

India Bottled Water Market, By Stock Keeping Units (Less than 1L, 1L-2L, More than 2L), By Packaging (Bottles, Barrels, Sachet, Glasses), By End User (Individual and Commercial), By Region, Competition, Forecast & Opportunities, 2020-2030F

Market Report | 2024-10-30 | 83 pages | TechSci Research

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Report description:

India Bottled Water Market was valued at USD 3.84 Billion in 2024 and is anticipated to grow with a CAGR of 14.7% through 2030. Bottled water refers to water that is packaged in food-grade bottles intended for human consumption. It comes in various types depending on the source and treatment processes involved. This industry has seen significant growth in India due to factors such as rapid population growth, an increase in foreign students and visitors, inadequate supply of clean tap water, easy availability of bottled water, and rising health awareness. Private companies have played a crucial role in meeting the demand for clean drinking water where government supply falls short, thereby contributing to the expansion of the bottled water sector.

India in year 2024 endured one of its most severe and prolonged heatwaves, resulting in over 40,000 suspected cases of heat stroke and more than 100 heat-related fatalities. The extreme heat strained water supply systems and power grids, exacerbating a severe water crisis in Delhi. According to the India Meteorological Department, nearly 40% of the country experienced twice the usual number of heatwave days from April to June. Parts of Rajasthan saw temperatures soar to 50 degrees Celsius, while nighttime temperatures remained around 35 degrees Celsius in many areas. Wahter, a packaged drinking water brand, has achieved significant success by selling 200,000 bottles in the Delhi NCR region within its first month of launch. This milestone underscores Wahter's dedication to addressing the critical need for accessible and affordable drinking water throughout India. The brand's collaboration with the Shoobhi Foundation demonstrates the effectiveness of their platform, achieving an ROI of approximately 18% with over 12,000 scans from just 65,000 bottles. They reached more than 5 million views across Delhi NCR, including demographics typically underserved by conventional advertising methods.

Key Market Drivers**Demographic Trends**

India's demographic landscape plays a pivotal role in shaping the bottled water market. With a burgeoning population exceeding 1.3 billion people, there is an ever-increasing demand for safe and portable drinking water. Urbanization and industrialization have

led to rapid lifestyle changes, with more people moving to cities where access to clean tap water can be inconsistent or unreliable. As urban centers expand, so does the reliance on bottled water as a convenient and trustworthy source of hydration. Moreover, India is home to a large and growing middle-class population, characterized by rising disposable incomes and heightened awareness of health and wellness. This demographic shift has fueled the preference for packaged drinking water over traditional sources, as consumers prioritize safety and convenience in their daily consumption habits. The urban middle class, in particular, values the assurance of quality and purity that branded bottled water offers, thereby driving market growth.

Health Considerations

Health consciousness is a significant driver in the Indian bottled water market. Concerns over waterborne diseases and contaminants in tap water have heightened consumer awareness regarding the importance of drinking safe and clean water. Bottled water, often marketed as purified or mineral water, provides reassurance to consumers who seek a reliable alternative to tap water. The perception of bottled water as a healthier choice, free from harmful pollutants and microbes, contributes to its increasing popularity across demographics.

Furthermore, lifestyle diseases such as obesity and diabetes have spurred a growing emphasis on hydration and dietary habits. Bottled water, positioned as a calorie-free and sugar-free beverage option, aligns with health-conscious consumer preferences seeking to maintain optimal hydration without compromising on nutritional goals. This health-driven demand is further amplified by the endorsement of bottled water by healthcare professionals and nutritionists, reinforcing its role as a staple in modern dietary practices.

Infrastructure Challenges

Inadequate infrastructure for potable water distribution remains a persistent challenge in many parts of India, particularly in semi-urban and rural areas. Limited access to clean tap water compels residents to rely on alternative sources, including bottled water, to meet their daily hydration needs. The bottled water industry fills this crucial gap by providing a ready-to-consume solution that ensures consistent quality and safety, regardless of geographical location or water supply reliability.

Moreover, frequent episodes of water contamination and pollution incidents underscore the vulnerability of public water systems, prompting consumers to seek dependable alternatives. Bottled water, with its stringent quality control measures and packaging standards, offers a reliable option that safeguards against potential health risks associated with untreated or unsafe drinking water. As infrastructure development efforts continue to address water supply deficiencies nationwide, the bottled water market remains resilient as a trusted choice for households, institutions, and businesses seeking reliable access to clean drinking water.

