

2025

# PROGRESS REPORT

AMPLIFYING THE VOICE OF THE  
BOTTLED WATER INDUSTRY

**IBWA**  
INTERNATIONAL  
BOTTLED WATER  
ASSOCIATION



**Bottled Water Facts**  
Setting the Record Straight in the Conversation on Bottled Water

Featured Post

SMALL HABITS MATTER.  
RECYCLE RIGHT.



**ADD WATER TO MYPLATE.**

Original → Reimagined



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Alton, Virginia

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Plymouth, Michigan

# LETTER FROM THE PRESIDENT

**As I reflect on 2025, I'm proud to report that bottled water has achieved a remarkable milestone: ten consecutive years as America's No. 1 packaged beverage, by volume. This decade of leadership represents more than market success—it demonstrates the trust consumers have in our products and our industry's unwavering commitment to providing safe, quality, convenient, healthy hydration beverages.**

Preliminary 2025 market research data from Beverage Marketing Corporation tells a compelling story. In a year when most beverage categories experienced negative growth, bottled water stood out as one of only two categories achieving volume increases (the other was energy drinks). Bottled water consumption reached 16.8 billion gallons, a 2.5% increase over 2024. Retail sales climbed to \$52.1 billion, up 3.1%, while per capita consumption grew to 47.5 gallons. Those numbers reveal the essential role our products play in consumers' daily lives.

Throughout 2025, IBWA advanced our members' interests on multiple fronts. We secured regulatory victories, including the U.S. Food and Drug Administration's (FDA) final decision to allow bottled water to use the word "healthy" on product labels. We successfully advocated against sales bans

that would have restricted consumer access to bottled water while allowing access to less healthy beverages. We reinforced water's essential role in daily nutrition by advocating for a water icon on the MyPlate graphic, which is based on the *Dietary Guidelines for Americans*. And our science-backed coverage of emerging contaminants, like PFAS and microplastics, positioned us as responsible stewards committed to transparency and scientific integrity.

Our communications strategy evolved in 2025 to meet the challenges of promoting and defending bottled water against the unfounded attacks by our critics. While our critics publish misinformation and push narratives misleading the public, we present science and verified data, strategically using our partnerships with content creators and social media to combat deception with transparency. Our social media efforts, revitalized BottledWaterMatters.org website, and proactive media outreach help to counter misinformation while further establishing IBWA as a trusted resource.

IBWA's environmental advocacy included championing recycling infrastructure improvements by supporting key federal legislation and participating in international discussions on pragmatic approaches to reduce plastic waste. Our industry's

commitment to sustainability is backed by data showing bottled water has the smallest environmental footprint among all packaged beverages—a fact we emphasize during policy discussions.

Our successes in 2025 are the result of the hard work of the entire IBWA team—members, staff, and consultants. Your dedication helps ensure consumers have access to the safe, reliable hydration they need, when and where they need it. IBWA's foundation of scientific integrity, strategic advocacy, transparent communication, and member collaboration will continue to guide our efforts. I know that IBWA is well-positioned to meet the challenges and opportunities of the new year and beyond. And I am confident that 2026 will be a defining year for our association as we advance our mission, deliver exceptional value to our members, and reinforce bottled water's essential role in healthy hydration.



A handwritten signature in black ink that reads "Joe Doss". The signature is fluid and cursive, written over a light grey background.

**Joe Doss**  
IBWA President and CEO



## WHO WE ARE




The International Bottled Water Association (IBWA) is the definitive voice for the bottled water industry, representing the producers of America's most popular packaged beverage. Our membership includes a diverse coalition of bottlers, distributors, and suppliers that work together to deliver safe, quality bottled water to millions of consumers daily.

Our membership accounts for 73% of the U.S. bottled water market, and our association is built on the foundation of community-focused businesses, with more than half of our members operating as small, local enterprises generating under \$2.6 million in annual sales. These companies aren't just business organizations—they're integral parts of their communities, supporting nearly 617,000 jobs nationwide through both direct employment and ancillary opportunities.

Founded in 1958, IBWA has championed the highest standards in bottled water safety and quality for almost seven decades. We work with the U.S. Food and Drug Administration (FDA), which regulates bottled water as a food product, to establish comprehensive and stringent standards for bottled water products. Our bottler members go above and

beyond, following not only federal and state regulations to ensure every bottle of water they produce meets rigorous health and safety requirements but also adhering to the IBWA Bottled Water Code of Practice. To be an IBWA bottler member, a company must also submit to a mandatory, annual third-party plant inspection, verifying our membership's commitment to excellence.

At IBWA, we back up our advocacy with real science and keep our messaging transparent—because that's how we defend and promote what matters: our great products that provide healthy hydration in sustainable packaging. We make sure policymakers, media, and consumers understand why bottled water isn't just convenient—it's essential for public health, emergency preparedness, and keeping people hydrated every day.



**Bottled Water  
Code of Practice**

Revised November, 2024  
Effective January 1, 2025

International Bottled Water Association  
Alexandria, VA 22314  
(703) 683-5213  
<http://www.bottledwater.org>

## WHO WE ARE



During his state-of-the-industry address, IBWA President Joe Doss reviewed industry milestones and the association's vision for 2026.



IBWA Chair Dan Kelly (right) honors outgoing 2025 Chair Doug Hidding with a commemorative gift during the association's Las Vegas Conference and Trade Show.



On June 4, 2025, during IBWA's annual "Hill Day," members and staff visited with congressional offices in Washington, DC, to discuss the need to add a water icon to the MyPlate nutrition graphic.

“

### OUR VISION

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

### OUR PURPOSE

Champion safe, sustainable, available bottled water.

”

# Bottled Water Tops America's Favorite Beverage List for 10th Consecutive Year



By ensuring bottled water is accessible alongside other beverage options, we provide consumers with the opportunity to make healthier choices throughout their day—whether at home, work, school, or on the go.



Beverage Marketing Corporation's (BMC) preliminary figures for 2025 confirm that bottled water has maintained its position as the No.1 beverage (by volume) in the United States for the tenth consecutive year. This milestone reflects both consumer trust and our industry's commitment to providing safe, quality healthy hydration options.

In a year when most beverage categories experienced negative growth, bottled water stood out as one of only two categories achieving volume increases, demonstrating the essential role our products play in consumers' daily lives. Our sustained growth is reflected in BMC's preliminary 2025 bottled water statistics:

- Consumption: 16.8 billion gallons, a 2.5% increase over 2024 numbers
- Per capita consumption: 47.5 gallons per person (average), 0.4% growth
- Retail sales: \$52.1 billion, a 3.1% increase
- Share of U.S. beverage market: 29%, 8% over the next closest category, carbonated soft drinks (21%)
- Positive growth in all markets: single-serve PET (0.2%), 1-2.5 gallon/multi-serve (1.5%), HOD (2.0%), domestic sparkling (3.5%), and imported (1.1%)

**Meeting Consumer Demand for Safe, Quality Hydration.** As people become increasingly mindful of their dietary choices, bottled water has emerged as the packaged beverage of choice. It offers a zero-sugar, zero-calorie alternative that aligns with health-conscious lifestyles. The market shift is remarkable: nearly all bottled water's volume gains over the past two decades have come from decreased consumption of carbonated soft drinks and fruit drinks. (See "Consumers' Choice" chart on p.5.) This isn't a trend; consumers are actively showing a sustained commitment to choosing beverages that support their health goals.

