



**Highland Spring Group  
Press Kit  
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## HIGHLAND SPRING GROUP

The Highland Spring Group is the UK's largest supplier of bottled water.

Bottling over 350 million litres of water a year, the Highland Spring group, produces brands including Highland Spring, Speyside Glenlivet, Gleneagles and Green Valley. It also produces a range of private label waters for some of the UK's major supermarkets and food service retailers.

Highland Spring Limited was formed in 1979 and following its acquisition of the Greencore Water company, the Highland Spring Group was created.

Led by chief executive, Les Montgomery the company has ambitious plans to be a £100 million and 500m litre turnover business by 2013.

Headquartered at Blackford, Perthshire, the Highland Spring Group oversees five bottling plants and employs 408 staff. It has a current production capacity of over 700 million litres of water a year and has an available resource in excess 2.2 billion litres a year.

All Highland Spring Group's waters are harvested from naturally renewable sources, which are constantly replenished by the UK's ample rainfall. The company is fully committed to protecting the environment and developing the business in a sustainable, eco-friendly way. The water is packaged in glass and PET bottles in full compliance with UK and EU Food & Safety Packaging Regulations and industry codes of best practice.



## HIGHLAND SPRING

Highland Spring is the leading UK produced brand of bottled water. It is the number two overall brand in the bottled water sector in Britain, number one sparkling brand and leading kids' bottled water.

The water is drawn from protected land in the Ochil Hills, Perthshire, certified organic by the Soil Association. No farming, agricultural spraying, building or habitation is permitted and the land has been kept free from pesticides and pollution for more than two decades.

It takes around 15 years for the water to filter through the basalt and sandstone strata to boreholes lined with stainless steel which allow the water to be gently pumped to the surface and then down to the bottling plant in Blackford.

Untouched by human hand, Highland Spring is delivered to consumers exactly as nature intended with nothing added or taken away, apart from the addition of CO<sub>2</sub> for its sparkling range.

2010 has seen a flurry of new product developments and promotions for the Highland Spring brand. The company's biggest on-pack promotion to date, Best Seat in the House, was launched in April, featuring tennis sensation Andy Murray and will help consumers enjoy a fantastic summer of sport.

Earlier in the year Highland Spring unveiled a new sparkling bottle design, reflecting the iconic shape of the brand's glass range. The bottles use 9% less plastic and 39% less paper than those they replace.

Spring 2010 also saw the launch of an exclusive handbag size 'hint of pink' bottle in association with Breast Cancer Care to help raise valuable funds to support the 46,000 people diagnosed with breast cancer every year in the UK.



## SPEYSIDE GLENLIVET

In March 2009 Highland Spring acquired the Speyside Glenlivet Water Company Ltd, which had gone into administration earlier that year. Highland Spring stepped in to safeguard the future of the popular natural mineral water brand, securing 12 jobs. Speyside Glenlivet is bottled at source in The Braes of Glenlivet on the Crown Estate of Glenlivet, near Ballindalloch in Moray.

The premium brand is targeted at fine dining establishments in the UK and overseas. It delivers to an impressive list of restaurant and hotel customers including the Dorchester in London, The Ritz in Paris and The Balmoral in Edinburgh.

Speyside Glenlivet Natural Mineral Water is sourced from the highest natural spring in Scotland and has one of the lowest mineral contents of any bottled water. This unique positioning helps the product cleanse and refresh customers' palates allowing the flavours of fine food to shine.

The brand unveiled a new trade advertising campaign in May 2010 featuring renowned Scottish Michelin starred chef Martin Wishart. The advertising copy reinforces the importance of sourcing, with a testimonial from the Michelin starred chef - *"Sourcing is perhaps the most important element in the alchemy of the restaurant. From fabulous raw materials to the wine and water we serve, we will never compromise on quality."*



## GLENEAGLES NATURAL MINERAL WATER

Known for its eye catching, award winning stylish glass bottle, The Gleneagles brand is sourced from The Glen of Glen Devon and bottled at the Group's Maltings plant in Blackford.

The Maltings is a listed building and was originally built as a brewery and maltings in 1886. Natural water has been bottled at the plant since 1898 with Highland Spring acquiring the business in 2001.

An exquisite product, Gleneagles Natural Mineral Water is recognised as one of the most stylish bottled waters, only available in a selection of the world's most exclusive restaurants and hotels.



## **THE CAMPSIE FELLS**

In November 2009 Highland Spring agreed to acquire the bottled water division of Dublin-based Greencore Group plc, establishing it as the largest bottled water supplier in the UK.

The acquisition included The Campsie Fells plant in Lennoxton, just outside Glasgow. The water is sourced from underground springs on the protected catchment area in the Campsie Fells, which have been privately owned by the same family since the 16<sup>th</sup> century.

The bottling plant produces naturally sourced waters for a variety of private label customers across the UK including some of the UK's largest grocery retailers.

## **THE BRECON BEACONS**

Also included as part of the recent acquisition was The Brecon Beacons bottling plant in Blaen Twyni, near Swansea.

