



After 30 successful years, Highland Spring remains the leading British brand of bottled water (Source: Zenith Bottled Water Report 2010) and is the only major bottled water brand to have its catchment area certified organic by the Soil Association. Highland Spring ensures its water is as pure as can be, drawn from protected underground springs in the Ochil Hills, Perthshire, Scotland.



Market

Packaged water has grown significantly over the past 10 years, but has suffered more recently from poor summers in 2007 and 2008, and in the challenging economic climate. The market returned to growth in 2009 with volume sales increasing by 4.6 per cent in the 52 weeks to October (Source: Zenith 2010). With production exceeding 228 million litres, Highland Spring recorded a sales turnover of almost £55 million in 2009, an increase of 7.5 per cent year-on-year, benefiting from UK shoppers' increasing preference for British brands.

Product

Highland Spring's status as 'the water from organic land' is unique among major bottled water brands. The 1,000-hectare catchment

area from where the water is drawn has been carefully protected for more than 20 years, earning it organic status as certified by the Soil Association. This approach reflects the company's overall commitment to minimising its environmental impact. In March 2010 new PET bottle designs were launched for the 1.5L and 500ml sparkling products – at that time the lightest branded sparkling water bottles on the market, using nine per cent less plastic and 39 per cent less paper than their predecessors.

Highland Spring remains the only bottled water brand recognised by the Eco-Management and Audit System, not only meeting the standard but going far beyond what is required in order to maximise protection of the environment.

Achievements

Highland Spring continues to be at the forefront of category growth, retaining second

place in the market whilst increasing volume to 228 million litres (Source: Zenith 2010). In grocery multiples, Highland Spring is the leading sports cap brand (Source: Nielsen 2nd October 2010) and was the pioneer of the 'Kids' water market in 2001. The brand's top selling 'on the go' purchase, the 500ml screw cap, has increased value sales by 25 per cent year-on-year. Highland Spring also supplies more than



18.8 million litres to the on-trade every year and was awarded Gold at The Publican Licensees' Choice Awards 2010.

The brand also dominates the sparkling 'impulse' market and commands one-third of all sales of this format. This has helped cement the brand's number one position in the sparkling sector – outperforming its nearest competitor by more than two to one (Source: Zenith 2010). Also contributing to this success is the redesigned sparkling PET range, which has been awarded a prestigious Effectiveness Award by the Design Business Association.

Highland Spring is regarded as the most trusted bottled water in the UK (Source: NOP June 2010), and has also been recognised for the sixth consecutive year by The Good Shopping Guide 2011 as the leading ethical bottled water brand. The business is extremely proud of these achievements, and features The Good Shopping Guide logo across its packaging.

Recent Developments

Highland Spring Group is a privately owned business, headquartered in the UK. In 2009 the Group acquired the Speyside Glenlivet brand, followed by the water business of Greencore Group plc in 2010, thus becoming the leading producer and supplier of naturally-sourced bottled water in the UK market. Highland Spring Group's brand portfolio includes Highland Spring, Speyside Glenlivet, Gleneagles, Green Valley and a range of retailer own-labels and flavoured waters. The Group consists of five rural catchment areas and manages water abstraction

rights for 2.2 billion litres per annum. It's anticipated that the business will have supplied more than 350 million litres of bottled water in 2010, with an estimated turnover of £75 million.

Promotion

2010 saw further development of the major marketing thrust that began in 2009.

Having successfully communicated its organic status through advertising in previous years, Highland Spring set out to make an emotional connection with consumers. The new line, 'Brought to you with care', sets out to emphasise the care taken in protecting the brand's catchment area along with the importance of nurturing loved ones with the best – the water from organic land.

As advocates of healthy lifestyles, Highland Spring is proud of its comprehensive sports sponsorship portfolio.

Highland Spring is the exclusive drinks sponsor of professional tennis players Andy Murray and his brother, Jamie, as well as being the official bottled water supplier to the Lawn Tennis Association. In 2010, the brand used its association with Britain's number one tennis professional for a major on-pack promotion: 'Best Seat In The House'. The promotion encouraged consumers to collect and redeem tokens for tennis-related rewards, driving consumer loyalty and overall category growth.

Highland Spring also sponsors Scottish cyclist and



Olympic gold medallist Sir Chris Hoy, and is the official water supplier to high profile rugby teams and athletics events, as well as sponsoring top golf and snooker professionals.

At a grassroots level, Highland Spring sponsored more than one hundred 5km and 10km events, half marathons and marathons during 2010.

A new development in 2010 has been the Coachcast Series, an innovative set of online videos on Highland Spring's website that promote training tips from sports stars including Andy Murray, Sir Chris Hoy and London Wasps.

Brand Values

Highland Spring is an iconic Scottish brand and is committed to protecting the wider environment and developing its business in a sustainable and eco-friendly way.

As the guardian of its land, the company goes to great lengths to protect its source, and to extend its ethical approach to production, packaging, recycling and transport – a nurturing approach that reflects the views of its consumers.

Things you didn't know about Highland Spring

In 2001 Highland Spring became the first British brand of bottled water to have the land from which it is drawn certified organic by the Soil Association.

Highland Spring has been chosen as the leading ethical bottled water for six years running by The Good Shopping Guide, the world's leading information resource for ethical shoppers.

Highland Spring is a founder member of the Natural Hydration Council.

All of Highland Spring's packaging is 100 per cent recyclable.

1979	1993	1998	2001	2006	2007
Highland Spring Ltd is formed.	Highland Spring displaces Perrier from the top spot in the sparkling water market and secures the contract to supply bottled water to British Airways worldwide.	Highland Spring becomes the official water supplier to the World Snooker Association.	The brand continues to innovate, pioneering the 'Kids' bottled water market.	The first national TV advertising campaign is rolled out.	Highland Spring is revealed as the exclusive drinks sponsor to British tennis star Andy Murray and his brother, former Wimbledon doubles champion, Jamie Murray.

2008	2009	2010
Highland Spring signs a major sponsorship partnership with Sir Chris Hoy, multi-gold medal winner at the Beijing Olympics.	A refreshed brand identity is introduced across packaging and classic Hollywood stars are used to promote 'the water from organic land'.	A new sparkling PET range is launched and wins a prestigious industry award. Highland Spring Group is formed following acquisition of Greencore Group plc bottled water division, making it the UK's leading producer and supplier of naturally-sourced bottled water.