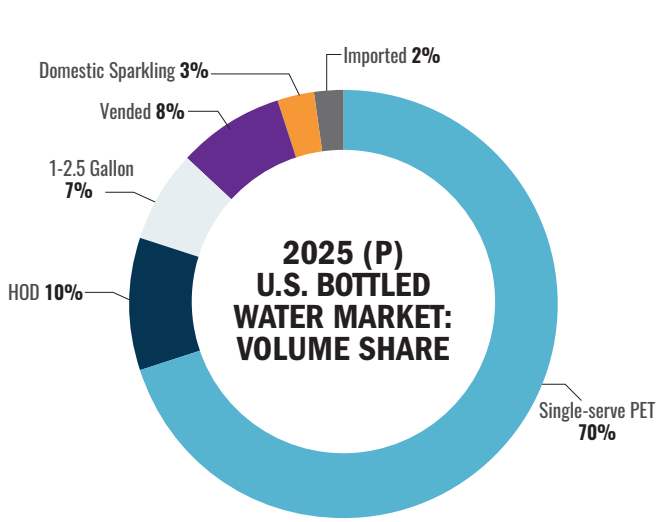
**Ensuring Access to Healthy Beverage Options.** The availability of bottled water wherever beverages are sold plays a crucial role in public health and wellness. By ensuring bottled water is accessible alongside other beverage options, we provide consumers with the opportunity to make healthier choices throughout their day—whether at home, work, school, or on the go. This widespread availability demonstrates our industry's concern for public wellness and our commitment to supporting healthier communities. When consumers have access to bottled water, they consistently choose it over other packaged beverages for its good taste, convenience, safety, and reliability.

# CONSUMER DEMAND

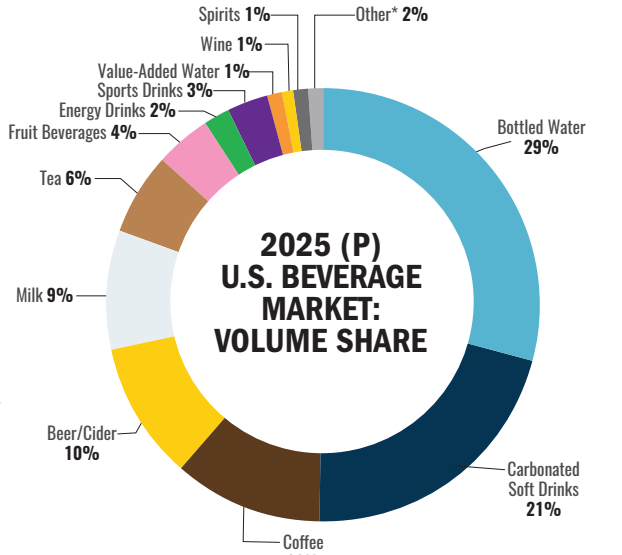
**Growing Consistently for Decades.** In 2016, bottled water replaced carbonated soft drinks as America's favorite packaged beverage, by volume, a position we've proudly maintained for ten consecutive years. In 2025, per capita bottled water consumption stood at 47.5 gallons, over 13 gallons higher than carbonated soft drinks at 33.9 gallons. This gap widens each year as consumers increasingly prioritize healthy hydration in their daily routines. While most other beverages experienced negative growth in 2025, only energy drinks grew faster in volume than bottled water. All bottled water markets experienced positive growth in 2025.

**Adapting to Consumer Packaging Needs.** While single-serve PET plastic bottles continue to dominate, with 70% of the bottled water market volume, BMC's 2025 consumer research reveals significant growth trends in other segments of the market since 2022. HOD has grown to capture 10% market share, while the vended category has reached 8%—with both segments achieving stronger growth rates than single-serve PET over this period. This diversification demonstrates our members' ability to adapt to changing consumer preferences and economic conditions while maintaining our commitment to quality and accessibility.

**Looking Forward.** Despite ongoing criticism aimed at discouraging consumers from drinking bottled water, people continue to choose our products because they want the good taste, convenience, safety, and reliability that bottled water provides. Bottled water's success in 2025 confirms two things: 1) consumers continue to make healthy hydration and bottled water an important part of their lives, and 2) our continued growth is the result of hard work by IBWA's entire team—members, staff, and consultants—who remain dedicated to meeting the increasing demand for safe, quality water options.



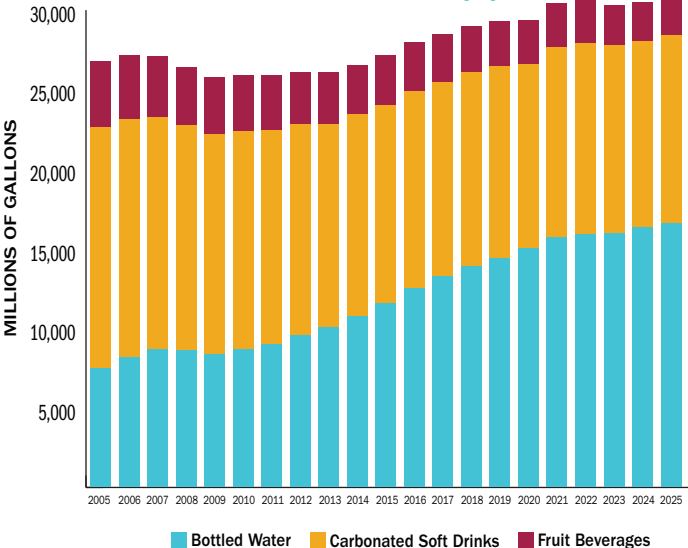
P = preliminary  
Source: Beverage Marketing Corporation © 2025



\* "Other" includes dairy alternative, vegetable juice, coconut water, and kombucha tea.

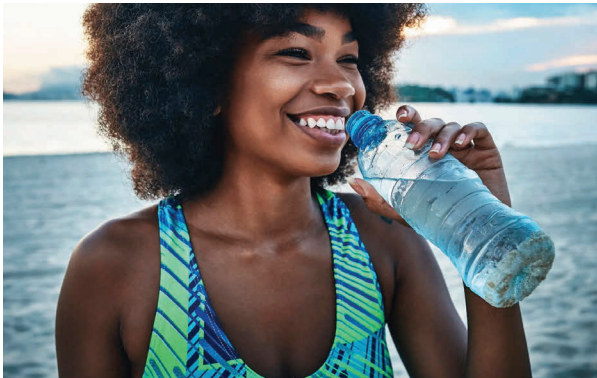
P = preliminary  
Source: Beverage Marketing Corporation © 2025

**CONSUMERS' CHOICE: THE RISE OF BOTTLED WATER 2005 - 2025 (P)**





BOTTLEDWATERFACTS.COM  
Viral nonsense: Fact-Checking Instagram "Health" Influencers—Bottled Water Facts



BOTTLEDWATERFACTS.COM  
How Big is the Environmental Impact of Bottled Water?



