

Hanging on for **Pure Life**

Why the Strategies
Behind Nestlé's New
Bottled Water Brand
May Be Good for the
Company but Bad for
Public Water

food&waterwatch





About Food & Water Watch

Food & Water Watch works to ensure the food, water and fish we consume is safe, accessible and sustainable. So we can all enjoy and trust in what we eat and drink, we help people take charge of where their food comes from, keep clean, affordable, public tap water flowing freely to our homes, protect the environmental quality of oceans, force government to do its job protecting citizens, and educate about the importance of keeping shared resources under public control.

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Executive Summary

As many consumers in the United States and Europe are dropping bottled water, the industry is beginning to see a decline in sales. In fact, between 2007 and 2010, Nestlé Waters, the biggest water bottler in the world, saw its total sales drop 12.6 percent.

Today, Nestlé appears to have developed new strategies to combat this challenging sales climate, which center around its Pure Life brand. Unfortunately, while the brand has been profitable, these tactics do not bode well for public water in the United States or abroad.

The United States is the largest bottled water market in the world and has long been a major source of Nestlé's bottled water sales. The company's North American subsidiary is the biggest bottler in the United States. Today, the U.S. bottled water industry is seeing sales fall as many consumers and governments are choosing to drink tap water instead, citing concerns about the cost, energy, water use and plastic waste associated with bottled water. The CEO of Nestlé Waters North America has said that he is not concerned about tap water cutting into profits. Nevertheless, the company appears to be changing its tactics to keep its sales afloat.

Nestlé has shifted the focus of its advertising dollars in the United States to its new Pure Life brand. Between 2004 and 2009, spending on Pure Life advertising increased by more than 3000 percent; the company's nearly \$9.7 million expenditure on the brand in 2009 was more than any other bottled water company spent on a leading domestic brand, and more than Nestlé's next five spring water brands combined.

Along with this change in expenditures came a shift in strategy. Pure Life differs from Nestlé's previous brands in the United States in terms of the source of its water, the messaging used to sell it, and its target audience. Pure Life bottles municipal tap water rather than spring water, which can help the company avoid the costly conflicts over water access and labeling that have plagued its spring water operations in the past, allowing it instead to vie with its main competitors, PepsiCo and Coca-Cola, on price. The company focuses its messaging on the health benefits of bottled water, especially compared to sugary soft drinks, which improves the image of its product and helps it appeal to parents and teachers who are concerned about their children's health. It also specifically targets Hispanic immigrants in the United States and "emerging markets" in developing nations abroad — consumers who are accustomed to inadequate water infrastructure and therefore less inclined to drink from the tap because of safety concerns.

In 2009, Nestlé's Pure Life brand helped the company outperform the rest of the U.S. bottled water industry. Between 2008 and 2009, Pure Life sales grew 18 percent while every other leading brand saw sales drop. While Nestlé's revenues went down with the rest of the industry in that time period, its 3.5 percent overall sales decline was less than that of the overall industry, which went down 5 percent. The Pure Life brand also played a role in increasing the total sales of Nestlé's global water division. Although Nestlé Waters' sales declined 3.4 percent in Europe and 1.1 percent in the United States and Canada between 2009 and 2010, total sales increased by 0.4 percent, due to the 24.6 percent growth in "other regions."

While these strategies appear to have helped boost Nestlé's profits, they have not been so beneficial for consumers or the environment. No matter the source, when there is safe tap water available, bottled water comes with unnecessary costs to the consumer as well as environmental damage from the associated energy, water use and plastic waste. In addition, Nestlé's new Pure Life strategies could be especially worrisome when it comes to their potential impact on public water.

Nestlé's shift to bottling municipal water in the United States has led an industry trend in shifting from spring water to municipal water. Between 2005 and 2009, the overall volume of tap water bottled by the industry grew by 66 percent while the volume of spring water increased by only 9 percent, which means that tap water bottling expanded at more than seven times the rate of spring water bottling. Today, many public water systems are inadequately funded and facing potential water shortages; allowing a corporation to bottle and sell community water can be a raw deal for the municipality. Bottling municipal water instead of spring water does not do away with the environmental concerns, which is why residents in Sacramento, for one, opposed a new Pure Life facility that would draw on their city tap water.

In addition, selling bottled water as healthy, especially to children, distracts consumers from another option that is also healthy — the tap. Promoting the mindset that bottled water is a good source of healthy water undermines public confidence in tap water, which is especially dangerous today as our disappearing public drinking water sources need political support and funding.

While Nestlé's global water division's sales are falling in Europe, the United States and Canada, they are growing rapidly in the "emerging markets" that Nestlé is targeting in the rest of the world. In 2010, Nestlé's sales of bottled water in these "other regions" increased by 25 percent over its 2009 sales in these areas. This is problematic because specifically selling bottled water to populations around the world that do not have access to safe drinking water capitalizes on the world water crisis. While this may be profitable for Nestlé, it does not provide a long-term solution for the billions of people abroad who lack access to adequate water and sanitation. In fact, the company will likely sell bottled water to the customers abroad who can afford it, not those who are in most dire need of better water supplies.

Just as consumers in the United States are better served by properly maintained public water infrastructure than bottled water sales, the water needs of populations abroad cannot be addressed without recognizing that access to water is affected by governance. To address the world water crisis, the global community must treat access to water as a basic human right, not a source of profits.

