

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

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Report description:

Pakistan Bottled Water Market Analysis

The Pakistan bottled water market size stands at USD 401.45 million in 2025 and is projected to grow at an 11.37% CAGR to reach USD 687.82 million by 2030. This expansion reflects mounting health concerns linked to tap-water contamination, rapid urbanization that increases on-the-go consumption, and widening retail access that brings packaged drinking water within reach of ever-larger consumer segments. Multinational and domestic brands now compete head-to-head on quality, price, and sustainability credentials, while regulatory crackdowns on non-compliant producers accelerate market consolidation. Heightened climate volatility, reflected in prolonged droughts and erratic rainfall, further undermines municipal supply reliability and sustains demand for packaged alternatives, particularly in Punjab, Sindh, and the Islamabad Capital Territory. Against this backdrop, premium, sparkling, and functional offerings are carving out fast-growing niches as middle-class buyers trade up for perceived purity, taste, and lifestyle alignment.

Pakistan Bottled Water Market Trends and Insights

Rising health and contamination concerns

Health and contamination concerns are on the rise, significantly driving the growth of the Pakistan bottled water market. Increasing awareness about waterborne diseases and the adverse effects of consuming contaminated water has led to a surge in demand for safe and hygienic drinking water. Consumers are increasingly opting for bottled water as a reliable and convenient

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solution to address these concerns. Additionally, the lack of access to clean and safe drinking water in several regions of Pakistan further amplifies the need for bottled water, making it a critical factor in the market's expansion. The Pakistan Council of Research in Water Resources (PCRWR) recently labeled 28 bottled brands as unsafe due to quality concerns, an action that eliminated fringe players from the market. This regulatory intervention has funneled demand toward certified and trusted labels, as consumers increasingly prioritize safety and quality assurance. Consequently, established players with certified products have gained a competitive edge, further solidifying their position in the market.

Urbanisation-driven on-the-go consumption

Pakistan's urban population is projected to reach 99.4 million by 2030, creating unprecedented demand for portable hydration solutions. This urbanization trend significantly drives the bottled water market in Pakistan by increasing the need for convenient, on-the-go consumption options. Urban consumers, who lead increasingly fast-paced lifestyles, actively seek bottled water as a practical and hygienic solution to meet their hydration needs while on the move. USDA's Pakistan Exporter Guide highlights the expansion of modern retail infrastructure, which ensures bottled water is readily available in supermarkets, convenience stores, and on growing e-commerce platforms. The rise of e-commerce platforms, in particular, has made it easier for urban consumers to access bottled water, further supporting the market's growth. Urban consumers actively invest in premium and functional water segments, showing a higher willingness to pay for superior hydration experiences that align with their evolving preferences. This shift toward packaged consumption reflects broader lifestyle changes in Pakistan's rapidly modernizing urban centers, where convenience, quality, and health-conscious choices are becoming increasingly important.

Fluctuating packaging/raw material costs

Rising and falling costs of packaging and raw materials significantly impact the Pakistan Bottled Water Market. These fluctuations create challenges for manufacturers in maintaining consistent production costs and pricing strategies. The volatility in raw material prices, such as plastic resins used for bottle manufacturing, directly affects the overall cost structure. Additionally, packaging materials, which are crucial for product safety and branding, often experience price variations due to changes in supply chain dynamics, import duties, and global market trends. Such unpredictability can hinder profit margins and force companies to either absorb the costs or pass them on to consumers, potentially affecting demand. Furthermore, the dependency on imported raw materials exposes the market to currency exchange rate fluctuations, further exacerbating cost instability. Manufacturers also face challenges in securing a steady supply of high-quality materials, as disruptions in the global supply chain can lead to shortages and increased prices. These factors collectively create a complex environment for bottled water producers, making it difficult to maintain competitive pricing while ensuring profitability.

Other drivers and restraints analyzed in the detailed report include:

Climate-induced tap-water unreliability / Government sanitation initiatives / Environmental concerns about plastic waste /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

In 2024, still water dominates the Pakistan bottled water market, commanding a substantial 72.14% share. This large market presence highlights the strong preference of Pakistani consumers for basic hydration solutions. The widespread concerns over tap water contamination have significantly boosted reliance on still bottled water as a safer and more accessible alternative. Consumers prioritize purity and safety, which reinforces the demand for still water across urban and rural regions alike. Additionally, the affordability and availability of still water further contribute to its leading position in the market. Overall, still water remains the most trusted option for hydration amidst ongoing public health awareness.

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On the other hand, sparkling water represents the fastest-growing segment in the Pakistan bottled water market, projected to achieve a robust 14.14% compound annual growth rate (CAGR) through 2030. This rapid growth is largely driven by increasing urbanization, which exposes consumers to modern lifestyles and new beverage choices. Younger demographics, in particular, are gravitating toward sparkling water due to its refreshing taste and perceived lifestyle appeal. The rising influence of health-conscious trends and premiumization also fuels the demand for sparkling water. Moreover, improvements in distribution channels and marketing efforts are helping this segment gain traction. As a result, sparkling water is poised to become a significant player in Pakistan's evolving bottled water landscape over the coming years.

In 2024, the mass price segment holds a commanding 84.28% share of the Pakistan bottled water market, underscoring the price sensitivity of Pakistani consumers. Affordability remains a critical factor driving purchasing decisions, especially given the economic challenges faced by many households. This segment's dominance reflects the widespread demand for budget-friendly hydration options accessible to a large portion of the population. Consumers in this category prioritize cost-effectiveness without compromising basic quality and safety standards. Availability of mass-priced bottled water in various retail outlets further supports its extensive market penetration. Overall, the mass price segment serves as the backbone of the bottled water industry in Pakistan, catering to the essential hydration needs of the majority.