BOTTLEDWATERFACTS.COM  
From Disaster Relief to Daily Life, Bottled Water is an Unsung Hero—Bottled Water Facts

## Facts vs. Fiction: IBWA Mounts Influential Campaign to Promote and Defend Bottled Water

For decades, the bottled water industry has provided a vital service to millions of Americans—delivering safe, reliable, and convenient hydration when and where it's needed most. Yet today, the industry is under relentless attack from activist groups that have made it their mission to destroy our businesses through a calculated campaign of misinformation. Make no mistake: these groups have explicitly stated their objective is to put bottled water companies out of business.

The assault on our industry takes many forms, but it always begins with the same weapon: false information. In 2025, these groups spread unfounded claims about plastic container safety, despite decades of scientific evidence and regulatory approval confirming the safety of our products. They distorted the environmental impact of our products while ignoring the substantial investments our industry has made in sustainability, recycling innovation, and water stewardship. They pushed narratives designed not to inform but to mislead and manipulate public opinion.

Their tactics have evolved from simple protests to sophisticated legislative campaigns. They lobby for punitive taxes on water use that would make our products unaffordable for working families. They push for unreasonable recycled content mandates that ignore technological and economic realities. They seek to restrict permits for bottled water facilities that provide jobs and economic opportunity in communities across America. Most egregiously, they target convenient, single-serving bottled water for sales bans—removing the healthiest packaged beverage from the shelf and forcing consumers toward less healthy alternatives.

The irony is profound. At a time when public health officials encourage increased water consumption, when communities face aging infrastructure and water quality challenges, and when natural disasters regularly demonstrate the critical importance of bottled water supplies, these groups seek to eliminate the most reliable source of safe hydration available to Americans: bottled water.

## PROMOTE AND DEFEND CAMPAIGN

While these groups have largely failed to achieve their goals—bottled water sales and consumption continue to grow because consumers value and need our products—they are becoming more creative and organized in their misinformation campaigns. This is why IBWA has invested in a campaign to promote and defend our members and the bottled water industry. We cannot allow false narratives to go unchallenged. We cannot permit misinformation to shape policy decisions that affect millions of consumers. We cannot stand idle while activist groups attempt to destroy businesses that employ thousands of hardworking Americans and serve communities nationwide.

The mission of this campaign is to ensure policymakers, media, and consumers have access to bottled water facts, not misleading fiction. It's about protecting consumer choice and public health. It's about honoring and recognizing an industry that provides healthy hydration every day and stands ready to serve when wells run dry, when pipes fail, when storms strike, and when communities need us most.

Our strategy is to proactively disseminate the facts about bottled water's safety, quality, and environmental stewardship. We counter false claims with science and verified data. We meet deception with transparency. The

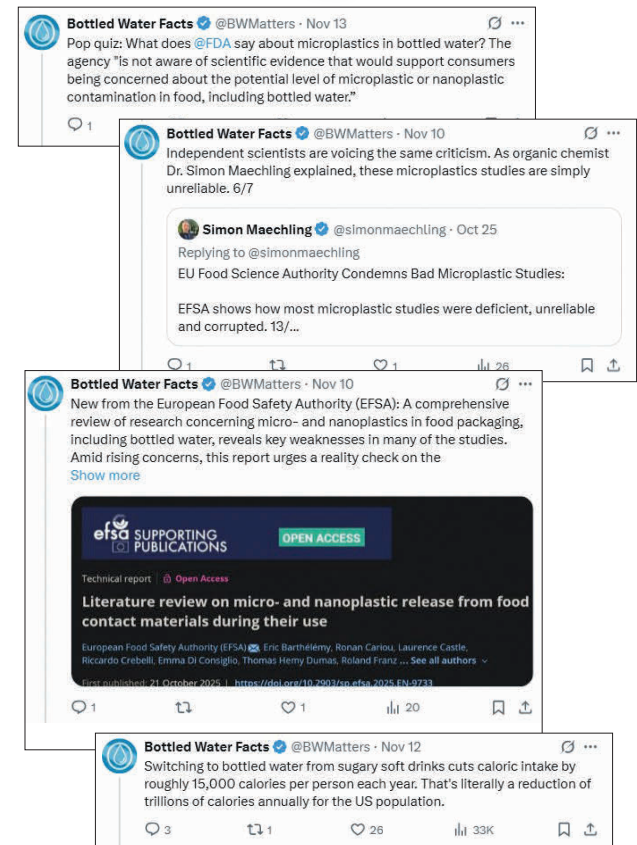
activists opposing us may be persistent, but we have something more powerful on our side: the facts, the science, and the genuine value we provide to society.

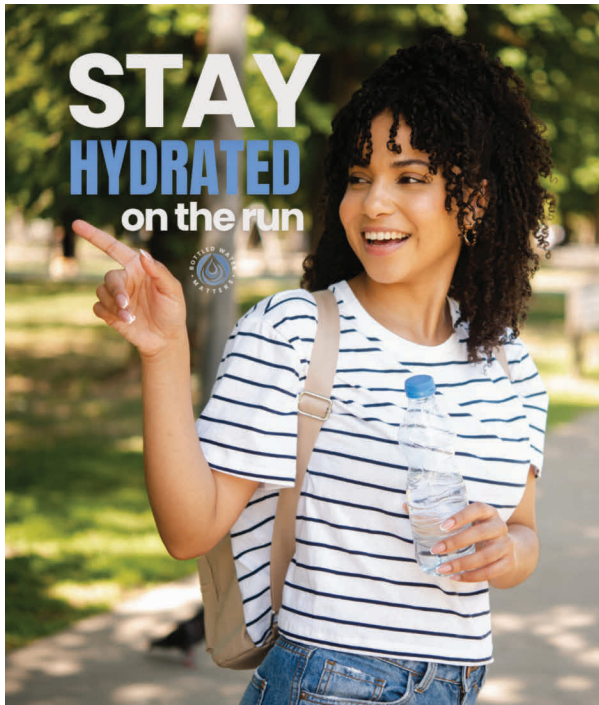
While we want to hold the media accountable for the false narratives they publish, the goal is to put a spotlight on positive bottled water stories:

- To emphasize our role in helping consumers become the healthiest versions of themselves
- To explain water's role as an essential nutrient
- To stress the safety, quality, and strict regulation of our products
- To highlight our critical role in disaster relief or when municipal sources fail

The bottled water industry has weathered challenges before, but the organized nature of current opposition demands an equally organized response. This campaign is that response—a factual, forceful promotion and defense of bottled water. We will not let misinformation win. We will not let our employees, our communities, and our consumers down. And we will continue with this campaign in 2026.

### *Sensationalism Over Science?* Fact-Checking News Coverage of Bottled Water





## From Capitol Hill to Social Media: Inside IBWA’s Promotion of Healthy Hydration

IBWA stands at the forefront of promoting healthy hydration as a cornerstone of American wellness. Through strategic advocacy, educational initiatives, and modern communication strategies, IBWA continued to work in 2025 to transform how Americans think about and consume water—delivering measurable victories that benefit both public health and consumer choice.

