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for the **ASIAN FOOD SUPPLY CHAIN**

 **Industry.**  **Retail.**  **Foodservice.**  **eCommerce.**  **Services.**

Market Trend of Bottled Drinking Water

Overview of Global Functional Water Market



- The global functional water market is expected to accelerate at a CAGR of almost 9% during the forecast period with increasing demand and triggering the growth of the market.
- In 2017, the flavored functional water segment accounted for 80% of the global market and is projected to decline to 76% by 2022, exhibiting a 4% decrease in market share.

Overview of Bottled Water in Asia Pacific



- Bottled water in Asia Pacific is seeing rapid growth, driven by the healthy living trend, rising concern over the quality of tap water, the consumption of bulk water, premiumisation, new flavours, the penetration of rural areas and the launch of products with functional benefits.
- Consumers in Asia Pacific are shifting to carbonated bottled water from carbonates. They are starting to enjoy carbonated bottled water as an alternative, as carbonates are usually sugary beverages containing colourings.
- Carbonated bottled water is used as a mixer by consumers to make their own beverages –by doing this they can monitor their calorie intake.

Overview of Bottled Water in Asia Pacific



- With increasing purchasing power and rising health awareness, consumers are pursuing healthier choices within bottled water.
- As a result, still natural mineral bottled water, which is rich in minerals, although carries a much higher unit price than the average, is enjoying the most vigorous volume growth.
- Consumers also prefer water enriched with vitamins.

Consumers' Demands



- Consumers are looking for a product that offers more in terms of value than just regular refreshment.
- The functional water segment is gaining attention in the global bottled water market by satisfying the need for both taste and nutrition among consumers.
- They are demanding for bottled drinking water products that provide a comprehensive package of both flavor and functionality.

Definition of Functional Water



- “The functional water beverage can be vitamin-enriched and contain other functional elements such as a calming relaxant or multi-vitamin reviver.
- The consumers across East and West Europe, North and South America and Japan, China and South Korea are increasingly buying functional water, and this will contribute towards the market growth.



ClueBiotics has recently launched its self-titled prebiotic water known as Clue Prebiotic Water contains 4g of fructooligosaccharides (FOS), which supports digestive function, immune health, calcium absorption and is a good source of fiber. Ingredients: Reverse osmosis water, FOS, citric acid, magnesium chloride and calcium chloride

Source from: Technavio, 2018.

Growing Factors



- The growing population of **health-conscious** consumers across the globe prefers functional beverages over other bottled drinks.
- High consumption of functional beverages is due to the fact that it contains quality ingredients that provide **additional health benefits**, which is positively affecting the growth of the global functional water market.
- The fact that functional water contains **added minerals, vitamins, herbs, and electrolytes like sodium, potassium and amino acids** is the reason consumers are readily embracing functional water products.
- The availability of functional water in **various flavors** is another prominent reason for its widespread appeal to the consumers across the world.
- Increasing rate of **tap water contamination** is significantly driving the consumer population in adopting bottled water.

Source from: Technavio, 2018.

Top Emerging Trend



- Functional beverages are gaining traction especially among the health-conscious consumers over other bottled drinks.
- Functional water contains **minerals, vitamins,** and **herbs** that benefit health driving the consumer inclination toward functional beverages.
- The demand for functional beverages is growing due to the increasing awareness of the negative impact of sugary and aerated drinks.
- Consumers are looking for beverages that contain quality ingredients providing additional health benefits.
- Moreover, the growing rate of obesity, diabetes and other diseases are also creating health awareness among consumers due to which they are avoiding sugary soft drinks. It is estimated that this market will grow steadily at a CAGR close to 9% by 2022.

Source from: Technavio, 2018.

Top Emerging Trend



- The growing interest in functional water with **herbal ingredients** is one of the key trends gaining traction in the functional water market.
- Consumers are well informed about the health benefits of functional water consisting of herbs.
- For instance, the consumption of **aloe vera** infused drinking water is gaining popularity in the market for its role in improving the immune response of the human body.
- As sweetened and carbonated beverages have a fattening effect on the body, functional water products with herbal ingredients are gaining popularity.

Market Examples

With added Vitamins & Minerals



LIFEWTR, Premium Purified Water

Contains the electrolytes Magnesium Sulfate and Potassium Bicarbonate, which are minerals that are added to enhance taste

Ingredients: Purified Water (Purified By Reverse Osmosis), **Magnesium Sulfate**, **Potassium Bicarbonate**



CORE Hydration

Ultra-purified, has a pure crisp taste and just the right amount of electrolytes and minerals

Ingredients: Calcium Chloride, Reverse Osmosis Water, Magnesium Chloride and Potassium Bicarbonate

With added Vitamins & Minerals



SoBeWater

Vitamin enhanced water beverage

Favors: Black and Blue Berry, Strawberry Dragonfruit, and Yumberry Pomegranate

Ingredients for Strawberry Dragonfruit Flavor: Water, Fumaric Acid, Purified Stevia Leaf Extract, Natural Flavor, Potassium Citrate, **Ascorbic Acid (Vitamin C)**, Calcium Lactate, Xanthan Gum, Purple Sweet Potato Juice Concentrate (Color), **Niacinamide (Vitamin B3)**, **Calcium Pantothenate (Vitamin B5)**, **Pyridoxine Hydrochloride (Vitamin B6)**, **Cyanocobalamin (Vitamin B12)**



