

# Natural Mineral & Spring Waters

The Natural Choice For Hydration









# Foreword

The European Federation of Bottled Waters (EFBW) is committed to protecting the unique qualities of natural mineral and spring waters and works to promote the bottled water sector and its products. The aim of the Federation is to ensure that the high safety, quality and environmental standards of natural waters are recognised and maintained.

More than a quarter of the global bottled water production is located in Europe, where consumers purchase and drink more than 52 billion litres of bottled water every year. The sector contributes significantly to the European economy by providing direct employment to 54,000 people and investing particularly in less prosperous regions such as rural areas.

Natural mineral and spring water producers are key players in the European food supply chain and pioneers in the field of sustainable resource management. The sector shares best management practices and proactively encourages public-private partnerships in order to safeguard water resources for future generations.

European consumers have a market preference for naturally sourced waters which have not been disinfected nor chemically processed and which are associated to a specific place of origin. Producers are proud to provide pure natural mineral and spring waters of consistently high quality.

EFBW – representing European bottled water producers – works closely with EU institutions, specialised agencies and regulatory bodies, both to inform and to ensure that the interests of the bottled water sector are represented and its views are shared. For this reason, the European Federation of Bottled Waters has produced this industry report, outlining the particular characteristics of natural mineral and spring waters, EFBW’s main work areas as well as key facts and figures about the bottled water sector.

We remain ready and willing to engage, exchange and offer our expertise and unique insights, as well as to feed into the discussions and debates which will shape Europe’s economy and its future.



**Jean-Pierre Deffis**  
President



**Patricia Fosselard**  
Secretary General

# EU Bottled Water Industry In Figures

## Manufacturing in the EU

Turnover

€ 12.4 billion

The bottled water industry is a key sector in the economies of the EU Member States.

Source: Canadean (EU 28)

## EFBW bottled water producers in the EU

594

Among them

84% small & medium sized enterprises\*

The European bottled water sector counts a large number of regional and local producers.

Source: EFBW (EFBW member survey)

\* In the European Union SMEs are defined in [Recommendation 2003/361/EU](#): An enterprise is regarded as small or medium sized if it has not more than 250 employees, not more than 50 Million Euro turnover and/or an annual balance sheet total not exceeding 43 million Euro.

## Bottled water consumption in the EU

52 billion litres

Source: Canadean (EU 28)

## Providing jobs in the EU

Direct employment

54 thousand people

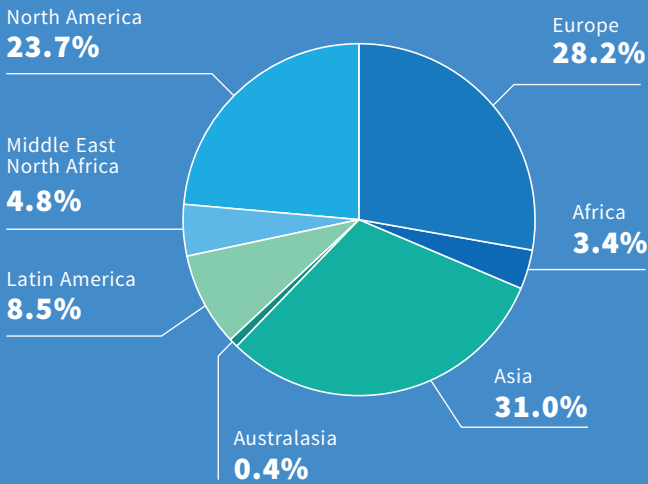
Indirect employment

833 thousand people

The bottled water sector is a key job provider, particularly in economically disadvantaged areas.

