

# 2025 Beverage Calories Initiative:

## Report on 2021 Progress toward the National Calorie Goal

March 2, 2023

Prepared by:



Prepared for:



# Overall Progress-to-Date

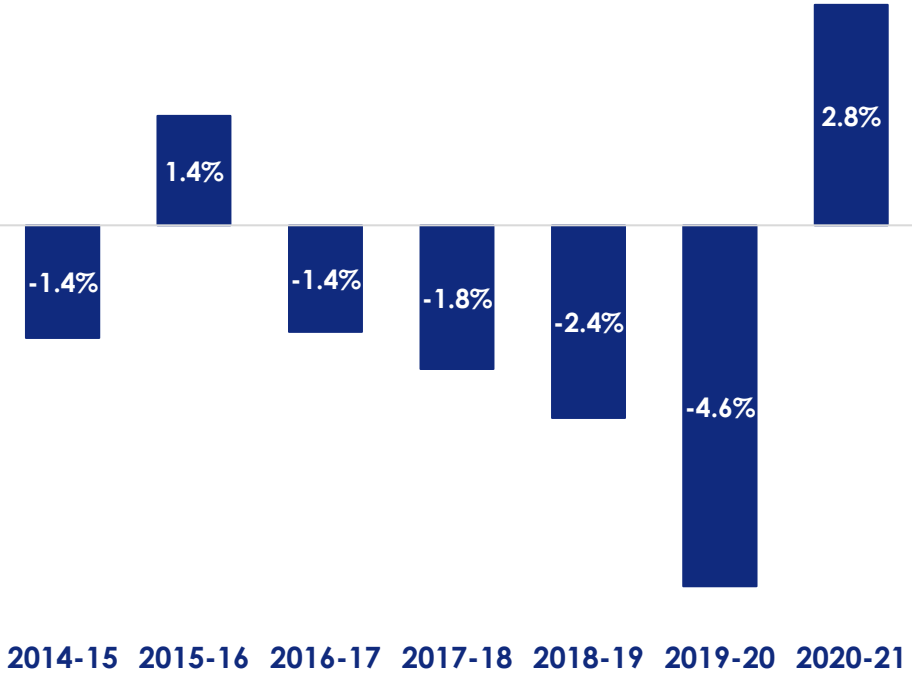
In September 2014, the American Beverage Association, The Coca-Cola Company, Dr Pepper Snapple Group (now Keurig Dr Pepper), PepsiCo, and the Alliance for a Healthier Generation announced a commitment to help reduce liquid refreshment beverage (“LRB”) calories in the American diet nationally by 20% by 2025. This report – one in a series of annual reports – reviews the progress achieved toward this goal through 2021.

From 2014 to 2019, average LRB calories per person fell 5.6%, which included annual declines of 1.4% to 2.4% for three years straight after 2016. In 2020, calories fell another 4.6% - largely driven by the COVID-19-related disruptions in dining patterns. As consumption at out-of-home venues such as restaurants partially bounced back in 2021, LRB calories per person increased 2.8%. Because of this turnabout in the trend, the industry went from being halfway to the goal of a 20% decline in LRB calories per person to a 7.4% decline. As a result, meeting the 20% reduction goal by 2025 will require an acceleration of the annual calorie reduction pace to roughly 3.6%.

The 2021 growth in calories per person per day was likely, at least in part, a rebound from the outsized reductions of 2020. Indeed, LRB volumes per person grew much faster than they did in any previous year. While beverage volume growth helped drive up calories per person, the continued shift of the beverage mix toward water and other low- and no-calorie beverages – a trend that has continued since 2014 – meant that calories per person increased by less than volumes.

The net result of these two outlier, pandemic-impacted years is that LRB calories per person are roughly 2% below pre-pandemic (i.e., 2019) levels. This means that the long-term trend is still moving in the right direction. The pace of progress, however, will need to accelerate to meet the 20% goal over the remaining four years of the initiative.

## Yearly Percentage Change in Calories per Person



## BCI National Calorie Goal Progress-to-Date



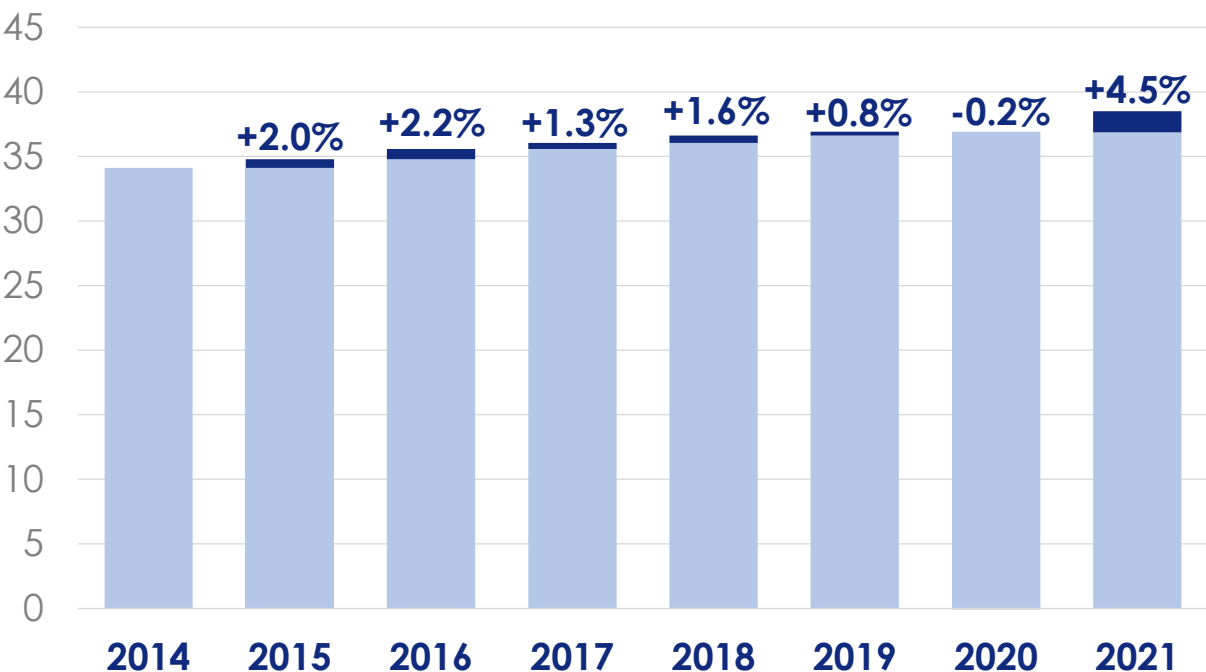
Source: U.S. Census Bureau, 2020, and the Beverage Marketing Corporation: DrinkTell Database, 2020.

# Growth in Calories per Person Driven by Volume Growth

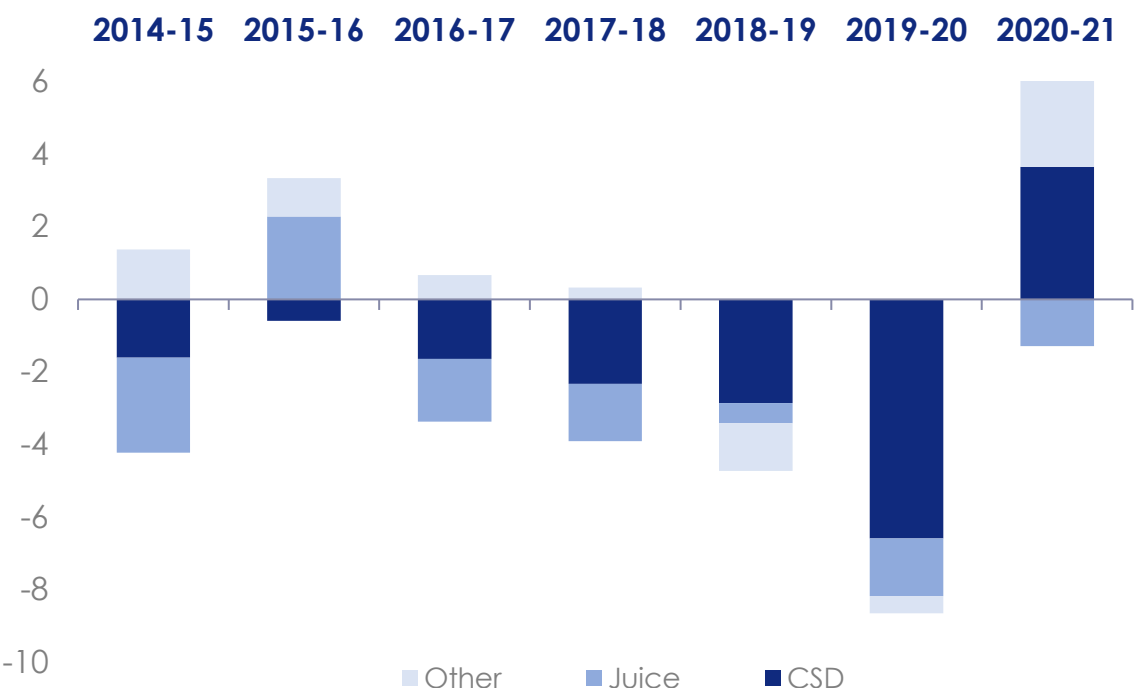
Beverage volume growth drove the 2021 increase in calories per person. **From 2020 to 2021, LRB volumes per person grew by 4.5% – the largest increase in volumes since the BCI launch in 2014.** Prior to 2020, the LRB volumes per person steadily increased, driven primarily by water's growth. In 2020, that trend came to a temporary halt as water's growth was fully offset by the decreasing volumes of other beverages. In 2021, LRB volume growth resumed and was driven not just by water's growth but also by the growth of non-water beverage volumes. This was the first time since the BCI launch that per person volumes of non-water beverages grew.

