their Product Innovation Award.



Hosting legislators for a plant tour is a great way to educate them about the bottled water industry.



IBWA's 2024 Plant Manager of the Year David Munnill (Primo Brands) celebrates his award with his wife, Chynelle.

Americans' Packaging Preference:

plastic (75%), glass (16%), metal can (6%), and carton (3%).

87% of Americans
have a positive opinion
of bottled water.



International Bottled Water Association | NEWS RELEASE | October 15, 2024



Alexandria, VA – The vast majority (88%) of Americans say they consume bottled water, according to a new national survey of more than 2,000 U.S. adults aged 18 and older conducted online by The

Harris Poll on behalf of the International Bottled Water Association (IBWA). And almost 9 out of 10 (87%) of Americans say they have a positive opinion of bottled water as a beverage choice.

Love for bottled water is growing, as 69% of Americans say it is among their most preferred non-alcoholic beverages (up from 65% in 2022).

Investing In Research

IBWA member companies recognize that the best approach for environmental sustainability is proactive resource management based on a comprehensive understanding of how water and energy are used, and the emissions produced in operations. In collaboration with the Antea Group, IBWA released its **2024 Water and Energy Use Benchmarking Study** in May, updating the 2018 analysis.

This new study can aid companies in benchmarking their current water and energy use. IBWA bottler members can use information from the study to strengthen existing water and energy stewardship programs and keep up with ever-evolving consumer and beverage industry trends. The 2024 study also includes information on facility emissions, which was added to the benchmarking update for the first time.

The 2024 update looks at what drives industry water and energy use and emissions production, so companies can implement practices in their operations to use resources more efficiently.

The new water use ratio figure for bottled water is 1.41 liters per liter, which includes the liter that is consumed. That continues to be the lowest water use

ratio of all packaged beverage products. The latest energy use ratio figure for bottled water remained unchanged at .21 megajoules per liter. As for greenhouse gas emissions, the data show that bottled water production has a CO₂ equivalent emissions ratio of 21.9 grams per liter, which is the lowest of all packaged drinks.

Highlighting hydration habits

In support of IBWA's healthy hydration advocacy and communication efforts, the association also commissioned The Harris Poll to conduct a **consumer survey** on drink preferences and opinion of bottled water in 2024. The survey results (a few of which are highlighted at left) offer IBWA credible statistics to use with the media, consumers, and policymakers when promoting the benefits of healthy hydration. (Read the press release at bottledwater.org/nr/water-drinkers-love-for-bottled-water-is-stronger-than-ever-survey-finds.)

Advocating For Improved Recycling Legislation And Rates

Due to the importance of recycling to the bottled water industry, IBWA is supporting two bills in Congress that would help improve the recycling infrastructure in the United States: the Recycling and Composting Accountability Act and the Recycling Infrastructure and Accessibility Act. This legislation requires the collection of key data to help policymakers gain a better understanding of U.S. recycling capabilities. It will also improve access to recycling programs for disadvantaged communities. Both bills passed through the Senate with strong bipartisan support, and IBWA continues to seek passage of this legislation in the House.

In the states, interest in mandatory **recycled content legislation** has tapered off, as states lean toward investing in extended producer responsibility (EPR) initiatives. In 2024, Minnesota was the only state to join California, Colorado, Oregon, and Maine in having EPR laws on the books.

For those states that have recycled content legislation, IBWA has been keeping busy working on regulations implementation. For example, IBWA is working to ensure that there is enough recycled material to achieve future mandates to meet California's finalized recycled content mandate regulations. IBWA supported a newly-enacted California law that prohibits carpet manufacturers from using recycled material from plastic beverage bottles to meet their recycled content mandate requirements.

In New Jersey, IBWA is actively working to ensure that manufacturers of 3- and 5-gallon water bottles are not included in the state's recycled content

mandate. We were successful in getting the Department of Environmental Protection to issue a statement saying that these products were not covered by that requirement, and we are working with the law's sponsor to consider codifying the exception for HOD bottles.

The IBWA Board of Directors revised the association's policy on **bottle deposit laws**. This allows IBWA to be proactive in discussions in support of well-designed bottle deposit policies at the state and federal level. This action will help increase the amount of food-grade recycled material available to meet mandates in several states, and the targets set by companies to meet consumer demand. Adopting this change and embracing well-designed bottle deposit law policy at both the state and federal levels demonstrates IBWA's commitment to improve recycling collection and reduce demand for virgin plastic.