In the United States, it is important to support public drinking water rather than bottled water — no matter how cleverly the product is advertised. That is why Food & Water Watch is working to promote federal funding for drinking water infrastructure and water programs that will keep our public water clean and safe for future generations.

Water links us to our neighbor in a way more profound and complex than any other.

– John Thorson



Introduction

Between 2008 and 2009, only one leading bottled water brand in the United States posted an increase in sales: Nestlé Pure Life.¹ The brand's 18 percent growth was a huge outlier in a year where every single other leading brand saw sales decline, and overall industry sales dropped 5 percent (see Table 1).²

Table 1: Change in sales, 2008-2009

Brands	2008/09
Aquafina	-10.00%
Dasani	-7.90%
Poland Spring	-6.40%
Nestlé Pure Life	18.00%
Arrowhead	-11.90%
Crystal Geysler	-10.40%
Deer Park	-5.60%
Ozarka	-8.40%
Ice Mountain	-5.70%
Zephyrhills	-10.90%
Percent drop for the 10 leading brands	-6.20%
All Others	-3.80%
Percent drop for entire industry	-5.20%

Source: Beverage Marketing Corporation. "Bottled Water in the U.S." 2010 Edition. July 2010 at 150.

Pure Life is the newest of Nestlé Waters North America's top brands.³ Nestlé Waters North America is the U.S.-based subsidiary of Nestlé, a multinational corporation based in Switzerland.⁴ In 2009, the company owned a larger portion of the U.S. market than any other company. It was responsible for 35.4 percent of total industry sales,⁵ owned seven out of the 10 leading brands in the United States, including Pure Life, and brought in revenues worth \$3.8 billion.⁶ (See Table 2.) Although its sales went down in 2009, along with the other leading companies, Nestlé Waters North America's 3.5 percent decline⁷ outperformed the rest of the industry.

The Beverage Marketing Corporation attributes Nestlé's relative success to its competitive advantage and its skillful marketing.⁸ These traits appear to have contributed to the success of Pure Life, which differs from Nestlé's previous brands in the source of its water, the messaging the company is using to sell it, and the target audience for its advertising.

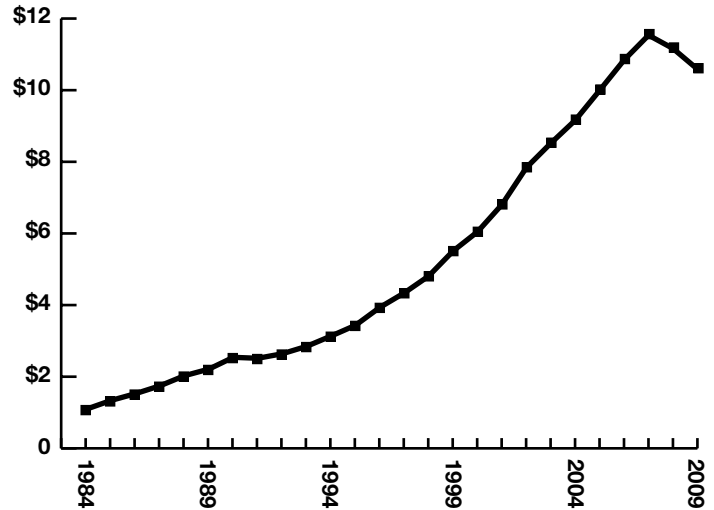
Unfortunately, while the tactics that the company is using to sell Pure Life may be boosting Nestlé's bottom line, they may not bode so well for the future of public water.

Background: Troubled Times for Bottled Water

Nestlé's change in tactics with its new Pure Life brand has likely been influenced by the new challenging sales climate for bottled water. Starting in 2008, the multi-billion dollar industry saw sales decline for two years in a row, a trend that the Beverage Marketing Corporation attributes to a bad overall economy and a "growing eco-consciousness."⁹

This recent downturn is an anomaly for a product that industry analysts describe as "one of the great success stories in the history of the beverage industry,"¹⁰ a product that has "transitioned from its precocious youth to energetic adulthood" and now has a "firmly entrenched position in the U.S. marketplace."¹¹ In the 25 years between 1984 and 2009, total estimated wholesale dollars increased tenfold — from 1 billion to more than 10 billion dollars¹² (see Chart 1), making it the second-best-selling beverage category, next to carbonated soft drinks.¹³

Chart 1: Estimated Wholesale Sales for the U.S. Bottled Water Market, in Billions of Dollars, 1994-2009



Source: Beverage Marketing Corporation. "Bottled Water in the U.S." 2010 Edition. July 2010 at 20.

Table 2: Top 10 U.S. Bottled Water Brands in Wholesale Dollar Sales, 2009

	Brand	Parent Company	Total Sales (in millions)
1	Aquafina	PepsiCo	\$1,176.9
2	Dasani	Coca-Cola	\$1,156.9
3	Poland Spring	Nestlé Waters North America	\$830.4
4	Nestlé Pure Life	Nestlé Waters North America	\$698.8
5	Arrowhead	Nestlé Waters North America	\$478.9
6	Crystal Geyser	Crystal Geyser Roxane	\$475.4
7	Deer Park	Nestlé Waters North America	\$456.8
8	Ozarka	Nestlé Waters North America	\$319.8
9	Ice Mountain	Nestlé Waters North America	\$261.6
10	Zephyrhills	Nestlé Waters North America	\$225.8

Source: Beverage Marketing Corporation. "Bottled Water in the U.S." 2010 Edition. July 2010 at 150.