Source: Canadean (EU 28)

## Global bottled water consumption

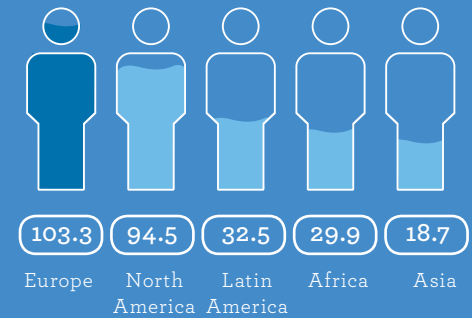


Source: Canadean

## Europe matters!

*“Europe enjoys the highest per capita consumption in the world”*

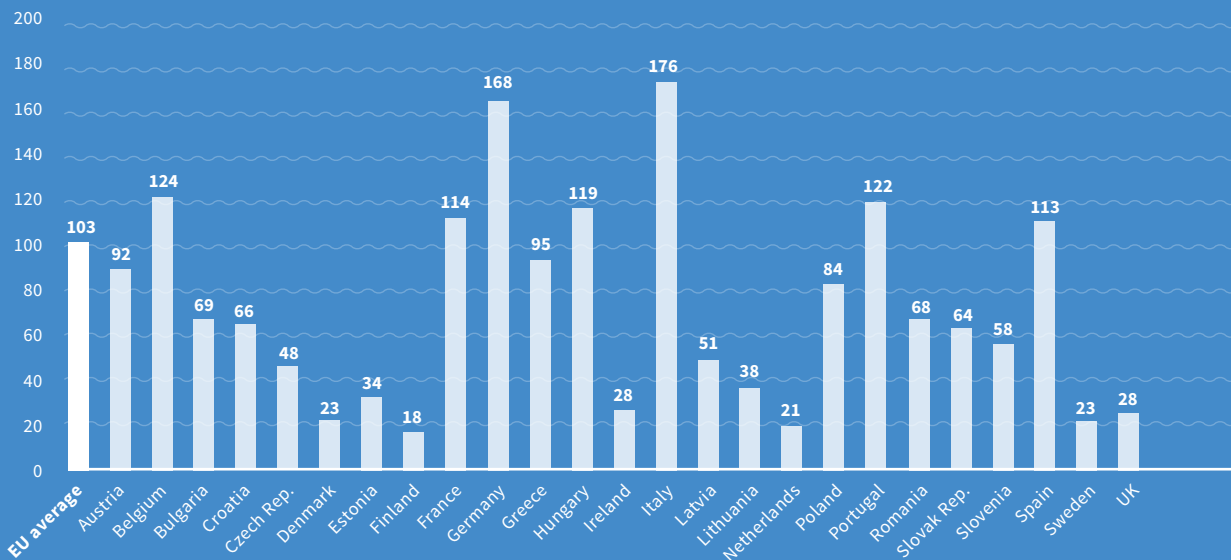
Packed water litres per capita yearly consumption



Source: Canadean

## EU bottled water

Per capita consumption per year



Source: Canadean

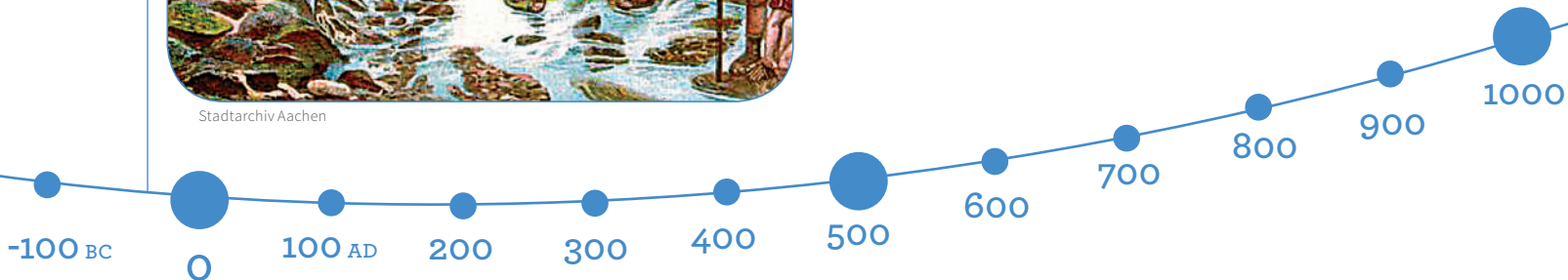
# Natural mineral and spring water

## An important part of Europe's cultural heritage



Stadtarchiv Aachen

The ancient Romans recognised the benefits of drinking and bathing in natural waters



