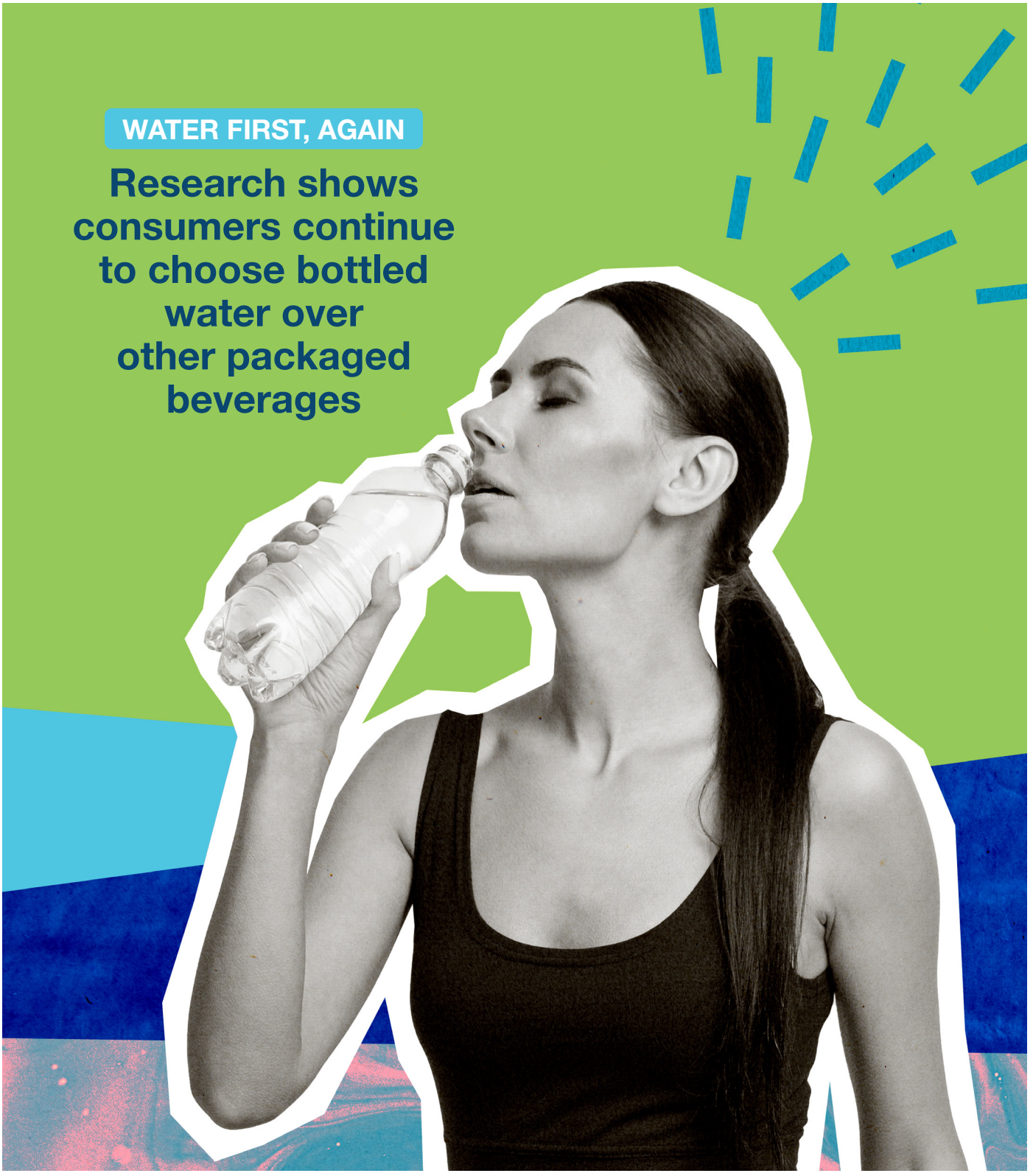
WATER FIRST, AGAIN

Research shows consumers continue to choose bottled water over other packaged beverages



By John G. Rodwan, Jr.