Since 2014, reductions in calories per person have been driven primarily by CSDs and 100% juices and juice drinks. In 2021, this remained true of calories from 100% juices and juice drinks. Calories from CSDs, on the other hand, grew in 2021 for the first time since before the launch of the BCI. This 2021 increase followed an outsized reduction in calories from CSDs in 2020. Both the decrease and subsequent increase were likely driven by the sharp 2020 reduction and 2021 partial recovery in commercial activity at out-of-home eating and entertainment venues such as restaurants. (A more detailed explanation is included on pages 7-8.)

LRB Ounces per Person per Day & Annual Percent Change



Annual Changes in Calories per Person per Day

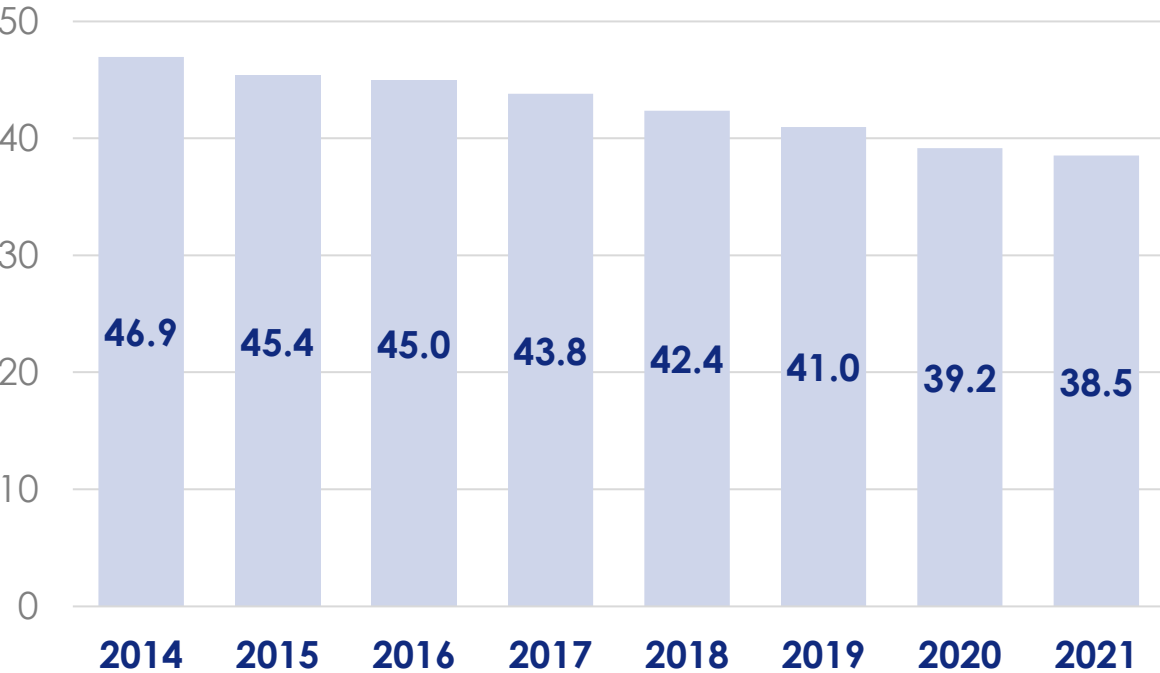


Source: U.S. Census Bureau, 2020, and the Beverage Marketing Corporation: DrinkTell Database, 2020.

# Declining Calories per 8-ounce Serving

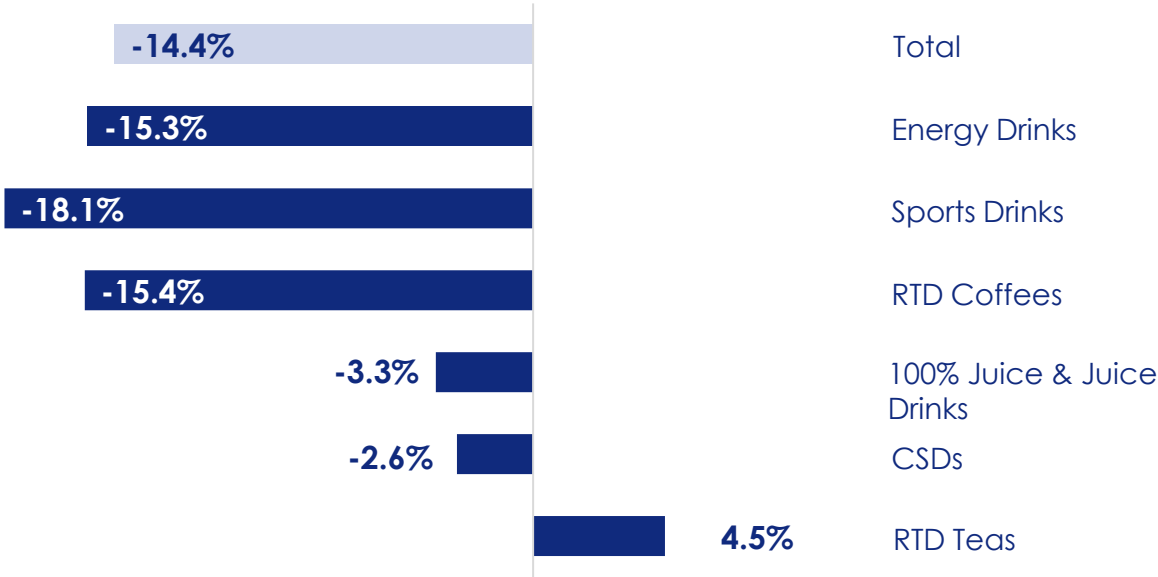
Despite the increase in LRB calories per person in 2021, the change in the composition of LRB toward lower-calorie beverages continued. This helped to offset some of the growth in volumes per person, meaning that calories per person increased by less than volumes per person. The 2021 reduction in average calories per 8-ounce serving continued a steady trend that began in 2014. The pace of reductions slowed in 2021, following an especially large reduction in 2020. **The average decline over both years, however, was on par with average annual changes since 2014. Since 2014, calories per 8-ounce serving have fallen by nearly 18%.**

Calories per 8-Ounce Serving, 2014-2021



Reductions in calories per 8-ounce serving have been driven primarily by the growth of water since 2014. Beginning in 2017, however, shifts in consumption toward lower-calorie versions of other beverages have also played a role. For example, although energy drink, sports drink, and RTD coffee consumption has been growing, the growth has mostly come from no-calorie versions of these beverages. This growth has enabled volumes per person for some categories to grow, even while their contributions to calories per person decline.