A large portion of the change in outlook appears to be due to a growing consumer awareness of the social and environmental concerns associated with the product. The bottled water industry uses water, consumes energy and creates mountains of plastic waste as a result of the production and transport of its product. Researchers at the Pacific Institute found that in 2006, the industry used three liters of water to produce each liter of bottled water, and that in 2007, the U.S. bottled water industry consumed the energy equivalent of between 32 and 54 million barrels of oil.¹⁴ They also calculated that bottled water production can take up to 2,000 times as much energy as tap water if the plastic production, water extraction, bottling and transportation costs are all factored in.¹⁵ In addition, the Government Accountability Office reported that in 2006, about three-quarters of plastic water bottles were not recycled.¹⁶ At this rate, millions of tons of empty plastic bottles end up in landfills, where they may never decompose. Meanwhile, for many cash-strapped consumers and governments, it makes more sense to drink tap water, which costs between \$0.002 and \$0.003 per gallon, rather than the typical bottled water brands, which cost hundreds to thousands of times that amount, while being less environmentally friendly.¹⁷

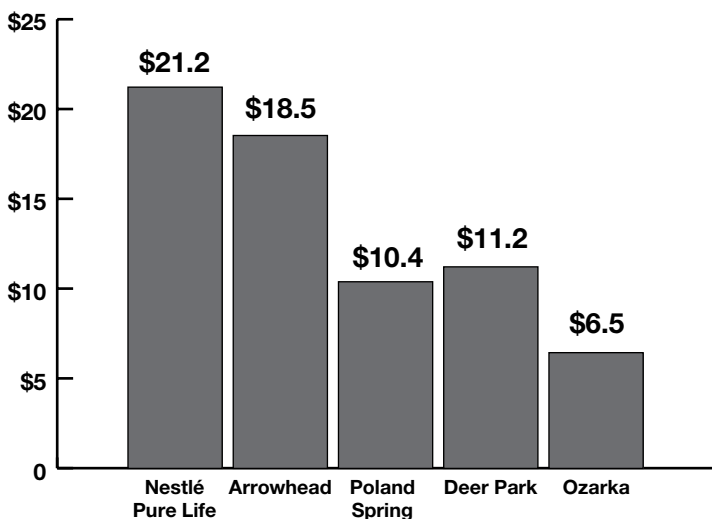
As consumer and environmental organizations, along with the media, have publicized these issues, many consumers and governments are cutting down on bottled water, and industry sales are declining.

As the tides are turning for bottled water, some companies appear to be losing interest in the product. For example, the Beverage Marketing Corporation notes that the major bottlers have “turned off the spigot” of advertising dollars in recent years.¹⁸ The \$0.004 per gallon that the overall industry spent on advertising in 2009 was a “31-year low.”¹⁹ PepsiCo spent 500 times less on Aquafina in 2005 than it did in 2009, as its advertising expenditures went down from \$25.6 million to \$50,500.²⁰ Coca-Cola’s \$3.1 million budget for advertising Dasani in 2009 was a “far cry from its peak,” which was in 2001, at \$26.4 million.²¹ Even Nestlé “slashed ad spending on its major brands in 2008,” although in 2009, it “spent more on some brands and less on others.”²² In 2010, the Wall Street Journal reported that Danone, a multinational corporation in France that owns some of the world’s leading brands, including Evian, was talking about selling its water division to a Japanese company.²³

But Nestlé Waters North America appears to have no intention of letting up entirely. In his 2009 presentation on the future of bottled water, Nestlé CEO Kim Jeffery said that the company is “bullish” on bottled water.²⁴ Further, the Beverage Marketing Corporation reports that Jeffery “is not outwardly concerned about the threat from tap water.”²⁵

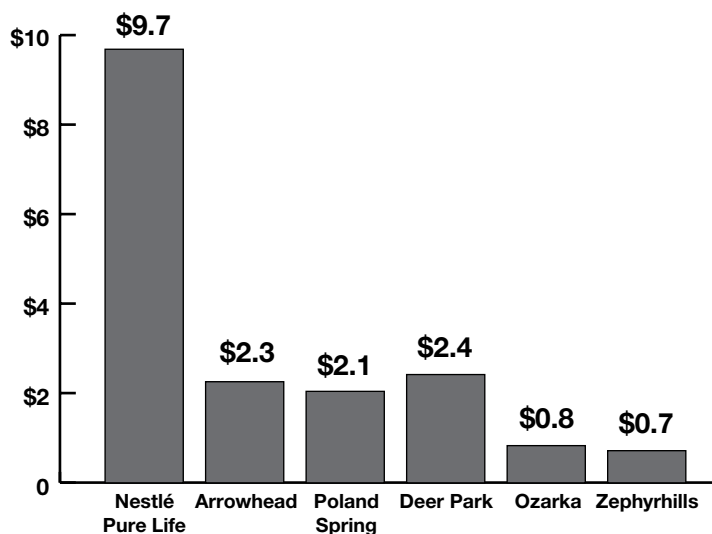
Yet while Nestlé remains publicly optimistic, the company does appear to be changing its strategies in response to the consumer backlash — shifts that are most evident in its new focus on Pure Life.