U.S. bottled water hit new highs in 2025 for both volume and dollar sales, even as growth eased from the year before. While volume didn't climb as fast as it did in 2024, it still outpaced 2022 and 2023. Producers' revenue and retail dollars cooled too: in some recent years, inflation pushed prices up and sales dollars grew much faster than volume. That gap closed in 2025, when volume, wholesale dollars, and retail dollars all rose at nearly the same pace.



Bottled water volume grew by 1.5% in 2025 after having enlarged by 2.9% in 2024. Earlier, volume had inched up by just 0.4% in 2023 and by 1.1% in 2022. Packaged water experienced much more vigorous growth just a few years earlier, such as 2016's leap of almost 8% and a nearly 5% jump as recently as 2021. The recent modest uptick likely reflected higher prices impeding volume growth as consumers cut back on discretionary spending.

Over the course of the last half century or so, bottled water transformed the U.S. beverage marketplace, and it continues to affect consumers' perceptions and ensuing choices regarding beverages. Back when Perrier first entered the U.S. market in the 1970s, Americans generally did not buy or carry around bottles of water, but that soon became a firmly entrenched norm. Consequently, the number of calories U.S. consumers take in from beverages dropped as bottled water became a mainstream beverage. As it expanded to emerge as the preferred beverage option, bottled water created new habits. Suitable for imbibing around the clock and not needing to be refrigerated or served over ice, bottled water earned its status as the largest beverage by volume by resonating with consumers of all sorts, not just those aiming to reduce calories or eschew artificial sweeteners.

Unmatched Volume Growth Run

Other than small reductions in 2008 and 2009—years when most other beverage categories were also stymied by that period's financial crisis—bottled water volume grew every year from 1977 to 2025. That timeframe included 17 double-digit annual volume growth spurts. Before the sluggishness of 2022 and 2023, bottled water volume consistently enlarged at solid single-digit percentage rates since resuming growth in 2010. With 2023's softness, per capita consumption dipped to 46.4 gallons, down a tenth of a gallon from the year before. That marked the first decrease in average intake since overall volume declined a decade and a half earlier. However, 2024's stronger volume growth boosted per-person consumption to more than 47 gallons for the first time, while 2025's increase pushed it close to 48 gallons. No other beverage type comes anywhere close to that level.

Before the economic downturn toward the end of the century's first decade, bottled water achieved a lengthy winning streak of significant volume growth, as delineated in the Beverage Marketing Corporation (BMC) DrinkTell Database. During the 2000s, bottled water volume charted double-digit percentage growth rates in two years and advanced at rates close to that level in several others. Bottled water volume grew by 12% in 2002, and after growing by almost 11% in 2005, it enlarged by 9.5% in 2006. Departing from the pattern of preceding years, bottled water volume declined by 1.1% in 2008 and then by 2.6% in 2009.

In sharp contrast to carbonated soft drinks, which followed a number of years of tepid growth with multiple volume reductions, bottled water showed that its two consecutive losses were aberrations rather than the onset of stagnation or ongoing shrinkage.

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When bottled water volume resumed growth in 2010, it effectively restored volume to where it stood prior to the declines. Stronger growth followed in subsequent years. By 2025, volume reached a record high of almost 16.7 billion gallons—about 8 billion gallons higher than it had been in 2007. Carbonated soft drinks, conversely, underwent their sixteenth consecutive year of volume reduction through 2020 before a couple of annual increases following an unusually large decrease in the first year of the pandemic; very slow or no growth appears probable for the foreseeable future.

