



Euromonitor
International

Bottled Water in the US

December 2025

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Bottled Water in the US - Category analysis

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2025 DEVELOPMENTS

On-trade channel pushes the category into positive total volume sales waters

INDUSTRY PERFORMANCE

Functional bottled water continues to develop as a category

Novelty, hydration, taste and healthier alternative energies spring from flavoured bottled water

WHAT'S NEXT?

Three pillars to success

Breakthroughs in formulae to spur functional beverages

GLP-1 adoption to gain momentum

COMPETITIVE LANDSCAPE

BlueTriton Brands offers a strong, diverse portfolio to lead the category

Mixed bag for The Coca-Cola Co in bottled water

CHANNELS

Commodity status of bottled water favours brick-and-mortar retailers

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Premiumisation and caution visible in soft drinks in the US

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Functional beverages witness rapid transformation

Affordability remains a key concern

Slower but significant new product development

WHAT'S NEXT?

Value sales to outpace volume sales in growth terms amid a focus on wellness trends

Players to invest in innovation and marketing to gain a competitive edge

Climatic imprint on soft drinks

COMPETITIVE LANDSCAPE

The leading player innovates and premiumises its offer to stay ahead

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