

2025 Beverage Calories Initiative:

Report on 2019 Progress toward the National Calorie Goal

PREPARED FOR:

American Beverage Association
Alliance for a Healthier Generation

PREPARED BY:

Keybridge

September 28, 2020



Keybridge is an economic and public policy consulting firm. Keybridge provides technical analysis to a diverse clientele that includes leading non-profit organizations, global financial institutions, multinational corporations, premier trade associations, and federal government agencies. Our principals serve as economists, policy experts, and advisers on issues that reside at the forefront of public policy economics.

For more information, please visit us at www.keybridgedc.com.

Copyright © 2020 by Keybridge
All trademarks used herein are the property of their respective owners.

TABLE OF CONTENTS

Executive Summary 5

Section 1: Introduction 7

Section 2: Methodology Summary 7

Section 3: Results 8

Section 4: Conclusions 18

Appendix Tables 20

[THIS PAGE INTENTIONALLY LEFT BLANK]

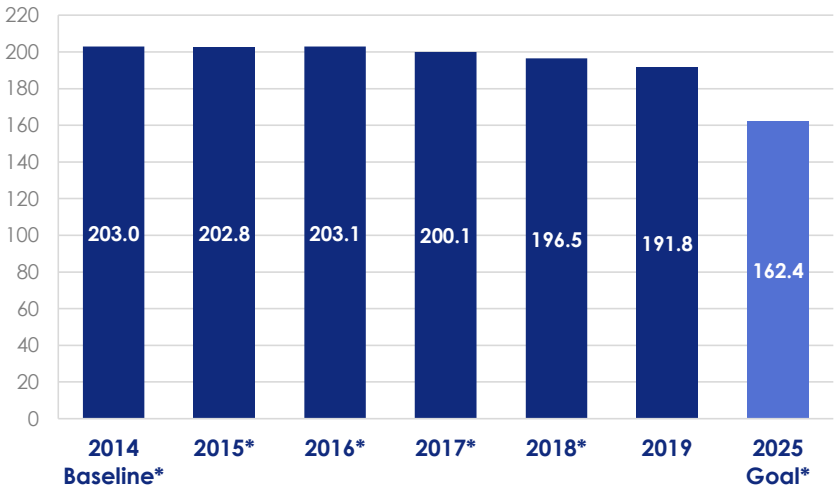
EXECUTIVE SUMMARY

In September 2014, the American Beverage Association (“ABA”), The Coca-Cola Company, Dr Pepper Snapple Group (now Keurig Dr Pepper), PepsiCo (“BCI Companies”), and the Alliance for a Healthier Generation (“Healthier Generation”) announced a commitment to help reduce beverage calories in the American diet. This commitment includes two key components: (1) the National Initiative, which aims to reduce liquid refreshment beverage (“LRB”) calories consumed per person nationally by 20% by 2025 (i.e., the national calorie goal); and (2) the Communities Initiative, which aims to achieve equivalent reductions over ten years in eight to ten select communities where the challenge is believed to be greatest (i.e., the community calorie goal). The collective effort to fulfill these commitments is called the 2025 Beverage Calories Initiative (“BCI”).

To measure progress over time, the ABA retained Keybridge as a third-party evaluator. This is the fifth report on progress toward the national calorie goal. The primary measure of progress for the national calorie goal is the change in beverage calories per person per day since the 2014 baseline.

From 2014 to 2019, LRB calories per person per day fell 5.6% from 203.0 to 191.8. In order to achieve the national calorie goal, this measure must decline by 20% from baseline to 162.4 calories per person per day by 2025.

Beverage Calories Per Person Per Day
Average LRB Calories Per Person Per Day



*2014, 2015, 2016, 2017, 2018, and the 2025 Goal were revised due to updated data. See Data Sources section in the Detailed Methodology.
Sources: Beverage Marketing Corporation: DrinkTell Database; U.S. Census Bureau, 2019

This report draws the following conclusions from the national calorie numbers:

- (1) From 2018 to 2019, LRB calories fell by 4.8 calories per person per day while LRB sales volume grew.¹ This was the strongest show of progress toward the national calorie goal since the BCI was launched and the third consecutive year of notable calorie declines.

¹ Numbers in the figures are rounded to the nearest tenth. As a result, changes reported in the text may differ slightly due to rounding.

- (2) The progress recorded in 2019 was driven by per person calorie reductions from carbonated soft drinks ("CSDs"), sports drinks, 100% juices, and juice drinks. The contribution from sports drinks, in particular, represents a major change from earlier years.
- (3) Per person volumes of no- and low-calorie CSDs held steady in 2018 and 2019, representing a change from previous years when declining volumes of no- and low-calorie CSDs had been a headwind to calorie reduction progress.
- (4) The growth of waters, defined as unsweetened, no-calorie still and carbonated waters, slowed in 2019 but continues to be the main driver of LRB volume growth.
- (5) Beverage calories in the major retail channels included in the Nielsen Scantrack dataset continued to fall, despite volume growth, and are on pace to achieve a 20% reduction by 2025.
- (6) Calorie reduction progress was also achieved for the second year in a row in the other market segments that are not included in the Nielsen dataset – fountain beverages, small and independent retail stores, and other segments. In previous years, calories per person from these market segments grew, inhibiting progress toward the calorie reduction goal.
- (7) Reductions in LRB calories per person still need to accelerate to meet the 20% national calorie goal in 2025. However, if the annual calorie reduction rate achieved in 2019 (2.4%) is maintained through 2025, a total reduction of more than 18% will be achieved by the culmination of the BCI commitment.

I. INTRODUCTION

In September 2014, the American Beverage Association (“ABA”), The Coca-Cola Company, Dr Pepper Snapple Group (now Keurig Dr Pepper), PepsiCo (“BCI Companies”), and the Alliance for a Healthier Generation (“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”). First, 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 Second, 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. The Communities Initiative also aims to identify calorie reduction strategies that can be applied more broadly to help achieve beverage calorie reductions nationally.

BCI participants also committed to independent, third-party monitoring of progress over time. In consultation with 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 2019 progress toward the national calorie goal. Progress toward the community calorie goal will be featured in a forthcoming report. Detailed information about calorie reduction strategies being implemented 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.