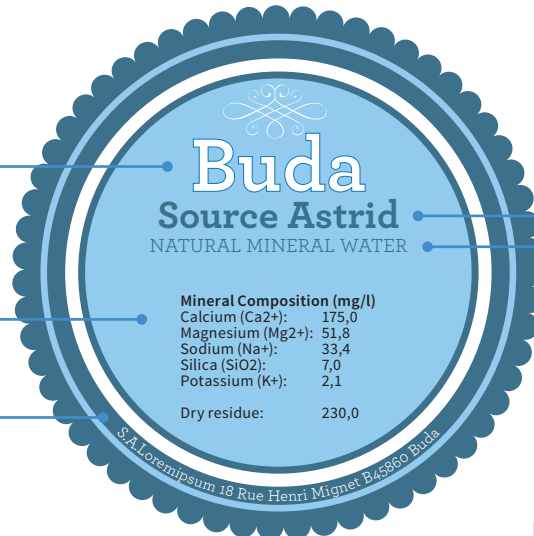
### Natural mineral water

#### You know what you drink

Trade description/  
place of the spring

Specific stable  
composition

Bottling location

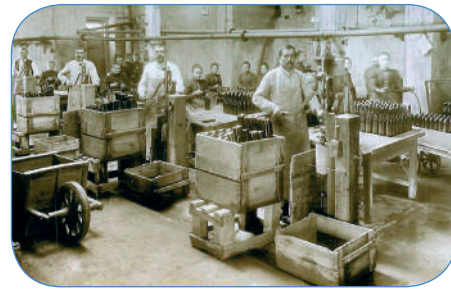


Name of the spring

Sales description  
'Natural Mineral Water'

Buda is not an existing brand. The label has been created for the purpose of this brochure.

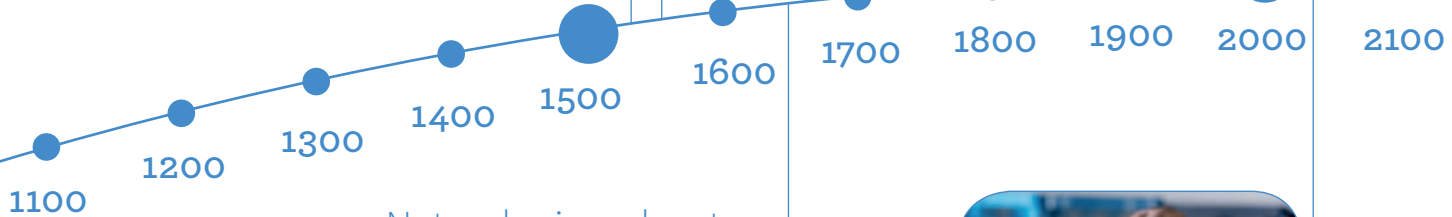
With the recognised therapeutic benefits of natural mineral waters and the success of thermal resorts, people visited thermal towns to take the medicinal waters



Eugen Appel, Rosbach v.d.H.

## Bottling and commercialisation

first began in Europe in the mid-16th century, with natural mineral water coming from Belgium, France, Italy and Germany



Natural mineral waters were first sold in pharmacies in the 17th century as medicinal waters