Preferred Packaging

Single-serve plastic bottles became by far the most popular format, driving overall category growth in most years and accounting for most of its volume. While it remains the leading segment, single-serve plastic has lost some momentum. In 2023, this segment underperformed, with volume hardly changing. The segment's performance improved somewhat in 2024, but it lagged overall bottled volume growth again in 2025. Self-service refill (vended) and home and office delivery (HOD) saw volume contract during the height of the COVID-19 pandemic, when many people worked from home rather than in cooler-equipped offices, but outperformed the (significantly larger) single-serve segment in every year from 2022 to 2025. Multi-serving bottles (typically ranging in size from 1 to 2.5 gallons), domestic sparkling water, and imports declined for a second year in a row in 2023; all grew in 2024 and 2025.

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Strong Revenue Performance

Bottled water producers' revenues also fell in both 2008 and 2009, and did so more dramatically than volume did, but they also bounced back. Bottled water wholesale dollar sales first neared $6 billion in 2000. By 2007, they reached $12 billion. Category sales declined to $11.6 billion the following year and then to $11 billion in 2009. They inched up in 2010 and 2011 and moved above $12 billion in 2012. Wholesale dollars reached $12.9 billion in 2013 and topped $13.7 billion in 2014. They approached $15 billion in 2015, exceeded $16.3 billion in 2016, surpassed $17.4 billion in 2017, climbed above $18.7 billion in 2018, approached $20 billion in 2019, neared $20.8 billion in 2020, surpassed $22.8 billion in 2021, and advanced to $25.5 billion in 2022, with the nearly 12% increase largely attributable to higher prices due to post-covid supply chain and wholesale cost increases. For the same reason, revenues grew by 6.3% to $27.2 billion in 2023. In 2024, growth of 3.8% pushed revenues up to $28.2 billion. Sales of $28.6 billion in 2025 reflected growth of 1.5%.

At the retail level, 2025 sales hit $51.3 billion after having topped $50 billion for the first time the year before. Retail sales growth of 1.4% in 2025 was slower than in the preceding four years.

Unmatched on Affordability

Even as consumer spending faced pressures from inflation and shifting economic conditions in 2025, bottled

U.S. BOTTLED WATER MARKET
Volume, Producer Revenues, and Retail Sales
2022 – 2025

Year	Millions of Gallons	Annual % Change	Millions of Wholesale Dollars	Annual % Change	Millions of Retail Dollars	Annual % Change
2022	15,880.9	1.1%	$25,544.9	11.9%	$45,800.2	12.3%
2023	15,947.3	0.4%	$27,165.1	6.3%	$48,770.6	6.5%
2024	16,404.4	2.9%	$28,198.7	3.8%	$50,558.2	3.7%
2025	16,651.1	1.5%	$28,626.5	1.5%	$51,291.2	1.4%

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water maintained its position as the most economical commercial beverage choice available. While retail prices across nearly all consumer goods adjusted upward over recent years, bottled water continues to offer exceptional value, averaging roughly 2.4 cents per ounce at retail.

By comparison, carbonated soft drinks average nearly 7 cents per ounce, fruit beverages and juices cost roughly 9.5 cents per ounce, and other specialty or value-added categories scale significantly higher. This structural affordability—combined with zero calories, zero artificial ingredients, and unmatched convenience—ensures that bottled water remains an accessible, healthy grocery staple for households across the socioeconomic spectrum, anchoring its status as America's preferred beverage.

Consumers Increasingly Choose Water First

For decades, seemingly unstoppable growth in per capita consumption indicated clear, ongoing demand for a product that consumers regard as a healthy alternative to other beverages. U.S. residents increased their annual consumption by 16.1 gallons from 30.4 gallons per person in 2012 to 46.5 gallons ten years later. As expected, the tiny dip in 2023 did not signal a turning point, as per capita consumption increased by almost a gallon in 2024 after 2023's stumble and grew by another four-tenths of a gallon in 2025.