II. 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.³ Finally, the Nielsen Company’s Scantrack dataset (“Scantrack”) is used to examine calorie trends within the narrower set of sales channels covered

² 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. LRB excludes alcoholic beverages, dairy products, brewed beverages, drink mixes, energy shots, lemon and lime juice, coconut milk, concentrates, flavor drops, and tap water. The inclusion of brewed beverages would make accurate measurement of progress toward the national calorie goal much more difficult given that retail outlets and consumers often add their own sugar, cream, and other caloric additives to brewed teas and coffees. Brewed teas are the only beverages that are made by the BCI Companies in substantial quantities, but not measured.

³ The Beverage Digest dataset lacks coverage of some refrigerated juices and teas and therefore cannot be used to corroborate those portions of the DrinkTell dataset.

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 2019 progress shows per person calorie estimates for 2019, the fifth year of BCI implementation at the national level. It also features revised estimates for 2014 through 2018 and the 2025 goal.⁴ Updates to these estimates were due to revisions in the underlying brand-level sales volume estimates in DrinkTell and Scantrack.

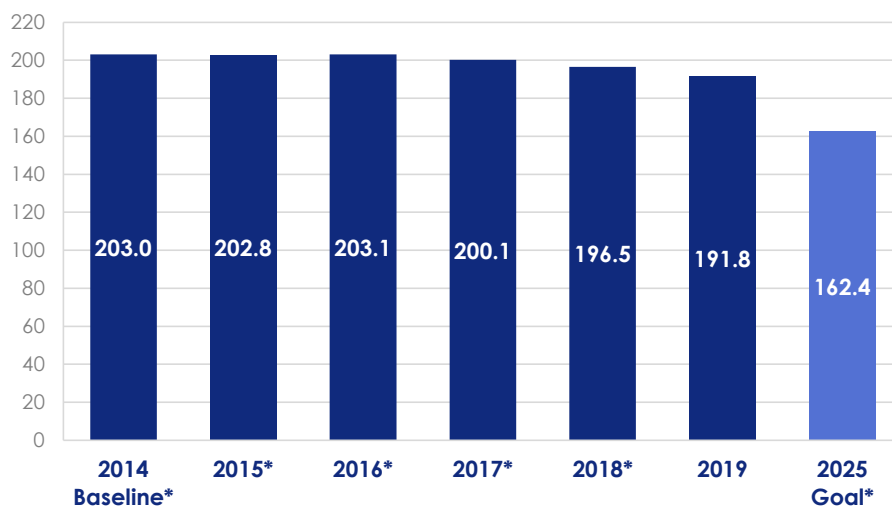
The full methodology can be found at www.ameribev.org/education-resources/policies-research/bci.

III. RESULTS: PROGRESS TOWARD THE NATIONAL CALORIE GOAL

3.1 Overall Progress

The primary measure of progress for the national calorie goal is the change in beverage calories per person per day. From 2014 to 2019, LRB calories per person per day fell by 11.3 calories (approximately 5.6%), from 203.0 to 191.8. Over this same period, LRB volumes per person rose by 8.1% and average calories per 8-ounce serving declined by 12.7%.

Figure 1
Beverage Calories Per Person Per Day
Average LRB Calories Per Person Per Day



*2014, 2015, 2016, 2017, 2018, and the 2025 Goal were revised due to updated data. See Data Sources section in the Detailed Methodology.

Sources: Beverage Marketing Corporation: DrinkTell Database; U.S. Census Bureau, 2019

The entire calorie reduction observed since 2014 occurred in the last three years. Between 2016 and 2019, LRB calories per person per day declined by more than 11 calories after being essentially flat from 2014 to 2016. As seen in Figure 1, this measure must decline by 20% from the 2014 baseline to 162.4 calories per person per day by 2025 in order to achieve the national calorie goal.

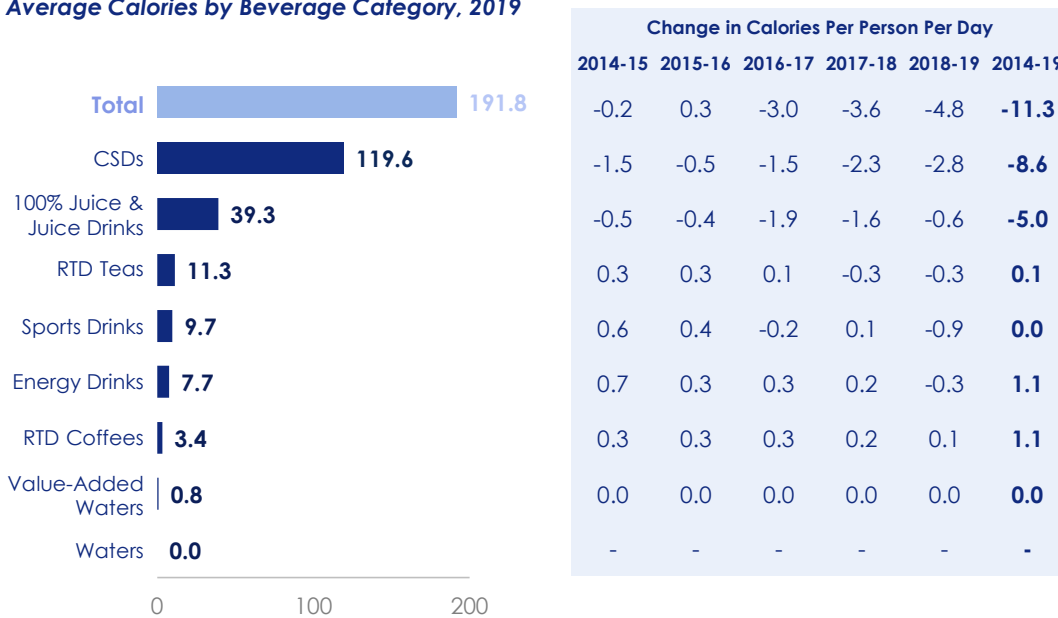
⁴ The goal was revised because it is set at 20% below the 2014 estimate, which was revised.

3.2 Progress by Beverage Category

Change since Baseline (2014-2019)

As shown in Figure 2, calories per person per day declined by 11.3 calories (5.6%) between 2014 and 2019. The two beverage categories accounting for the majority of progress are CSDs and 100% juices and juice drinks, where calories per person per day declined by 8.6 calories (6.7%) and 5.0 calories (11.3%), respectively. This progress is particularly important as these two categories accounted for more than 80% of total LRB calories in 2019 and previous years. A portion of these calorie reductions were offset by growth in calories from RTD coffees and energy drinks, which are much smaller, but growing, categories.