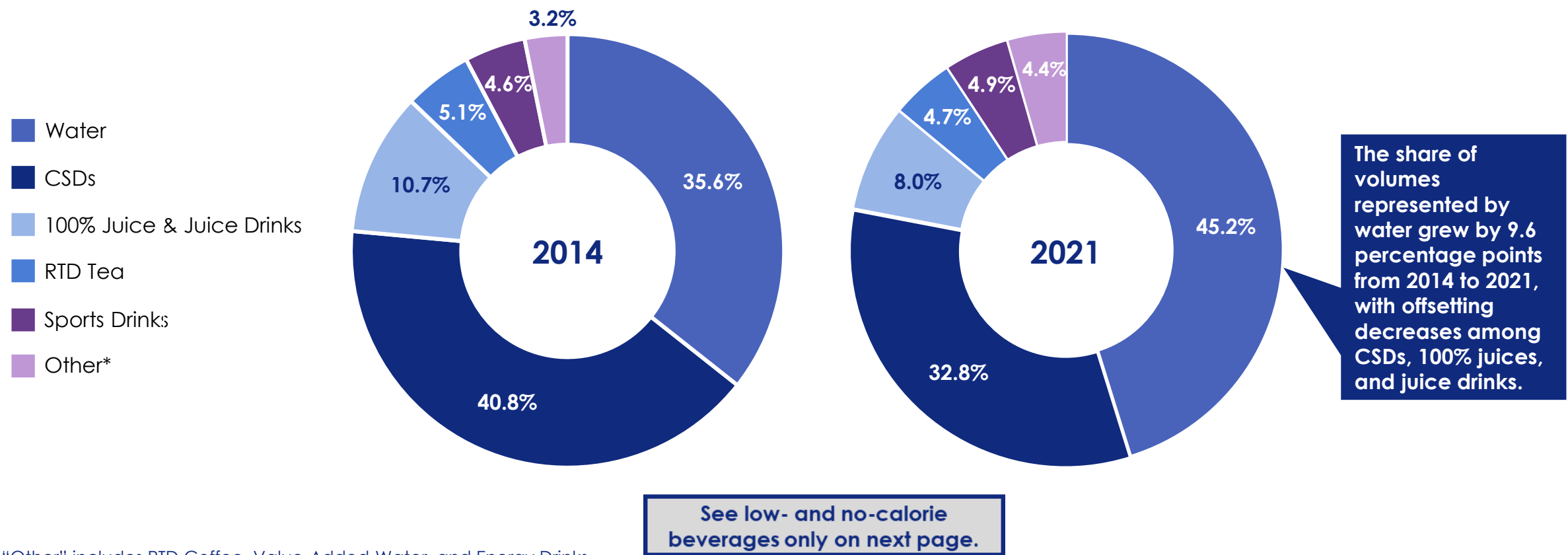
Percent Change in Calories per 8-Ounce Serving, 2017-2021



Source: Beverage Marketing Corporation: DrinkTell Database, 2020.

# LRB Product Mix Shifting toward Low- and No-Calorie Beverages, Including Water

Percent of Total Volumes, All Beverages

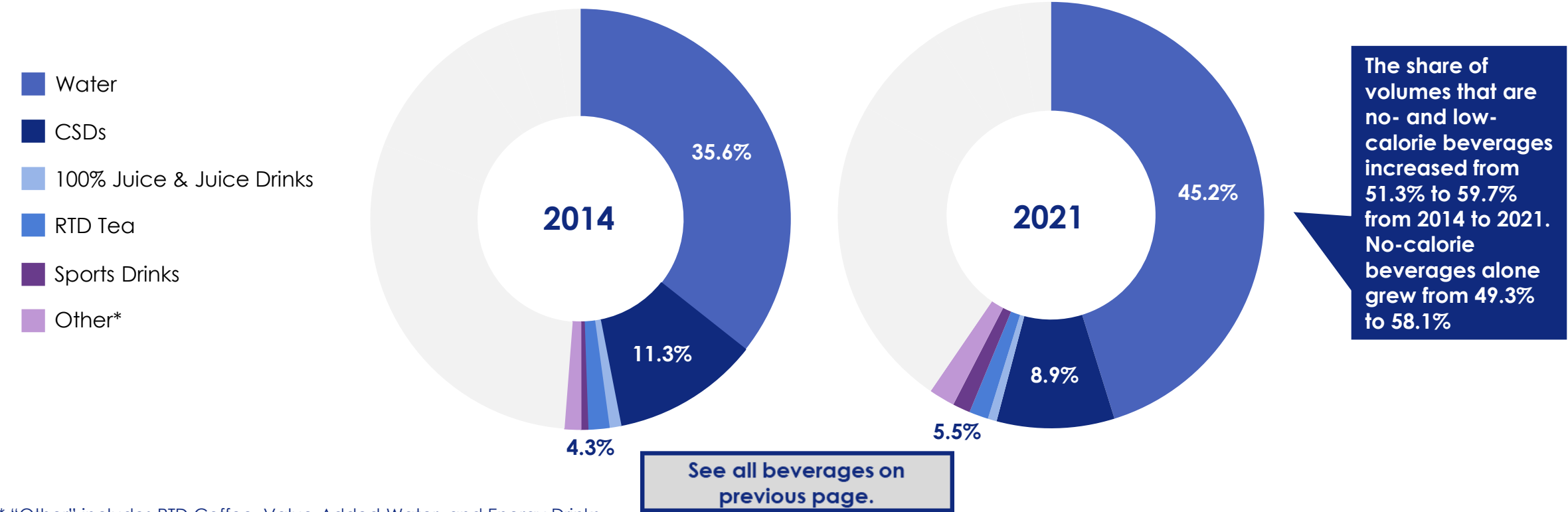


\* "Other" includes RTD Coffee, Value-Added Water, and Energy Drinks

One persistent trend that has helped to drive long-term reductions in calories per person has been the shifting composition of LRB towards lower-calorie beverages, particularly water. From 2014 to 2021, per person water volumes – including sparkling waters – grew by 43.1%. As shown in the figures above, water's share of LRB grew by 9.6 percentage points over that period. These increases were mirrored by decreases in the share of volumes represented by CSDs, 100% juices, and juice drinks. From 2014 to 2021, per person volumes of full-calorie CSDs and 100% juices and juice drinks – the source of more than 80% of all LRB calories – fell by 8.6% and 12.2%, respectively. Looking at LRB composition by calorie categories shows a similar shift. Low- and no-calorie beverages went from representing 51.3% of LRB volumes in 2014 to 59.7% in 2021.