Associations with healthfulness, convenience, safety, and value are among the reasons for bottled water's rising rates of consumption. A multitude of packaging types, ranging from single-serve to bulk, facilitates a correspondingly broad array of usage occasions. Compared with other ready-to-drink beverages, bottled water remains inexpensive, even after some recent inflationary price increases and other factors affecting input costs, such as tariffs.Consumers' burgeoning interest in beverages boasting benefits beyond refreshment alone also contributed to the quintessential hydrating beverage's ascent. Bottled water's lack of calories and the absence of artificial ingredients appeal to many consumers. Even in locales where tap water may be safe and readily available, people may prefer bottled water, which they often believe tastes better. The ready availability of packaged water wherever beverages are sold also differentiates bottled water from tap.

Although sometimes seen as competing with tap water, bottled water actually attained its position as the biggest beverage category by enticing consumers away from other packaged beverages. Some consumers may have abandoned regular, full-calorie sodas in favor of diet (or "zero-sugar") versions, but many others transitioned to bottled water instead. Further, as some consumers became averse to artificial sweeteners, they moved away from diet sodas as well as regular iterations.

Performance by Segment

Domestic non-sparkling water remained by far the largest individual segment of the U.S. packaged water business in 2025. Domestic non-sparkling water's 15.8 billion gallons

U.S. BOTTLED WATER MARKET
Per Capita Consumption
2015 – 2025

YEAR	GALLONS PER CAPITA	ANNUAL % CHANGE
2015	35.9	6.7%
2016	38.4	7.0%
2017	40.4	5.3%
2018	42.1	4.1%
2019	43.3	2.8%
2020	44.7	3.3%
2021	46.4	3.8%
2022	46.5	0.3%
2023	46.4	-0.4%
2024	47.3	2.1%
2025	47.7	0.7%

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represented 94.6% of total volume. Domestic non-sparkling saw slower volume reductions than the overall market in 2008 and 2009 and then outperformed it again in 2010. It moved very slightly slower than the total market in following years until 2021, when the biggest segment increased at the same rate as the overall market. In 2022, domestic non-sparkling water enlarged slightly faster than total bottled water volume, driven by a strong showing by the direct-delivery and self-service refill segments. In 2024, it moved essentially in line with the total market, up by 2.8%. In 2025, it increased by 1.4%.

The non-sparkling segment includes various sub-segments that typically perform quite differently from each other. In several recent consecutive years, all four segments grew, although they did so at dissimilar rates. In 2023, three of the four grew; in both 2024 and 2025, they all grew again.

During most of the 1990s and 2000s, the retail premium sub-segment—consisting of still water in single-serve polyethylene terephthalate (PET) bottles—propelled the overall category's growth. In fact, retail PET volume enlarged by a double-digit percentage rate 16 consecutive times through 2007. Growth slowed considerably in 2008 before it ceased in 2009. Yet PET's 0.9% reduction in 2009 was far less than the 2.6% loss measured for bottled water volume as a whole. Moreover, 2009 PET volume of almost 5.2 billion gallons stood more than 4.1 billion gallons higher than it had in 1999, and its share of total bottled water swelled from 25% to more than 62% during that 10-year period. In 2010, PET experienced the strongest growth of any bottled water segment, advancing by 6.8% to 5.5 billion gallons, which pushed its share above 64%. Growth slowed in 2011 but remained well in advance of the total market: volume greater than 5.8 billion gallons resulted from growth of 5.3%, which boosted PET's share to 65%. In 2012, PET had its strongest performance since 2007, increasing by more than 8% to 6.3 billion gallons, which represented nearly 66% of the overall market. Greater than 6% growth in 2013 pushed volume up to nearly 6.7 billion gallons—essentially two-thirds of the total. In 2014, the segment saw an even greater growth rate than in 2012, catapulting volume above 7.2 billion gallons and market share to 67.5%. Still another year of acceleration in 2015 drove PET volume to nearly 7.9 billion gallons and share to more than 68%.

