

## **United Arab Emirates Bottled Water - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

United Arab Emirates Bottled Water Market Analysis

The UAE bottled water market, valued at USD 3.95 billion in 2025, is projected to reach USD 5.16 billion by 2030, growing at a CAGR of 5.49%. The market's strength is underpinned by the UAE's distinction of having the highest per capita bottled water consumption globally. This consumption pattern is influenced by the country's extreme climate conditions, substantial immigrant population, and robust tourism sector. The UAE's position as a leading tourist destination in the Middle East has significantly contributed to the increased demand for bottled water, with consumers preferring it over tap water due to its assured purity. The market is further characterized by growing consumer interest in functional, fortified, and flavored water variants, reflecting evolving preferences for specialized hydration solutions. These factors collectively indicate a sustained growth trajectory for the market, with opportunities for product innovation and market expansion.

United Arab Emirates Bottled Water Market Trends and Insights

Rising Demand for Functional Water From Fitness Enthusiasts

Health-conscious consumers in the UAE increasingly adopt functional water products as the wellness market expands beyond traditional hydration needs. The trend gains momentum with the proliferation of fitness facilities across Dubai and Abu Dhabi, which serve as key distribution channels for enhanced water products. This health-focused mindset, combined with high disposable income levels and growing awareness of preventive health measures, enables consumers to pay premium prices for

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functional benefits. According to the Gym Nation report from 2025, 92% of respondents in UAE and the KSA aspire to improve their health, further driving the category's growth beyond traditional sports drinks into daily consumption patterns, particularly among expatriate communities seeking wellness-oriented products. Additionally, the functional water segment benefits from clear regulatory oversight through Emirates Quality Mark standards, which ensures consumer confidence in product claims and nutritional content.

### Growing Tourism and Hospitality Sector

Tourism expansion creates sustained demand for bottled water across the UAE's hospitality infrastructure, with hotel guests consuming significantly higher volumes than residents. The UAE welcomed 18.72 million overnight visitors in Dubai during January-December 2024, representing a 9% increase compared to 2023, according to the Department of Economy and Tourism. This growth reinforces the country's position as a global luxury travel destination and drives substantial demand for portable hydration solutions. Additionally, the hospitality sector's shift toward sustainability presents opportunities for local bottled water brands to capture market share from imported alternatives, reducing carbon footprints while maintaining service standards. These factors collectively indicate a robust growth trajectory for the bottled water market in the region.

### Environmental Concerns and Plastic Waste

Consumer awareness campaigns and media coverage highlighting plastic pollution in marine environments, coupled with regulatory pressures like the UAE's Net Zero 2050 commitment, create significant market restraints for the bottled water industry. The Dubai Can initiative exemplifies government efforts to reduce PET bottle usage, encouraging hotels and retail establishments to adopt refillable water systems and stations. These environmental concerns influence purchasing decisions, particularly among environmentally conscious consumers, while corporate sustainability reporting requirements compel companies to reassess their packaging strategies to balance convenience with environmental responsibility.

Other drivers and restraints analyzed in the detailed report include:

Expansion of Food Service Establishments / Government Regulations and Quality Standards Driving Growth / Strong Competition From Water Purifier Appliances /

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

### Segment Analysis

Still bottled water dominates the UAE market with an 87.54% share in 2024, driven by established distribution networks, competitive pricing, and broad consumer acceptance across demographic groups. This commanding position reflects consumer preference for traditional hydration solutions and price sensitivity across mass market segments. The widespread availability of still water through retail channels, including supermarkets, convenience stores, and vending machines, reinforces its market dominance. Additionally, the hot climate of the UAE and the cultural emphasis on regular hydration contribute to the sustained demand for still bottled water.

Meanwhile, functional and flavored bottled water is emerging as the fastest-growing segment, projected to grow at a 5.96% CAGR through 2030. This growth is supported by product innovation and health-conscious consumers seeking enhanced hydration benefits. The segment's expansion is particularly notable in urban markets, where higher disposable income levels enable premium positioning strategies and value-added products, aligning with broader wellness trends among UAE residents and expatriate communities. Manufacturers are responding to this trend by introducing new variants with added vitamins, minerals, and natural flavors. The growing focus on sugar-free alternatives and clean label products further strengthens the appeal of

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functional and flavored water options.

Mass market bottled water products dominate the UAE market with a 72.44% share in 2024, driven by price-sensitive consumption patterns across diverse demographic segments. The category's strong position is attributed to competitive pricing strategies, extensive distribution networks, and consumer focus on functional hydration rather than premium positioning. Local manufacturers have successfully captured this segment by maintaining consistent quality while keeping prices accessible to the general population. The widespread availability of mass market brands through supermarkets, convenience stores, and traditional retail channels further reinforces their market dominance.

The premium bottled water segment is experiencing robust growth, with a projected CAGR of 6.63% through 2030, supported by imported brand positioning, functional water innovations, and sustainability credentials that justify higher price points. Consumer research indicates an increasing willingness to pay more for perceived quality and environmental benefits. This trend aligns with the UAE's strong economic position, reflected in its GDP per capita of USD 50,033.1 as of April 2025, according to World Bank, enabling the expansion of premium offerings that cater to affluent consumers and the hospitality sector. Premium water brands have successfully differentiated themselves through unique mineral compositions and sophisticated packaging designs. The segment's growth is further supported by the UAE's expanding luxury tourism sector, where high-end hotels and restaurants create steady demand for premium water products.

The UAE Bottled Water Market Report is Segmented by Product Type (Still Bottled Water, Sparkling Bottled Water, Functional/Flavored Bottled Water); by Packaging Format (PET Bottles, Glass Bottles, Cans); by Category (Mass, Premium); by Distribution Channel (On-Trade, Off-Trade) and by Geography (Dubai, Abu Dhabi, Sharjah and Northern Emirates, Rest of UAE). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Nestle SA / Danone SA / The Wonderful Company LLC / Reignwood Group / Sophia Water / Agthia Group PJSC / Masafi LLC / National Food Products Co. / Mai Dubai LLC / Al Bayan Purification & Bottling / PepsiCo Inc. / Al Rawabi / Loi Hein Company Ltd / Emirates Refreshments / Barakat Quality Water / Al Ain Farms / The Coca Cola Company / Dolphin Mineral Water / Dubai Crystal Mineral Water / Ma Hawa /

Additional Benefits:

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

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