Hydrive Energy Water

With added perk of energy from B Vitamins and caffeine

Flavors: Citrus Burst, Black Cherry, Blue Raspberry, Triple Berry, Kiwi Melon, Grape Fusion

Ingredients: Water, Citric Acid, Natural Flavor, Sodium Citrate, Caffeine, Potassium Sorbate (Preservative), Sodium Benzoate (Preservative), Sucralose, Acesulfame Potassium, **Niacinamide (Vitamin B3)**, **Calcium D Pantothenate (Vitamin B5)**, **Pyridoxine Hydrochloride (Vitamin B6)**, **Cyanocobalamin (Vitamin B12)**, FD&C Red #40, FD&C Yellow #6, FD&C Blue #1

With added Vitamins & Minerals



Bulletproof's FATwater

Flavors: Grapefruit, Lemon and Pineapple

Ingredients: Deionized Water, Caprylic Acid Triglycerides from Highly Refined Coconut Oil, Gum Arabic, Xylitol (From N. American Hardwood), Citric Acid, Rebaudioside A., Ester Gum, **Niacin (Vitamin B3), Calcium Pantothenate (Vitamin B5), Pyridoxine Hydrochloride (Vitamin B6), Thiamin Hydrochloride (Vitamin B1), and Vitamin B12**



Karma - Wellness Water

Acai Pomeberry, Raspberry Guava Jackfruit, Passionfruit Green Tea, Orange Mango, Pineapple Coconut

Ingredients for Passionfruit Green Tea : Spring Water, Natural Flavor, Sugar, Citric Acid, Green Tea Leaf Extract, Stevia rebaudiana Leaf Extract, dl-alpha-Tocopheryl Acetate, **d-Calcium Pantothenate, Niacinamide, Retinol Palmitate, Pyridoxine Hydrochloride**, Vegetable Juice (color), Cholecalciferol, Cyanocobalamin

With Added Herbs



Ayala's Sparkling Water

Flavors: Lemongrass Mint Vanilla, Cinnamon Orange Peel, Ginger Lemon Peel, Lemon Verbena Geranium, Cloves Cardamom Cinnamon and Lavender Mint



OKF Herb Flower Water

*Herbal flower is mixed with mineral water
With zero calories, herbal flower water gives you
freshness and healthy life
Flavors: Lavenda, Rosemary, Camomile,
Peppermint, Hibiscus*

Ingredients for Lavender Mint Flavor: Sparkling Purified Water, Extracts Of Lavender, Spearmint, Lemongrass, Thyme And Natural Flavor

With Added Herbs



Chi Herbal Mineral Water Original

Combined with locally sourced sparkling mineral water, then a hint of honey and kiwifruit to create this original masterpiece

Ingredients: Mineral Water, Herbal Extract Blends (Fo-ti, Ginseng, Aloe, Gotu Kola, And Ginger), Acid (Citric Acid), Preservative (Sorbic Acid), **Flavours** (Kiwifruit, Honey)



BuchuLife Herbal Water

Boasting naturally occurring antioxidants, bioflavonoids and vitamins sourced from the oil of the Buchu leaf (formulated Buchu Oil contains the potent antioxidants (bioflavonoids), diosphenol & Vitamins A, B & E)

Flavors: Natural, Cranberry, Lime & Blackcurrant

Ingredients: Formulated Buchu Oil, Carbonated Spring Water

With Added Herbs



Trader Joe's Organic Herbal Flavored Waters

Flavors: Lemon Ginger and Lemongrass Spearmint

Ingredients for Lemon Ginger: Purified Water, Contains 2% Or Less Of Organic Lemon Extract, Organic Ginger Extract and Citric Acid.



Jeevika Herbal Water

Available Flavors: Betel, Chandan, Ajwain, Vetiver, Vitamax

Ingredients for Chandan Herbal Water flavour: Aqueous extract of Sandalwood, Ginger, Vetiver

Aloe Vera Infused



Alo Original Aloe Drink Exposed Aloe + Honey

Naturally sweetened with honey

Ingredients: Water, Aloe Vera Juice, Aloe Vera Pulp, Cane Sugar, Honey, Citric Acid, **Vitamin C** (Ascorbic Acid), Natural Grape Flavor



Aloe Gloe Organic Aloe Water Coconut

Varieties: Crisp Aloe, Crisp Aloe with Pulp, Lemonade, White Grape and Coconut

Ingredients: Water, Aloe Vera Inner Leaf Powder, Cane Sugar, Coconut Water from Concentrate, Malic Acid, Natural Flavors and Stevia

Aloe Vera Infused



AloeCure Water with PureLeaf

Flavors: Zero, Mango, Pomegranate and Green Grape

Ingredients for Mango Flavor: Water, Sugar, Aloe Vera Juice (Aloe Vera Pulp, Water), Natural Flavor, Citric Acid, Ascorbic Acid, Calcium Lactate, **Gellan Gum**, **Cellulose Gum (CMC)** and Sodium Citrate