### “Healthy” Labels: A Decade’s Long Achievement.

After more than 10 years of persistent advocacy, IBWA secured a landmark victory that exemplifies the power of science-based advocacy and strategic perseverance. FDA’s final regulation allowing bottled water to use the word “healthy” on product labels, which went into effect April 28, 2025, represents far more than a labeling change—it’s a triumph of common sense and scientific integrity.

Particularly important for bottlers is the streamlined implementation: water products automatically qualify for the designation, no Nutrition Facts Panel is required, and companies can implement these changes immediately.

This practical approach demonstrates IBWA's ability to advocate for regulations that benefit both industry and consumers without unnecessary bureaucratic burden. Having “healthy” on our labels empower consumers to make informed choices at a glance.

**Water in the Dietary Guidelines.** As the next edition of the *Dietary Guidelines for Americans* (DGAs) will likely be published in early 2026, IBWA continued our efforts to reinforce water’s essential place in everyday nutrition. The DGAs serve as the foundation for national nutrition policy, shaping what schools teach, how healthcare facilities plan meals, and the advice health professionals share with the public. Thanks in part to the hard work of IBWA, water has been increasingly recognized in previous editions of the DGAs. The 2015 guidelines first named water as the beverage of choice for hydration, and that was reaffirmed and expanded upon in the 2020 edition. In January of 2025, IBWA provided oral comments to the U.S. Departments of Health and Human Services (HHS) and Agriculture (USDA) emphasizing



## HEALTHY HYDRATION

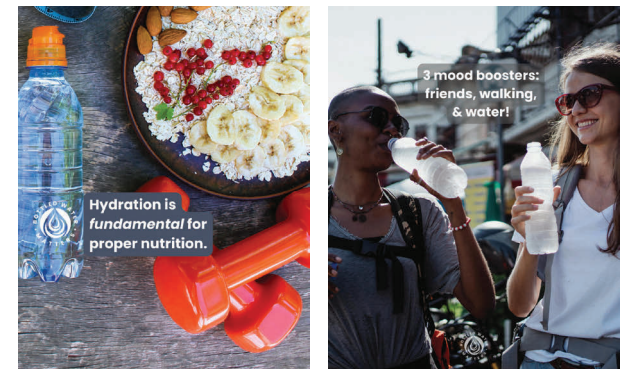
the health benefits of consuming plain water and recommending water in place of sugar-sweetened beverages.

**Uniting Stakeholders to Advocate for Water on MyPlate.** Building on the DGAs, the MyPlate nutrition graphic translates national nutrition science into a simple, practical tool that helps Americans make healthier choices at every meal. IBWA established the Hydrate MyPlate Alliance, a coalition of health-focused organizations and industry partners, to advocate for water's rightful place in America's nutrition guidance. The Alliance's message is clear: optimal nutrition is impossible without adequate hydration. Through ongoing discussions with the USDA's Center for Nutrition Policy and continuous engagement with policymakers, IBWA is championing the addition of a water icon to the MyPlate graphic. In fact, IBWA's Hill Day congressional visits on June 4, 2025, focused discussions on the need to add a water icon to MyPlate.

**Educating Consumers Where They Are: Online.** Understanding that today's consumers live in a digital-first world, IBWA has launched sophisticated social media campaigns that speak directly to online audiences about healthy hydration. IBWA's messaging connects hydration to outcomes that resonate with all Americans: more energy, better focus, and

overall healthfulness. By providing research-backed content through BottledWaterMatters.org and maintaining an active social media presence on Facebook, Instagram, TikTok, and YouTube, IBWA creates a space for continuous dialogue about healthy hydration. Throughout 2025, IBWA provided healthy hydration posts in our monthly social media toolkits to help members educate their consumers. These resources enable members to become ambassadors for healthy hydration in their communities.

**The Broader Impact.** IBWA's healthy hydration work addresses a critical gap in public health messaging. While sugary beverages are marketed with multimillion-dollar campaigns, water—the healthiest beverage choice—needed a champion. IBWA stepped into that role, ensuring that the benefits of hydration receive the attention and promotion they deserve. Through the combination of regulatory victories, strategic partnerships, digital innovation, and persistent advocacy, IBWA has created a powerful platform. Promoting healthy hydration through every available channel, IBWA helps ensure that all Americans have the information and access they need to make water a central part of their wellness journey.



IBWA met with Congressman Tim Walberg to emphasize the importance of adding water to MyPlate.





Through persistent advocacy, IBWA works to ensure that science drives policymaking and that our member companies' voices are heard during any emerging contaminant discussions.



## Battling Misinformation By Ensuring That Science Is an Integral Part of Emerging Contaminants Discussions

From PFAS to microplastics, bisphenol-A (BPA) to antimony trioxide, new scientific research and any corresponding policy and public concern continuously reshape the regulatory landscape. What sets IBWA members apart is our ability to not only meet today's standards but anticipate tomorrow's requirements.

Through strategic engagement with federal and state regulators, participation in scientific research, and coordinated advocacy, IBWA works to ensure regulations remain science-based and not burdensome to members.

In 2025, this proactive approach delivered tangible value—providing members with early warnings about regulatory changes, helping them navigate complex issues with confidence, and defending against unscientific proposals. When new standards emerged, our members were already prepared to meet them.

**PFAS: Proactive Industry Leadership.** Per- and polyfluoroalkyl substances (PFAS) continue to be a key focus for both regulators and the bottled water industry. In April 2025, FDA released results from a nationwide survey

of 197 domestic and imported bottled water samples collected between 2023 and 2024. The findings were clear: none of the samples exceeded the Environmental Protection Agency's (EPA) Maximum Contaminant Levels (MCLs) for PFAS in tap water, and all detected PFAS levels were below IBWA's more rigorous Standard of Quality (SOQ).

While FDA does not currently maintain a PFAS standard for bottled water, IBWA has required its members to test annually for PFAS since 2019, holding them to an SOQ that mirrors or exceeds EPA standards. This requirement demonstrates the industry's ongoing commitment to delivering the safest, highest-quality bottled water available.

Looking ahead, the EPA plans to rescind certain PFAS MCLs and may extend compliance timelines on others through 2031. IBWA remains engaged with FDA to ensure regulatory consistency and science-based decision-making. Under current law, FDA must either establish a PFAS SOQ for bottled water or adopt EPA's rule 180 days before it becomes effective. Once im-

plemented, the federal standard would preempt any inconsistent state-level regulations—a major step toward national regulatory uniformity.

At the state level, PFAS legislation was a dominant issue in environmental and public health discussions in 2025. To date, most proposals have focused on municipal water systems rather than packaged beverages. That focus, however, is expected to expand. IBWA continues to work proactively to anticipate and shape future regulations to protect both industry operations and consumer confidence.

### **Micro- and Nanoplastics: Science First.**

Micro- and nanoplastics (MNPs) remain a topic of public and regulatory interest, often amplified by media attention. However, current scientific evidence does not indicate that levels detected in food or beverages pose a risk to human health, according to FDA's recently launched microplastics webpage: [www.fda.gov/food/environmental-contaminants-food/microplastics-and-nanoplastics-foods](http://www.fda.gov/food/environmental-contaminants-food/microplastics-and-nanoplastics-foods).

