

THE Facts About Bottled Water



The Healthy Hydration Company™

Facts About Nestlé Waters Canada

Recycling

- Nestlé Waters Canada and its industry partners fund a minimum of 50% of every municipal recycling program in Canada, whether curbside, depot/deposit or public spaces.¹ 97% of Canadians have access to a municipal recycling program.²
- Nestlé Waters Canada is committed to developing a next-generation bottle made entirely from recycled materials or renewable resources by 2020.

Tap vs Bottle

- If potable tap water is available, we believe people should drink it.
- Bottled water does not compete with tap water. 91% of bottled water drinkers consume tap water at home and bottled water on the go.³
- Maintaining Canada's municipal water and sewer infrastructure is vitally important for all consumers, including Nestlé Waters Canada. Nestlé Waters and its employees support increased investment in this vital infrastructure by all levels of government so that each and every Canadian citizen has access to a safe and secure supply of tap water.
- Bottled water is simply not tap water in a bottle. Nestlé Waters Canada uses underground sources on private property to produce its waters. According to a February 2014 AC Nielsen report, 95% of Canadian bottled water comes from spring water sources on private property.

Water Supply

- We have the only full-time hydro geologist in the Canadian beverage industry. This individual is responsible for the sustainable development of existing spring sources to ensure environmental and domestic receptors are protected.
- We are the world's largest producer of bottled water, but only use 0.0009% of the total fresh water drawn worldwide.
- Nestlé Waters Canada's current permit in Aberfoyle, Ontario, is for 2,500 litres per minute. We are currently using about 60% of that.
- We draw less than 3.2% of available permitted water between April and September and about 1% between October and March from the Mill Creek sub watershed in Wellington County. Well less than 0.0053% of permitted water for taking in the Grand River watershed, and less than of 1% of available water from the Kawkawa Lake watershed in Hope.⁴
- We have paid for the water we draw in Ontario since 2009. We will begin to pay for the water we draw in British Columbia beginning in 2016.



Health &
Wellness

1 Stewardship Ontario, 2007.

2 Statistics Canada, Households and the Environment Survey, 2006.

3 Probe Research Inc. July 2012.

4 Grand River Conservation Authority and Nestlé Waters North America

The Facts About The Bottled Water Industry

The water bottling and distribution business is one of the oldest forms of commerce in the world.



The origins of bottled water can be traced back to 10,000 B.C., where early man used primitive vessels and skins to transport water to their dwellings.

According to Euromonitor International, the international bottled water market is forecast to grow by 78% from 2012 to 2017 – from 242,407.70 million litres to 311,618.10 million litres.¹



According to Taiyou Reports, growth of international bottled water market is forecast to be

\$70 billion
by 2017

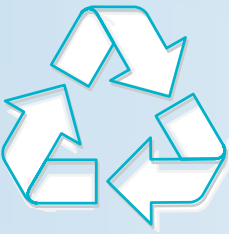
stimulated by rising populations, consumer spending patterns, lifestyle trends and a growing level of health consciousness.

Canadians have been purchasing spring water in bottles made of glass, plastic and other materials for almost 100 years.



¹ Euromonitor International. Passport; Bottled Water in Canada, March 2013

Facts About Recycling



The beverage industry is committed to improving on its almost **70% DIVERSION RATE** for beverage containers, including investing heavily to establish public spaces recycling programs nationally.

Public spaces recycling involves the collection of recyclable materials – items typically captured through deposit-refund and curbside recycling programs that are abandoned by consumers in public spaces such as sports parks, arenas, cultural facilities, streetscapes, transit stops, schools, gas stations and restaurants.

Bottled water represents less than 1% of a consumer's overall environmental footprint.

Compared to other packaged beverages, bottled water has the lightest environmental footprint because it doesn't use "grown" ingredients such as sugar during production, and because the bottles use the least amount of plastic.³ A consumer can further reduce the bottle's carbon footprint by 25% by simply recycling it.⁴

Plastic water bottles are the third most recycled product in Canada.

They are also the third most valuable item in a recycling program and, when recycled, are used to make playground equipment, automobile parts, carpeting, fleece clothing, sleeping bags, shoes, luggage, other plastic containers, etc.⁶

Recycling plastic bottles into new products

saves 50-60% of the energy

that would be required to make the same product.¹

In a 2008 report by Leger Marketing,

96%

of Canadian bottled water drinkers said they recycle their plastic bottles.

The recovery rate in Canada for plastic beverage containers averages almost

70%²

According to Stewardship Ontario, plastic beverage containers, including plastic water bottles,

account for less than 1%

of the total waste stream in Ontario and plastic water bottles account for only **40%** of that.

If the industry disappeared tomorrow, there would be

no appreciable decrease

in the volume of refuse going to landfill.