# LRB Product Mix Shifting toward Low- and No-Calorie Beverages, Including Water

Percent of Total Volumes, Low- and No-Calorie Beverages Only



\* "Other" includes RTD Coffee, Value-Added Water, and Energy Drinks

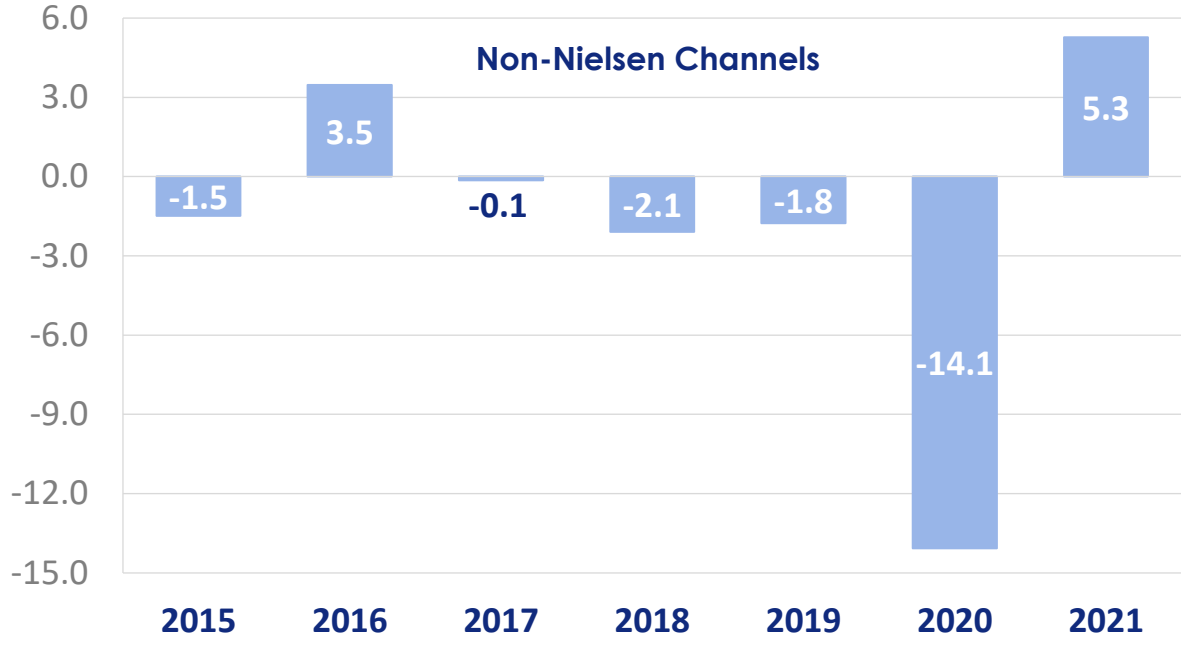
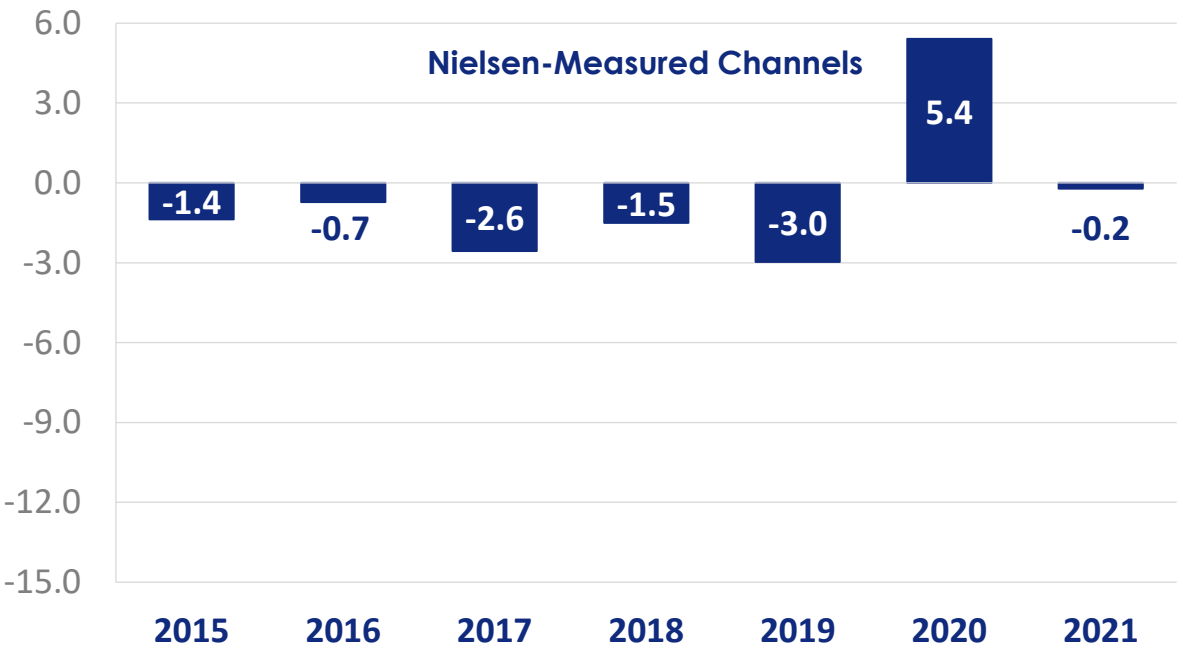
One persistent trend that has helped to drive long-term reductions in calories per person has been the shifting composition of LRB towards lower-calorie beverages, particularly water. From 2014 to 2021, per person water volumes – including sparkling waters – grew by 43.1%. As shown in the figures above, water's share of LRB grew by 9.6 percentage points over that period. These increases were mirrored by decreases in the share of volumes represented by CSDs, 100% juices, and juice drinks. From 2014 to 2021, per person volumes of full-calorie CSDs and 100% juices and juice drinks – the source of more than 80% of all LRB calories – fell by 8.6% and 12.3%, respectively. Looking at LRB composition by calorie categories shows a similar shift. Low- and no-calorie beverages went from representing 51.3% of LRB volumes in 2014 to 59.7% in 2021.

# Diverging Beverage Calorie Changes in Different Sales Channels in 2021

The pandemic drove shifts in where consumers purchased their food and beverages. The changes occurred abruptly in 2020 and mostly persisted in 2021. The data showing this come from Nielsen's Scantrack dataset and the Beverage Marketing Corporation's DrinkTell dataset. The former includes only packaged beverages sold through stores – primarily chain grocery, convenience, drug, dollar, big box, and club stores. These channels have typically represented about 60% of total LRB volumes and calories. The DrinkTell data, in contrast, represent beverages sold through all channels. “Non-Nielsen” market segments are represented by the differences between the datasets, and they include beverages from restaurants, vending machines, entertainment venues, all other fountain beverages, and some other small channels.

In 2020, consumers increased their beverage calorie consumption from Nielsen channels like grocery, dollar, and big box stores by 5.4 calories per person per day. This was more than offset by a decrease of 14.1 calories per person per day in Non-Nielsen Channels. These changes in consumption correspond with well-documented, COVID-induced consumer purchase pattern changes in 2020 as out-of-home consumption plummeted. On net, LRB calories per person per day fell by almost 9, the most since the launch of the BCI in 2014. In 2021, beverage calorie consumption in non-Nielsen channels partially rebounded, causing an increase of 5.3 calories per person per day in those channels. Meanwhile, calories from Nielsen channels were mostly flat. The net result was an increase of 5.1 calories per person per day across all channels in 2021.

Change in Beverage Calories Per Person Per Day



Source: Nielsen Scantrack, 2021, U.S. Census Bureau, 2021, and the Beverage Marketing Corporation: DrinkTell Database, 2021.

# Impacts of COVID-19 Pandemic on Food and Beverage Consumption Expenditures

The figures below feature external data that show the impact of the pandemic on food and beverage purchases through 2021. The left-hand figure shows OpenTable dinner reservations, which is a good proxy for dining out activity. The chart shows the severe reduction in dining out from March 2020 onward. The number of reservations declined to essentially zero in March and April 2020. Reservations picked up but remained around half of their 2019 levels into the spring of 2021. It wasn't until late in the spring of 2021 that reservations began to increase towards their pre-pandemic levels. This is likely reflective of similarly reduced commercial activity at other entertainment venues where people often consume beverages – e.g., movie theatres, sports stadiums, etc. This data helps explain the partial recovery of beverage sales and calorie consumption from non-Nielsen channels in 2021.

## OpenTable U.S. Seated Diners

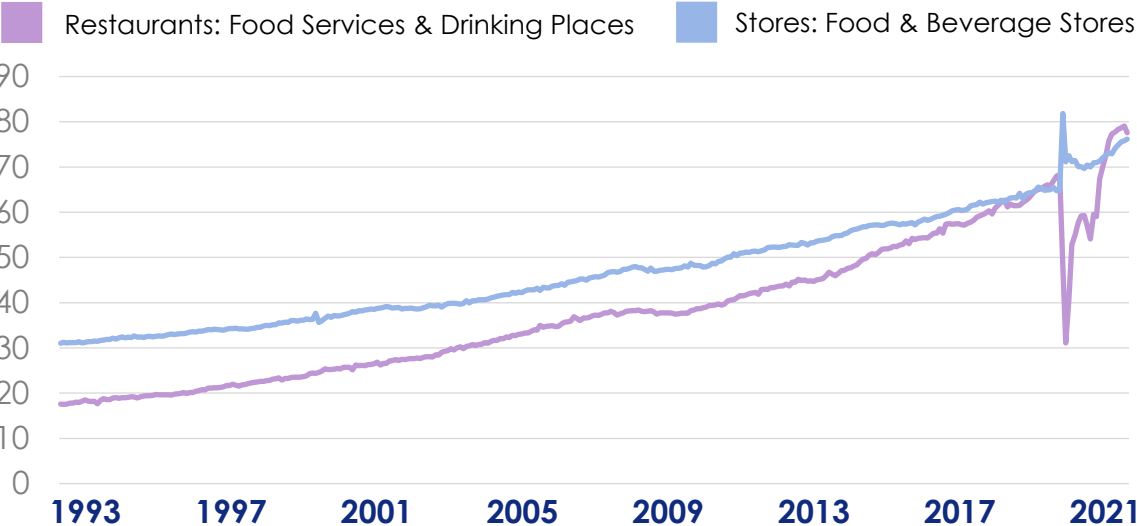
Y/Y % change in diners at restaurants in the OpenTable network, 7-day moving average



The right-hand figure features data from the U.S. Census Bureau showing food and beverage expenditures by type of establishment. The graph shows convergence over decades as people increased the share of food and beverages expenditures made at "Food Services & Drinking Places" (i.e., restaurants and bars) versus stores. The lines sharply diverge in March 2020 as the COVID-19 pandemic decreased U.S. food and beverage expenditures at restaurants and bars. Restaurant expenditures remained below their previous trend into the spring of 2021. In contrast, food and beverage expenditures at stores spiked at the beginning of the pandemic and remained above their previous trend into 2021. Both figures below demonstrate why beverage consumption in non-Nielsen market segments remained depressed in 2021.