Figure 2
Beverage Calories Per Person Per Day
Average Calories by Beverage Category, 2019



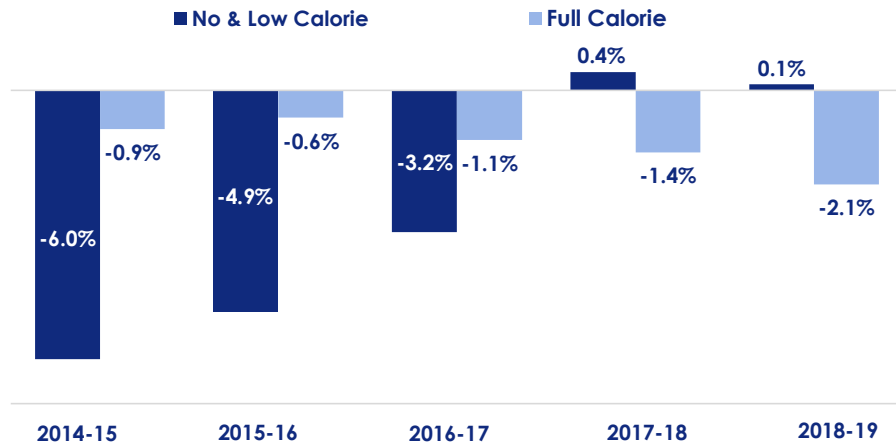
Source: Beverage Marketing Corporation: DrinkTell Database; U.S. Census Bureau, 2019

Change in 2019 (2018-2019)

From 2018 to 2019, calories per person per day fell by 4.8, the largest decline since the launch of the BCI and the third consecutive year of notable calorie declines. The largest reductions in calories came from three beverage categories: CSDs, 100% juices and juice drinks, and sports drinks.

Reductions in calories from CSDs – 2.8 calories per person per day – accounted for more than half of calorie reductions, falling at their fastest pace since the BCI was launched. This was driven by declining per person volumes of full-calorie CSDs. As Figure 3 shows, this contrasts with per person volumes of no- and low-calorie CSDs, which remained relatively steady in 2019. This represents a continuation of the trend observed in 2018 but a major change from previous years, when declining volumes of no- and low-calorie CSDs had been a headwind to calorie reduction progress.

Figure 3
Change in Volume of CSDs
Percent Change in Volume Per Person Per Day, 2014-2019

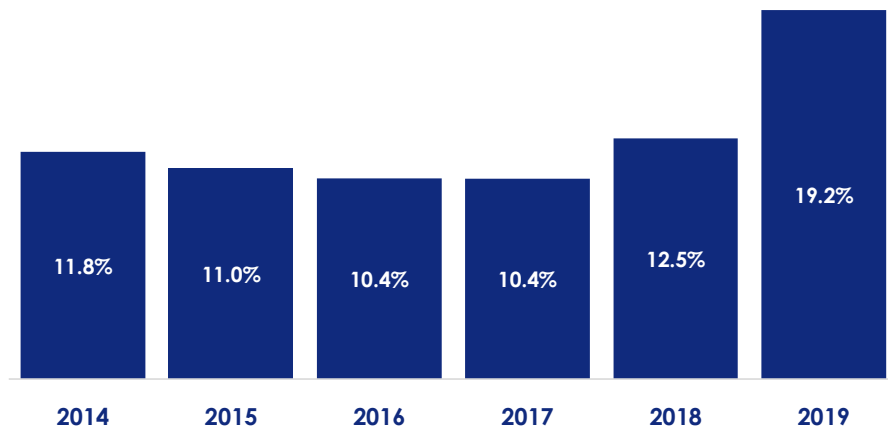


Sources: Beverage Marketing Corporation: DrinkTell Database; U.S. Census Bureau, 2019

Per person calories from 100% juice and juice drinks fell in 2019 at a slower, though still substantial, pace than in 2018 (0.6 calories per person per day compared with 1.6).

Sports drinks represented a third category that contributed substantially to 2019 calorie reduction progress, falling by 0.9 calories per person per day (or 8.3%) despite 1.5% growth in per person sports drink volumes. The decrease is the result of the nine-percentage point shift from mid- and low-calorie to zero calorie sports drink options between 2017 and 2019, as shown in Figure 4.

Figure 4
No-Calorie Sports Drinks Share of Sports Drink Volumes
Share of Volume Per Person Per Day, 2014-2019



Sources: Beverage Marketing Corporation: DrinkTell Database; U.S. Census Bureau, 2019

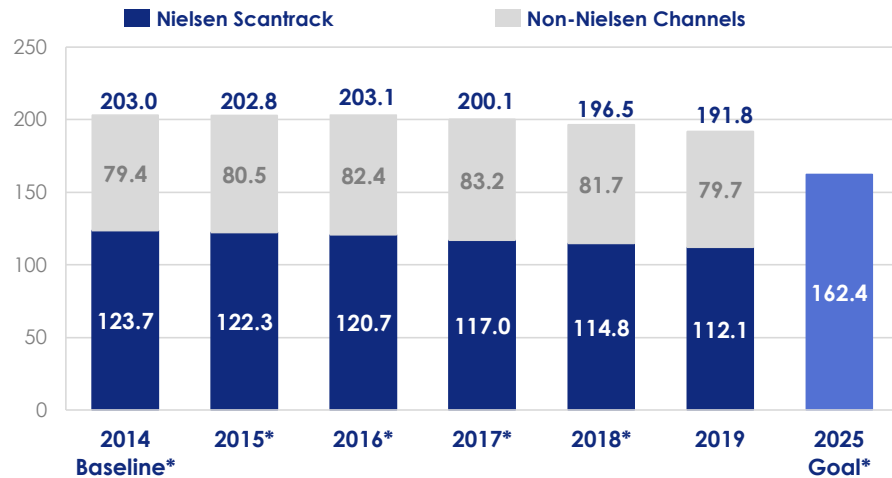
Reductions in per person calories from RTD teas and energy drinks also contributed, albeit less substantially, to calorie reductions in 2019.