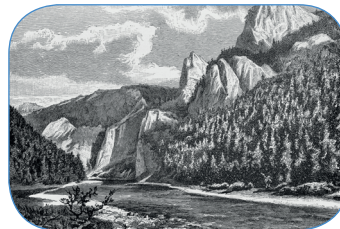


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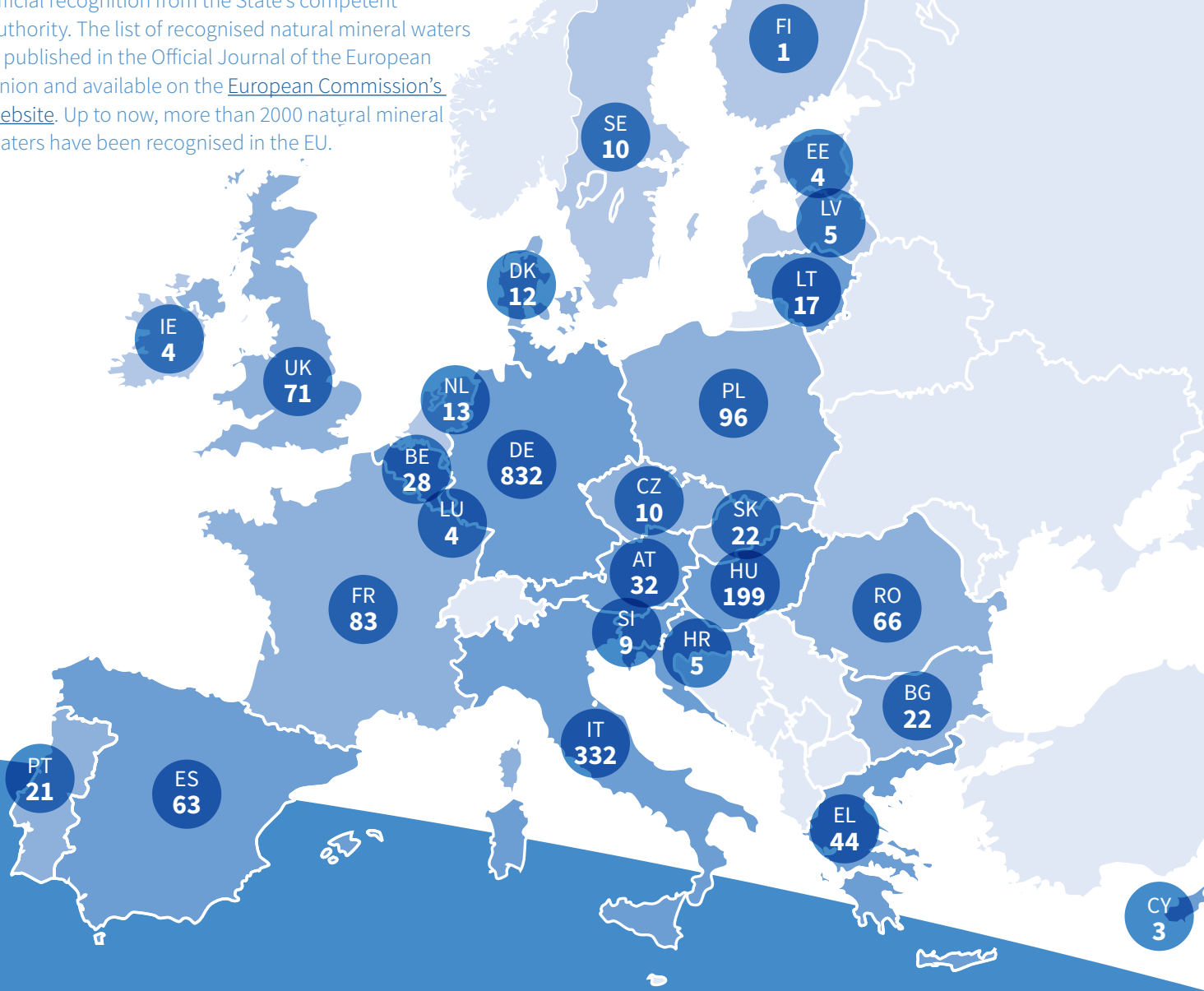
Nowadays, natural mineral and spring water is the consumers' first choice of non-alcoholic beverage

The first water source protection measures were introduced in the 17th century



# EUROPE: land of sources

Each natural mineral water in Europe must receive official recognition from the State's competent authority. The list of recognised natural mineral waters is published in the Official Journal of the European Union and available on the [European Commission's website](#). Up to now, more than 2000 natural mineral waters have been recognised in the EU.





# European consumers go for natural

## EU bottled water

Breakdown per category

Natural mineral water  
**83%**



Although all bottled waters might look the same, in fact each natural mineral water or spring water has its own distinctive taste, a unique set of properties and a specific mineral composition which is derived from the geological conditions present in the area where the water is extracted. Consumers can choose their water by taste depending on mineral content and their preference for still or sparkling.

Bottled waters are mainly packed in glass and plastic PET. They offer a wide range of sizes to suit every consumer need and drinking occasion. Packaged water has the advantage of being portable and provides an easy way to stay hydrated throughout the day in every circumstance.

European and national legislation distinguish three categories of waters: natural mineral water, spring water and bottled drinking water. The European Union has laid down specific rules for natural mineral and spring waters, which clearly set them apart from drinking water, more commonly known as tap water.

