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Liquid



Indian Wine
The Great Nashik Terroir

Handia
A Brew of Tradition

Premium Waters

Cause and Effect

Cause and Effect Premium Waters



The bottled water industry is one of India's fastest growing sectors, having ballooned by 40-45% in the last five years alone. India is the world's 12th largest (by value) consumer of bottled water, according to a recent UN report. So, how did we get here?

India now holds the unfortunate distinction of being home to 14 of the most polluted cities on the planet. This has caused large swathes of India's groundwater – the main source of drinking water – to be infected with both pathogens and chemicals. A BMC Public Health Journal study estimated that each year water-borne diseases affect nearly 38 million Indians and 73 million working days are lost. RO systems, home

filtration systems, and even boiling tap water were once standard methods to make tap water potable, but nowadays water testing sometimes reveals extreme pollutants even in RO-filtered municipal water. Consumers have had no choice but to turn to bottled water.

Rising urbanization, increased industrial output and lacunas in maintenance and infrastructure are related factors. The growth in tourism, domestic and international, further pushes up demand. Today, there are hundreds of brands of water available, roughly 80% of which are small and local manufacturers, but the industry is controlled by large corporations

such as Parle (Bisleri), PepsiCo (AquaFina), Coca Cola (Kinley) and Tata (Himalayan).

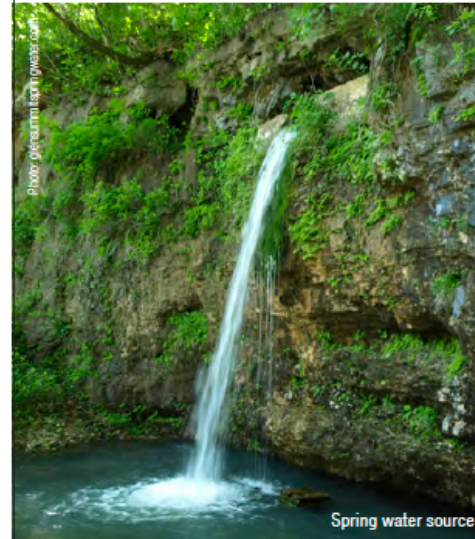
Having to pay for bottled water has filtered into India's psyche as a necessity. But there's a booming sub-industry that is not borne of need – that of luxury mineral water. Not all packaged water is created equally. Mineral and bottled water are two different beasts, though the terms are often and incorrectly interchanged.

Mineral water, unlike regular bottled water, does not undergo chemical processing. It is obtained by bottling mineral-rich waters from pristine natural sources. As the name suggests, it contains high quantities of essential minerals like magnesium, calcium and sodium that are a good source of nutrients and can support bone and digestive health, and reduce blood pressure. It is sometimes called spring water because it is drawn from natural springs. Mineral water is naturally carbonated to different degrees, but may be aerated with carbon dioxide to create 'sparkling' water. Recent evidence suggests that carbonated mineral water can benefit heart health and improve cholesterol levels. Mineral waters may also be created artificially by adding salts to distilled water.

Water is redefined, as something to be inhaled and appreciated much like wine.

Increasing health consciousness (especially post-pandemic), and rising awareness and globalization of the Indian consumer are major forces behind the growth of mineral waters. For consumers already accustomed to buying bottled water, it is not such a leap. Higher disposable incomes, health and ecological concerns, and a market flooded with fake mass-produced bottles on one hand, with improved prices, choices and better distribution channels on the other, lead consumers to consider more exclusive, and expensive, options. Both in cost and consciousness, mineral water is almost a logical step-up from ordinary bottled water.

Ever since a 2021 magazine article revealed that cricket icon Virat Kohli only drinks Evian spring water from France, high-end, 100% natural mineral and sparkling waters have captured public imagination. International brands have made their way onto shelves



Spring water source



Water tasting competition

in upmarket grocery stores, while home-grown options have proliferated.

The pioneer was Dadi Balsara, who set up a natural mineral water plant in Dhaulta Kuan, Himachal Pradesh and launched the Himalayan brand back in 1991. The brand was bought by the Tata Group in 2001. Mulshi Springs, sourced from a natural spring in the Sahyadri range by Naveen Luthra, was the first to use glass bottles in 2008. Another early entrant was Veen, a Finnish company owned by Aman Gupta that initially bottled from a source in the Nilgiris and then brought pure Himalayan water from Bhutan. Kelzai offers India's 'first volcanic water', also from a source in the Sahyadris.

Vadodara-based Evocus, India's first 'black water', is a pH-balanced alkaline water that gets its dramatic colouring from more than 70 trace minerals. Nu by Clear Premium Water has sourced water from the Himalayas and positions itself as 'tailored to the discerning tastes of the elite consumer'. Four-year-old Laangza Water, from an aquifer in the Himalayan Sivalik range, plays up its purity as an ideal drink for new mothers and infants.

Some brands appeal to the eco-friendly buyer. Behram Mehta's Aava has won international awards for taste

Flavoured mineral water has gained popularity as a healthy alternative to sugary soft drinks.

and packaging. It boasts of recycling more PET than it produces. Responsible Whatr, from a source in Himachal Pradesh, launched in recyclable aluminium cans and recently announced its milestone of a million cans sold.

With growth comes innovation. Flavoured mineral water has gained popularity as a healthy alternative to sugary soft drinks. Catch has a range of low-calorie sparkling waters with natural fruit flavours such as blackberry and peach, while Wild Water offers four flavours of water-based, preservative-free Vitamin Drinks. 'Blending waters' such as BLND launched by Indian start-up Fultariya Beverages offer special waters crafted as mixes for whisky, single malt, gin and vodka. BLND waters use the 'art of blending' to enhance the balance and flavours of the spirits.

The Indian market has huge potential for growth. Per capita consumption of bottled water currently stands



at only five litres/year, well below the global average of 24 litres/year. The brands are alive to this. In 2023, Bisleri introduced a sparkling version of its premium Himalayan spring water line Vedica, which 'combines effervescence with a perfectly balanced mineral composition'. Himalayan embraced the direct-to-consumer approach by developing their own online platforms or partnering with delivery apps. Vedica Sparkling is available through the Bisleri@Doorstep App. Veen's focus is on luxury hotels and restaurants.

Exotic, far-away sources and the promise of purity and health create a certain mystique around high-end mineral waters. Practical considerations like transportation and bespoke packaging also make them many times costlier than regular bottled water. Institutes like the Fine Water Academy that certifies

water sommeliers (a first in India), are growing around the industry. Fine waters are added to the mix at high-end tables to elevate the entire dining experience. Water is being redefined, as something to be inhaled and appreciated much like wine, with different grades of taste, quality and refinement.

It's a story riddled with contradictions. While many continue to struggle for access to safe drinking water, premium waters have carved a niche in the luxury sector. The Indian bottled water market was valued at over \$22 billion by 2023, with a projected annual growth of 6%. Clearly, this story is just getting started. Irony, or simple cause and effect? Perhaps, it's a little of both. [YL](#)

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