Chart 2: Total Advertising Expenditures, in Millions of Dollars, 2004-2009



Source: FWW calculation based on data from Beverage Marketing Corporation. “Bottled Water in the U.S.” 2010 Edition. July 2010 at 270.

Chart 3: 2009 Advertising Expenditures, in Millions of Dollars



Source: Beverage Marketing Corporation. “Bottled Water in the U.S.” 2010 Edition. July 2010 at 270.

A New Strategy: From Perrier to Pure Life

Pure Life is a new brand for the leading bottler in the United States. The Swiss food and beverage giant first tapped into the U.S. bottled water market with its Perrier brand in the late 1970s.²⁶ The expensive sparkling water from France appealed to some consumers as a status symbol.²⁷

Since then, Nestlé acquired spring water brands around the country that extracted water from some of the most ecologically sensitive water sources in the United States,²⁸ which the company’s own marketing suggests are also some of the most pristine. Today, six out of its seven leading brands are regional spring water brands: Poland Spring, from Maine; Arrowhead, from California, Arizona and Nevada; Deer Park, sold from New York to Florida; Ozarka, from the Southwest; Ice Mountain in the Midwest; and Zephyrhills, in Florida.²⁹

In contrast, Pure Life is available on a national scale.³⁰ It was actually the company’s first “multi-site” bottled water product, introduced in Pakistan in 1998.³¹ It came to the United States in 2002, when Nestlé announced that it would change its recently acquired Aberfoyle Springs into Nestlé Pure Life.³²

Today, the company is focusing the bulk of its advertising energy on Pure Life rather than its regional spring water

brands. The company increased expenditures on advertising for Pure Life by 3,000 percent between 2004 and 2009, from \$309,200 to nearly \$9.7 million.³³ In that time period, it spent more than twice as much on advertising for Pure Life than its leading spring water brand, Poland Spring.³⁴ (See Chart 2.) In fact, in 2009, Nestlé spent far more money advertising Pure Life than any company spent on any other leading bottled water brand.³⁵ The amount it spent on Pure Life was four times as much as it spent on Arrowhead — its next-highest brand in advertising dollars spent — and more than it spent on the next five of its leading spring water brands combined.³⁶ (See Chart 3.)

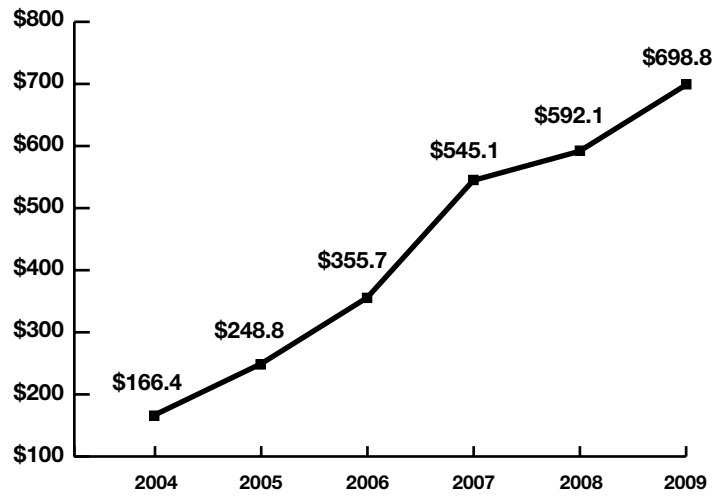
This shift in expenditures appears to have paid off, as Pure Life has seen exceptional growth. Since 2004, Nestlé Pure Life sales have increased 320 percent, from 166.4 million to 698.8 million in wholesale dollar sales.³⁷ (See Chart 4.) But it wasn't just the amount of money the company spent advertising the product that changed. With Pure Life, Nestlé also changed the source of its water, the messaging the company is using to sell it, and the target audience for its advertising.

These shifts are strategic because they allow the company to avoid some of the factors that have made selling bottled water more difficult in recent years. Unfortunately, these new strategies do not address consumer concerns about the environmental impacts of the product — and, in fact, present new problems for public water.



Members of the Portland State University Environmental Club encourage other students to drink tap water instead of bottled water. Photo courtesy Lisa Meersman.

Chart 4: Nestlé Pure Life Sales, in Millions of Dollars, 2004-2009



Source: Beverage Marketing Corporation. "Bottled Water in the U.S." 2010 Edition. July 2010 at 223.

Bottling Municipal Water: Profitable for Nestlé, Not for Public Water Systems

Although Pure Life began as a spring water brand when it first came to the United States, the company began its shift to bottling municipal water in 2005.³⁸ Today, Nestlé's shift in source water has played a large role in the whole industry trend towards bottling municipal water. Between 2005 and 2009, the overall volume of tap water bottled by the industry grew by 66 percent while the volume of spring water increased by only 9 percent, which means that tap water bottling expanded at more than seven times the rate of spring water bottling.³⁹ In the past five years, municipal water's share of the market has increased 14.3 percent—from one third to nearly half of the total volume sold.⁴⁰ The Beverage Marketing Corporation attributes much of this trend to the shift in source of Pure Life.⁴¹

According to the Beverage Marketing Corporation, "conventional wisdom in the bottled water industry is that the majority (but by no means all) of bottled water consumers do not recognize the distinction between spring water and drinking water packaged after it has been processed in municipal systems."⁴² If changing the source water does not significantly affect sales, bottling municipal water is a strategic move for the company because it can help Nestlé avoid the costly conflicts with communities that have plagued its spring water operations in the past.