Economic Factors

Economic factors play a pivotal role in shaping the dynamics of the bottled water market in India. The country's growing economy and rising disposable incomes have bolstered consumer spending power, allowing for increased expenditure on premium and branded bottled water products. Rising urbanization and changing consumer lifestyles have also contributed to the willingness to pay a premium for perceived quality and convenience in packaged drinking water.

Furthermore, the competitive pricing strategies adopted by bottled water brands have democratized access to safe drinking water across diverse socioeconomic segments. Economies of scale in production and distribution have enabled manufacturers to optimize costs while maintaining competitive retail pricing, making bottled water accessible to a broader spectrum of consumers beyond urban centers. This affordability factor, coupled with the assurance of product safety and quality, continues to drive market expansion and penetration into untapped regional markets.

Consumer Preferences

Consumer preferences and evolving tastes play a crucial role in shaping the bottled water market landscape in India. Beyond basic hydration needs, preferences for specific water characteristics such as taste, mineral content, and packaging formats influence purchasing decisions among diverse demographic segments. Bottled water brands cater to these preferences by offering a variety of product variants, including natural mineral water, purified drinking water, flavored water, and functional water enriched with vitamins or electrolytes. Packaging innovation also plays a pivotal role in enhancing consumer appeal and convenience, with options ranging from single-serve PET bottles to larger containers for household consumption. Eco-friendly packaging initiatives, such as recyclable materials and lightweight designs, resonate with environmentally conscious consumers seeking sustainable consumption choices. The customization of product offerings and packaging formats underscores the industry's responsiveness to consumer feedback and market trends, driving continued innovation and market growth in the

bottled water segment

Key Market Challenges

Regulatory Issues

One of the primary challenges facing the bottled water market in India relates to regulatory compliance and oversight. The industry is subject to various regulations and standards set by regulatory bodies such as the Food Safety and Standards Authority of India (FSSAI). Ensuring compliance with these standards across different states and regions can be complex and resource-intensive for bottled water manufacturers.

Moreover, inconsistencies in regulatory enforcement and interpretation across different jurisdictions can create challenges in maintaining uniform quality and safety standards. This variability can lead to consumer skepticism regarding the reliability and purity of bottled water products, impacting market trust and brand reputation.

Additionally, periodic changes in regulatory requirements or new guidelines can necessitate adjustments in production processes, labeling requirements, or packaging standards, posing operational challenges for industry players. The need for continuous monitoring and adaptation to regulatory developments remains a persistent challenge in the bottled water market in India.

Environmental Concerns

Environmental sustainability is a growing concern for the bottled water industry globally, and India is no exception. The production, packaging, and disposal of plastic bottles used for bottled water contribute to environmental pollution, particularly plastic waste accumulation. The widespread use of single-use PET bottles raises concerns about resource depletion, energy consumption, and carbon emissions associated with manufacturing and transportation.

Moreover, inadequate recycling infrastructure and low rates of plastic bottle recycling exacerbate environmental impacts, leading to littering and landfill accumulation. The perception of bottled water as contributing to plastic waste pollution has prompted calls for sustainable packaging alternatives and heightened consumer awareness about environmental stewardship.

Addressing these environmental concerns requires industry initiatives such as promoting recycling programs, investing in eco-friendly packaging solutions (e.g., biodegradable materials), and advocating for responsible consumption practices among consumers. Collaborative efforts with government agencies, non-governmental organizations (NGOs), and recycling stakeholders are essential to mitigate the environmental footprint of the bottled water market in India.

Infrastructure Limitations

Infrastructure challenges, particularly related to water supply and distribution, pose significant hurdles for the bottled water market in India. Despite urbanization and economic growth, access to clean and reliable tap water remains inconsistent in many regions, especially in semi-urban and rural areas. This reliance on bottled water as an alternative drinking water source underscores the importance of robust infrastructure for water purification, storage, and distribution.

Furthermore, logistical challenges in transporting bottled water products across diverse geographical locations can impact supply chain efficiency and operational costs. Limited access to cold storage facilities and reliable transportation networks in remote areas can hinder market reach and distribution capabilities for bottled water manufacturers.

Addressing infrastructure limitations requires investments in water treatment facilities, pipeline networks, and storage infrastructure to improve access to potable water supplies. Collaboration between public and private sectors is essential to enhance infrastructure development and ensure sustainable water management practices that support the bottled water industry's growth and resilience.