Yearly, Canadians discard about

500 lbs of newsprint

but only

20 lbs of plastic containers

(including beverage, household and personal care products).⁵

In 2009, the Regional Municipality of Halton collected

46,590 tonnes of recyclables.

Just 5% was plastic bottles and plastic tubs.



¹ Canadian Plastics Industry Association. The Benefits of Plastic Bottles.

² StewardEdge Consultants. July 2012.

³ Quantis International. Environmental Life Cycle Assessment of Drinking Water Alternatives and Consumer Beverage Consumption in North America. February 1 2010.

⁴ Quantis International. February 2010.

⁵ Canadian Plastics Industry Association. The Benefits of Plastic Bottles.

⁶ Stewardship Ontario. 2007.

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Facts About PET Bottles

PET bottles are **100%** recyclable

AND CAN BE RECYCLED OVER AND OVER AGAIN¹



Recycled PET is used to make a variety of everyday items – everything from sweaters to sleeping bags to playground equipment – making PET **one of the most valuable recycled materials available.**

Reusable or Single use?

Research shows that a reusable water bottle will have to be **used an average of 80 times** before it has a carbon footprint lower than that of a single use bottle.

This assumes high efficiency dishwashers are used. If the bottles are washed in a typical lower energy efficient domestic dishwasher, or are washed by hand, or are rinsed under hot running water, then the carbon footprint of the reusable water bottle, including washing, will be higher and could be greater than that of the single use bottle even after it has been reused hundreds of times.³



Any empty PET bottle is a resource – not a waste

every collected bottle is recycled into new bottles or other products. Its collection generates an environmental benefit by avoiding the production of virgin PET resin.

PET is the third most recycled product in Canada after newspapers and aluminum

PET is hygienic, strong and safe

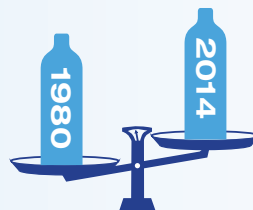
Because it is lightweight and durable, it is a very energy-efficient packaging material, which is why it's preferred for packaging many foods.

Recycled content, plant based plastics and light weight all reduce PET's energy use

If all energy inputs (hydro, materials, etc.) are translated to oil equivalents, it would account for less than 2.5% of the bottle's volume. Recycling preserves **86%** of that energy content for use in other products and packing.²

PET does not contain BPA, phthalates, dioxins, endocrine disruptors, lead or cadmium.

Advances in technology continue to decrease the weight of PET containers



In 1980, a 1.5 litre PET bottle weighed approximately 45 grams - today it weighs between 25 and 32 grams.

PET's light weight reduces the amount of raw material needed to produce beverage containers compared to glass or metal and uses less energy to transport, and because it's durable, it requires relatively less packaging for production.

¹ The National Association for PET Container Resources. Sustainability.
² US EPA. Solid Waste Management and Greenhouse Gases. 2002. All energy data based on percentages represent life-cycle energy savings of producing materials using recycled inputs compared with virgin inputs as a percentage of energy requirements using virgin inputs.
³ CIAL Group, Colin F.W. Issacs. Lifecycle Carbon Footprint Analysis of Bottled Water. August 11, 2008. Page 14.

Facts About Our Water Supply

The Canadian bottled water industry is an efficient user of its water source.

The industry uses **only 1.3 litres of water to make one litre of bottled water** compared to other beverage industries which may use several litres of water to make 1 litre of that beverage.²

The earth's hydrologic cycle **naturally** replenishes our spring waters.

This renewable supply falls from the sky, passing through lakes and rivers as it moves to the sea. Some goes underground, replenishing aquifers that can be tapped by wells.⁴



As one of the first signatories of the World Business Council for Sustainable Development pledge, Nestlé is **committed to upholding** the human right to water and sanitation within its operations. As a result, over **300,000 beneficiaries** are reached by water, sanitation and hygiene projects around Nestlé manufacturing facilities.

In 2009, Ontario lost **25%** of its tap water to leaky infrastructure at a cost of **\$700 million**

...that's enough to fill **131,000 Olympic-sized swimming pools.**¹

THERMAL POWER GENERATION	63%
MANUFACTURING	15%
MUNICIPALITIES	9.5%
AGRICULTURE	9.5%
MINING	1%
BOTTLED WATER02%

The Canadian bottled water industry uses just **0.02%** of permitted water in Canada.³

About **97%** of water drawn by bottled water companies is bottled.⁵

It takes...

- **600 litres** of water to produce **20 litres** of tap water.⁶
- **3 litres** of water to produce **1 litre** of soft drinks.⁷
- **42 litres** of water to produce **1 litre** of beer.⁸

There are a number of initiatives Canadians can undertake to help preserve, protect and strengthen our water systems. They include calling on Government to:

- Make water and sewer infrastructure development and maintenance a priority
- Make all residential, commercial and industrial water takers pay their fair share of the real cost of water consumption
- Address the inefficient use of water by municipalities, agriculture and industries
- Require treatment of wastewater before it is returned to rivers, lakes and oceans
- Invest in related public education and communications about water conservation and protection

¹ Residential and Civil Construction Alliance of Ontario Study.