Spring water bottling sucks up large quantities of water from local sources, often near environmentally sensitive

sources of water.⁴³ This can deplete surrounding waterways if water from the ground is pulled out faster than it is naturally replenished.⁴⁴ Often, residents near proposed plants oppose spring water operations because of concerns about the long-term safety of their water supply, as well as issues such as noise and wear on local infrastructure.⁴⁵ The Beverage Marketing Corporation notes that residents also express concerns that “the company takes too much of a finite resource (water) without paying adequate compensation.”⁴⁶ Nestlé has attracted negative press or paid for expensive lawsuits because of such conflicts in Michigan, Massachusetts, Colorado, Texas, Maine, Florida, California and Oregon.⁴⁷

Today, the company is finding it more difficult to find new sources of spring water because local groups are increasingly organized and vocal in their opposition to new plants. Despite the vast financial resources that Nestlé has at its disposal, it abandoned its attempt to bottle water from McCloud, California, after loud citizen outcry, and is facing strong resistance to its planned plant in Cascade Locks, Oregon.⁴⁸

If most consumers do not care where their water comes from, bottling spring water may not be worth the bad publicity. Already, the top two leading brands in the country, PepsiCo’s Aquafina and Coca-Cola’s Dasani, draw from municipal sources.⁴⁹ Although the brands have received negative press for bottling tap water, many consumers do not appear to be bothered by it. Even with their respective 10 percent and 8 percent drops in sales in 2009, both brands still brought in more than a billion dollars in sales each.⁵⁰

In fact, the Beverage Marketing Corporation notes that most customers appear to have very little brand loyalty, and instead are more concerned about the price.⁵¹ It says that the bottled water market is “increasingly price-sensitive” and that “price wars in the bottled water sector have been prevalent in the last decade and a half.”⁵²

This is where Nestlé has an advantage as a “low-cost producer” — it has a large parent company, so it can take risks other companies can’t, and it produces its own bottles, which keeps costs down.⁵³ A large portion of the success of Pure Life appears to be due to its low price. The new brand is cheaper than its leading rivals, which helped the company make deals with large suppliers such as Burger King and Walmart that had previously gone to Aquafina or Dasani.⁵⁴

While bottling municipal water appears to have been a good move for the company, it’s not such a great deal for the public. While the Beverage Marketing Corporation puts a positive spin on the product by describing

municipal water bottlers as “intermediaries” between municipal water systems and consumers,⁵⁵ this ignores the fact that pipes can also serve as “intermediaries” that bring the water straight to households at a lower cost to the consumer.

Unfortunately, many municipal water systems in the United States today are woefully underfunded, in need of maintenance and repair, and facing water shortages. When bottlers take water out of a municipal system, they are profiting from a community resource that is funded by taxpayer dollars. They may even pay less for the water than other users. For example, in January 2011, when the city of Pasadena, Texas, agreed to allow Nestlé’s new Pure Life bottling plant in its city limits, it offered the company a 50 percent discount on the city’s water — and still said it was giving the company a tougher deal than most municipalities would have offered.⁵⁶

The Beverage Marketing Corporation describes municipal water bottlers as “intermediaries” between water systems and consumers, but pipes also serve as “intermediaries” that bring the water straight to households at a lower cost to the consumer.

A perfect example of Nestlé’s shift in strategy occurred recently in northern California. The company had planned to bottle spring water from the rural town of McCloud, but faced six years of resistance from residents concerned about the effects a bottling plant would have on their local ecosystems and quality of life.⁵⁷ Instead of pursuing the McCloud facility, Nestlé announced in 2009 that it would use an existing facility to bottle municipal water in the more populous state capital of Sacramento instead.⁵⁸ The plant planned to use 30 million gallons of the city’s tap water in 2010, along with additional water from private springs, to bottle water under the Pure Life and Arrowhead brands.⁵⁹ When the CEO of Nestlé Waters North America wrote to the residents of McCloud announcing that the

company was withdrawing its plans to build a plant there, he said that "Sacramento plant production will replace the production we expected in McCloud."⁶⁰ Seeing this, a group of concerned local residents formed the group Save Our Water Sacramento to oppose the plant and seek a stop to bottling plants in the city.⁶¹ As a leader of Save Our Water Sacramento stated regarding the switch from bottling water in McCloud to bottling it in Sacramento, "It's not like those environmental issues disappear."⁶²

Selling Bottled Water as Healthy: Good for Nestlé's Image, Not the Tap's

Along with the change in source water, Nestlé has changed its messaging approach from promoting the "pure" source of the water to the health benefits. This move is strategic for the company because it can help avoid criticism over the accuracy of its labeling, broaden the appeal of the product, and create a new, more positive overall image for Nestlé's bottled water by associating itself with healthy kids and the anti-obesity movement. Unfortunately, promoting bottled water in this way undermines consumer support for a healthy source of drinking water that is also more cost-effective and environmentally friendly: the tap.