Spring water  
**14%**



### Natural mineral water

Natural mineral water comes from a specified underground source and must be protected from any kind of pollution. They are characterised by their stable mineral composition as indicated on the label, their microbiological wholesomeness and their original purity. Therefore, natural mineral waters may not be disinfected nor chemically treated. Moreover, they must be bottled at source and fitted by a tamper evident seal.

Bottled drinking water  
**3%**



### Spring water

Spring water must also comply with high quality standards. They must be safe to drink at source and may not be disinfected. In contrast to natural mineral waters, spring waters do not have to prove a stable mineral balance. It is not required to state the mineral composition on the label.

### Bottled drinking water

Bottled drinking water may originate from various sources, including groundwater, surface water and municipal supply. It is generally treated and disinfected. Minerals may be restored.

Source: Canadean

**97%** of all bottled water sold in Europe is either natural mineral water or spring water

# Natural mineral & spring waters offer outstanding quality

The unique quality of European natural mineral and spring waters is recognised all over the world. They have to meet the highest safety standards and strict hygiene requirements. Source protection, regular testing and monitoring at the spring and throughout the entire bottling process guarantee the upmost quality of natural mineral and spring waters.

## WATER – A GIFT OF NATURE

Naturally pure as they pass through the geological structures of their protected underground sources, natural mineral and spring waters do not require chemical treatments or disinfection to make them safe for consumption. Naturally sourced waters meet the growing demand for healthy products which retain their original purity.

The specific mineral content and unique taste profile of each natural mineral or spring water reflects the geological characteristics of the source from where it is drawn. Moreover, the defining characteristics of naturally sourced waters are reflected in their protected origin status and guaranteed by strict EU legislation governing the extraction and packaging of the product.



## A RIGOROUS LEGAL FRAMEWORK

Europe has one of the world's most effective and strict legal frameworks which ensures that naturally sourced waters reach consumers in their original state.

European legislation defines natural mineral water as 'microbiologically wholesome', distinguished by its nature (mineral content, trace elements) and its original purity.

Natural mineral  
and spring waters are:

Safe to drink  
at source

Not chemically treated

Bottled at source with a  
tamper proof seal

Fully traceable

Not transported in tankers



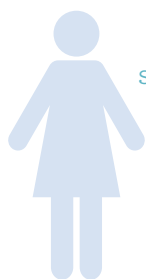
Watch our video on  
the unique quality of  
bottled water

# Water is the healthiest way to hydrate

Water is a vital nutrient for our body. Drinking water is the healthiest, most natural way to hydrate. Available data suggests that Europeans are not drinking enough when compared with the European recommendations on adequate water intake.

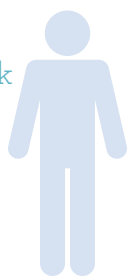
EFBW believes it is important to promote the benefits of drinking water in adequate quantities. The Federation advocates policymakers and regulators to adopt and promote national guidelines on healthy hydration and water intake.

Based on the EFSA's scientific opinion on adequate water intake and assuming that food contributes on average 20 % of the total water intake:



A woman should drink at least 1.6 litres of water every day

A man should drink at least 2 litres of water every day



## THE IMPORTANCE OF HEALTHY HYDRATION

On average 60% of an adult's body weight is composed of water. As such, water is our most important macronutrient in quantitative terms. It is essential to life, and we would only survive a few days without it.

The European Food Safety Authority (EFSA) states that water contributes to the maintenance of normal physical and cognitive functions and normal thermoregulation. Based on the EFSA's scientific opinion on adequate water intake\*, women should drink 1.6 litres and men 2 litres every day, assuming that food contributes on average 20 % of the total water intake.

Natural mineral and spring waters are the healthiest and most natural ways to hydrate because they contain zero calories, no sugar and no added chemicals. Improving hydration and drinking habits can make a simple and significant contribution to a healthier lifestyle. Nutritional policies and education have an important role to play in that context.

EFBW members regularly undertake pro-water campaigns to raise awareness on the importance of healthy hydration across Europe and to encourage people to drink water.