3.3 Progress by Market Segment

Change since Baseline (2014-2019)

From 2014 to 2019, significant progress was made in reducing calories from packaged beverages sold through Nielsen-measured channels (chain grocery, convenience, dollar, drug, club, and big box stores).⁵ As shown in Figure 5, calories from these beverages declined by 11.6 calories per person per day, or 9.4%, between 2014 and 2019. This occurred even while LRB volumes per person in these channels grew by 5.4%. Calorie

Figure 5
Daily Beverage Calories Per Person
 LRB Calories Per Person Per Day, Nielsen vs. Non-Nielsen Channels



*2014, 2015, 2016, 2017, and the 2025 Goal were revised due to updated data. See Data Sources section in the Detailed Methodology.

Sources: Beverage Marketing Corporation: DrinkTell Database; Nielsen Scantrack, U.S. Census Bureau, 2019

reductions in these channels are on pace to achieve a 20% reduction by 2025. As discussed later in this report, disruptions to the beverage market due to the COVID-19 pandemic are likely to change this trend in 2020.

Calories per person from beverages sold through market segments not measured by Nielsen (i.e., restaurants, vending, small independent stores, and other channels) have not followed the same trajectory. Instead, they have remained virtually unchanged from 2014 to 2019, as reductions in calories per 8-ounce serving were almost fully offset by per person volume growth of 12.4%.

However, comparison among years reveals a more dynamic story. In 2015 and 2016, calories per person from beverages in non-Nielsen market segments rose fast enough to fully offset the calorie reduction progress observed in Nielsen-measured channels. In 2017, that growth slowed significantly before declining in 2018 and 2019. The reversal of this trend was essential for the observed acceleration in overall calorie reduction progress.

⁵ The Scantrack dataset reports total beverage sales volumes based on transactions from a sample of stores. Hundreds of retailers report sales volume data on products scanned from thousands of stores across the country. Based on this sample, Nielsen scales up the data to approximate all packaged beverages sold in most food, convenience, drug, dollar, and mass merchandiser stores. The dataset also includes limited coverage of beverage volumes sold through small and independent grocery stores (i.e., stores with less than \$2 million in annual sales) and small and independent drug stores (i.e., stores with less \$1 million in annual sales).

Change in 2019 (2018-2019)

In 2019, calories from Nielsen-measured channels continued to decline, decreasing by 2.7 calories per person (or 2.4%) from 2018. Calories from non-Nielsen market segments decreased for the second year in a row in 2019, dropping by 2.1 calories per person (2.5%). With calories from Nielsen-measured and non-Nielsen market segments declining at roughly equal rates, 2019 represented the second year of calorie reduction progress being more evenly achieved across a broader spectrum of market segments.

3.4 Examining the Factors Contributing to Calorie Reductions

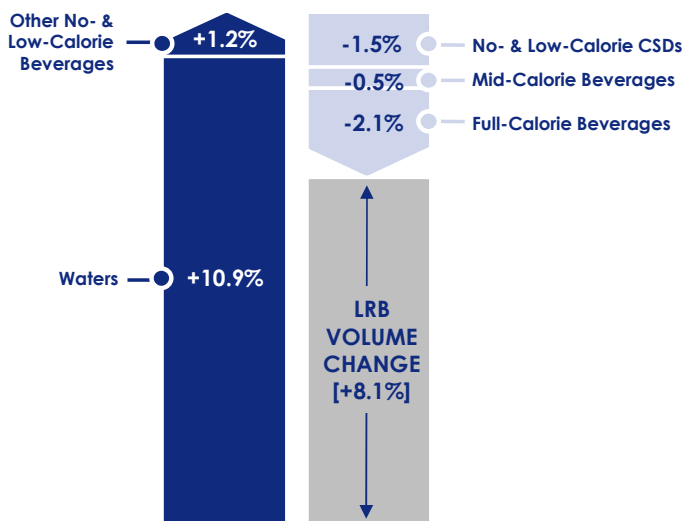
Change in per person beverage calories is a function of three key factors: (1) the number of beverages consumed per person, (2) the number of calories per ounce, and (3) the number of ounces per beverage (i.e., container size). A reduction in any of these factors will contribute to reductions in beverage calorie consumption.

3.4.1 Beverage Volumes Per Person

Change since Baseline (2014-2019)

While per person LRB calorie consumption fell from 2014 to 2019, LRB volumes per person grew by 8.1% or 2.6 ounces per person per day.⁶ Figure 6 shows that the growth of waters more than accounts for the entire observed LRB volume growth. Roughly a quarter of water's growth was offset by decreases in the volumes of other beverages. The other 74% of water's growth represents additional LRB consumption. Some portion of this 8.1% growth may be due to consumer shifts from unmeasured beverages that are not included in LRB (e.g. tap water, brewed teas and coffees, and powdered drink mixes) to beverages that are included in LRB.

Figure 6
Change in LRB Volumes Per Person
Contributions to LRB Volume Change by Category, 2014-2019



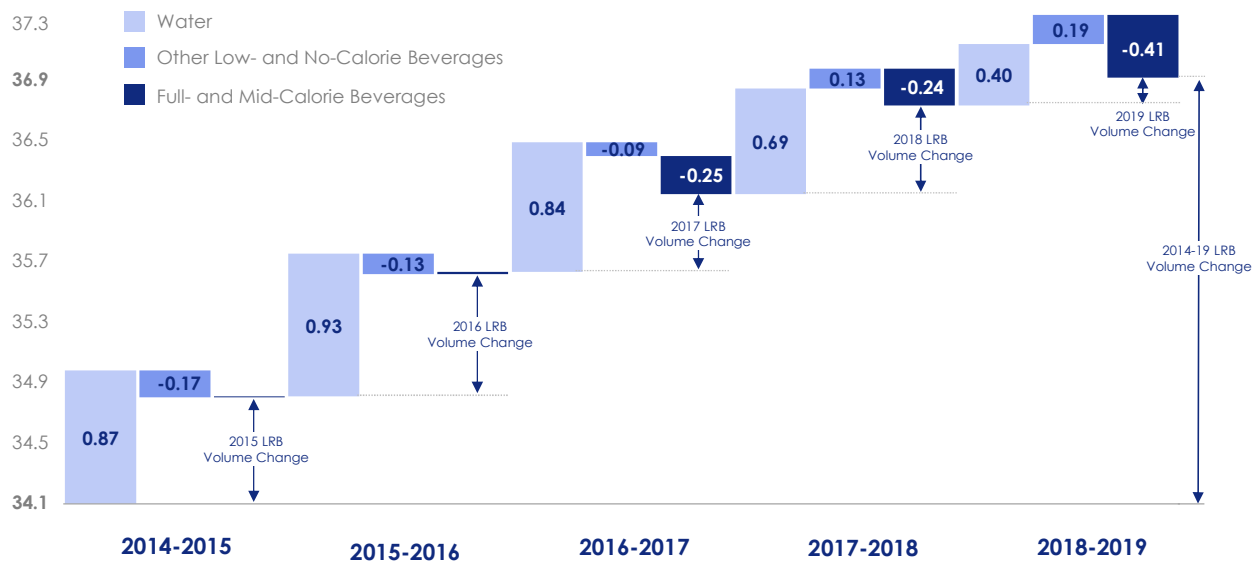
*"Other" includes all non-water no- and low-calorie LRBs, including CSDs.
Sources: Beverage Marketing Corporation: DrinkTell Database;
U.S. Census Bureau, 2019