Market Competition

Intense competition within the bottled water market poses challenges for new entrants and existing players alike. The market is characterized by a diverse range of brands offering various product categories such as natural mineral water, purified drinking water, flavored water, and functional beverages. Brand differentiation, pricing strategies, and marketing initiatives play critical roles in capturing and retaining market share amid competitive pressures.

Established brands often leverage economies of scale, extensive distribution networks, and strong brand equity to maintain competitive advantages. New entrants face barriers to market entry, including regulatory compliance costs, distribution challenges, and brand recognition hurdles. Differentiating products based on quality, innovation, and consumer preferences is essential for competing effectively in a saturated market environment.

Moreover, price sensitivity among consumers and fluctuating raw material costs (e.g., PET resin) can impact profit margins and

pricing strategies within the bottled water industry. Effective market segmentation and targeted marketing campaigns tailored to diverse consumer segments can help navigate competitive pressures and sustain growth in a competitive market landscape.

Consumer Awareness and Perception

Consumer awareness and perception regarding bottled water quality, safety, and health benefits influence purchasing decisions and market dynamics. Misconceptions or misinformation about tap water quality versus bottled water purity can shape consumer preferences and behavior. Effective communication of product attributes, quality certifications, and transparent labeling practices are essential to building consumer trust and loyalty.

Moreover, concerns about plastic packaging waste and environmental sustainability increasingly influence consumer preferences toward eco-friendly alternatives or refillable options. Educating consumers about recycling practices, sustainable consumption habits, and the environmental impact of bottled water can foster responsible consumer behavior and enhance market sustainability.

Addressing consumer awareness challenges requires industry efforts to promote transparency, ethical practices, and corporate social responsibility initiatives. Engaging with consumers through digital platforms, educational campaigns, and community outreach programs can foster informed decision-making and enhance brand credibility within the bottled water market in India.

Key Market Trends

Shift Towards Premium and Functional Waters

One notable trend in the Indian bottled water market is the increasing demand for premium and functional waters. As consumers become more health-conscious and discerning about their beverage choices, there is a growing preference for bottled waters that offer additional benefits beyond basic hydration. Functional waters enriched with vitamins, minerals, electrolytes, or antioxidants are gaining popularity, catering to specific health and wellness needs.

Premiumization within the bottled water segment is driven by perceptions of higher quality, purity, and added value through unique packaging, exotic water sources, or enhanced hydration properties. Brands are leveraging these trends by introducing innovative product formulations and marketing strategies that emphasize health benefits and differentiation from traditional bottled water offerings.

Moreover, the rise of lifestyle diseases such as obesity and diabetes has fueled demand for functional waters that offer hydration with added health benefits. Products targeting niche segments such as sports enthusiasts, fitness-conscious individuals, and urban professionals seeking convenient, on-the-go hydration solutions are driving growth in the premium and functional water categories.

Sustainability Initiatives and Eco-Friendly Packaging

Environmental sustainability has become a significant trend influencing the bottled water market in India. Concerns over plastic pollution and environmental impact have prompted industry players to adopt sustainable packaging practices and eco-friendly initiatives. Brands are increasingly focusing on reducing the environmental footprint of their operations by using recyclable materials, lightweight packaging, and promoting recycling programs.

Initiatives such as promoting refillable bottles, adopting biodegradable packaging materials, and supporting plastic waste management initiatives are gaining traction among environmentally conscious consumers. These efforts not only address consumer concerns about plastic waste but also enhance brand reputation and corporate social responsibility credentials within the competitive market landscape.

Government regulations and industry standards advocating for sustainable practices and environmental stewardship further reinforce the adoption of eco-friendly packaging solutions in the bottled water sector. Companies that proactively embrace sustainable business practices are well-positioned to capitalize on consumer preferences for environmentally responsible products and contribute to long-term market sustainability.

Growth in Online Retail and Direct-to-Consumer Channels

The rise of e-commerce platforms and digital retail channels has transformed the distribution landscape of the bottled water market in India. Online retail offers convenience, accessibility, and wider consumer reach, allowing brands to connect directly with consumers and bypass traditional distribution channels. This shift is particularly significant in urban areas where digital penetration is high, and consumers prioritize convenience in purchasing daily essentials.

Brands are leveraging digital marketing strategies, promotional campaigns, and personalized customer experiences to enhance

brand visibility and engagement in the online marketplace. Subscription models, bundled offerings, and promotional discounts are used to incentivize repeat purchases and foster brand loyalty among online shoppers.