## Food & Beverage Expenditures by Type of Establishment

\$US Billions





## Key Conclusions

- ▶ Calories per person per day have fallen 7.4% since the launch of the BCI. This means that the pace of calorie reductions will need to accelerate to meet the 20% reduction goal by 2025.
- ▶ Calories per person per day grew in 2021, a departure from the 2016-2020 downward trend. The 2021 increase followed an especially large decrease in 2020. It is likely that both the sharp decrease in 2020 and the partial rebound in 2021 were driven, at least in part, by COVID-related lockdowns and subsequent re-openings.
- ▶ Changes in the composition of LRB continued in 2021 with calories per 8-ounce falling just as it has for each year of BCI implementation. Since 2014, calories per 8-ounce serving have fallen by almost 18%.
- ▶ The reason for the continued decline in calories per 8-ounce serving is the growth of no- and low-calorie beverages, particularly water, as a share of LRB volumes. This share grew from 51.3% in 2014 to 59.7% in 2021. The shares of the categories responsible for the most calories – CSDs, juices, and juice drinks – shrank by a similar amount.
- ▶ Per person calorie growth in 2021 was driven by volume growth. Volumes per person grew by 4.5% in 2021, much faster than in any other year since the BCI was launched.
- ▶ Calorie reductions since 2014 have been driven primarily by reductions in calories from CSDs, 100% juices, and juice drinks. In 2021, calories from and volumes of 100% juices and juice drinks continued to fall, while calories from and volumes of CSDs and other beverages increased.
- ▶ The COVID-19 pandemic drove sharp changes in where consumers purchased their beverages – from restaurants and other out-of-home venues to grocery and other stores. In 2021, beverage consumption in non-Nielsen market segments (which includes restaurants and other out-of-home venues) partially recovered while beverage sales in Nielsen channels (which includes most stores) remained above its pre-pandemic trend.

COVID Impact: The pandemic and the associated lockdowns disrupted beverage supply and demand in both 2020 and 2021. The net impact of these disruptions on 2020 LRB calories per person appears to have been negative (i.e., reducing calorie consumption below where it likely would have otherwise been). Its impact on 2021 calorie consumption is even more unclear as commercial activity where beverages are purchased waxed and waned through surges and easing of COVID transmission throughout 2021. As COVID-19 has become more endemic in 2022, its fleeting and lasting impacts on beverage consumption may come into greater focus and enable a more complete assessment of how the short- and long-term trajectories of beverage calorie consumption were affected.

## Appendix A: Background

In September 2014, the American Beverage Association, The Coca-Cola Company, Dr Pepper Snapple Group (now Keurig Dr Pepper), PepsiCo, and the Alliance for a Healthier Generation announced a commitment to help reduce beverage calories in the American diet. Recognizing the contribution that excess calories play in obesity, the commitment signatories aim to reduce beverage calories consumed through a two-part initiative referred to as the 2025 Beverage Calories Initiative ("BCI"):

1. The National Initiative seeks to reduce liquid refreshment beverage ("LRB")\* calories consumed per person nationally by 20% by 2025 (i.e., the national calorie goal).
2. The Communities Initiative seeks to achieve equivalent calorie reductions (i.e., the community calorie goal) in communities where reducing beverage calories is expected to be the most challenging.

BCI participants committed to independent, third-party monitoring of progress over time. In consultation with the Alliance for a Healthier Generation, the ABA held a competitive request-for-proposal process and selected Keybridge to measure and monitor progress. Each year, progress toward the national and community calorie goals is reported publicly. This report features progress through 2021 toward the national calorie goal. Progress toward the community calorie goal will be featured in a forthcoming report.

Detailed information about many of the calorie reduction strategies being implemented by BCI Companies is available in previous progress reports and in downloadable summaries from each company, all of which are available at [www.ameribev.org/education-resources/policies-research/bci](http://www.ameribev.org/education-resources/policies-research/bci).



\*Liquid refreshment beverages ("LRB") refers to most beverages available for purchase through retail stores, fountain, vending machines, and restaurants, and covers nearly all beverages manufactured by the BCI Companies at the time the commitment was made. LRB includes carbonated soft drinks ("CSDs"), juices and juice drinks, ready-to-drink ("RTD") teas and coffees, sports drinks, energy drinks, water and value-added water. LRB excludes alcoholic beverages, dairy products, brewed beverages, drink mixes, energy shots, lemon and lime juice, coconut milk, concentrates, flavor drops, and tap water.

## Appendix B: Methodology Summary

The measurement approach is described in detail in earlier BCI reports and in the accompanying detailed methodology document. It is based on three features: (1) using sales volume data as a proxy for consumption; (2) using multiple data sources in order to corroborate findings; and (3) identifying the underlying drivers of changes in calories per person.

Consistent with previous reports, the main national calorie estimates shown are based on Beverage Marketing Corporation's DrinkTell database ("DrinkTell"). DrinkTell provides data for all beverages classified as LRB and sold through all channels. A second beverage volume data source, the Beverage Digest Fact Book, is used to corroborate volume trends among the beverage categories it fully covers, including carbonated soft drinks ("CSDs"), the largest category in terms of both volume and calories. Finally, the Nielsen Company's Scantrack dataset ("Scantrack") is used to examine calorie trends within the narrower set of sales channels covered by this dataset. Scantrack covers all packaged beverages sold in most major chain stores, which have accounted for about 60% of the LRB volumes captured by DrinkTell. The Scantrack dataset is also used to measure container size changes because it is the only dataset with detailed stock keeping unit ("SKU") level product information.

This report on 2021 progress shows per person calorie estimates for 2021, the seventh year of BCI implementation at the national level. It also features revised estimates for 2014 through 2020 and the 2025 goal. Updates to these estimates were due to revisions in the underlying brand-level sales volume estimates in DrinkTell and Scantrack as well as updates to national population estimates which incorporate the more accurate data available from the 2020 decennial census.

The full methodology can be found at [www.ameribev.org/education-resources/policies-research/bci](http://www.ameribev.org/education-resources/policies-research/bci).

# Appendix C: Data Tables

Average Calories Per Person Per Day (Average Per Capita Daily Calories) <sup>1</sup>										
Category	2014	2015	2016	2017	2018	2019	2020	2021	2014-2021 Change	2020-2021 Change
Total										
CSD	128.0	126.4	125.8	124.1	121.8	118.9	112.4	116.0	-12.0	3.7
Juice	42.3	39.6	41.9	40.2	38.6	38.0	36.5	35.2	-7.1	-1.3
RTD Tea	10.6	11.1	11.3	11.7	11.6	11.4	11.0	11.7	1.1	0.7
RTD Coffee	2.1	2.4	2.6	2.8	3.0	3.1	3.4	3.9	1.8	0.5
Energy	6.8	6.8	7.0	7.3	7.5	7.1	7.2	8.3	1.4	1.1
Value Added Water	0.8	0.8	0.9	0.9	1.0	0.9	0.7	0.9	0.1	0.2
Sports Drinks	9.7	10.3	10.6	10.3	10.4	9.7	9.4	9.7	-0.1	0.3
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	200.3	197.4	200.2	197.5	193.9	189.1	180.5	185.5	-14.8	5.1
Full-Calorie (More than 67 Calories per 8 oz.)										
CSD	127.5	126.0	125.4	123.8	121.5	118.7	112.1	115.7	-11.8	3.7
Juice	37.8	35.3	37.8	36.2	34.5	34.1	32.9	32.0	-5.8	-0.9
RTD Tea	6.0	6.6	7.0	7.1	7.2	7.3	7.2	8.1	2.1	0.9
RTD Coffee	2.0	2.3	2.5	2.7	2.8	2.9	3.2	3.6	1.6	0.4
Energy	6.0	6.6	6.9	7.2	7.4	6.9	7.0	8.1	2.1	1.1
Value Added Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sports Drinks	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Subtotal	179.3	176.7	179.5	177.0	173.3	169.9	162.4	167.5	-11.8	5.1
Mid-Calorie (41-66 Calories per 8 oz.)										
CSD	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Juice	3.6	3.5	3.3	3.1	3.0	2.7	2.7	2.5	-1.1	-0.2
RTD Tea	3.9	3.7	3.6	3.6	3.4	3.3	3.0	2.9	-1.0	-0.1
RTD Coffee	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.1	0.0
Energy	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.0	-0.1	0.0
Value Added Water	0.6	0.6	0.6	0.7	0.7	0.7	0.5	0.6	0.1	0.1
Sports Drinks	9.5	10.0	10.3	10.1	10.1	9.4	9.2	9.4	-0.1	0.2
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Subtotal	17.7	18.0	18.1	17.7	17.5	16.3	15.6	15.6	-2.1	0.0
Low-Calorie (5-40 Calories per 8 oz.)										
CSD	0.3	0.2	0.2	0.2	0.1	0.1	0.1	0.1	-0.2	0.0
Juice	0.8	0.9	0.9	0.8	1.1	1.1	0.8	0.7	-0.1	-0.1
RTD Tea	0.7	0.7	0.7	1.0	1.0	0.8	0.7	0.7	0.0	0.0
RTD Coffee	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.0
Energy	0.7	0.1	0.1	0.1	0.1	0.1	0.1	0.1	-0.7	0.0
Value Added Water	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.0	0.0
Sports Drinks	0.3	0.3	0.3	0.2	0.3	0.2	0.2	0.3	0.0	0.1
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Subtotal	3.0	2.4	2.4	2.5	2.8	2.7	2.1	2.1	-0.9	0.0
No-Calorie (Less than 5 calories per 8 oz.)										
CSD	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.0	0.0
Juice	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
RTD Tea	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
RTD Coffee	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Energy	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0
Value Added Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sports Drinks	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Subtotal	0.3	0.2	0.2	0.2	0.2	0.2	0.3	0.3	0.0	0.0
By Nielsen-Measured Channels and Non-Nielsen Channels										
Nielsen <sup>2</sup>	127.9	126.5	125.8	123.2	121.7	118.7	124.1	123.9	-3.9	-0.2
Non-Nielsen <sup>3</sup>	72.4	70.9	74.4	74.3	72.2	70.4	56.3	61.6	-10.8	5.3