IBWA's **Put It The Bin** social media campaign included a partnership with Ryan Hickman, who earned the association's "Recycling Champion" award in 2018. A popular influencer on Instagram, Ryan created reels discussing the importance of recycling, how bottled water containers are always recyclable, and the positive impact recycling can have for generations to come.

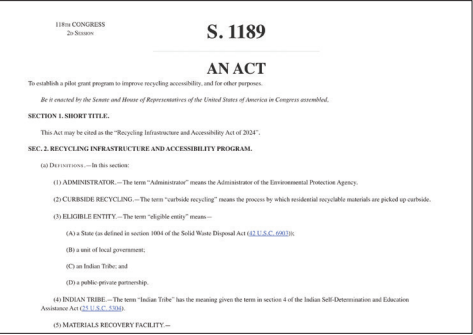
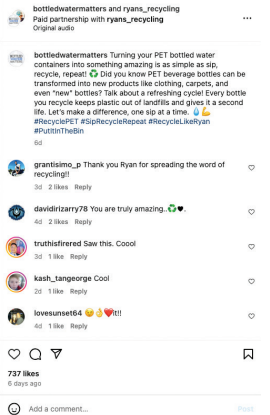
Supporting our partner, Keep America Beautiful, IBWA again sponsored **America Recycles Day**. This event happens annually on November 15 and focuses on inspiring people to learn about proper recycling practices, understand the impact of their individual actions, and make personal commitments to reduce waste and recycle more consistently.



Keep America Beautiful
November 15 at 12:00 PM · 🌐
Curious how to recycle those water bottles? 🤔 Find out if you're recycling right, and then be sure to take the #AmericaRecyclesDay quiz! <https://kab.org/america-recycles-day-quiz/> Bottled Water
Hint: this MAY be a question on the America Recycles Day quiz, so you may have gotten a free answer 🤖
#KeepAmericaBeautiful #DoBeautifulThings #RecyclingRealityCheck



“Leveraging the power of digital storytelling, IBWA crafts social media content that highlights the benefits of recycling.”



“IBWA’s revised PFAS SOQs will become effective on January 1, 2025; EPA’s new PFAS rule won’t become effective until 2029.”



“FDA has stated that it is ‘not aware of scientific evidence that would support consumers being concerned about the potential level of microplastic or nanoplastic contamination in food—including bottled water.’”



Monitoring Emerging Contaminants

IBWA's actions concerning **per- and polyfluoroalkyl substances (PFAS)** underscore the commitment of our members to always provide consumers with the safest and highest-quality bottled water products. In 2024, IBWA monitored more than 60 state bills that deal with PFAS in food packaging or drinking water. While a small percentage of those bills passed, none of them apply to bottled water.

IBWA opposes state PFAS legislation because we need one national regulation for bottled water, which will prevent a patchwork of differing requirements that IBWA members must meet. Although not mandated by FDA, IBWA currently requires its members to test their bottled water products annually for PFAS, and we have set Standards of Quality (SOQ) for 18 PFAS substances.

In April, the Environmental Protection Agency (EPA) published a final rule establishing Maximum Contaminant Levels (MCLs), for six PFAS substances in tap water. To align with the EPA rule, the IBWA Board of Directors updated IBWA's SOQs for PFAS in 2024. The new IBWA SOQs require members to meet the same levels as the six PFAS substances covered by EPA's final rule. In addition, IBWA members must continue to meet the SOQs for 12 other PFAS substances in our current SOQ, at their current levels. The revised IBWA SOQs will become effective on January 1, 2025. EPA's new PFAS rule won't become effective until 2029.

By law, FDA must issue an SOQ for bottled water no later than 180 days before the effective date of the EPA PFAS rule or determine that a regulation is not needed for bottled water. If FDA takes no action before the prescribed 180 days, the EPA standard becomes applicable to bottled water by operation of law.

IBWA is also discussing this matter with FDA, asking the agency about its timeline for regulating PFAS in bottled water and whether the FDA SOQ will be the same as the EPA MCLs. FDA could issue a PFAS SOQ before the deadline required by law, but the effective date would be the same as EPA's 2029 compliance date. Importantly, once FDA issues a PFAS regulation, it would preempt any state requirements.