Aloe H2O Organic Aloe Water

Flavors: Cucumber, Blueberry-Pomegranate, Coconut-Lime and Peach-Mango

Ingredients for Peach-Mango Variety: Water, Aloe Vera Juice, Cane Sugar, Natural Flavors, Citric Acid and Stevia Extract

Aloe Vera Infused



OKF Farmer's Aloe Vera Flavoured Drink

Flavors: Original, Mango, Pineapple, Pomegranate, Strawberry, and Watermelon

Ingredients for Original Flavor: Water, Aloe Vera Juice, Aloe Vera Gel, Fructose, Sugar, Calcium Lactate, Citric Acid, Artificial Grape Flavor, Trisodium Citrate, Gellan Gum and Sucralose



Iberia Aloe Vera Drink

Ingredients for Blackberry Flavor: Water, Fructose, Aloe Vera Pulp, Mango Flavor, Citric Acid, Sodium Citrate, Calcium Lactate, Mango Concentrate, Gellan Gum, **Vitamin C** and Beta-Carotene Flavor

Various Flavors



Smartwater Sparkling Flavours

No sugars, no sweeteners, no calories. Just a drop of fruit flavour

Flavors: Lemon, Kiwi & Berry and Green Apple

Ingredients for Lemon Flavor: Vapour Distilled Carbonated Spring Water, Natural **Lemon Flavouring**, **Electrolytes: Calcium Chloride, Magnesium Chloride, Potassium Bicarbonate**



Hint Fruit infused water

With zero calories, sugar or diet sweeteners

Flavors: Watermelon, Blackberry, Pomegranate & Strawberry-kiwi

Ingredients for Blackberry Flavor: Purified Water, Blackberry and other natural flavors from non-GMO plants

Various Flavors



Karma Wellness Water Probiotics

Flavors: Blueberry Lemonade, Berry Cherry, Kiwi Melon, Strawberry Lemonade & Tropical Coconut

Ingredients for Berry Cherry: Spring Water, Resistant Maltodextrin (Prebiotic), Malic Acid, Citric Acid, Cane Sugar, Salt, Fruit Juice (color), Stevia rebaudiana Leaf Extract, Natural Flavor, **D- α Tocopheryl Acetate (Vitamin E)**, **D-Calcium Pantothenate (Vitamin B5)**, **Niacinamide (Vitamin B3)**, **Vitamin A Palmitate**, **Pyridoxine Hydrochloride (Vitamin B6)**, **Chromium Picolinate**, **Cyanocobalamin (Vitamin B12)**, Probiotic Culture (**Inulin**, Bacillus coagulants)



Propel Zero Enhanced Water

Flavors: Grape, Berry, Kiwi Strawberry

Ingredients for Grape Flavor: Water, Citric Acid, Sodium Hexametaphosphate (To Protect Flavor), Natural Flavor, Potassium Sorbate (Preserves Freshness), Ascorbic Acid (Vitamin C), Sucralose, **Sodium Citrate**, **Potassium Citrate**, **Acesulfame Potassium**, **Niacinamide (Vitamin B3)**, **Calcium Disodium EDTA (To Protect Flavor)**, **Vitamin E Acetate**, **Calcium Pantothenate (Vitamin B5)**, **Pyridoxine Hydrochloride (Vitamin B6)**

Various Flavors



Aquelle Flavoured Water

Flavors: Naartjie, Litchi, Marula, Honey Melon, Lemon, Strawberry, Pineapple, Granadilla, Watermelon, Apple

Ingredients for Apple flavor: Carbonated natural spring water, Fructose, Malic acid, **Flavouring**,
Preservative: Sodium Benzoate, Non-nutritive sweeteners (Aspartame [contains Phenylalanine], Acesulfame K), **Vitamin C**

Various Flavors



Smartwater Sparkling Flavours

Natural sweetness from monk fruit, packed with B vitamins, fiber and antioxidants

Flavors: Dark Cherry, Kiwi Cucumber, Watermelon Raspberry, Passion Peach, Strawberry Serrano Lime, Coconut Mango and Blueberry Lemonade

Ingredients: Deionized Water, Soluble Vegetable Fiber (Corn), Natural Flavors, **Calcium Lactate Gluconate (as Calcium)**, Lactic Acid, **Monk Fruit Extract**, Rebaudioside A (Natural Stevia Leaf Extract), **Pantothenic Acid (Vitamin B5)**, **Niacinamide (Vitamin B3)**, **Alpha Tocopherol Acetate (Vitamin E)**, **Pyridoxine Hydrochloride (Vitamin B6)**, **Thiamine Hydrochloride (Vitamin B1)**, **Folic Acid**, **Biotin**, **Vitamin K**, **Cyanocobalamin (Vitamin B12)**

References



- Technavio. (2018). Global Functional Water Market 2018-202. Research Report.
- Euromonitor International. (2018). Bottled Water in Asia Pacific. Industry Report.