

MARKET REPORT



Global Bulk/HOD Water 2019 - Key Insights and Drivers behind the Bulk/HOD Water Market Performance

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Summary

Access to potable water is still often difficult in rural areas of Africa, Asia, and MENA, and keeping bulk water at home is frequently favored over drinking from unsafe water sources. In affluent nations of the Global North, point-of-use (POU) filtration systems continue to threaten bulk/HOD water volumes in the workplace. Meanwhile, the convenience of packaged water is often favored when on the move, and tap water is deemed safe to consume in the home.

Extreme summer weather across both the northern and southern hemisphere strengthened consumption by increasing demand for refreshment at home and at work. Regions with limited access to potable municipal water typically registered the fastest growth rates, with a few exceptions, as bulk water presented the best value for money when avoiding contaminated water. When excluding Africa, Asia, and MENA, global volumes declined on average in 2018. With the other regions either experiencing very small growth or decline, the aforementioned three regions propped up the category. Out of the three, Africa registered the fastest volume growth, albeit from a low base.

The purported health benefits of mineral water gained share for the segment, while the bottled spring water segment suffered minor decline globally. Share ratio remained reasonably consistent, as expected for this rather static category. Spring and mineral water's higher average PPLs discouraged purchases in Africa, where consumers instead chose to stick with trusted table water sources.

Bulk/HOD water packaging is still majority polycarbonate, the reusability providing both financial savings and helping to reduce single-use plastic waste. However, polycarbonate often contains Bisphenol-A (BPA), which can cause tumors when leached into liquid contents. PET is on the rise, with many preferring the hygiene benefit of single-use bottles. PET is the majority material in MENA, where home consumers of bulk water prefer the thinner plastic to polycarbonate, as the former are crushable and thereby more easily disposable.

Home delivery remained the most common channel for the category worldwide (52.8% volume share). Despite losing some volume share to the faster-growing institutions channel, the continued growth of home delivery in China allowed the channel to grow globally. Volume growth of the channel was higher across Africa, which saw double-digit growth. However, due to Africa's smaller volume compared to China, the volume increase had less of an impact on a global scale. Saudi Arabia and the UAE also contributed strong growth to the channel, with busy lifestyles driving the need for convenience.

The report "Global Bulk/HOD Water Report 2019" acts as an essential tool for companies active or planning to venture in to Global Bulk/HOD Water (Soft drinks) market. The comprehensive statistics within the research handbook provides insight into the operating environment of the market and also ensures right business decision making based on emerging trends and industry model based forecasting.

GlobalData considers Bulk/HOD Water as Potable water sold in packs of over 10 liters for use in dispensers. Includes water bottled on site for use in Horeca outlets, in containers greater than 10 liters.

Scope

Global Bulk/HOD Water Report 2019 report covering over 8 Global regions comprising of Africa, Asia, Australasia, Easter Europe, Western Europe, Latin America, North America and Middle East and North Africa, provides -

- Top line value and volume growth data, % share by water source, key companies, packaging and distribution (on-/off-premise), with forecasts.
- Details of key new product launches by region.
- Overview of the competitive landscape in the Bulk/HOD Water market, with analysis of key company performance.
- Insightful and valuable analysis of the drivers behind both current and emerging trends in the Bulk/HOD water market.

Reasons to Buy

- The Global Bulk/HOD Water report allows you to evaluate forecast projections, enhancing your understanding of the evolving trends and consumption patterns.
- The report is arranged by region, giving a comprehensive view of current and emerging trends and opportunities to support corporate strategic planning.
- Identify the current and emerging trends and future growth opportunities in the global bulk/HOD water market to assess the likely impact on company's performance.
- Interrogate the data to understand both the historic and likely future performance of the global bulk/HOD water industry by region to support long-term strategic planning.

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