In 2016, the single-serve segment enlarged by more than 9% to reach 8.6 billion gallons. PET volume slowed in 2017, but with volume of close to 9.2 billion gallons, the segment still accounted for close to 70% of U.S. bottled water volume, a share it retained in 2018, when volume approached 9.7 billion gallons. In 2019, the segment's share did climb above 70% as volume exceeded 10 billion gallons for the first time. Volume topped 10.5 billion in 2020, which represented 70.2% of all bottled water. Its share reached 71% in 2021 as volume rose to almost 11.2 billion gallons. The segment's 11.3 billion gallons were 71.2% of U.S. bottled water volume in 2022. The segment's flatness in 2023 cost it two-tenths of a share point. And slow growth reduced its share again in 2024. By 2025, PET's volume was 11.7 billion gallons and its share was 70.2%.

Retail bulk volume saw some setbacks as consumers frequently opted for convenient PET multipacks in large format retail channels instead of larger sizes. Its share fell from nearly one-quarter of the category volume at the beginning of the

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U.S. BOTTLED WATER MARKET
Volume and Growth by Segment
2023 – 2025

	Non-sparkling		Domestic Sparkling		Imports		Total	
Year	Volume*	Change	Volume*	Change	Volume*	Change	Volume*	Change
2023	15,111.5	0.6%	501.3	-3.0%	334.4	-1.3%	15,947.3	0.4%
2024	15,530.0	2.8%	521.9	4.1%	352.5	5.4%	16,404.4	2.9%
2025	15,751.7	1.4%	539.5	3.4%	359.8	2.1%	16,651.1	1.5%

*Millions of gallons Source: Beverage Marketing Corporation
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century to 7.1% by 2025, largely due to competition from PET. After multiple declines, the segment did grow each year from 2011 to 2018. However, in 2019, retail bulk volume saw a small reduction in volume. Growth resumed in 2020, when portability was less of an issue for homebound consumers and continued (albeit slowly) in 2021. In both 2022 and 2023, the segment declined at rates similar to those registered in the early 2000s, though upticks occurred in 2024 and 2025.

Like retail bulk, **HOD** faced competition from PET bottles; unlike retail bulk, it has experienced strong growth recently. The segment, which was the largest of them all as recently as the mid-1990s, accounted for almost 10% of total volume by 2025.

The **vending segment** consisting of refillable jug containers saw some growth even when total bottled water volume did not. Its low cost during economic difficulties undoubtedly had something to do with vending's positive results. It continued to grow in 2020 and did so at a faster clip than in 2019. Even so, it moved at a slower pace than the domestic still water market or the bottled water market as a whole. In 2021, it was the only domestic non-sparkling water type to see volume decline. That distinction shifted to retail bulk in 2022, when self-service refill water volume increased by almost 4%. In 2023, segment volume swelled by nearly 5%, making it the fastest moving bottled water type that year, a feat it managed to repeat in 2024 and 2025, when growth was even faster.

In 2025, PET's volume was 11.7B gallons and its market share was 70.2%.

The pair of segments outside the domestic non-sparkling space—**domestic sparkling and imports**—grew in 2024 and 2025 after having declined in both 2022 and 2023. Imported water, the smallest segment of them all, is prone to fluctuations. In 2024, imported and domestic sparkling water together accounted for 5.4% of total U.S. bottled water volume.

In terms of retail sales, single-serve PET was the biggest part of the business with 68% of the total in 2025. Domestic non-sparkling of all types together accounted for about 78% of retail sales. Though domestic sparkling and imports represented comparatively small portions of bottled water volume, they have outsize shares due to their higher price points. For instance, while imported volume was only about 2% of the total, it garnered more than 13% share of retail sales.

More Growth on the Horizon

Bottled water's solid performance in 2025 indicates that consumers have not changed their positive perceptions of the category. BMC expects bottled water to sustain its persistent (if modest) growth in the near future. It also expects per capita consumption to continue moving upwards.

John G. Rodwan, Jr., *has written about the beverage industry for decades, including 25 years as editorial director at Beverage Marketing Corporation (BMC). The BMC DrinkTell Database contains detailed statistics on bottled water and other beverages. Learn more at* beveragemarketing.com.

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