⁶ Total LRB volumes grew by 11.5% while U.S. population fell by 3.1%. Population data come from the United States Census Bureau, (2019). Annual Estimates of the Resident Population for the United States, Regions, States, and Puerto Rico: April 1, 2010 to July 1, 2019 (NST-EST2019-01). Washington, DC: U.S. Government Printing Office. 2019: 328,239,523; 2018: 326,687,501; 2017: 324,985,539; 2016: 322,941,311; 2015: 320,635,163; 2014: 318,301,008

Change in 2019 (2018-2019)

In 2019, overall LRB volume per person continued to grow, even as calorie reductions accelerated. As in previous years, the growth in volume was driven by water. Still water remains the main driver of growth, but carbonated waters – which include unsweetened carbonated waters, both unflavored and flavored – are increasingly important. Their volumes have more than doubled since the 2014 baseline year. In fact, since 2016, carbonated waters have grown faster than any other LRB category and they now represent a larger share of LRB volumes than energy drinks.

Figure 7
Annual Contributions to LRB Volume Change
Contributions to Volume Change (Ounces) by Calorie Category, 2014-2019



**“Other” includes all non-water no- and low-calorie LRBs, including CSDs.
 Source: Beverage Marketing Corporation: DrinkTell Database

In 2019, like 2018, overall volume growth was also driven by growth in per person volumes of other no- and low-calorie beverages. As shown in Figure 7, this contrasts with the trend over previous years, when no- and low-calorie beverage volumes other than water were declining. Falling volumes of no- and low-calorie CSDs, in particular, drove this trend. The stabilization of this category was also the main reason for the change in trend in 2018 and 2019.

Another important change in 2018 that accelerated in 2019 was that the growth in water volumes was accompanied by ever larger decreases in per person full- and mid-calorie beverage volumes. From 2014 to 2016, no- and low-calorie beverages other than water represented the bulk of all per person volume declines, which is a key reason why total calories per person did not change substantially in the first years of the BCI initiative.

3.4.2 Calories Per 8-Ounce Serving

Change since Baseline (2014-2019)

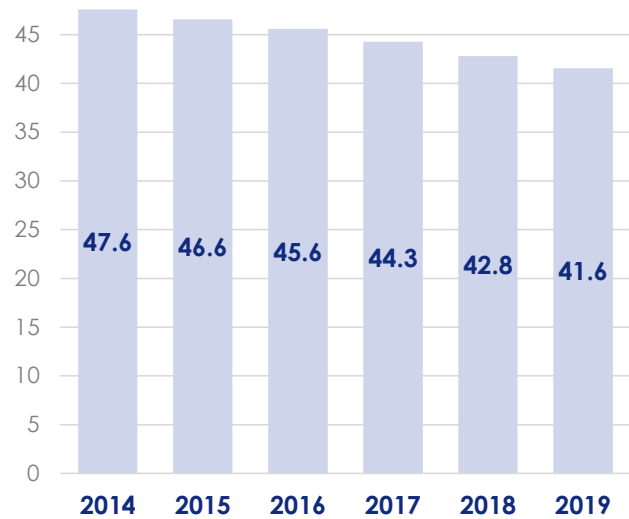
The average number of calories per 8-ounce serving declined from 47.6 in 2014 to 41.6 in 2019 as shown in Figure 8, a change of 12.7%. This decrease was driven primarily by the continued growth of waters as a share of the overall product mix. Because waters have no calories, an increase in their share helped reduce average calories per 8-ounce serving.

Additional drivers of the change in calories per 8-ounce serving include decreases in the shares of full-calorie CSDs and 100% juices and juice drinks, both of which have more calories per ounce than the average among LRBs.

In the first three years of the BCI, the falling volume share of no- and low-calorie CSDs counteracted the impact of these other trends and were a headwind to even larger overall declines in calories per 8-ounce

serving. Like water, a growing volume share of no- and low-calorie CSDs would help to reduce average calories per 8-ounce serving. However, as previously noted, their volume share declined sharply from 2014 to 2017, driving average calories per 8-ounce serving up and inhibiting improvements in this metric.

Figure 8
Change in Calories per 8-Ounce Serving
Average Calories per 8-Ounce Serving, 2014-2019



Source: Beverage Marketing Corporation; DrinkTell Database

Change in 2019 (2018-2019)

Calories per 8-ounce serving continued to decline at a consistent pace in 2019, decreasing 1.25 calories, which was greater than the reductions achieved in 2015 and 2016 yet less than those achieved in 2017 and 2018. Figure 9 shows the contributions of key trends toward the annual change in calories per 8-ounce serving in 2014-2019. Throughout the period, growing volumes of waters and declining volumes of full-calorie CSDs, 100% juices, and juice drinks made significant contributions toward these reductions. In 2019, the slower growth of waters led to a smaller contribution to the reduction in calories per 8-ounce serving while shifts toward other low-calorie beverages made larger contributions.