Conversely, the premium segment is the fastest-growing sector in the Pakistan bottled water market, projected to grow at a robust 13.46% CAGR through 2030. This growth signals a shifting consumer landscape where a notable segment of the population is increasingly willing to invest in higher quality products. Factors such as superior water purity, aesthetically appealing packaging, and trusted brand reputation drive the appeal of premium bottled water. Rising disposable incomes and greater health awareness among urban consumers contribute to this upward trend. Additionally, marketing efforts highlighting the benefits of premium water reinforce consumer confidence and desire for elevated experiences. As a result, the premium segment is set to gain significant momentum alongside evolving consumer preferences in the coming years.

The Pakistan Bottled Water Market Report is Segmented by Product Type (Still Water, Sparkling Water, Functional Water, Flavoured Water), Price Point (Mass, Premium), Packaging Type (PET Bottles, Glass Bottles, and Others), Distribution Channel (On Trade, Off-Trade), and Geography (Punjab, Sindh, Khyber Pakhtunkhwa, Balochistan, Islamabad Capital Territory). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Nestle S.A / PepsiCo, Inc / The Coca-Cola Company / Qarshi Industries (Pvt.) Ltd. / Masafi LLC / Gourmet Foods (Pvt.) Ltd. / Murree Brewery Co. Ltd. / Danone S.A. / Reignwood Investments UK Ltd. (VOSS) / Sufi Group of Industries / PakTurk Bottlers / 3B Water Engineering & Services (Pvt.) Ltd. / Culligan Pakistan / Blue Water (Pvt.) Ltd. / Pineo Bottled Water / Shezan International Ltd. (Shezan Spring) / Sparkletts / Haleeb Foods Ltd. (AquaMax) / Al-Safa Water Company / Ravi Beverages (Springley) /

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Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

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2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET LANDSCAPE

4.1 Market Overview

4.2 Market Drivers

4.2.1 Rising health and contamination concerns

4.2.2 Urbanisation-driven on-the-go consumption

4.2.3 Climate-induced tap-water unreliability

4.2.4 Expanding retail channels

4.2.5 Concerns over tap water quality

4.2.6 Government sanitation initiatives

4.3 Market Restraints

4.3.1 Fluctuating packaging/raw material costs

4.3.2 Environmental concerns about plastic waste

4.3.3 Quality consistency challenges

4.3.4 Intense brand competition hindering market growth

4.4 Value / Supply-Chain Analysis

4.5 Regulatory Landscape

4.6 Technological Outlook

4.7 Porter's Five Forces

4.7.1 Bargaining Power of Buyers/Consumers

4.7.2 Bargaining Power of Suppliers

4.7.3 Threat of New Entrants

4.7.4 Threat of Substitute Products

4.7.5 Intensity of Competitive Rivalry

5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

5.1 By Product Type

5.1.1 Still Water

5.1.2 Sparkling Water

5.1.3 Functional Water

5.1.4 Flavoured Water

5.2 By Price Point

5.2.1 Mass

5.2.2 Premium

5.3 By Packaging Type

5.3.1 PET Bottles

5.3.2 Glass Bottles

5.3.3 Others

5.4 By Distribution Channel

5.4.1 On Trade

5.4.2 Off-Trade

5.4.2.1 Supermarkets/Hypermarkets

5.4.2.2 Convenience Stores

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- 5.4.2.3 Online Retail Stores
- 5.4.2.4 Home and Office Delivery (HOD)
- 5.4.2.5 Other Distribution Channels
- 5.5 By Geography
 - 5.5.1 Punjab
 - 5.5.2 Sindh
 - 5.5.3 Khyber Pakhtunkhwa
 - 5.5.4 Balochistan
 - 5.5.5 Islamabad Capital Territory

6 COMPETITIVE LANDSCAPE

- 6.1 Market Concentration
- 6.2 Strategic Moves
- 6.3 Market Share Analysis
- 6.4 Company Profiles (includes Global Overview, Market-level Overview, Core Segments, Financials, Strategic Information, Market Rank/Share, Products & Services, Recent Developments)
 - 6.4.1 Nestle S.A
 - 6.4.2 PepsiCo, Inc
 - 6.4.3 The Coca-Cola Company
 - 6.4.4 Qarshi Industries (Pvt.) Ltd.
 - 6.4.5 Masafi LLC
 - 6.4.6 Gourmet Foods (Pvt.) Ltd.
 - 6.4.7 Murree Brewery Co. Ltd.
 - 6.4.8 Danone S.A.
 - 6.4.9 Reignwood Investments UK Ltd. (VOSS)
 - 6.4.10 Sufi Group of Industries
 - 6.4.11 PakTurk Bottlers
 - 6.4.12 3B Water Engineering & Services (Pvt.) Ltd.
 - 6.4.13 Culligan Pakistan
 - 6.4.14 Blue Water (Pvt.) Ltd.
 - 6.4.15 Pineo Bottled Water
 - 6.4.16 Shezan International Ltd. (Shezan Spring)
 - 6.4.17 Sparkletts
 - 6.4.18 Haleeb Foods Ltd. (AquaMax)
 - 6.4.19 Al-Safa Water Company
 - 6.4.20 Ravi Beverages (Springley)

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

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