\* Source: EFSA Journal 2010; 8(3):1459 (48 pages)

Drink at least 8-10 glasses a day



Zero calories · No sugar · No additives



Watch our video on water and hydration



# Producers are dedicated to a sustainable future

Sustainable resource management is a top priority for natural mineral and spring water producers. Comprehensive groundwater management is crucial to ensure the protection and availability of natural water sources for future generations.

Producers have been safeguarding catchment areas for over a hundred years, helping to protect the natural ecosystems through which water flows to reach its natural source. The industry has a long-standing commitment to preserving resources and continues to play a leading role in promoting recycling, reducing its packaging, and minimising energy and water consumption.

## RESPONSIBLE WATER RESOURCE MANAGEMENT

Natural mineral and spring waters are renewable resources. The amount of water withdrawn always respects the annual replenishment of the source to ensure availability for future generations. The industry only uses a minute amount of the total water extracted in Europe (< 0.02% volume).

The areas of land surrounding underground water sources are subject to rigorous and extensive environmental protection. Producers work in partnership with local communities, public authorities and farmers to ensure the protection of the source. This joint collaboration not only helps to safeguard biodiversity and natural habitats, but is also important for social and economic regional development.

A renewable resource  
that is carefully managed

Public-private partnerships  
to protect the resource



# Reducing packaging & promoting recycling

European producers have led the initiative to establish national recovery and recycling schemes, such as green dot systems, and continue to do so in partnership with local authorities.

All packaging materials used by the industry are 100% recyclable (glass, PET plastic and cans). The sector promotes the European PET Bottle Platform's (EPBP) Recycling Guidelines to help maintain the high quality of recycled PET.

Among all plastics containers, PET bottles have a high rate of return which is steadily increasing. Recycled PET (rPET) may be used to manufacture new PET bottles, as well as for a diversity of other applications such as fibre textiles and plastic sheeting.

Industry uses 100% recyclable packaging



Continuous eco-innovation

## POLYMARK PROJECT

EFBW is partner in a three-year research project funded by the European Commission.

The project aims at developing a new technology to identify and sort food contact and non-food contact plastics in waste streams. The key objective is to maximise the value from recycling and the re-use of High Value Plastics.

[www.polymark.org](http://www.polymark.org)

The industry is continuously optimising its packaging through light-weighting and invests in eco-innovation, new packaging design and research for non-oil based packaging alternatives to save resources.

## DEVELOPING PRODUCT CATEGORY RULES

The European Commission selected EFBW to develop and test EU Product Category Rules (PCR) for bottled water. These rules will enable bottled water producers to assess and improve their environmental performance as well as to adequately communicate to consumers and other stakeholders their product's environmental impact in a harmonised way.

Harmonised impact assessment

# Find out more

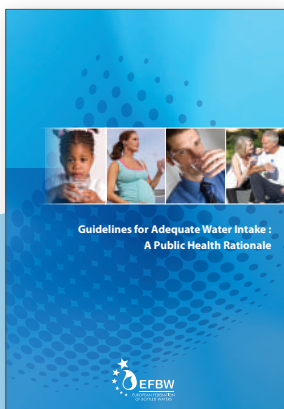


To learn more about EFBW, its activities and latest publications, visit the website at

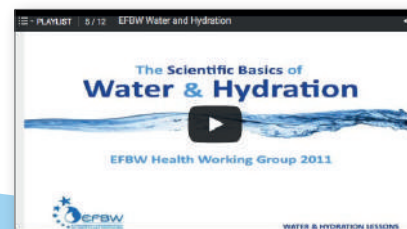
[www.efbw.org](http://www.efbw.org)

You will find detailed information on EFBW's latest publications and videos, policy positions, as well as up-to-date data and news about the European bottled water sector.

Download our publications



Watch our videos





# EFBW in brief

The European Federation of Bottled Waters (EFBW) is the voice of the bottled water industry, dedicated to promoting the unique qualities of natural mineral and spring water among EU institutions and international organisations. Based in Brussels since 2003, the European Federation of Bottled Waters is a registered international not for profit trade association. EFBW has a membership base of 26 national trade associations, 6 direct member companies as well as a number of scientific and research institutions. EFBW offers expertise in regulatory issues, scientific and technical affairs as well as matters relating to health and the environment. The Federation is an active member of FoodDrinkEurope and the International Council of Bottled Water Associations (ICBWA).