Figure 9

Change in Calories per 8-Ounce Serving

Contributions to Changes in Calories Per 8-Ounce Serving, 2014-2019

Change in Calories per 8-oz Serving Due to:	2014-15	2015-16	2016-17	2017-18	2018-19
Volume Declines of Full-Calorie CSDs	-0.45	-0.45	-0.39	-0.45	-0.39
Volume Declines of 100% Juice & Juice Drinks	-0.19	-0.16	→ -0.29	-0.24	→ -0.13
Volume Growth of Waters	-0.84	-0.82	-0.81	→ -0.54	→ -0.37
Volume Decline of No- & Low-Calorie CSDs	0.42	0.34	→ 0.20	→ 0.05	0.01
Other Volume Shifts*	0.08	0.04	0.04	0.05	0.07
Impact of Caloric Shifts**	-0.01	0.06	→ -0.05	→ -0.34	-0.43
TOTAL	-1.00	-0.99	-1.31	-1.48	-1.25

→ Change in Contribution > 0.1

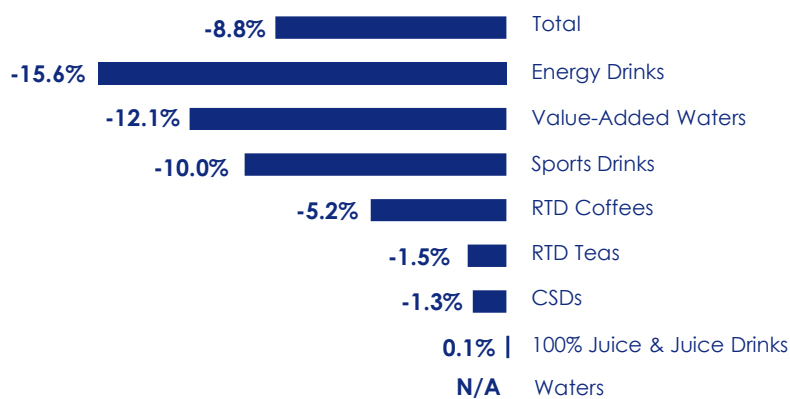
* Includes volume changes of other beverage categories (Value-Added Water, RTD Coffee, RTD Tea, Energy, and Sports Drinks).

** Includes shifts in average calories per 8-ounce serving within categories.

Source: Beverage Marketing Corporation; DrinkTell Database

In 2019, caloric shifts within other beverage categories had their most substantial impact since the BCI was launched. This was because the volume shares of lower-calorie versions of almost all beverage categories – not just CSDs – grew relative to the higher-calorie versions. As Figure 10 shows, the shift towards lower-calorie beverages over the past three years has been substantial and has reduced calories per 8-ounce serving in almost all categories over that period.

Figure 10
Change in Calories per 8-ounce Serving
Average Change by Category, 2016-2019



Change in Share of Volume Per Person Per Day Within Beverage Categories, 2016-2019				
	No-Calorie	Low-Calorie	Mid-Calorie	Full-Calorie
Total	+4.2%	-0.1%	-0.7%	-3.3%
Energy Drinks	+12.6%	-1.4%	+1.4%	-12.6%
Value-Added Waters	+1.9%	+1.1%	-2.2%	-0.8%
Sports Drinks	+9.1%	-0.4%	-8.1%	-0.7%
RTD Coffees	+2.8%	+2.2%	+0.3%	-5.3%
RTD Teas	+1.3%	-0.3%	-1.0%	0.0%
CSDs	+0.6%	-0.2%	0.0%	-0.4%
100% Juice & Juice Drinks	0.0%	-0.1%	+0.4%	-0.3%
Waters	N/A	N/A	N/A	N/A

Sources: Beverage Marketing Corporation: DrinkTell, Database; U.S. Census Bureau, 2019

One other change in 2019 and 2018 versus previous years was that the progress in reducing calories per 8-ounce serving was similar in both Nielsen-measured and non-Nielsen market segments. From 2014 to 2017, this metric declined by roughly 3% per year in Nielsen-measured channels and by 1% per year in non-Nielsen market segments, as shown in the Appendix tables. In 2018 and 2019, calories per 8-ounce serving in both Nielsen-measured and non-Nielsen market segments decreased by roughly 3% per year.

3.4.3 Portion Sizes

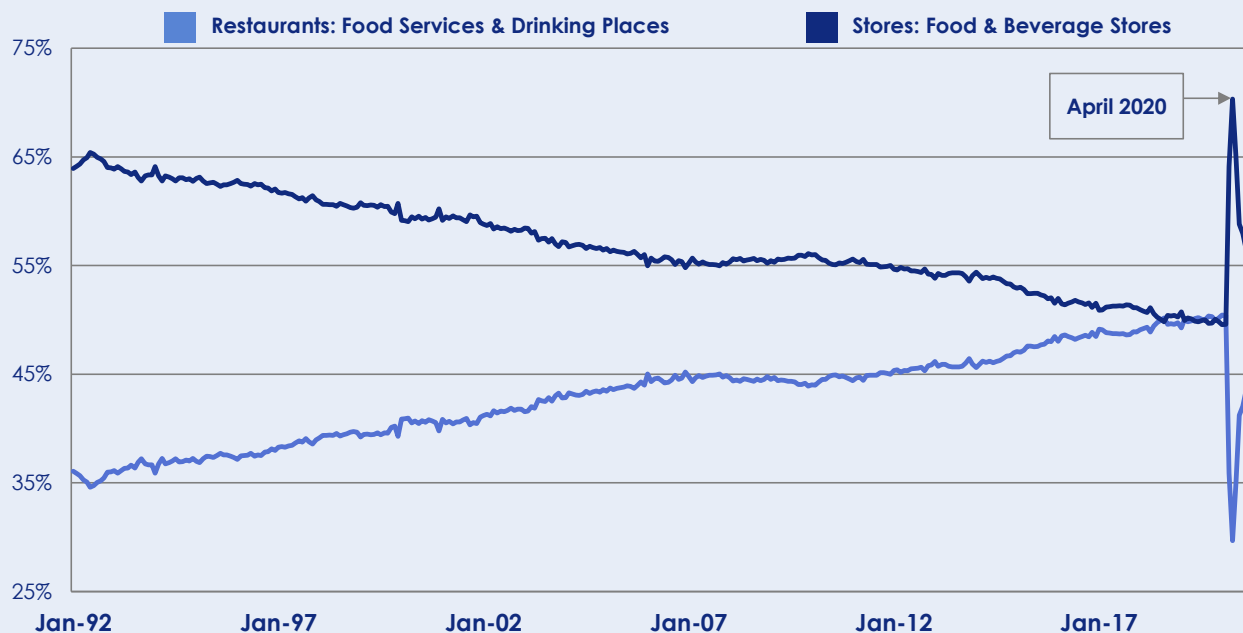
In 2019 and in prior years, changes in container and pack sizes did not appear to be a significant driver, on net, of changes in calories per person. There has been growth among smaller containers of certain full- and mid-calorie beverages. However, the impact of these smaller containers on average container size was offset by shifts from medium-sized to larger containers. This is true for beverages overall as well as for caloric beverages only. The impact of container size changes will continue to be tracked in future years. Detailed container size information is included in the Appendix tables.