Microplastics and nanoplastics (MNPs) continue to get a lot of attention from the media and government officials. Early in 2024, a Columbia University study was published that focused on nanoplastics and bottled water. FDA stated that it is "not aware of scientific evidence that would support consumers being concerned about the potential level of microplastic or nanoplastic contamination in food, including bottled water." FDA has created a microplastic webpage that highlights the following key points: Microplastics and nanoplastics are entering the food supply—primarily through the environment, and current scientific evidence does not demonstrate that

Monitoring Emerging Contaminants (continued)

levels of MNPs detected in foods pose a health risk to humans. (For more information, visit www.fda.gov/food/environmental-contaminants-food/microplastics-and-nanoplastics-foods.)

IBWA's media response to the Columbia study stressed that there is no standardized testing method and no scientific consensus on the health impacts of MNPs. Therefore, reporting on studies such as these does nothing more than scare consumers. The vast majority of news articles about this study included IBWA's position, and when they didn't, we reached out to editors asking them to do so.

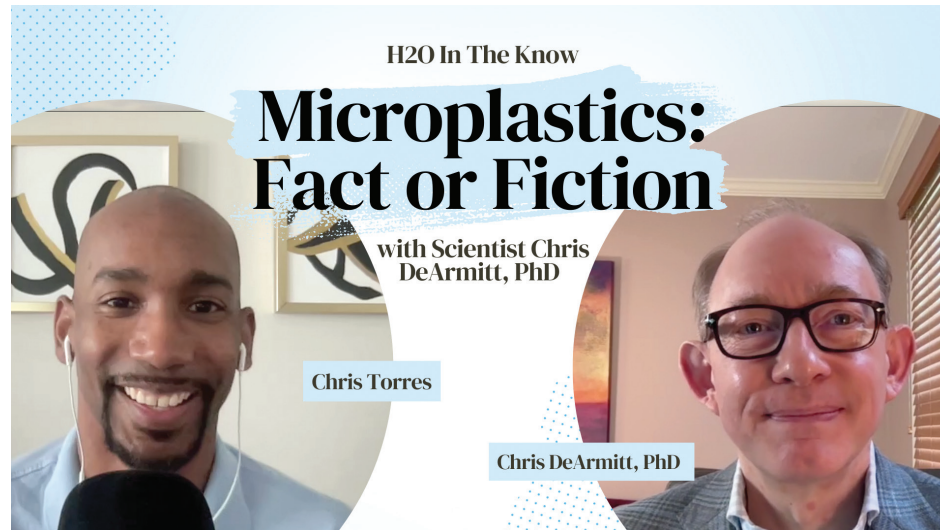
IBWA's ongoing efforts on MNPs include:

- talking with FDA
- monitoring EPA activity
- continuing to share information with bottled water associations throughout the world, particularly Natural Mineral Waters Europe (NMWE)
- monitoring media coverage and new research on MNPs in water
- engaging in state and federal legislative activity, particularly California as it was the first state to introduce legislation to require unwarranted testing and reporting of microplastics in bottled water

IBWA met with the sponsor of the California bill and was successful in getting him to drop those provisions. The bill as enacted into law requires the state to conduct a study on microplastics in tap water and bottled water. More states will likely seek to enact legislation on microplastics, particularly focusing on bottled water.

In addition, IBWA consulted with Joseph Cotruvo, PhD, former director of the Criteria and Standards Division of the EPA's Office of Drinking Water. Dr. Cotruvo prepared a paper that raised several scientific concerns about the study, and IBWA provided that document to the media to support our position.

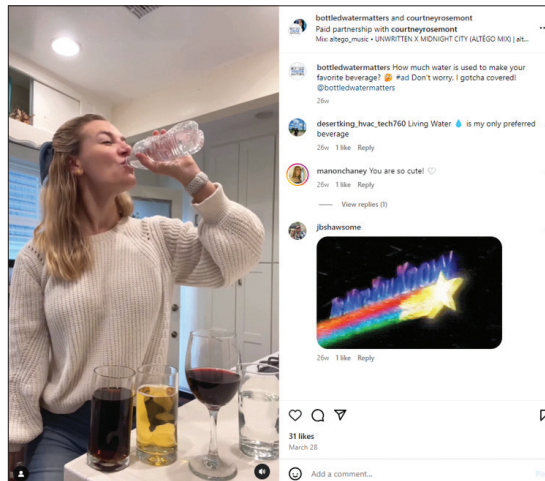
To introduce scientific facts into the online MNP discussion, IBWA partnered with plastics expert Chris DeArmitt, PhD, to produce a *Bottled Water Reporter* magazine article and an episode of our "H2O In The Know" podcast. Dr. DeArmitt uses peer-reviewed scientific studies to debunk myths and misunderstandings about the impact of plastic and microplastics. Listen to the podcast at <https://soundcloud.com/h20intheknow>.