² Agriculture & Agri-food Canada. The Canadian Bottled Water Industry. 25 Mar 2009.

³ Environment Canada. Water.

⁴ John B. Sprague. Excerpt from Eau Canada by Karen Bakker. 2006. Page 20.

⁵ Nestlé Waters North America. 2008.

⁶ Professor Alexander Zehnder. Alberta Water Research Institute.

⁷ K. Eschleman, Drinking Water Research Foundation, Coca-Cola Company and the Environmental Protection Agency.

⁸ K. Eschleman, Drinking Water Research Foundation, Coca-Cola Company and the Environmental Protection Agency.

Facts About Tap Water vs Bottled

**We see our competition
as other bottled beverages,
NOT tap water.**

“Bottled water competes with a variety of other cold beverages, including **carbonated soft drinks, milk, juices, soya beverages, energy drinks, and sport drinks** and to a lesser extent with hot drinks such as coffee, tea and hot chocolate, and low alcohol wine coolers and ciders.”¹ -Agriculture and Agri-Food Canada

The majority of Canadians (52%) drink a combination of bottled and tap water.² They consume tap water at home and bottled water on the go for proper hydration, good health and simple convenience.³

Quality standards for bottled and municipal waters are similar. Bottled water is held to the **same scrutiny** as tap water and is strictly regulated by Health Canada and the Canadian Food Inspection Agency as a food product. According to Health Canada: **“Consumers should be aware that bottled water is as safe to consume as tap water from a microbiological quality and chemical safety standpoint.”**⁴ -Canadian Food Inspection Agency

Less than 1% of municipal tap water is used for drinking. If the bottled water industry ceased operation tomorrow, there would be **no appreciable increase in the amount of tap water** consumed by Canadians.⁵



¹ Agriculture & Agri-food Canada. The Canadian Bottled Water Industry. 25 Mar 2009.

² Probe Research Inc. July 2012.

³ Probe Research Inc. July 2012.

⁴ Health Canada. Food and Nutrition, Questions and Answers on Bottled Water. December 15, 2013.

⁵ City of Toronto. Public Works. December 2008.

Facts About Health and Wellness

Water is a safe and healthy choice.

No matter what source it comes from, all bottled water sold in Canada is inspected and treated during the manufacturing process to ensure that it meets Canada's requirements for safety and quality.²

In Canada, bottled water is considered to be a food and is regulated under the Food and Drugs Act.

Under the Act and its regulations, all bottled water offered for sale in Canada must be safe for people to drink. In addition, the companies that bottle water must comply with quality standards, good manufacturing practices, and labeling requirements.⁴

The Canadian Food Inspection Agency regularly inspects domestic bottled water manufacturers.

They sample and analyze both domestic and foreign products to ensure that bottled water sold in Canada meets the requirements of Division 12 of the Food and Drug Regulations and is safe for human consumption.⁵ Testing is also conducted via surprise inspections by the Canadian Food Inspection Agency, Health Canada, the Canadian Bottled Water Association and National Sanitation Foundation (NSF) International, an independent and highly-regarded public health and food safety inspection agency. NSF is a World Health Organization Collaborating Centre for Food and Water Safety and Indoor Environment. No waterborne disease outbreaks have been associated with drinking bottled water in Canada.⁶

The Canadian Food Guide

promotes drinking water as a great calorie-free response to thirst¹

Adult Canadians should drink

9-12

cups of fluid per day -water is one of the best options³

70%

of Canadians said if bottled water wasn't available, they'd consume less healthy alternatives.

In a 2009 test study, the Toronto District School Board removed bottled water from school and administration sites.

The results? Of those students who normally purchased bottled water at school, 22% drank nothing at all and those who substituted pop or soft drinks for water outnumbered those who chose milk or juice.⁷



¹ Health Canada. Eating Well with Canada's Food Guide. November 18, 2011.

² Health Canada. It's Your Health – The Safety of Bottled Water. April 2009.

³ Dietitians of Canada. Guidelines for Staying Hydrated. May 3, 2013.

⁴ Health Canada. It's Your Health – The Safety of Bottled Water. April 2009.

⁵ Health Canada. Food and Nutrition, Questions and Answers on Bottled Water. December 15, 2013.

⁶ Canadian Food Inspection Agency. Fact Sheet, Food Safety Facts on Bottled Water.

⁷ Toronto District School Board. Impact of Eliminating the Sale of Bottled Water at Board Sites.

Report No. 02-08-1388Administration, Finance and Accountability Committee. March 4, 2009. Page 36.