LOOKING FORWARD: IMPACT OF COVID-19 PANDEMIC ON THE NATIONAL CALORIE GOAL

The COVID-19 pandemic has exacted a terrible human and economic toll and significantly altered many aspects of American's daily lives and behaviors, including profoundly changing food and beverage purchase habits. The results discussed in this report are based on beverage volume data from 2019 and earlier, and were therefore not affected by the COVID-19 pandemic. The next progress report will feature data from 2020, which will be greatly affected by the pandemic. Data already available from Nielsen and the federal government for Q2 2020 show major disruptions. For example, Nielsen data for Q2 2020 show an 8% increase in full-calorie beverage volumes versus the prior year, virtually ensuring that total calories per person from those channels will be up in 2020. Meanwhile, major decreases in restaurants and other foodservice channels may more than offset the increases in Nielsen-measured channels. The consumer expenditure data shown in Figure 11 reinforces this disruption in beverage trends. It establishes a dramatic reversal of a decades-long trend of increasing share of food and beverage spending at bars and restaurants.

Figure 11

Share of Food & Beverage Expenditures by Type of Establishment Advance Retail Sales for Restaurants & Stores



Source: Federal Reserve Bank of St. Louis. Advance Retail Sales: Food Services and Drinking Places, Millions of Dollars, Monthly, Seasonally Adjusted.

While these early snapshots of data provide some clues as to how the pandemic may affect the calorie trend, significant uncertainty remains for the total impact on 2020 and possibly beyond, the length of disruption to purchasing patterns, and the degree to which post-pandemic beverage consumption trends will revert to their pre-pandemic levels. It is likely that BCI Company strategies for achieving the goals will need to be rethought after the immediate public health emergency has eased.

IV. CONCLUSIONS

- (1) From 2018 to 2019, LRB calories fell by 4.8 calories per person per day while LRB sales volume grew. This was the strongest show of progress toward the national calorie goal since the BCI was launched and the third consecutive year of notable calorie declines.**

After remaining steady at roughly 203 calories from 2014 to 2016, average LRB calories per person per day began to fall, declining by progressively larger amounts in 2017 (-3.0 calories), 2018 (-3.6 calories), and 2019 (-4.8 calories). This occurred despite nearly 8% growth in per person LRB volumes over that period.

- (2) The progress recorded in 2019 was driven by per person calorie reductions from carbonated soft drinks (“CSDs”), sports drinks, 100% juices, and juice drinks. The contribution from sports drinks, in particular, represents a major change from earlier years.**

Calories from CSDs, sports drinks, 100% juices, and juice drinks accounted for roughly 90% of the calorie declines in 2019. The contributions of sports drinks were primarily due to a major shift in demand from mid- and low-calorie to no-calorie sports drinks from 2017 to 2019.

- (3) Per person volumes of no- and low-calorie CSDs held steady in 2018 and 2019, representing a change from previous years when declining volumes of no- and low-calorie CSDs had been a headwind to calorie reduction progress.**

In the first three years of the BCI, declining volumes of no- and low-calorie CSDs inhibited progress toward achieving the national calorie goal. Per person volumes of these beverages have since stabilized, contributing toward the improved calorie reduction progress observed in 2018 and 2019.

- (4) The growth of waters, defined as unsweetened, no-calorie still and carbonated waters, slowed in 2019 but continues to be the main driver of LRB volume growth.**

Per person water volumes continued to grow in 2019, though at a slower rate than in previous years. Still, the growth of waters alone was large enough to account for the entire observed LRB volume growth. Growth in water consumption is generally considered to positively contribute to LRB calorie reductions. From 2014 to 2016, however, it did not appear to contribute much since it was not accompanied by declining volumes of caloric beverages. The difference from 2016 to 2019 was that waters' growth was accompanied by a larger decline in caloric beverage volumes than in past years, which is a key reason for the calorie reductions achieved.

- (5) Beverage calories in the major retail channels included in the Nielsen Scantrack dataset continued to fall, despite volume growth, and are on pace to achieve a 20% reduction by 2025.**

Packaged beverages sold in channels included in the Nielsen Scantrack dataset, which include chain grocery, drug, dollar, convenience, big box, and club stores, accounted for about 60% of LRB volumes and calories in the 2014 baseline year. Calories per person from these beverages have declined by roughly 2% per year over the past five years even while volumes per person

increased every year. As a result, calories from these channels are on pace for a 20% reduction by 2025.

- (6) Calorie reduction progress was achieved for the second year in a row in the other market segments that are not included in the Nielsen dataset. In previous years, calories per person from these market segments had grown, inhibiting progress toward the calorie reduction goal.**

Calories decreased by 2.1 calories per person (2.5%) in 2019 in the market segments not measured by Nielsen, which include all fountain beverages and packaged beverages sold in food service outlets and small independent retailers, among other places. This decrease was a continuation of declines in 2018. This shows that calorie reductions were well-balanced across Nielsen-measured and non-Nielsen channels in 2018 and 2019, unlike in earlier years when calories per person from beverages sold in non-Nielsen market segments grew and offset much of the calorie reduction progress achieved in Nielsen-measured channels.

- (7) Reductions in LRB calories per person still need to accelerate to meet the 20% national calorie goal in 2025. However, if the annual calorie reduction rate achieved in 2019 (2.4%) continues through 2025, a total reduction of more than 18% will be achieved by the culmination of the BCI commitment.**

The average rate of reduction in annual calories needed to achieve the national calorie goal in 2025 was initially 2.0%, or slightly less than 4 calories per person per day. The 2.4% (or 4.8 calorie) reduction achieved in 2019 exceeded that rate for the first time since the launch of the BCI. However, because calories per person per day were flat for the first two years of the commitment, the average annual rate needed to achieve the goal is now 2.7%. Progress in 2019 has helped compensate for lack of progress in the first two years of the BCI, and a continuation of progress at this pace will narrow the gap and help the industry get close to the 20% goal by 2025. To fully meet the goal, however, the rates of average annual calorie reduction will need to increase for the remaining years of the commitment.