“IBWA produced educational tools to help interject facts into the MNPs discussion. The ‘H2O In The Know’ podcast and Bottled Water Reporter article introduced peer-reviewed scientific studies that debunk common MNPs myths.”



“As the definitive authority on bottled water, IBWA champions transparency through rigorous, science-driven communication that cuts through misinformation.”



IBWA[®]

Social Media Toolkit

January 2024

IBWA provides members with this social media toolkit to help you share bottled water facts on all of your company's social media platforms.

Use the following posts to educate your customers, legislators, friends, and family about bottled water and the important issues our industry faces — or use the posts below as inspiration and write your own!

January 1: New Year

Happy New Year! Still looking for a New Year's resolution? Consider a resolution that combines embracing a healthier lifestyle and supporting the environment. Staying hydrated with water plays an important all year long (yes, even in winter), and plastic bottled water containers have been shown by science to have less of an impact on the environment than aluminum cans, paperboard cartons, and glass. [https://bit.ly/DrinkPackaging](#). Also, don't forget to recycle your empty water bottles with their caps on! #NewYear2024 #StayHydrated #StayHealthy

[Download Image](#)

January 2: National Science Fiction Day

Today is #NationalScienceFictionDay! While the topic of science fiction explores the imaginative, one scientific fact that is far from fiction is the essential role water plays in our bodies. Staying adequately hydrated aids physiological processes like body temperature regulation and transportation of nutrients. To maintain proper hydration, bottled water is the healthiest and safest choice because #BottledWater is heavily regulated by the FDA, which works to ensure bottled water products are safe to consume. #H2OFactCheck

[Download Image](#)

Any Day: Regulation

Hydrate With Confidence. When you drink bottled water, you can feel really good about your beverage choice. That's because FDA, the federal agency that makes sure our food and drinks are safe to consume, oversees bottled water production. The facilities that make bottled water must follow specific regulations to help ensure it is a high-quality, safe beverage product. So, when you choose bottled water, you can feel confident you're choosing a healthy and satisfying hydration drink that's regulated to the highest beverage production standards! #DrinkMoreWater #QualityCounts

[Download Image](#)

Bottled Water
Published by MelWater Engage
August 6

Drink bottled water and feel the difference! More hydration, better health, smaller environmental footprint, and more—check out these 7 #bottledwaterfacts! #ecofriendly #healthyhabits

7 THINGS YOU NEED TO KNOW ABOUT BOTTLED WATER

BOTTLED WATER HELPS PEOPLE DRINK MORE WATER.

In 2023, Americans drank, on average, 12 gallons more bottled water than soft drinks.

BOTTLED WATER HELPS PEOPLE LIVE HEALTHIER LIVES.

BOTTLED WATER IS BOTTLED IN THE MOST ENVIRONMENTALLY FRIENDLY CONTAINER.

EVERY GOOD THING HAS A SHADE OF BLUE. DRINKING BOTTLED WATER HELPS YOU STAY HYDRATED.

+4

Bottled Water
Published by MelWater Engage
July 9

Drinking water can boost energy, improve brain function, and aid digestion. That's why it's essential to add water to MyPlate, the healthy diet nutrition graphic used by schools and doctors' offices across the U.S. While 80 countries have added a symbol for water to their nutritional graphics, surprisingly the United States has NOT! Champions for change are asking the USDA, HHS, and our elected officials to add a water symbol to the MyPlate graphic. This will act as a visual reminder. [See more](#)

UNLOCK THE FULL BENEFITS OF A HEALTHY DIET.

Water is fundamental to gaining the benefits of all the other food groups on MyPlate.

ADD WATER TO MYPLATE.

Drinking water is an important part of a healthy diet! That's why we're asking USDA and HHS to add water to MyPlate.

Educating Consumers, The Media, Legislators, And Regulators

As the voice and face of the bottled water industry, IBWA ensures that our members, the public, media, and elected officials receive clear, accurate, and timely bottled water information. The educational communications we produce help to maintain IBWA's reputation as a trusted source of factual, science-based bottled water information.