Nonetheless, IBWA is deeply engaged in this emerging issue, maintaining a science-first approach and introducing credible research into any policy discussions. Ongoing IBWA actions include:

- regular dialogue with FDA and monitoring EPA activities

- engagement in state and federal legislative discussions, particularly in California
- coordination with international bottled water associations, including Natural Mineral Waters Europe (NMWE)
- continuous review of media coverage and new research across food and beverage sectors

Through these strategic efforts, IBWA ensures its role as a trusted source of factual, science-based information amid growing public attention on microplastics.

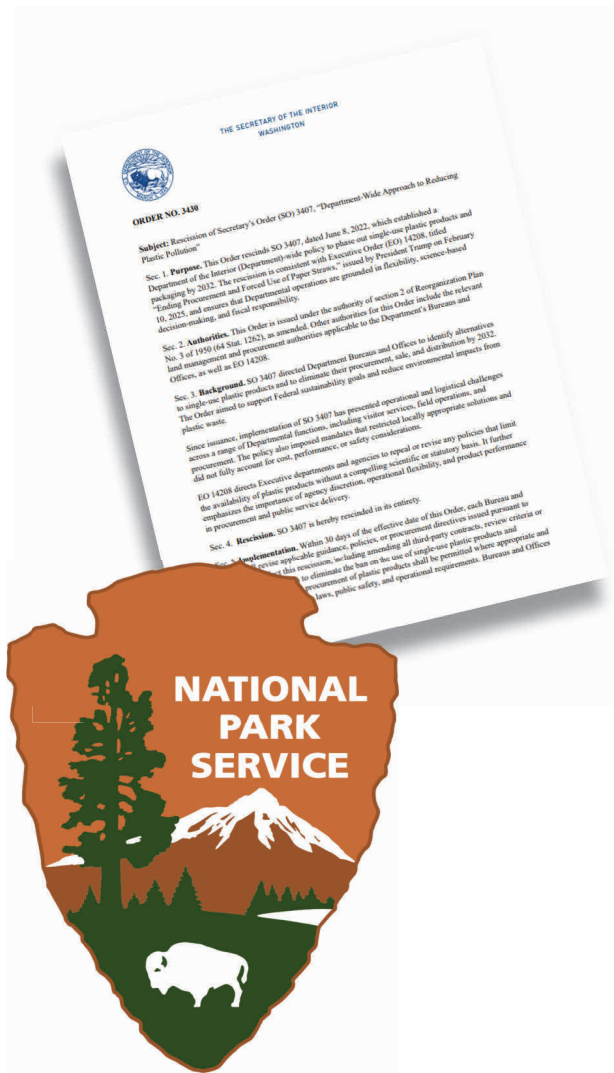
**BPA and Antimony Trioxide: Defending Science and Sustainability.** Two longstanding packaging-related materials—BPA and antimony trioxide—have resurfaced in recent legislative discussions. Legislation in California threatened to ban antimony trioxide, a critical component in PET production. Through strategic coalition leadership, IBWA drafted key opposition language and directly engaged with NGOs supporting the bill. Our advocacy efforts helped secure removal of the antimony trioxide ban language from the proposed legislation. However, that legislation still includes a provision that would ban food packaging that contains BPA. As noted by FDA, current levels of exposure to BPA through food packaging do not pose an immediate health risk to the general population. IBWA continues to

oppose this bill's scientifically unsupported restrictions on BPA.

On a federal level, a Citizen Petition seeking to restrict BPA in all food-contact materials, including polycarbonate bottles (a move backed by long-time bottled water critics) remains under FDA review since 2022. IBWA continues to monitor this petition closely and advocate for science-based evaluations of BPA safety. Globally, the European Commission issued a final regulation on December 19, 2024, banning BPA and related bisphenols in food-contact materials effective mid-2026 after an 18-month transition. Such developments are expected to inspire similar proposals in the United States—making IBWA's ongoing leadership and engagement even more critical.

IBWA's leadership on these critical issues underscores a few of the association's greatest member benefits—early insight, strong advocacy, and unified action that keeps the bottled water industry ahead of evolving legislative and regulatory trends. Through persistent advocacy, IBWA works to ensure that member companies' voices are heard, science drives policymaking, and the bottled water industry continues to lead emerging contaminant conversations.

# Protecting the Consumer's Right to Choose Bottled Water—and the Industry's Right to Exist



Proposals to ban the sale of bottled water continue to pop up at the federal, state, and local levels. As anti-plastic sentiment persists and unsubstantiated claims about microplastics gain traction, IBWA anticipates renewed pushes for bans on the sale of water in single-serve plastic beverage containers. So, it's more important than ever for IBWA to champion bottled water, sharing with key audiences the important role it plays in ensuring access to convenient, safe, healthy hydration.

**Keeping Bottled Water Available in National Parks.** One of IBWA's biggest 2025 wins came when the U.S. Department of the Interior (DOI) withdrew its order to eliminate all single-use plastic items—including bottled water—from National Parks and federal lands. That decision follows years of IBWA advocacy, educating DOI and National Park Service (NPS) officials about how removing bottled water access could harm public health and the environment. We provided data, answered questions, and proposed practical solutions that protect both park visitors and nature. As a result, bottled water can be sold in parks across the country, for now.

New bills in Congress, including S. 1926 and H.R. 3604, could give the NPS authority to restrict or ban the sale of products packaged in plastic containers in the future. Although those proposals haven't yet advanced, IBWA remains vigilant, monitoring, educating, and engaging with lawmakers to prevent misguided sales bans that set harmful precedents.

Although bottled water sales in parks represent a small portion of total industry sales, such bans are frequently cited by anti-bottled water activists to justify broader restrictions elsewhere. That's why IBWA will keep advocating to preserve access to bottled water—everywhere it's needed.

**Sales Ban Proposals.** In 2025, Nevada considered legislation to ban the sale of single-serve beverages packed in plastic containers, including bottled water, in communities abutting the Lake Tahoe Watershed. The bill was defeated, but supporters plan to reintroduce it in 2027 when the legislature returns.

At the local level, inspired by the South Lake Tahoe, California ban, the Vail Colorado City

Council heard recommendations in August of 2025 for a possible sales ban ordinance; however, that measure has not been approved.

Honolulu, Hawaii, successfully approved a narrow measure to ban the sale of all plastic beverage containers in vending machines on city property. IBWA opposed this measure, along with our allies the American Beverage Association, Hawaii Food and Industry Association, Retail Merchants of Hawaii, and the Hawaii Restaurant Association. Supporters included the Surfrider Foundation and the Sierra Club.

IBWA continues to closely monitor communities throughout the Northeast and West Coast, where bottled water sales bans remain a threat. These regions have historically shown the strongest support for restrictive plastic packaging legislation.

**Other Advocacy Across the States.** In addition to proposals to ban the sale of bottled water, IBWA worked on several other important state issues in 2025, including bills to:

- 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.