The water is sourced from a protected 40 acre site from the mountains in the heart of the Brecon Beacons National Park in Wales. A steady supply of rainfall is almost always guaranteed here, constantly replenishing the natural resource deep underground.

The site produces a range of flavoured waters for the UK grocery retail trade as well as the Green Valley brand which is a value product aimed at the cash & carry and food service sectors of the market.



## HIGHLAND SPRING - SPORTS SPONSORSHIPS

The Highland Spring brand works very hard to promote the benefits of a healthy, active lifestyle and is absolutely committed to forging the link between active sport and good hydration. In the UK, most people, and especially children, don't drink enough water or participate regularly in active sport. Through a comprehensive, focused program of sports sponsorship, Highland Spring promotes the benefits of an active lifestyle to target consumer groups and encourage good hydration as a key part of active sport.

The company is a major supporter of UK sport and a long-term sponsor of many national and international events including tennis, cycling, rugby, golf, running and athletics.

### **Sponsorship portfolio**

- Exclusive beverage sponsor of Andy Murray, Britain's number one and world No 4 tennis player. The 23 year-old tennis ace who hails from Dunblane (10 miles from the company's bottling plant) displays the brand logo on his shirt sleeve and drinks Highland Spring as part of his dietary regime. The company also sponsors Andy's brother Jamie, one of Britain's top doubles players and 2007 Wimbledon mixed doubles champion and mum Judy Murray, one of the UK's leading coaches.
- Lawn Tennis Association - Highland Spring supports British tennis from the grassroots up. In February 2008, the company signed up as the first official supplier in the LTA's new commercial programme. As official water, Highland Spring has a strong presence at the LTA international tour events in June which include the AEGON Championships staged at Queens, the AEGON Classic in Birmingham and the AEGON International in Eastbourne.
- GB Davis Cup Team – Since 2007, Highland Spring has been the official water supplier to the GB Davis Cup Team. The Davis Cup is the biggest and most prestigious team competition in men's tennis, and sees around 130 nations battle it out for top honours.
- In association with the LTA, Highland Spring has created the "Highland Spring Hot Shots Tour". The interactive tennis roadshow helps to promote tennis in a fun and enjoyable way to both children and adults at key tennis events and in key urban centres across the UK.
- In November 2008, Highland Spring signed a new sponsorship deal with Sir Chris Hoy: BBC Sports Personality of the Year, 4 times Olympic Gold Champion, 10 times World Champion and 2 times Commonwealth Champion, and the first Briton in more than 100 years to complete an Olympic hat-trick. Highland Spring is the official water supplier to Chris Hoy as he competes and trains around the

world. Chris works with Highland Spring to inspire and motivate British children to get involved in sporting activities and adopt better drinking habits.

- The company is also the official water supplier to numerous cycling events including: Etape Caledonia, Mountain Bike World Cup and The Tour of Britain.
- Highland Spring has been involved with rugby for a number of years and is currently the official water supplier to 8 of the 12 premier rugby clubs; Wasps, London Irish, Saracens, Sale Sharks, Bath, Newcastle, Worcester and Gloucester.
- The company is also the official bottled water supplier to 18 Scottish rugby union teams; Kinross, Watsonians, West of Scotland, Kilmarnock, Heriots, Biggar, Dundee, Crieff, Jed Forest, Kelso, Glasgow Hawks, Currie, Stirling, Ayr, Boroughmuir, Hawick, Gala and Melrose.
- Highland Spring sponsors 3 European golfers: Marc Warren, Alastair Forsyth and Steven O'Hara. The company is also the official water supplier to The Johnnie Walker Championship, The Barclays Scottish Open and The Ladies Scottish Open.



## **BOTTLED WATER – A HEALTHY NATURAL REFRESHMENT**

There is no healthier drink than bottled water. It is the only fluid you need to hydrate as part of a normal, healthy lifestyle and contains zero sugar, calories, preservatives or additives. The average Briton drinks just 200ml of water a day – less than one glass out of the six to eight glasses (2 litres) the World Health Organization recommends we should be drinking daily.

Jane Griffin, dietitian and nutrition consultant said: “Water is involved in a huge number of important processes that go on all the time in the body such as transporting nutrients and oxygen, getting rid of waste, temperature regulation of the body, swallowing, digestion, movement of joints and the eye, transport of sound, keeping the correct blood volume and pressure and respiration.”

Highland Spring pioneered the kids’ bottled water market in 2001. Today it produces the UK’s leading children’s bottled water, *Highland Spring for Kids*, which is sourced from the same organic catchment area as the parent brand. It comes in a multi-pack of 12x330ml sports bottles.

Many parents may not know the levels of sugar sweetened beverages. Leading nutritionist, Juliette Kellow advises a glass of blackcurrant squash may contain the equivalent of five teaspoons of sugar while some children’s drinks may contain up to nine teaspoons of sugar – more than a can of cola.