Furthermore, direct-to-consumer (DTC) initiatives enable brands to gather valuable consumer insights, optimize inventory management, and respond quickly to changing market trends and consumer preferences. The integration of technology and data analytics in e-commerce platforms facilitates targeted marketing campaigns, personalized recommendations, and seamless customer interactions, driving growth and competitiveness in the bottled water market.

Rising Demand for Natural and Organic Products

There is a growing consumer preference for natural and organic bottled water products in India, driven by increasing awareness of health, sustainability, and ethical consumption practices. Natural mineral water sourced from pristine environments and free from chemical treatments appeals to consumers seeking purity and authenticity in their beverage choices.

Organic certifications and claims of minimal processing resonate with health-conscious consumers who prioritize transparency and traceability in food and beverage products. Brands that emphasize natural sourcing, sustainable practices, and ethical stewardship of water resources are gaining favor among discerning consumers seeking holistic health benefits and environmental responsibility.

Market trends indicate a shift towards transparency in labeling, certifications, and product claims related to natural and organic bottled water offerings. Brands that communicate their commitment to quality, purity, and sustainable sourcing practices are well-positioned to capitalize on the growing demand for natural and organic products in the competitive bottled water market in India.

Segmental Insights

Packaging Insights

The Bottles segment dominated the India Bottled Water Market primarily due to convenience, accessibility, and consumer preference for portable hydration solutions. Bottled water packaged in PET (Polyethylene Terephthalate) bottles offers convenience for on-the-go consumption, making it popular among urban and rural consumers alike. These bottles are lightweight, durable, and easily recyclable, addressing logistical challenges in distribution and storage across diverse geographical areas. The segment benefits from extensive retail penetration, including supermarkets, convenience stores, and online platforms, ensuring widespread availability and visibility.

Moreover, PET bottles meet stringent quality and safety standards, assuring consumers of the product's purity and freshness. The affordability and scalability of PET packaging enable manufacturers to cater to varying consumer preferences and market segments, from budget-conscious buyers to premium product enthusiasts. Overall, the dominance of Bottles by packaging segment in the India Bottled Water Market reflects its alignment with consumer lifestyles, regulatory compliance, and industry innovation, contributing to its sustained growth and market leadership.

Regional Insights

The North region segment dominated the India Bottled Water Market primarily due to several key factors. Firstly, the North region, which includes states like Delhi, Uttar Pradesh, Rajasthan, Punjab, Haryana, and Uttarakhand, has a large population base and significant urbanization levels. Urban centers in the North region experience higher demand for bottled water due to issues with municipal water quality and reliability, driving consumers to opt for packaged drinking water as a safer alternative. The North region encompasses major metropolitan areas such as Delhi-NCR, which are hubs for economic activity, tourism, and corporate offices. These urban centers generate substantial demand for bottled water from offices, hotels, restaurants, and households, contributing significantly to market volume and revenue.

Furthermore, the North region benefits from robust distribution networks and retail infrastructure, ensuring widespread availability and accessibility of bottled water products. Manufacturers and brands strategically focus on expanding their presence in this lucrative market segment through targeted marketing campaigns, promotional activities, and product innovations tailored to local preferences and consumer behavior. Overall, the dominance of the North region segment in the India Bottled Water Market underscores its economic significance, population density, urbanization trends, and infrastructure development, making it a pivotal driver of market growth and leadership.

Key Market Players

 Bisleri International Pvt. Ltd.

- Varun Beverages Ltd
- Coca-Cola India Pvt. Ltd
- Parle Agro Private Limited
- Tata Consumer Products Limited
- PepsiCo India Holdings Pvt Ltd
- RMD Foods & Beverages Pvt. Ltd.
- United Breweries Limited
- Picasona Agriculture Products Private Limited
- Narang Group (RN)

Report Scope:

In this report, the India Bottled Water Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□ India Bottled Water Market, By Stock Keeping Units:

- o Less than 1L
- o 1L-2L
- o More than 2L

□ India Bottled Water Market, By Packaging:

- o Bottles
- o Barrels
- o Sachet
- o Glasses

□ India Bottled Water Market, By End User:

- o Individual
- o Commercial

□ India Bottled Water Market, By Region:

- o North
- o South
- o East
- o West

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the India Bottled Water Market.

Available Customizations:

India Bottled Water Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

□ Detailed analysis and profiling of additional market players (up to five).

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