“ In 2025, IBWA tracked more than **325 bills** and **300 regulations** across the states that could impact the bottled water industry. Key issues included **EPR, bottle deposit systems, PFAS testing, microplastics, and sales bans.** ”

### JOIN TODAY, SHAPE TOMORROW: THE POWER OF PAC PARTICIPATION

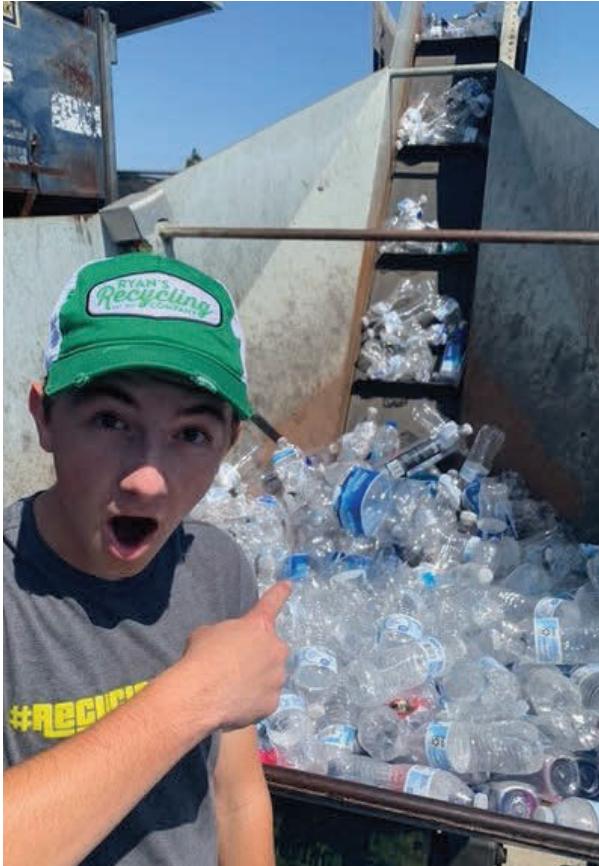
IBWA's Political Action Committee is a vital tool that helps us educate members of Congress and build champions for the bottled water industry. PAC contributions make it possible for IBWA to support political candidates who support the bottled water industry.

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 a member about PAC issues unless we have that form. Please note, submitting this form does NOT obligate you to contribute to the IBWA PAC. It simply gives IBWA permission to let members know about PAC activities and events.

If you want to receive information about the IBWA PAC, please contact either IBWA Vice President of Government Relations Jeremy Pollack ([jpollack@bottledwater.org](mailto:jpollack@bottledwater.org)) or Director of Government Relations J.P. Toner ([jtoner@bottledwater.org](mailto:jtoner@bottledwater.org)).



# Promoting Recycling, Protecting Access, and Shaping Policy



IBWA and recycling influencer Ryan Hickman produced a video explaining the recycling process for a PET bottle.

Each year, IBWA works tirelessly to ensure fair, fact-based policies for the bottled water industry—at the federal, state, and even global level. Here’s a look at some of our most important efforts from 2025.

## Promoting Recycling and Sustainable Packaging.

At the federal level, IBWA continues to champion improvements to the U.S. recycling system. We educate lawmakers with accurate data to ensure policies are guided by facts—not misinformation. A key point we emphasize: bottled water in PET plastic containers has the smallest environmental footprint of all packaged beverages.

In 2025, IBWA supported two bipartisan bills in Congress—the Recycling and Composting Accountability Act and the Recycling Infrastructure and Accessibility Act—that would strengthen recycling infrastructure, expand consumer access, and improve national data collection. These efforts would help policymakers better understand recycling performance and identify where improvements are needed. Both bills enjoyed strong bipartisan backing in past sessions, and IBWA is working to keep that momentum going.

## Educating Consumers to “Put It In The Bin.”

Public trust in recycling is essential, and IBWA is investing in consumer education through our “Put It In The Bin” campaign. In 2025, we partnered again with recycling influencer Ryan Hickman to produce a YouTube video that walks viewers through the entire recycling process—from curbside pickup to manufacture of rPET bottles. To encourage viewership of the video, IBWA created promotional reels for distribution on Instagram and TikTok. Our previous collaboration with Ryan generated more than 1.3 million views across social media platforms—and we anticipate similar success from this project.

## Engaging on the Global Stage: The UN Plastics Treaty.

IBWA participated in international discussions as the United Nations worked to negotiate a global plastics treaty. With the U.S. Department of State, which leads negotiations for the United States, IBWA emphasized that plastic is a highly efficient, environmentally responsible packaging material when managed properly. We oppose blanket bans or production caps and instead



## RECYCLING AND EPR

support treaty measures that focus on what works:

- better waste management systems
- higher recycling and collection rates
- smarter, more sustainable product design

To strengthen our role in these talks, IBWA partnered with the U.S.-based National Association for PET Container Resources (NAPCOR) and PETCORE EUROPE, two respected organizations dedicated to advancing plastic recycling. Together, we co-sponsored a reception for UN delegates at the Geneva negotiations in August, which provided an opportunity to share the industry's perspective directly with global policymakers. While no treaty agreement was reached in Geneva, IBWA continues to closely follow developments to ensure that final policies are practical, data-driven, and effective.

**EPR Legislation.** The concept of extended producer responsibility (EPR) is gaining traction nationwide. In 2025, Maryland and Washington enacted new EPR laws, reflecting growing momentum behind these programs. IBWA is working to have bottle deposit programs integrated with EPR systems, creating the most effective recycling outcomes. To amplify that message, IBWA joined the Coalition for High Performance Recycling (CHPR) to advocate for comprehensive recycling policies that combine EPR with deposit programs.

Although Maryland's and Washington's new laws don't yet include bottle deposit provisions, they both allow such systems to be added later. Meanwhile, Rhode Island passed a needs-assessment bill for EPR and bottle deposits—paving the way for possible legislation in 2026.

In New Jersey, IBWA had previously secured a Department of Environmental Protection clarification that 3- and 5-gallon HOD bottles are exempt from the state's recycled content mandate. IBWA is now working to have that exemption formally codified in law.

IBWA is actively tracking EPR developments nationwide, including the following:

- New York's proposed EPR bill with provisions that were unfavorable to the bottled water industry did not advance in 2025.
- Oregon became the first state to fully implement its EPR program (effective July 1, 2025), though it now faces legal challenges over its constitutionality and business impacts.
- California Governor Gavin Newsom paused the final rulemaking for the state's EPR program, directing CalRecycle to revise its proposal due to fiscal concerns. The agency has since issued new draft rules and is working to stay on track with key implementation milestones.



**Each year, IBWA works tirelessly to ensure that any state, federal, or global policy that impacts the bottled water industry is fair and fact-based.**



## A Year of Clear Messaging: IBWA's Communications Impact



**IBWA communications demonstrate a sophisticated, multi-channel approach to combating misinformation while championing the bottled water industry's core truths.**



Misinformation about bottled water is widespread—and it moves fast. From social media chatter to headlines on major news outlets, misconceptions can quickly shape public opinion and influence policymakers. IBWA is committed to setting the record straight by championing five core truths about our industry:

- Bottled water is America's No. 1 packaged beverage.
- It provides essential, healthy hydration.
- Our products are held to rigorous, comprehensive FDA safety and quality standards.
- Bottled water containers have the lowest environmental footprint of any packaged beverage.
- In emergencies—when hurricanes strike or water systems fail—bottled water is not a luxury; it's a lifeline.