In the past, Nestlé's major brands focused their advertising on the quality of the water that comes from a specific location. Poland Spring, its label depicting a river flowing between rows of pine trees, says that it "Just may be the best tasting water on earth;" Arrowhead is "mountain spring water"; Deer Park uses the line, "That's good water!" Ozarka, from the Southwest, says it is "Straight from nature to you!" Ice Mountain claims to be "Pure as the Driven Snow!" And Zephyrhills, in Florida, bills itself as "Pure water from a pure place."⁶³ Most recently, the company launched a "Born Better" campaign, "to help consumers learn about what makes Nestlé Waters' regional spring brands so unique."⁶⁴

In contrast, Pure Life's messaging focuses on what you do with the product rather than where it came from. Its slogan is "Satisfying your thirst for life."⁶⁵ Instead of mountains and rivers, its label depicts people holding their hands in the air.⁶⁶ And, rather than advertising the area it comes from, its web page says that it is an essential part of a healthy lifestyle.⁶⁷

Since water is clearly healthy, this new message is not likely to be disputed as inaccurate — unlike some of the company's previous messages, which have come under fire as its spring water operations have attracted public scrutiny. For example, Nestlé's Poland Spring brand was hit with several class-action lawsuits around the country accusing the brand of false advertising because of the alleged disconnect between the labeling and the way the actual bottling operations work.⁶⁸ The company admitted no wrongdoing, but in one suit, the judge approved a settlement in which Nestlé would give plaintiffs \$8 million in coupons and donate \$2.75 million to charities.⁶⁹

While Nestlé did not lose the case in court, many consumers have become skeptical of its claims. Moreover, as it is becoming more difficult to find new sources of spring water, it may be more difficult to defend spring water labels. Already, as the company continues its quest to bottle more water, many of its operations are moving farther away from the original sources described on their labels. Poland Spring is no longer getting its water just from its original site; it now has three plants in Maine, after adding one in Hollis and one in Kingfield.⁷⁰ It draws from additional sources around the state, including Fryeburg, Poland, Dallas Plantation, Pierce Pond Township and St. Albans.⁷¹ Similarly, the Deer Park brand has moved away from its origins. The company said in 2001 that it was closing down its Deer Park plant in Deer Park, Maryland, and going instead to Allentown, Pennsylvania; it also draws water from Florida.⁷² Selling bottled municipal water without emphasizing where it came from can help the





company avoid criticism down the road that these sources are not true to their labels.

Changing the message to focus on health rather than location also enables the company to reach a broader audience with a single product. Since the messaging does not specify a particular location, it can appeal to a national, rather than a regional audience. The company appears to be employing this new strategy with its new spring water brand, Re-source, as well, which says that it is spring water but does not advertise the specific location the spring water comes from.⁷³

In addition, switching its message may help Nestlé improve its overall corporate image. In the past, the company has attempted to paint itself as more environmentally friendly by making lighter packaging, supporting recycling programs and making donations to water-related charities.⁷⁴ These types of messages have been criticized as “greenwashing” — or “bluwashing” when it comes to water — making environmentally friendly claims that contradict or distract from the true impacts of a product.⁷⁵

By switching to a health message, the company may distract consumers from these critiques and associate itself instead with a much less objectionable subject — healthy

kids. Today, as many parents and teachers are worried about obesity affecting children, they are looking for alternatives to soda and other sugary beverages. According to Beverage World, an industry publication, many of Pure Life’s television commercials are designed to convince consumers that drinking water is better than drinking soda.⁷⁶

Pure Life is capitalizing on this trend by bringing its health message specifically to schools. Its Go Play! program gave children the opportunity to redeem Pure Life labels to earn points for their schools that could be redeemed as funds for recreational programming.⁷⁷ The Beverage Marketing Corporation reports that in 2009 the company said Pure Life is now present in a quarter of American school cafeterias.⁷⁸

Unfortunately, while these changes in messaging may improve Nestlé’s image, they promote a consumer mindset that is damaging to the future of public water. By advertising bottled water as healthy, the company is encouraging consumers to overlook the tap, even though it is also healthy. For example, one study conducted in Germany found that encouraging children to drink from school water fountains prevented obesity.⁷⁹ In addition, removing any mention of the source of the water means that the packaging does not even give the consumer a reminder



Targeting New Markets Solves Nestlé's Sales Problems, Not the World Water Crisis

Nestlé is also shifting the target of its marketing from its traditional customer base in the United States and Europe to Hispanic immigrants in the United States and “emerging markets” in the rest of the world. This is a strategic move because it targets populations that have not had access to safe tap water — but it won't solve the world water problems that make the product seem like a good option in the first place.

In the past, most of the company's bottled water revenues have come from markets in Europe and North America that are now less receptive to the product.⁸² In the United States, Nestlé's first bottled water product, Perrier, gained popularity as a status symbol among many urban middle-class consumers who were willing to pay the higher cost. Now, bottled water is ubiquitous, and many American consumers see tap water as a better alternative. Similar trends have occurred in Europe.