<sup>1</sup> Data from DrinkTell and Census Bureau

<sup>2</sup> Data from Nielsen Scantrack and Census Bureau

<sup>3</sup> Represents the difference between Drinktell and Nielsen Scantrack

Note: All averages are weighted by volume.

Daily Volume Per Person, Ounces Per Person Per Day <sup>1</sup>										
Category	2014	2015	2016	2017	2018	2019	2020	2021	2014-2021 Change	2020-2021 Change
Total										
CSD	13.9	13.6	13.3	13.1	13.0	12.8	12.2	12.6	-1.3	0.4
Juice	3.6	3.6	3.6	3.4	3.3	3.2	3.1	3.1	-0.6	0.0
RTD Tea	1.7	1.8	1.8	1.8	1.8	1.8	1.7	1.8	0.1	0.1
RTD Coffee	0.1	0.2	0.2	0.2	0.2	0.2	0.2	0.3	0.2	0.1
Energy	0.6	0.7	0.7	0.7	0.8	0.9	0.9	1.0	0.3	0.1
Value Added Water	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.4	0.1	0.1
Sports Drinks	1.6	1.6	1.7	1.6	1.7	1.7	1.8	1.9	0.3	0.1
Water	12.2	13.0	13.9	14.8	15.4	16.0	16.6	17.4	5.2	0.8
Total	34.1	34.8	35.6	36.0	36.6	36.9	36.9	38.5	4.4	1.6
Full-Calorie (More than 67 Calories per 8 oz.)										
CSD	10.1	10.0	9.9	9.8	9.6	9.4	8.9	9.2	-0.9	0.3
Juice	2.8	2.8	2.8	2.7	2.5	2.5	2.4	2.4	-0.3	0.0
RTD Tea	0.6	0.6	0.7	0.7	0.7	0.7	0.7	0.8	0.2	0.1
RTD Coffee	0.1	0.1	0.1	0.2	0.2	0.2	0.2	0.2	0.1	0.0
Energy	0.4	0.5	0.5	0.5	0.5	0.5	0.5	0.6	0.2	0.1
Value Added Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sports Drinks	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Subtotal	14.0	14.0	14.0	13.8	13.6	13.3	12.7	13.2	-0.7	0.5
Mid-Calorie (41-66 Calories per 8 oz.)										
CSD	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Juice	0.5	0.5	0.5	0.5	0.4	0.4	0.4	0.4	-0.2	0.0
RTD Tea	0.6	0.6	0.6	0.6	0.5	0.5	0.5	0.5	-0.2	0.0
RTD Coffee	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Energy	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Value Added Water	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.0
Sports Drinks	1.4	1.5	1.5	1.5	1.5	1.4	1.3	1.4	0.0	0.0
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Subtotal	2.7	2.7	2.7	2.6	2.6	2.4	2.3	2.3	-0.3	0.0
Low-Calorie (5-40 Calories per 8 oz.)										
CSD	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	-0.1	0.0
Juice	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.0	0.0
RTD Tea	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.0	0.0
RTD Coffee	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Energy	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.1	0.0	0.0
Value Added Water	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.0
Sports Drinks	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.0
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Subtotal	0.7	0.7	0.7	0.7	0.7	0.7	0.6	0.6	-0.1	0.0
No-Calorie (Less than 5 calories per 8 oz.)										
CSD	3.8	3.6	3.4	3.3	3.3	3.3	3.3	3.4	-0.4	0.1
Juice	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.0
RTD Tea	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.0	0.0
RTD Coffee	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Energy	0.1	0.1	0.2	0.2	0.2	0.3	0.3	0.3	0.2	0.0
Value Added Water	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.3	0.1	0.0
Sports Drinks	0.1	0.1	0.1	0.1	0.1	0.2	0.4	0.4	0.3	0.0
Water	12.2	13.0	13.9	14.8	15.4	16.0	16.6	17.4	5.2	0.8
Subtotal	16.8	17.4	18.2	18.9	19.7	20.5	21.2	22.3	5.5	1.1
By Nielsen-Measured Channels and Non-Nielsen Channels										
Nielsen <sup>2</sup>	21.2	21.5	22.2	22.2	22.6	22.8	24.1	24.8	3.5	0.6
Non-Nielsen <sup>3</sup>	12.9	13.3	13.4	13.8	14.0	14.1	12.7	13.7	0.8	1.0

# Appendix C: Data Tables

Total LRB Volume Eight-Ounce Equivalent Servings, In Millions¹										
Category	2014	2015	2016	2017	2018	2019	2020	2021	2014-2021 Change	2020-2021 Change
Total										
CSD	202,539	199,356	197,799	195,252	194,451	192,388	185,417	191,332	(11,207)	5,915
Juice	53,049	52,545	52,650	50,624	49,156	48,323	47,084	46,676	(6,373)	(408)
RTD Tea	25,350	26,343	27,234	27,533	27,459	26,953	26,059	27,390	2,040	1,331
RTD Coffee	1,924	2,230	2,515	2,836	3,086	3,290	3,717	4,491	2,566	773
Energy	9,249	10,068	10,553	10,942	11,881	12,909	13,234	14,921	5,673	1,687
Value Added Water	4,668	4,895	5,213	5,532	6,020	6,003	5,562	6,458	1,790	896
Sports Drinks	22,652	23,902	24,825	24,308	24,989	25,476	26,882	28,279	5,627	1,397
Water	176,925	190,916	206,545	219,639	231,394	240,640	251,080	263,485	86,560	12,405
Total	496,357	510,255	527,336	536,666	548,437	555,983	559,036	583,033	86,676	23,997
Full-Calorie (More than 67 Calories per 8 oz.)										
CSD	146,484	146,283	146,845	145,732	144,470	142,104	135,246	139,329	(7,155)	4,083
Juice	40,572	40,368	40,913	39,512	38,153	37,879	36,768	37,076	(3,496)	308
RTD Tea	8,444	9,424	10,064	10,205	10,485	10,623	10,687	11,966	3,522	1,279
RTD Coffee	1,673	1,932	2,148	2,390	2,506	2,630	2,845	3,214	1,542	370
Energy	6,341	6,931	7,242	7,606	7,875	7,518	7,730	8,998	2,657	1,268
Value Added Water	0	1	3	3	1	4	11	11	11	(0)
Sports Drinks	1	1	1	1	6	1	1	0	(1)	(1)
Water	-	-	-	-	-	-	-	-	-	-
Subtotal	203,515	204,940	207,215	205,448	203,497	200,759	193,288	200,595	(2,920)	7,307
Mid-Calorie (41-66 Calories per 8 oz.)										
CSD	8	8	8	7	7	2	1	0	(8)	(1)
Juice	7,990	7,671	7,292	6,959	6,736	6,207	6,173	5,659	(2,331)	(515)
RTD Tea	8,910	8,614	8,510	8,508	8,148	7,801	7,215	6,939	(1,971)	(276)
RTD Coffee	161	186	229	249	296	312	354	456	295	103
Energy	205	175	155	138	181	178	135	106	(99)	(29)
Value Added Water	1,379	1,461	1,560	1,732	1,790	1,665	1,347	1,593	214	247
Sports Drinks	20,024	21,320	22,249	21,788	21,827	20,519	20,111	20,486	462	375
Water	-	-	-	-	-	-	-	-	-	-
Subtotal	38,677	39,434	40,002	39,382	38,986	36,685	35,335	35,240	(3,438)	(96)
Low-Calorie (5-40 Calories per 8 oz.)										
CSD	1,202	990	827	592	500	371	306	273	(929)	(33)
Juice	2,751	3,326	3,332	3,078	3,224	3,198	2,846	2,474	(277)	(371)
RTD Tea	2,421	2,404	2,438	2,987	2,963	2,621	2,360	2,273	(147)	(87)
RTD Coffee	65	78	96	140	200	251	403	649	584	246
Energy	953	1,013	852	780	816	802	708	759	(194)	52
Value Added Water	811	859	888	947	1,079	1,139	886	1,026	215	141
Sports Drinks	1,616	1,529	1,495	1,390	1,550	1,428	1,387	1,766	150	378
Water	-	-	-	-	-	-	-	-	-	-
Subtotal	9,819	10,200	9,929	9,914	10,333	9,809	8,896	9,222	(597)	326
No-Calorie (Less than 5 calories per 8 oz.)										
CSD	54,845	52,075	50,120	48,920	49,474	49,911	49,865	51,729	(3,115)	1,865
Juice	1,737	1,180	1,113	1,076	1,043	1,039	1,297	1,467	(269)	170
RTD Tea	5,576	5,901	6,222	5,833	5,862	5,908	5,797	6,212	636	415
RTD Coffee	26	33	42	57	84	98	116	171	145	55
Energy	1,749	1,949	2,304	2,418	3,009	4,411	4,661	5,058	3,309	397
Value Added Water	2,477	2,574	2,763	2,849	3,150	3,194	3,318	3,827	1,350	509
Sports Drinks	1,011	1,052	1,081	1,129	1,606	3,529	5,383	6,027	5,016	644
Water	176,925	190,916	206,545	219,639	231,394	240,640	251,080	263,485	86,560	12,405
Subtotal	244,346	255,681	270,189	281,922	295,621	308,729	321,517	337,977	93,631	16,460
By Nielsen-Measured Channels and Non-Nielsen Channels										
Nielsen²	307,536	314,451	327,689	329,592	337,681	342,558	364,181	373,856	66,320	9,675
Non-Nielsen³	188,820	195,805	199,647	207,074	210,755	213,425	194,854	209,177	6,034	14,323