To make sure these messages are heard, IBWA meets consumers, media, and decision makers where they are: online. We maintain an active presence across social media platforms; deliver reliable information through our websites, Bottled Water Reporter articles, and Splash e-newsletters; and continue to share

fact-based perspectives through letters to the editor nationwide.

IBWA members can feel confident that your association is dedicated to protecting the industry's reputation and ensuring accurate information reaches people who make policy decisions that impact your business.

**Targeted Outreach.** A key part of IBWA's 2025 communications strategy was to improve the search engine optimization (SEO) of our BottledWater.org website. Industry-wide, this undertaking has proved a difficult task because web users are now relying heavily on automatically generated artificial intelligence (AI) summaries, which are located at the top of Google search result pages. Sometimes the information about bottled water is inaccurate because AI is gathering stories from the web that include the false claims that we work hard to correct. In a nutshell, that means the most used search engine on the internet is helping to spread false information advanced by our critics.

IBWA has significantly strengthened our ability to counter misinformation by investing in targeted digital outreach that guides the

## COMMUNICATIONS

public toward clear, science-based facts. This approach has been especially valuable on high-profile topics like microplastics, where public perception is often shaped by misleading or incomplete reporting. By enhancing our search visibility online and ensuring credible information is easy to find, IBWA is reaching more consumers than ever—even as overall web traffic declines across many industries due to the rise of AI-generated summaries.

**Social Media Industry Spokesperson.** Staying relevant on social media means staying current—and that’s why in 2025 IBWA launched its industry spokesperson campaign. Consumers connect with people, not industries, and our Water Warrior, Courtney Chen, brings a trusted, human voice to key messages about healthy hydration, responsible recycling, bottled water’s essential role in emergencies, and the facts behind plastic-related misinformation. As a credible spokesperson, she helped turn passive viewers into engaged supporters of pro-bottled water messages.

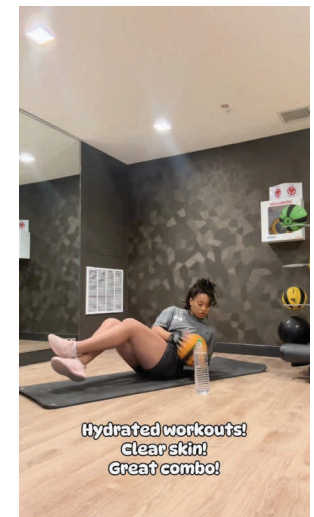
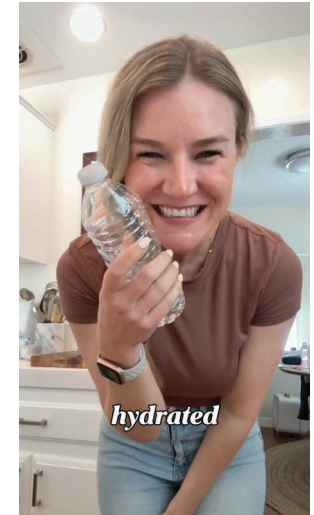
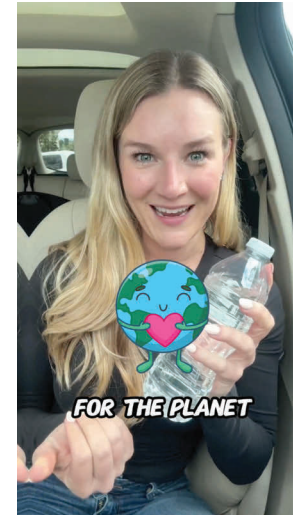
IBWA distributed our spokesperson reels to members, encouraging them to share on their own social media channels to help amplify IBWA’s voice. This strategy also helped ensure our messaging reached broader audiences and strengthened the industry’s ability to counter misinformation with credible, community-based support.

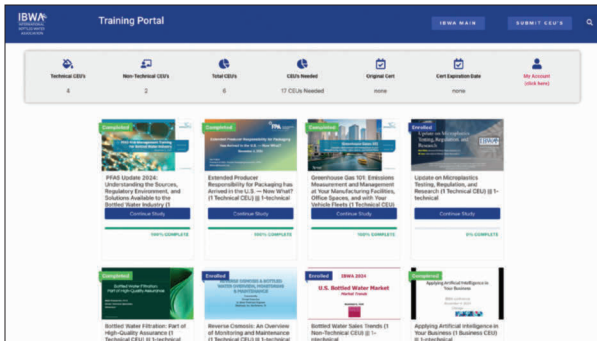
### **Bottled Water Matters Website Refresh.**

In 2025, IBWA invested in the revitalization of the BottledWaterMatters.org website as another way to ensure consumers have access to positive bottled water stories. Acting as a hub for pro-bottled water content, BottledWaterMatters.org seamlessly connects with our Facebook, Instagram, TikTok, and YouTube accounts.

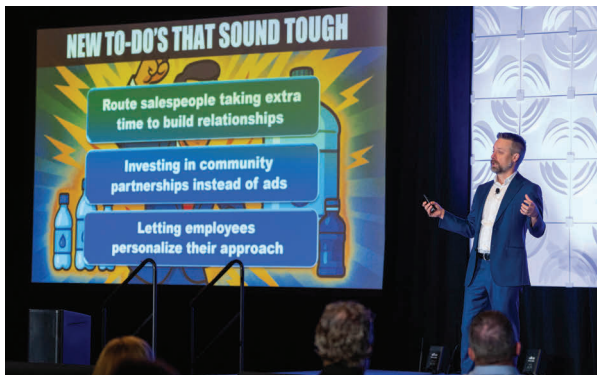
**Media Outreach.** Despite strong research confirming the health benefits of proper hydration and the minimal environmental impact of bottled water, false narratives still spread faster than facts—and are often echoed by media outlets relying on sensational online stories. That’s why IBWA’s proactive outreach to journalists and editors is essential. By opening direct lines of communication, correcting inaccuracies, and offering credible, science-based information, IBWA works to help newsrooms recognize misinformation patterns and report more accurately. Our recent engagements with major outlets—such as the New York Post, the Washington Post, Forbes, the Mirror US, and AARP—demonstrate that IBWA is not only an industry advocate but also a trusted resource—and we continue working to ensure media think of IBWA first whenever bottled water is in the news.

  
Check out IBWA’s educational reels on Instagram and TikTok  
[@bottledwatermatters](https://www.instagram.com/bottledwatermatters)





IBWA's upgraded Education Portal brings member training, CPO certification tracking, and webinars together in one convenient hub.



Keynote Brian Carter instructed bottlers on how to increase sales and keep existing customers.



IBWA's comprehensive conference education program offered attendees valuable insights on industry trends and business best practices.

# From Online Portals to Conference Halls: IBWA's Educational Programs Help Members Grow Their Businesses

IBWA's 2025 educational offerings provided members with multiple avenues to deepen their expertise and improve their business operations—whether through flexible online learning, dynamic conference sessions, or valuable networking opportunities with peers and industry leaders. Through each offering, IBWA delivered practical insights designed to help companies increase sales, enhance customer engagement, boost efficiency, and navigate emerging regulatory challenges with confidence.