But not everyone in the world has the option to drink safe tap water. According to the World Health Organization, 1.1 billion people worldwide lack access to an “improved drinking water source” and 2.6 billion lack sanitation facilities.⁸³ The United Nations says that “urgent action is needed if we are to avoid a global water crisis.”⁸⁴ As one food and drink consulting company put it, “In the western world, we take tap water availability and quality for granted. In other markets, bottled water is much more of a vital lifeline.”⁸⁵

Nestlé is specifically targeting these “emerging markets” with its bottled water. Today, the water division of the global corporation has plants in 37 countries, “wants to enter 5 more” and is “aiming to expand its proportion of sales from emerging markets to a third of revenue within a decade.”⁸⁶ It has its eyes set on China, Brazil, the Middle East and Pakistan, and hopes to “further accelerate the growth of its Pure Life brand” in emerging markets.⁸⁷ Today, Pure Life specifically is sold in Algeria, Argentina, Brazil, China, Egypt, Indonesia, Iran, Jordan, Lebanon, Mexico, Nigeria, Pakistan, Russia, Saudi Arabia, South Africa, Thailand, Turkey, the United Arab Emirates and Uzbekistan, as well as Canada, the United Kingdom and the United States.⁸⁸

Targeting new markets appears to be bringing the company some level of success. Although Nestlé Waters saw total sales decline 12.6 percent between 2007 and 2010, the company began to see positive overall growth due to

that water is a finite natural resource that should be used responsibly. These sorts of messages are especially worrisome when they are targeted towards children, some of the most impressionable consumers.

As bottled water has become more mainstream, consumers are becoming more accustomed to buying water in plastic packaging rather than drinking it from a tap or a fountain. The increased availability of bottled water and dwindling or run-down sources of public drinking water only reinforce this shift in mindset. For example, a stadium at the University of Central Florida was built without water fountains during a brief time when the Florida building code allowed the sale of bottled water to substitute for fountains. The bottled water ran out during the stadium's opening in 2007, resulting in dehydrated and sick fans.⁸⁰ Similarly, bottled water is now one of the most commonly sold products in schools, while many school drinking fountains around the country are falling into disrepair.⁸¹

Increasingly, bottled water is becoming available where public water is not. Many of these decisions are made because selling bottled water generates a profit, while providing public water does not, even though it is an extremely valuable service. If consumers are influenced by Nestlé's advertising to believe that bottled water is a good source of healthy water, they are likely to become less inclined to advocate for changes in policy and funding that are necessary to keep public water safe and affordable.

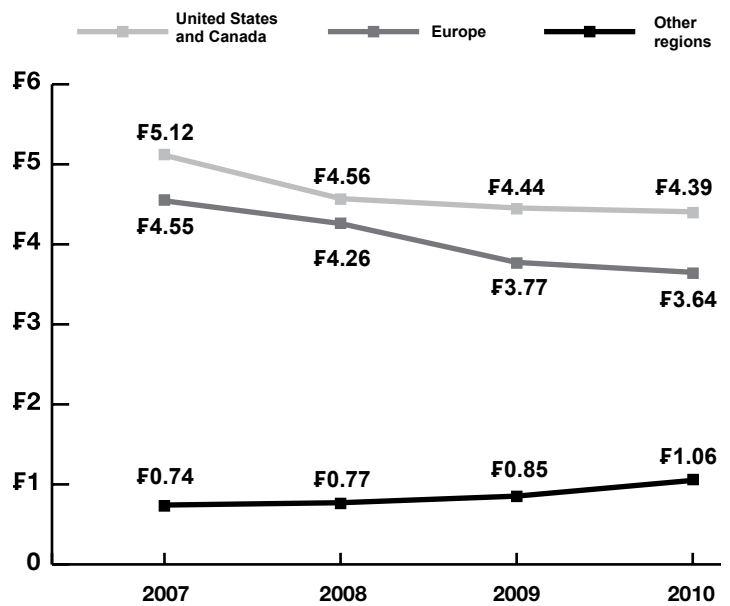
sales growth in emerging markets in 2010.⁸⁹ For example, in 2008, while Nestlé’s global water division saw negative growth overall, its emerging markets businesses grew more than 20 percent.⁹⁰ One Swiss publication dubbed Pure Life “The Perrier for the Poor.”⁹¹ It is now the best-selling water brand in the world.⁹² These Pure Life sales were probably a major reason why, by the end of 2010, Nestlé Waters’ 2010 Annual Report indicated that, while the company’s sales in Europe, the United States and Canada had declined again, the company’s sales in “other regions” grew dramatically.⁹³ (See Chart 5.) Nestlé’s sales in these other regions were 25 percent larger in 2010 than they were in 2009.⁹⁴ This growth offset the declines in Europe, the United States and Canada enough that Nestlé Waters saw a slight (0.4 percent) increase in overall sales.⁹⁵

Even in the United States, Nestlé is now targeting populations that are more likely to see bottled water as a good alternative to the tap because they come from countries where tap water is often not safe to drink. In 2008, the advertising magazine Brandweek reported that Pure Life’s target audience is “recent U.S. Hispanic immigrants, moms in particular, who are un-aculturated to American products, yet have an affinity for the Nestlé name.”⁹⁶ The company teamed up with Cristina Saralegui, a celebrity who has been referred to as the “Spanish Oprah”⁹⁷ for a series of television commercials. Overall, it spent \$19 million on Hispanic network television and cable ads in 2006, which went up to \$30 million in 2007. The company has also opened an entire store in New York City to appeal to this audience, which it calls Pure Life Mercado del Agua (water store).⁹⁸ Ironically, the Pure Life Mercado del Agua is located in the Bronx, one of the lowest-income areas of New York City — a city whose tap water has been touted as some of the best in the world.⁹⁹ This means that the store is specifically selling to a population that may be least likely to afford bottled water, even though there is a much cheaper water option available.

Unfortunately, while selling bottled water abroad may be a good way to find new customers for Nestlé, it is not going to solve the world water crisis. Nestlé’s global headquarters is targeting the billion customers that it estimates “will be able to increase their incomes enough to afford Nestlé products.”¹⁰⁰ It seems unlikely that the company will sell bottled water at a reduced price to the people who cannot afford to buy it. Unfortunately, the world’s citizens who most need water are the ones least likely to afford bottled water.