Juliette Kellow commented: “Encouraging children to drink more fluids is essential to prevent dehydration. Water is free from fat, sugar, salt and additives and is an essential part of a balanced, healthy diet for children. It’s also free from calories so is ideal to help prevent obesity.”

According to the British Dietetic Association the amount of fluid children need varies but should be about six to eight glasses a day, or more if it’s hot or a child exercises a lot.



## THE BOTTLED WATER MARKET

Bottled water continues to grow in popularity with 63% per cent of the UK adult (16+) population choosing it over other soft drinks. The market is worth £1.9 billion with 2.3 billion litres consumed in 2008 (Mintel 2009). Nevertheless, only 9.3 per cent of adults drink the recommended two litres a day, indicating huge potential for growth in the years ahead (*TGI 2010 Q1*).

Highland Spring enjoyed a bumper 2009 with the company achieving record sales levels in seven months of the year despite having the wettest July on record. June was a particular highlight as the company enjoyed its most successful month in its 31 year history, recording a record £8million sales turnover. Value sales of bottled water increased by 3% in 2009 with Highland Spring up 13% (Nielsen Multiples 52 weeks 26.12.09).

Highland Spring was also the top performing brand in multiple grocers in the last 12 months (to 17.04.10) with incremental sales growth of £6.7m; an increase in value share from 13.7% to 14.1%. It also remains the No.1 sparkling brand with 23.9% value brand share and No 1 in Cash and Carry and the on premise channel.

Still water is the most popular choice for consumers with 78.6 per cent choosing it most often (*TGI 2010 Q1*).

Scotland is perceived to be the country that is home to the purest, freshest water and of all leading brands; Highland Spring is considered to offer the purest water and considered by 50% of adults to be the most "Scottish" brand (NOP October 2009). Consumers also named Highland Spring as Britain's most trusted bottled water brand, an important consideration for today's bottled water consumers (NOP October 2009).

As well as being the leading UK producer Highland Spring boasts other market leading positions:

- No1 sports cap brand (Nielsen 17.04.10)
- No.1 kids brand (Nielsen 17.04.10)
- No 1 in cash and carries (Nielsen December 2009)
- No 1 in the On Premise channel (Zenith 2010 report)

## UK CONSUMER TRENDS

- As a nation Brits spent £1.34 billion on bottled water in 2009 (*Zenith 2010*).
- A massive 90.7% of adults still don't drink the recommended 2 litres of water a day (*TGI 2010 Q1*).
- 42% of adult consumers prefer to drink water sourced from organic land (*Zenith 2009*).
- Recent research indicates that 71% of consumers believe that Scotland produces the purest, freshest bottled water, followed by England (20%), Italy (4%) and France (2%) (*NOP Oct 2009*).
- London has the highest proportion of bottled water drinkers with 64.0% of adults drinking bottled water, followed by the South East 53.0% and then the North West 50.4% (*TGI 2010 Q1*).
- While 53.4% of women drink bottled water regularly, only 46.8% of men drink bottled water with the same frequency (*TGI 2010 Q1*).
- A third (33%) of adults prefer to drink bottled water sourced from organic land (*NOP Oct 2009*).
- Convenience (46%) is the no.1 factor influencing people's purchasing decisions while buying bottled water. Purity (36%) and price (36%) are the next two most important factors followed by health (34%) (*NOP Oct 2009*).

## PRODUCT RANGE

The Highland Spring Group offers the most comprehensive portfolio of naturally sourced waters in the UK market to meet all needs from the stylish glass range for fine dining to sports bottles for on the go.

The portfolio ranges from small 330ml to two litre bottles with easy-to-carry multi-packs suitable for families.

### Highland Spring

#### Glass Bottles

still : 330ml, 750ml, 1 litre clear glass  
sparkling : 330ml, 750ml, 1 litre green glass

#### Plastic

still : 330ml, 500ml, 500ml and 750ml sports cap, 1.5 litre, 2 litre  
sparkling : 330ml, 500 ml, 1.5 litre

#### Multi-packs

still : 6 x 500ml sports-cap  
still : 6 x 500ml screw cap, plastic  
still: 6 x 1.5 litres  
still : 2 x 2 litre plastic  
still: 12 x 500ml plastic  
still: 12 x 500ml sports-cap  
still: 12 x 330ml plastic (kids' pack)  
still : 6 x 2 litre plastic  
sparkling : 4 x 1.5 litre plastic  
sparkling: 6 x 500ml

### **Gleneagles Natural Mineral Water** - available in top hotels, restaurants and bars

- 75cl sparkling (silver cap)
- 75cl still (black cap)

### **Speyside Glenlivet**

#### Glass Bottles

*still; 330ml, 750 litre clear glass*  
*sparkling; 330ml, 750 ml clear glass*

### **Campsie Fells**

*4 x 1.5l still*

*6 x 500ml still*

*6 x 500ml sparkling*

*8 x 2l still*

### **The Brecon Beacons**

*500ml lemon and lime still*

*500ml raspberry and cranberry still*

*1.5 l peach still*

### **Green Valley**

*1.5 litre*

*500ml screw cap*

*500ml sports*