¹ Data from DrinkTell

² Data from Nielsen Scantrack

³ Represents the difference between Drinktell and Nielsen Scantrack

Share of LRB Volume by Beverage Category¹										
Category	2014	2015	2016	2017	2018	2019	2020	2021	2014-2021 Change	2020-2021 Change
Total										
CSD	41%	39%	38%	36%	35%	35%	33%	33%	-8%	0%
Juice	11%	10%	10%	9%	9%	9%	8%	8%	-3%	0%
RTD Tea	5%	5%	5%	5%	5%	5%	5%	5%	0%	0%
RTD Coffee	0%	0%	0%	1%	1%	1%	1%	1%	0%	0%
Energy	2%	2%	2%	2%	2%	2%	2%	3%	1%	0%
Value Added Water	1%	1%	1%	1%	1%	1%	1%	1%	0%	0%
Sports Drinks	5%	5%	5%	5%	5%	5%	5%	5%	0%	0%
Water	36%	37%	39%	41%	42%	43%	45%	45%	10%	0%
Total	-	-	-	-	-	-	-	-	-	-
Full-Calorie (More than 67 Calories per 8 oz.)										
CSD	30%	29%	28%	27%	26%	26%	24%	24%	-6%	0%
Juice	8%	8%	8%	7%	7%	7%	7%	6%	-2%	0%
RTD Tea	2%	2%	2%	2%	2%	2%	2%	2%	0%	0%
RTD Coffee	0%	0%	0%	0%	0%	0%	1%	1%	0%	0%
Energy	1%	1%	1%	1%	1%	1%	1%	2%	0%	0%
Value Added Water	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Sports Drinks	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Water	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Subtotal	41%	40%	39%	38%	37%	36%	35%	34%	-7%	0%
Mid-Calorie (41-66 Calories per 8 oz.)										
CSD	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Juice	2%	2%	1%	1%	1%	1%	1%	1%	-1%	0%
RTD Tea	2%	2%	2%	2%	1%	1%	1%	1%	-1%	0%
RTD Coffee	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Energy	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Value Added Water	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Sports Drinks	4%	4%	4%	4%	4%	4%	4%	4%	-1%	0%
Water	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Subtotal	8%	8%	8%	7%	7%	7%	6%	6%	-2%	0%
Low-Calorie (5-40 Calories per 8 oz.)										
CSD	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Juice	1%	1%	1%	1%	1%	1%	1%	0%	0%	0%
RTD Tea	0%	0%	0%	1%	1%	0%	0%	0%	0%	0%
RTD Coffee	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Energy	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Value Added Water	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Sports Drinks	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Water	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Subtotal	2%	2%	2%	2%	2%	2%	2%	2%	0%	0%
No-Calorie (Less than 5 calories per 8 oz.)										
CSD	11%	10%	10%	9%	9%	9%	9%	9%	-2%	0%
Juice	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
RTD Tea	1%	1%	1%	1%	1%	1%	1%	1%	0%	0%
RTD Coffee	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Energy	0%	0%	0%	0%	1%	1%	1%	1%	1%	0%
Value Added Water	0%	1%	1%	1%	1%	1%	1%	1%	0%	0%
Sports Drinks	0%	0%	0%	0%	0%	1%	1%	1%	1%	0%
Water	36%	37%	39%	41%	42%	43%	45%	45%	10%	0%
Subtotal	49%	50%	51%	53%	54%	56%	58%	58%	9%	0%
By Nielsen-Measured Channels and Non-Nielsen Channels										
Nielsen²	62%	62%	62%	61%	62%	62%	65%	64%	3%	4%
Non-Nielsen³	38%	38%	38%	39%	38%	38%	35%	36%	-3%	-4%

# Appendix C: Data Tables

Average Calories Per Eight-Ounce Serving <sup>1</sup>										
Category	2014	2015	2016	2017	2018	2019	2020	2021	2014-2021 Change	2020-2021 Change
Total										
CSD	73.5	74.4	75.4	75.7	75.1	74.5	73.5	73.4	0.0	-1.0
Juice	92.7	88.5	94.4	94.5	94.1	94.8	93.9	91.2	-1.4	-0.9
RTD Tea	48.6	49.2	49.4	50.6	50.6	50.9	51.1	51.6	3.1	0.2
RTD Coffee	127.2	127.5	123.0	117.8	115.7	113.0	110.6	104.0	-23.2	-2.5
Energy	85.8	79.5	79.1	79.8	75.9	66.1	65.6	67.0	-18.7	-0.5
Value Added Water	19.7	19.9	19.8	20.4	19.6	18.5	16.0	16.6	-3.2	-2.6
Sports Drinks	50.1	50.4	50.7	50.7	49.7	45.7	42.4	41.5	-8.6	-3.2
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	46.9	45.4	45.0	43.8	42.4	41.0	39.2	38.5	-8.4	-1.8
Full-Calorie (More than 67 Calories per 8 oz.)										
CSD	101.3	101.0	101.2	101.2	100.8	100.6	100.5	100.6	-0.7	-0.1
Juice	108.4	102.4	109.5	109.2	108.2	108.6	108.7	104.5	-3.9	0.1
RTD Tea	82.5	82.0	81.9	82.7	82.2	82.3	82.2	81.9	-0.6	-0.1
RTD Coffee	140.0	140.8	137.0	132.9	134.4	133.3	135.4	134.3	-5.7	2.1
Energy	109.6	112.1	112.6	112.4	111.9	110.8	109.8	108.9	-0.7	-1.0
Value Added Water	115.0	115.0	115.0	115.0	114.6	115.6	115.9	116.4	1.4	0.3
Sports Drinks	95.0	95.0	95.0	95.0	95.0	95.0	95.0	95.0	0.0	0.0
Water	-	-	-	-	-	-	-	-	-	-
Subtotal	102.5	101.2	102.7	102.6	102.0	101.9	101.9	101.1	-1.4	0.0
Mid-Calorie (41-66 Calories per 8 oz.)										
CSD	60.0	60.0	60.0	60.0	60.0	60.0	59.8	60.0	0.0	-0.2
Juice	52.7	53.2	53.2	53.6	53.5	53.3	53.2	53.1	0.4	-0.1
RTD Tea	50.7	50.6	50.7	50.6	50.5	50.4	50.1	50.0	-0.6	-0.3
RTD Coffee	60.4	59.9	58.7	57.5	57.4	56.8	56.7	56.5	-3.8	-0.1
Energy	56.8	56.4	54.9	54.0	51.1	49.3	49.1	49.4	-7.4	-0.2
Value Added Water	48.9	48.9	48.8	48.8	48.9	48.9	48.9	48.9	0.1	0.1
Sports Drinks	55.0	55.1	55.1	55.2	55.4	55.3	55.3	55.5	0.5	0.1
Water	-	-	-	-	-	-	-	-	-	-
Subtotal	53.3	53.5	53.6	53.7	53.7	53.6	53.6	53.7	0.4	0.0
Low-Calorie (5-40 Calories per 8 oz.)										
CSD	24.6	26.3	30.7	33.2	34.8	35.5	36.6	35.7	11.1	1.1
Juice	34.2	31.6	30.8	31.7	42.2	43.2	34.4	33.2	-1.0	-8.9
RTD Tea	33.6	36.1	35.9	39.7	38.6	38.9	38.2	37.4	3.8	-0.7
RTD Coffee	13.0	13.5	14.1	14.9	14.7	13.5	13.9	14.2	1.2	0.4
Energy	89.2	11.6	10.9	11.4	11.6	11.5	11.8	11.9	-77.3	0.3
Value Added Water	29.7	28.8	27.4	26.2	25.9	23.1	21.0	23.8	-6.0	-2.0
Sports Drinks	19.7	20.7	20.7	20.9	20.9	20.7	20.5	20.4	0.7	-0.2
Water	-	-	-	-	-	-	-	-	-	-
Subtotal	35.3	28.1	28.4	30.3	33.0	32.8	29.2	27.7	-7.6	-3.6
No-Calorie (Less than 5 calories per 8 oz.)										
CSD	0.4	0.4	0.5	0.4	0.4	0.4	0.4	0.4	0.0	0.0
Juice	1.5	0.8	0.7	0.7	0.9	0.8	0.6	0.5	-1.0	-0.2
RTD Tea	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.0	0.0
RTD Coffee	1.6	1.4	1.3	1.5	2.0	2.3	2.5	2.4	0.8	0.2
Energy	0.8	0.8	0.8	0.7	0.6	0.6	1.0	1.2	0.4	0.3
Value Added Water	0.2	0.4	0.8	1.0	0.8	1.0	0.9	0.9	0.6	-0.1
Sports Drinks	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Subtotal	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.0
By Nielsen-Measured Channels and Non-Nielsen Channels										
Nielsen <sup>2</sup>	48.2	47.0	45.3	44.4	43.1	41.6	41.1	40.0	-8.1	-1.1
Non-Nielsen <sup>3</sup>	44.9	42.8	44.6	42.9	41.2	39.9	35.4	35.8	-9.1	0.4