Just as consumers in the United States are best served by functioning tap water, populations around the world need safe public water. The Second United Nations Water

Chart 5: Nestlé Waters Sales by Region, in Billions of Swiss Francs, 2007-2010

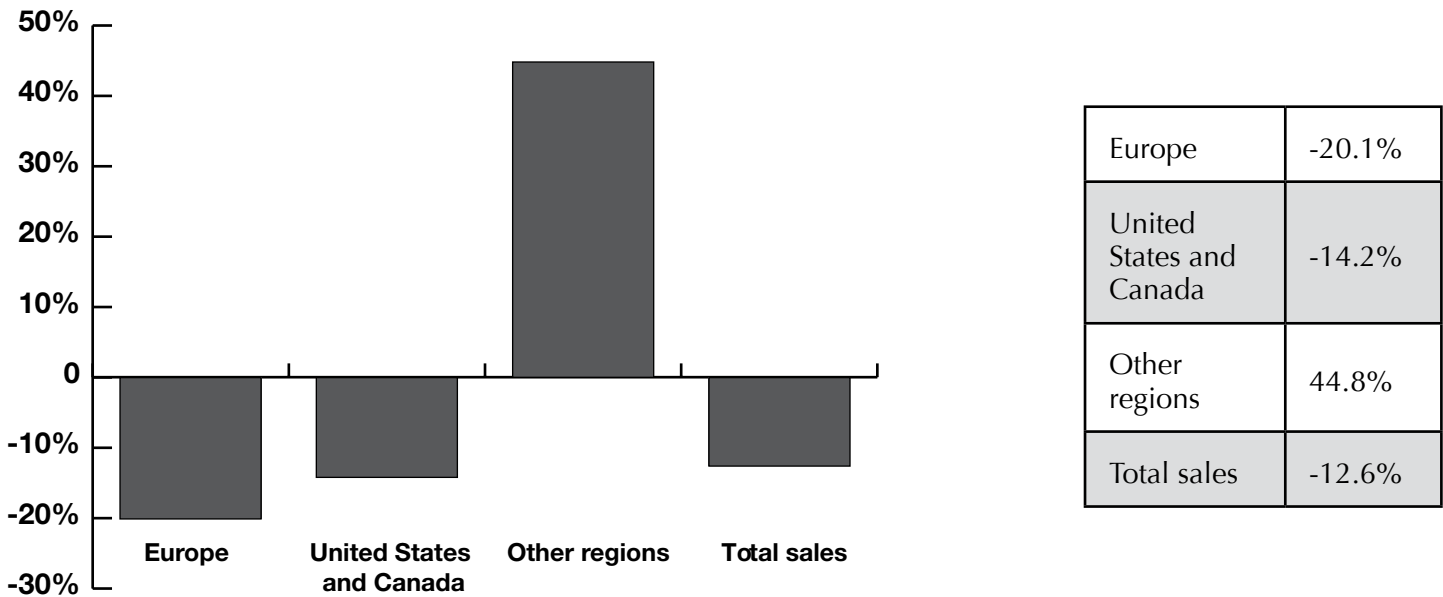


Source: Nestlé Annual Report. 2010 at 39 and Nestlé. Annual Report. 2009 at 29.



Nestlé’s Mercado del Agua, or Water Market, in the Bronx, specifically advertising the Pure Life brand. Photos by Food & Water Watch.

Chart 6/Table 3: Percentage Change in Nestlé Waters Sales by Region, Between 2007 and 2010



Source: FWW Calculation based on data from Nestlé. Annual Report. 2010 at 39 and Nestlé. Annual Report. 2009 at 29.

Development Report says that the water crisis is created by a crisis of governance — who has control over it and how it is managed.¹⁰¹ Buying bottled water does not address this issue. In fact, water bottlers have financial incentive not to address these challenges — if water is scarce, they can charge a premium for their product. Even in the United States, the potential deterioration of water infrastructure can be seen as a profit opportunity for bottled water. In his 2009 presentation about the future of bottled water, Nestlé CEO Kim Jeffrey said that the company believes that “tap water infrastructure in the United States will continue to decline” and that “people will turn to filtration and bottled water for pure water needs.”¹⁰²

While bottled water can be a temporary solution for obtaining clean water on an individual basis, it does not address the broader need to sustainably manage water resources in the United States or abroad, and it does not provide access to water for the billions of people around the world who can least afford it. To achieve this goal, the global community must recognize that water should not be treated as a source of profits, but rather as a basic human right.

Conclusion: Hanging on for Pure Life

A major part of Nestlé’s success in the U.S. bottled water industry relative to its competition in 2009 was the increased sales of its new Pure Life brand. This may be good for the company’s bottom line, but it doesn’t bode well for the future of public water if American consumers continue to buy bottled water when they could be drinking tap water — the most cost-effective, environmentally friendly source of water there is.

No matter how clever a company’s marketing campaign, consumers are better served by properly maintained tap water than by buying individually packaged bottles of water. Today, as many tap water systems in the United States are in need of maintenance and repair, it is important to ensure that this important public resource is adequately funded. That is why Food & Water Watch is working to renew America’s water through increased federal funding for drinking water programs and infrastructure.

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