## MEMBER ASSOCIATIONS

**Austria:** Forum Natürliches Mineralwasser, Natural Mineral Water Forum

**Belgium:** F.I.E.B / V.I.W.F - Fédération Royale de l'Industrie des Eaux et des Boissons rafraîchissantes / Koninklijk Verbond van de Industrie van Waters en Frisdranken, Belgian Water and Soft Drinks Association

**Bulgaria:** BSDA – Bulgarian Soft Drinks Association

**Croatia:** GIUPPH – Gospodarska interesna udruga proizvođača pića Hrvatske, Croatian Association of Drink Producers

**Czech Republic:** Svaz minerálních vod z.s., Czech Mineral Water Association

**Denmark:** Bryggeriforeningen, Danish Brewers' Association

**Europe:** WE – Watercoolers Europe

**France:** Fédération Nationale des Eaux Conditionnées et Embouteillées (FNECE), regrouping Chambre Syndicale des Eaux Minérales (CSEM) and the Syndicat des Eaux de Source (SES), National Federation for Packed Waters, regrouping the Trade Association for Mineral Waters and the Trade Association for Spring Waters

**Germany:** VDM – Verband Deutscher Mineralbrunnen e.V., German Mineral Water Association

**Greece:** SEFYMEN – Association of Greek Bottling Industries of Natural Mineral Waters

**Hungary:** Magyar Ásványvíz, Gyümölcslé és Üdítőital Szövetség, Hungarian Mineral Water, Fruit Juice and Soft Drink Association

**Italy:** MINERAQUA – Federazione Italiana delle Industrie delle Acque Minerali Naturali, delle Acque di Sorgente e delle Bevande Analcoliche, Italian association of natural mineral waters, spring waters and soft drinks

**Ireland:** IBC – The Irish Beverage Council

**Luxembourg:** FICEB - Fédération de l'Industrie et du Commerce des Eaux et des Boissons Non-Alcoolisées du Grand-Duché de Luxembourg, Industrial Federation for Waters and Non-Alcoholic Beverages of Luxembourg

**Netherlands:** FWS – Nederlandse vereniging Frisdranken, Waters, Sappen, Dutch Association for Soft Drinks, Waters and Juices

**Poland:** KIG "PR" – Krajowa Izba Gospodarcza "Przemysł Rozlewniczy", Polish Chamber of Business "Beverage Industry"

**Portugal:** A.P.I.A.M. – Associação Portuguesa dos Industriais de Águas Minerais Naturais e de Nascente, Portuguese Industrial Association for Natural Mineral and Spring Waters

**Republic of Serbia:** Udruženje Industrije Mineralnih Voda – Poslovno Udruženje, Mineral Water Industries Association – Business Association

**Romania:** APEMIN – Patronatul Apelor Minerale, Owners Association of Romanian Natural Mineral Bottled Waters

**Slovenia:** Združenje polnilcev embaliranih vod Slovenije GIZ, Slovenian Association of Bottled Waters

**Spain:** ANEABE – Asociación Nacional de Empresas de Aguas de Bebida Envasadas, Spanish Bottled Water Association

**Turkey:** Masuder – Türkiye Maden Suyu Üreticileri Derneği, Association of Mineral Water Producers of Turkey

**United Kingdom:** NHC – Natural Hydration Council

**United Kingdom:** BSDA – British Soft Drinks Association

## MEMBER COMPANIES

**Spadel** (Belgium)

**Karlovarské minerální vody, a.s.** (Czech Republic)

**Danone Waters** (France)

**Nestlé Waters MT** (France)

**Gerolsteiner Brunnen GmbH & Co. KG** (Germany)

**Uludağ Maden Sulari Türk AŞ** (Turkey)

## AFFILIATE MEMBERS

Laboratorio Dr. Oliver Rodés, S.A. (Spain)

NSF International (Belgium)

**Georgia:** GWPU – Georgian Water Producers Union

**South Africa:** SANBWA – South African National Bottled Water Association

**Turkey:** Suder – Ambalajlı Su Üreticileri Derneği – Packaged Water Manufacturers Association

**Ukraine:** AMDWPU – Association of Mineral and Drinking Water Producers of Ukraine



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