**FSMA Audit Preparation.** Compliance with FDA's Food Safety Modernization Act (FSMA) remains a top priority for bottled water companies, and IBWA continues to provide members with the resources they need to meet all requirements. Key tools for communicating that information include the IBWA Plant Technical Reference Manual (PTRM), Splash e-newsletter articles, and timely member bulletins. The PTRM also contains a detailed guidance document on the FSMA Preventive Controls Rule, while the updated 2025 IBWA Audit Handbook provides audit check sheets—some of the most effective tools members can use to prepare for FDA inspections.

**Online Education.** In 2025, IBWA upgraded its Education and Training Portal on the IBWA website: [bottledwater.org](https://bottledwater.org). The portal provides online education opportunities for IBWA members, all in one place. IBWA members can also use the portal to track their Certified Plant Operator (CPO) exam status and scores, continuing education units (CEUs), CPO certification date and expiration, as well as the number of training videos they have watched. Current and prospective CPOs can take the CPO exam online in the following two ways:

- three separate, one-hour modules
- a single exam coving all three modules

Webinars are available on the Education and Training portal to help members prepare for the three CPO exam modules. All exams are taken through a third-party online proctoring service. IBWA offers the exam online to enable members to schedule and take the exam on a day and time that is convenient for them. But you don't have to be a CPO or CPO candidate to view IBWA's webinars; they are free for all members.

**Conference Education.** The 2025 IBWA Conference and Trade Show, held September 29–October 1 in Las Vegas, delivered one of our most comprehensive education programs to date. Over three days, attendees had access to 15 expert-led sessions spanning both business and technical topics, with 16.5 continuing education credits available.

The course lineup reflected the forces currently defining the bottled water industry—rapid technological advancement, growing policy complexity, and the importance of strong professional networks. Business-focused sessions addressed the evolving realities of today’s marketplace, including the use of artificial intelligence, advances in route delivery technology, shifting bottled water sales trends, and other key drivers of operational success. On the technical side, participants received timely updates on PFAS, microplastics, emerging contaminants, and other issues shaping regulatory and scientific discussions across the industry.

Members can now view several education sessions from the 2025 Annual Business Conference on IBWA’s Education and Training Portal. By providing these recorded education sessions online, IBWA offers CPOs another opportunity to earn CEUs. Members can watch these webinars and earn CEUs remotely at no charge, at their convenience.

**Trade Show.** The face-to-face connections, hands-on learning, and industry collaboration on display during the 2025 IBWA Trade Show proved to be of considerable value to conference attendees. The trade show offered a premier platform for showcasing the latest innovations in products, technologies, and services—giving attendees an up-close look at the tools shaping the future of the industry.

Exhibitors benefited from a unique scheduling model that maximized visibility and engagement. Trade show hours were integrated into high-traffic events—including the Welcome Reception and catered meal breaks—creating multiple touchpoints for meaningful conversations and relationship building. This structure ensured that exhibitors had repeat opportunities to connect with key decision-makers, whether they were first-time participants establishing new business relationships or long-time partners strengthening existing ones.

Across the show floor, attendees and exhibitors alike took advantage of direct, one-on-one interactions to discuss challenges, explore new solutions, and spark potential collaborations. The strong turnout, busy aisles, and active networking underscored the importance—and continued success—of in-person engagement within the bottled water industry.



**By offering both in-person and virtual learning opportunities, IBWA ensures every member can access critical industry education regardless of their location, schedule, or resources.**



## 2026 AND BEYOND



**IBWA members are working together to build a future where facts guide policy decisions and truth shapes the conversation about bottled water.**



### **MOVING FORWARD TOGETHER**

In 2025, IBWA strengthened its role as the trusted voice for healthy hydration, bottled water innovation, and fact-based communication. From advancing digital outreach to elevating our presence with policymakers, the media, and consumers, this year's achievements reflect the hard work, dedication, expertise, and unity of our members, consultants, and staff.

Yet, as always, our work continues. The rise of AI-generated misinformation, ongoing regulatory pressures, and an increasingly complex communication landscape make IBWA's actions more essential than ever. As we look ahead to 2026 and beyond, we remain committed to ensuring that accurate, science-supported information guides public understanding and policy decisions.

We will continue to champion the benefits of bottled water; highlight the industry's strong safety, quality, and environmental record; and defend our members against false claims that threaten consumer confidence. And we will do so with the same resolve that has long defined IBWA—grounded in collaboration, driven by integrity, and focused on helping our members provide safe, healthy, reliable, and accessible bottled water wherever it is wanted and whenever it is needed.

With the continued engagement and support of our membership, IBWA is well-positioned to meet the challenges ahead and to seize every opportunity to advance the important work of the bottled water industry. Together, we will keep moving forward to defend and promote your companies and the bottled water industry.

## **2026 SAVE THE DATES**

Mark your calendars, clear your schedules, and join us throughout 2026. Because when IBWA members come together—virtually or in person—we don't just discuss the future of bottled water, we create it.

### **Virtual Winter Board of Directors and Committee Meetings**

February 10-12, 2026

### **Summer Board of Directors, Committee Meetings, and Capitol Hill Visits**

June 1-4, 2026

Hilton Alexandria Old Town  
Alexandria, Virginia

### **Annual Business Conference and Trade Show\***

September 28-October 1, 2026

Mohegan Sun  
Uncasville, Connecticut

\*Co-located with the Northeast Bottled Water Association (NEBWA)

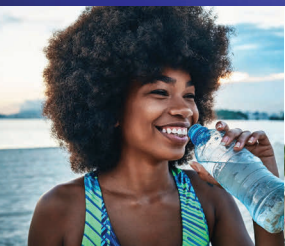
# IBWA

INTERNATIONAL  
BOTTLED WATER  
ASSOCIATION

[WWW.BOTTLEDWATER.ORG](http://WWW.BOTTLEDWATER.ORG)

IBWA is the authoritative source of information about all types of bottled waters, including spring, mineral, purified, artesian, and sparkling. Founded in 1958, IBWA's membership includes U.S. and international bottlers, distributors, and suppliers. IBWA is committed to working with the U.S. Food and Drug Administration (FDA), which regulates bottled water as a packaged food product, to establish comprehensive and stringent standards for safe, high-quality bottled water.

In addition to FDA regulations, IBWA member bottlers must adhere to the IBWA Bottled Water Code of Practice, which mandates additional standards and practices that in some cases are more stringent than federal and state regulations. A key feature of the IBWA Bottled Water Code of Practice is a mandatory annual plant inspection by an independent, third-party organization.



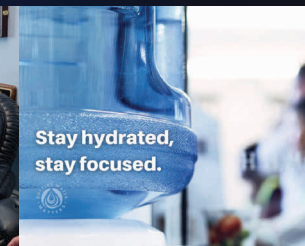
Know Your  
Emergency  
Water Needs



Recycling: a  
transformative  
journey



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



Stay hydrated,  
stay focused.



STAY  
HYDRATED  
on the run