<sup>1</sup> Data from DrinkTell    <sup>2</sup> Data from Nielsen Scantrack    <sup>3</sup> Represents the difference between Drinktell and Nielsen Scantrack

Average Oz. Per Container (Containers ≤ 1L Only) by Beverage Category <sup>2</sup>										
Category	2014	2015	2016	2017	2018	2019	2020	2021	2014-2021 Change	2020-2021 Change
Total										
CSD	13.4	13.4	13.5	13.5	13.5	13.5	13.4	13.4	0.0	-0.1
Juice	9.7	9.9	10.0	10.1	10.1	10.1	10.1	9.9	0.3	0.0
RTD Tea	18.4	18.3	18.2	18.3	18.2	18.0	17.8	17.6	-0.7	-0.2
RTD Coffee	13.7	13.6	13.7	13.6	13.8	14.0	13.8	13.7	0.1	-0.2
Energy	14.2	14.4	14.5	14.5	14.5	14.6	14.4	14.2	0.0	-0.2
Value Added Water	16.6	16.4	17.0	17.1	17.3	17.5	17.5	17.6	1.0	0.0
Sports Drinks	22.7	22.3	22.0	21.6	21.5	21.3	20.3	19.8	-2.9	-1.0
Water	16.9	16.9	16.8	16.7	16.6	16.6	16.5	16.5	-0.4	-0.1
Total	15.0	15.1	15.2	15.2	15.2	15.2	15.1	15.0	0.1	-0.1
Full-Calorie (More than 67 Calories per 8 oz.)										
CSD	13.4	13.4	13.5	13.5	13.5	13.5	13.4	13.3	0.0	-0.1
Juice	9.5	9.9	10.0	10.4	10.3	10.4	10.4	10.0	0.5	0.0
RTD Tea	16.6	16.5	16.4	16.2	16.1	16.0	15.9	15.9	-0.7	-0.1
RTD Coffee	13.8	13.7	13.8	13.8	14.0	14.1	14.0	13.9	0.1	-0.2
Energy	14.0	14.2	14.3	14.3	14.2	14.1	13.9	13.7	-0.3	-0.2
Value Added Water	18.4	18.3	16.6	16.8	17.4	17.8	18.2	17.9	-0.5	0.4
Sports Drinks	16.6	17.5	18.0	20.4	20.9	21.6	21.8	22.5	5.9	0.2
Water	-	-	-	-	-	-	-	-	-	-
Subtotal	12.9	13.1	13.2	13.2	13.2	13.2	13.1	13.0	0.1	-0.1
Mid-Calorie (41-66 Calories per 8 oz.)										
CSD	-	-	-	-	-	-	-	-	-	-
Juice	10.4	10.8	11.3	10.5	10.2	10.4	10.6	10.7	0.2	0.2
RTD Tea	19.1	19.0	18.7	19.3	19.6	19.5	19.1	19.0	-0.1	-0.3
RTD Coffee	14.7	14.1	13.0	10.5	10.3	10.9	10.6	11.3	-3.4	-0.3
Energy	13.0	13.5	13.2	13.8	14.4	15.0	14.4	13.6	0.6	-0.6
Value Added Water	20.3	20.4	20.1	19.9	19.9	19.9	20.1	20.5	0.2	0.2
Sports Drinks	23.2	22.7	22.4	22.2	21.9	21.7	20.6	20.1	-3.0	-1.0
Water	-	-	-	-	-	-	-	-	-	-
Subtotal	19.5	19.5	19.6	19.3	19.1	18.8	18.3	18.1	-1.4	-0.5
Low-Calorie (5-40 Calories per 8 oz.)										
CSD	12.8	12.4	12.6	12.6	13.0	12.8	12.0	9.8	-3.0	-0.7
Juice	9.9	9.7	9.6	9.6	9.9	9.2	8.6	8.6	-1.2	-0.6
RTD Tea	19.6	19.9	20.7	20.4	19.9	19.7	19.5	19.4	-0.2	-0.2
RTD Coffee	10.9	11.6	11.9	10.9	12.5	13.0	10.1	11.9	1.0	-2.9
Energy	14.5	14.8	14.6	14.5	14.5	14.6	14.8	14.4	-0.1	0.2
Value Added Water	7.5	7.9	9.3	10.3	10.3	10.7	10.9	11.1	3.6	0.2
Sports Drinks	17.3	17.0	16.6	15.5	15.9	15.5	14.8	13.6	-3.8	-0.7
Water	-	-	-	-	-	-	-	-	-	-
Subtotal	14.5	14.2	14.3	14.1	14.2	13.6	13.0	12.8	-1.7	-0.5
No-Calorie (Less than 5 calories per 8 oz.)										
CSD	13.3	13.4	13.5	13.5	13.5	13.6	13.6	13.5	0.3	0.0
Juice	9.6	8.8	8.6	8.6	8.9	9.0	9.2	9.7	0.1	0.2
RTD Tea	17.2	17.2	17.3	17.2	17.2	17.3	17.2	17.2	0.0	0.0
RTD Coffee	3.4	8.7	8.7	9.2	8.8	8.8	8.8	9.6	6.2	0.0
Energy	15.1	15.1	15.3	15.2	15.3	15.5	15.3	15.2	0.0	-0.2
Value Added Water	19.8	18.8	19.0	18.9	19.1	19.3	19.0	18.9	-0.9	-0.2
Sports Drinks	26.6	26.1	25.9	25.9	25.6	22.9	20.7	20.1	-6.4	-2.2
Water	16.9	16.9	16.8	16.7	16.6	16.6	16.5	16.5	-0.4	-0.1
Subtotal	16.0	16.0	16.1	16.0	16.1	16.1	16.0	16.0	0.0	-0.1
By Nielsen-Measured Channels and Non-Nielsen Channels										
Nielsen <sup>2</sup>	DrinkTell does not report container size information, thus all container size information reported above is reflective of beverages sold in Nielsen-measured channels.									
Non-Nielsen <sup>3</sup>										