

Europe Bottled Water - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Bottled Water Market size is estimated at USD 75.54 billion in 2025, and is expected to reach USD 90.71 billion by 2030, at a CAGR of 3.73% during the forecast period (2025-2030).

As a response to the COVID-19 crisis, on March 17, 2020, the European Commission closed the European Union borders of 27 member states to all non-essential travels for a minimum of 30 days, which severely impacted travel and tourism that translated to spending on bottled water, thus, impacting the sales of bottled water in Europe. Sales of bottled water have been facing hindrances in Europe as some of the major markets for bottled water are under lockdown and social distancing. As a result, many companies started to shift to online channels to gain traction in the market. Almost all the companies have adopted adequate measures to return to their everyday operations.

Over the period, the Europe bottled water market is growing with increasing sales in the sparkling and still water categories through both off-trade and on-trade channels. Sales of bottled water are rising from online retail stores in areas where home deliveries are a prominent sales channel. Increasing consumer concerns regarding the consumption of contaminated tap water is also one of the prime factors contributing to the market growth. Alongside, quality regulations play a pivotal role in boosting consumer confidence in the bottled water market in Europe.

Increased awareness, with the help of industry groups and the government, can help address some of the challenges while creating new opportunities for bottled water manufacturers by enhancing consumer perception of packaging sustainability. Thus, key players can tap such opportunities by introducing recyclable and eco-friendly packaging materials. The convenience of handling and mobility of the bottles are other factors driving the market. The rising concerns about the pollution caused by plastic are forcing the players to shift toward environment-friendly packaging.

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Europe Bottled Water Market Trends

Premiumization with the Growth of Fortified and Flavored Water

Premium bottled water is showing strong value growth across Europe, especially in Western Europe, wherein premium bottled waters have distinctly established themselves from the mainstream by setting up a unique selling point, attracting a target group of high-income consumers, and commanding a higher value than the mainstream market. The purity of the water is often highlighted as a unique selling proposition by the market players, while some brands add functionality, which boosts the value. Additionally, the branding, positioning, and packaging of the product, such as glass packaging, are also helping manufacturers to create a more premium image. Thus, with the rapid premiumization and growth of fortified and flavored water, the bottled water market is expected to grow. Meanwhile, premium water brands are moving beyond plain bottled water and into flavored water bottles too. San Pellegrino, Evian, Volvic, and Perrier expanded their ranges from pure water to flavors and infusions. Furthermore, due to consumers' growing preference for health and wellness trends, many companies are entering the market with new products. For instance, in May 2021, Pepsi Co., launched Soulboost, a functional sparkling water brand infused with ingredients L-theanine and Panax ginseng while targeting wellness-conscious consumers across the globe, including the European region.

Germany is the Largest Market

Germany forms one of the largest bottled water markets in the world. Plastic packaging is preferred over the glass in almost every country. Even in Germany, where glass has a strong presence, PET is the most dynamic and rapidly growing segment. Consequently, brands like Volvic Germany completed their switch to 100% rPET for its full range of water bottles as of 2021. In Germany, sparkling water is often served with meals, and thus, it holds a prominent share in the market. However, Germans are trying to live healthier lifestyles and have replaced sweetened drinks with water, especially functional water. The growing demand for functional water is boosting the market growth. As to the Beverage Marketing Corporation, Germany consumed more bottled water in 2019 than it had in the last five years, with about 168 liters of bottled water consumed per person in the year 2019. Thus, the increasing usage of bottled water in the country is expected to strengthen the market growth in the forecast period. Gerolsteiner Brunnen continued to lead the competitive and fragmented bottled water category in Germany. It remained the leading player in off-trade sales through foodservice channels. However, the sales are mainly driven by its sparkling mineral bottled water.

Europe Bottled Water Industry Overview

The Europe bottled water market is highly competitive with international and local players. Some of the globally renowned companies in the market include Danone SA, Gerolsteiner Brunnen GmbH & Co. KG, The Coca-Cola Company, PepsiCo Inc., Nestle SA., Ferrarelle Spa, RheinfelsQuellen H. Hovelmann GmbH & Co. KG, and Highland Spring Limited, among others. These along with other domestic players are trying to capture the market share by introducing new variants of products with significant differentiations from the existing products. Different regional markets are captured by independent players which are local players in their native market. These players have access to prominent distribution channels to maintain and improve the availability of their products. Many brands are also focusing on innovative packaging like label-free bottles, which are environment-friendly and sustainable, thereby attracting the attention of such customers.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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