The way people consume information has dramatically transformed in recent years, shifting from traditional media sources like television newscasts and printed newspapers to the dynamic, instantaneous world of social media platforms. That shift represents a fundamental change in how society consumes and interacts with news—and in how IBWA communicates its messaging.

In 2024, IBWA partnered with social media influencers to expand the reach of our pro-bottled water campaigns, focusing on the industry's small environmental footprint, healthy hydration, and the benefits of recycling. Through those partnerships, our videos caught the attention of millions of viewers we otherwise would not have reached.

IBWA also used social media to educate legislators about the fundamental role water plays in a healthy diet, in tandem with our members' visits

to congressional offices. IBWA's advocacy efforts to promote adding a water symbol to the U.S. nutrition graphic, MyPlate, were amplified by leveraging location-based messaging. That outreach ensured that each social media carousel and reel had the highest potential for meaningful engagement with decision makers and stakeholders working on the *Dietary Guidelines for Americans*, which is the basis for MyPlate.

To complement those digital efforts, IBWA monitors traditional media and writes letters to editors to offer a formal, structured response to relevant news stories and correct misinformation. In 2024, IBWA provided industry's perspective on everything from nanoplastics and bottled water's small environmental footprint to PFAS and FDA's regulation of our products. By maintaining a traditional communication strategy alongside digital efforts, IBWA creates a comprehensive communication approach that leverages multiple channels, ensuring our message is heard, respected, and carefully considered across different audience segments and communication platforms.

Networking And Building Relationships

Through IBWA membership, individuals and organizations are united by shared goals, creating a collaborative environment that extends far beyond mere professional networking.

Our annual conference and trade show, held in Chicago in 2024, is a seminal event, providing community-building and networking opportunities where members come together to learn about everything from emerging contaminant issues to the latest sales trends. Members often comment on the beneficial outcomes of meeting face-to-face, sharing their most significant achievements, discussing complex industry challenges, and exchanging best business practices. Year after year, these interactions transform professional connections into meaningful relationships, creating a support network that strengthens the entire industry.

Member participation on committees and working groups—such as those recently formed to focus on bottled water sales bans and strategic communications—also bolster IBWA’s community foundation. IBWA staff appreciate that members volunteer their time and expertise to advance shared objectives, working collaboratively to address industry challenges and opportunities. In 2024, members helped to create momentum for policy, regulatory, and communications issues (for example, seeking to add water to MyPlate, PFAS standards of quality, and reputation management) that will impact the industry for years to come.

Perhaps one of the best bonding experiences for association members is their collective advocacy efforts. When members travel together to state capitals and Washington, DC, or host legislators at their plants, they become more than individual business

representatives—they transform into a united force committed to sharing the bottled water industry’s value and importance. On June 5, 2024, members held meetings on Capitol Hill with one mission in mind: advocate for adding a water icon to the U.S. nutrition graphic MyPlate. Such shared experiences, where members support one another while presenting a unified message to policymakers, create a sense of purpose that transcends individual business interests. This collective storytelling builds a strong sense of professional identity and mutual respect.

IBWA is more than an organizational entity—it is a living, breathing community where members support, challenge, and inspire one another. The relationships formed through shared experiences, collaborative work, and collective advocacy create bonds that extend well beyond professional obligations, fostering a true sense of belonging and shared purpose.

Advancing hydration, health, and sustainability

IBWA’s mission to be the leading voice for the bottled water industry and its role in healthy hydration and drinking water conservation remains critically important as we set agendas for 2025 and beyond. IBWA will continue to serve as a vital bridge between bottled water professionals, consumers, the media, and legislators, educating them about not only the benefits of bottled water and healthy hydration but also our members’ ongoing commitment to recycling initiatives and sustainable practices. While significant progress has been made, the work of advancing understanding, promoting best practices, and addressing emerging challenges in the bottled water industry continues to rely on the skills and the steadfast commitment and work of our dedicated members and staff.

“As an association, IBWA serves as a powerful catalyst for building and nurturing a vibrant community of bottled water professionals who share a common purpose and passion.”



“IBWA’s annual conference is more than just a conference; it’s a celebration of our collective industry accomplishments and a forum for mutual growth.”





Vision

Be the leading voice for the bottled water industry and its role in healthy hydration and drinking water conservation.

Purpose

Champion safe, sustainable, available bottled water.

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