APPENDIX: SUMMARY NATIONAL DATA TABLES

Average Calories Per Person Per Day (Average Per Capita Daily Calories) ¹								
Category	2014	2015	2016	2017	2018	2019	2014-2019 Change	2018-2019 Change
Total								
CSD	128.2	126.7	126.2	124.7	122.4	119.6	-8.6	-2.8
Juice	44.3	43.8	43.3	41.4	39.8	39.3	-5.0	-0.6
RTD Tea	11.2	11.5	11.7	11.8	11.6	11.3	0.1	-0.3
RTD Coffee	2.2	2.5	2.7	3.1	3.2	3.4	1.1	0.1
Energy	6.6	7.3	7.6	7.8	8.0	7.7	1.1	-0.3
Value Added Water	0.8	0.8	0.9	0.9	0.9	0.8	0.0	0.0
Sports Drinks	9.7	10.3	10.7	10.5	10.6	9.7	0.0	-0.9
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	203.0	202.8	203.1	200.1	196.5	191.8	-11.3	-4.8
Full-Calorie (More than 67 Calories per 8 oz.)								
CSD	127.7	126.3	125.8	124.3	122.0	119.3	-8.5	-2.8
Juice	39.4	39.0	38.8	37.2	35.6	35.1	-4.3	-0.5
RTD Tea	7.2	7.8	8.1	8.1	7.9	7.9	0.6	0.0
RTD Coffee	2.2	2.4	2.7	3.0	3.2	3.3	1.1	0.1
Energy	6.4	7.1	7.4	7.7	7.8	7.5	1.1	-0.4
Value Added Water	0.1	0.1	0.0	0.0	0.0	0.0	-0.1	0.0
Sports Drinks	0.0	0.1	0.1	0.2	0.5	0.0	0.0	-0.5
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Subtotal	183.0	182.8	183.1	180.6	177.0	173.0	-10.0	-4.0
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
Juice	4.7	4.6	4.3	4.0	4.1	4.0	-0.7	-0.1
RTD Tea	3.7	3.3	3.2	3.3	3.2	3.0	-0.6	-0.2
RTD Coffee	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Energy	0.1	0.1	0.0	0.0	0.1	0.1	0.0	0.0
Value Added Water	0.6	0.6	0.7	0.7	0.7	0.7	0.1	0.0
Sports Drinks	9.4	10.0	10.3	10.0	9.9	9.5	0.0	-0.4
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Subtotal	18.6	18.5	18.5	18.0	18.0	17.4	-1.2	-0.6
Low-Calorie (5-40 Calories per 8 oz.)								
CSD	0.3	0.2	0.2	0.2	0.1	0.1	-0.1	0.0
Juice	0.2	0.2	0.2	0.2	0.2	0.2	0.0	0.0
RTD Tea	0.2	0.4	0.4	0.4	0.4	0.4	0.1	0.0
RTD Coffee	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	0.0
Value Added Water	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.0
Sports Drinks	0.3	0.3	0.3	0.2	0.3	0.2	0.0	0.0
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Subtotal	1.2	1.3	1.3	1.3	1.3	1.2	0.0	-0.1
No-Calorie (Less than 5 calories per 8 oz.)								
CSD	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
RTD Tea	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
Energy	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Value Added Water	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
Water	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	-0.1	0.0
By Nielsen-Measured Channels and Non-Nielsen Channels								
Nielsen ²	123.7	122.3	120.7	117.0	114.8	112.1	-11.6	-2.7
Non-Nielsen ³	79.4	80.5	82.4	83.2	81.7	79.7	0.3	-2.1

¹ Data from DrinkTell and Census Bureau ² Data from Nielsen Scantrack and Census Bureau ³ Represents the difference between Drinktell and Nielsen Scantrack Note: All averages are weighted by volume.

Daily Volume Per Person, Ounces Per Person Per Day ¹								
Category	2014	2015	2016	2017	2018	2019	2014-2019 Change	2018-2019 Change
Total								
CSD	13.9	13.6	13.4	13.2	13.0	12.8	-1.1	-0.2
Juice	3.7	3.6	3.6	3.4	3.3	3.2	-0.4	-0.1
RTD Tea	1.7	1.8	1.8	1.8	1.8	1.8	0.0	0.0
RTD Coffee	0.1	0.2	0.2	0.2	0.2	0.2	0.1	0.0
Energy	0.6	0.7	0.7	0.7	0.8	0.9	0.2	0.1
Value Added Water	0.3	0.3	0.4	0.4	0.4	0.4	0.1	0.0
Sports Drinks	1.6	1.6	1.7	1.6	1.7	1.7	0.1	0.0
Water	12.2	13.1	14.0	14.8	15.5	15.9	3.7	0.4
Total	34.1	34.8	35.7	36.2	36.7	36.9	2.8	0.2
Full-Calorie (More than 67 Calories per 8 oz.)								
CSD	10.1	10.0	9.9	9.8	9.7	9.5	-0.6	-0.2
Juice	2.9	2.8	2.8	2.7	2.6	2.5	-0.3	0.0
RTD Tea	0.7	0.8	0.8	0.8	0.8	0.8	0.1	0.0
RTD Coffee	0.1	0.1	0.2	0.2	0.2	0.2	0.1	0.0
Energy	0.5	0.5	0.6	0.6	0.6	0.6	0.1	0.0
Value Added Water	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
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Subtotal	14.3	14.3	14.3	14.1	13.9	13.5	-0.7	-0.3
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
Juice	0.7	0.7	0.6	0.6	0.6	0.6	-0.1	0.0
RTD Tea	0.6	0.5	0.5	0.5	0.5	0.5	-0.1	0.0
RTD Coffee	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
Value Added Water	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.0
Sports Drinks	1.4	1.4	1.5	1.4	1.4	1.4	0.0	-0.1
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Subtotal	2.7	2.7	2.7	2.7	2.7	2.6	-0.2	-0.1
Low-Calorie (5-40 Calories per 8 oz.)								
CSD	0.1	0.1	0.1	0.0	0.0	0.0	-0.1	0.0
Juice	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.0
RTD Tea	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.0
RTD Coffee	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	0.0
Value Added Water	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0
Sports Drinks	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
Subtotal	0.4	0.5	0.5	0.5	0.5	0.4	0.0	0.0
No-Calorie (Less than 5 calories per 8 oz.)								
CSD	3.8	3.6	3.4	3.3	3.3	3.3	-0.4	0.0
Juice	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
RTD Tea	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
Energy	0.1	0.1	0.1	0.1	0.1	0.2	0.1	0.1
Value Added Water	0.2	0.2	0.2	0.2	0.2	0.2	0.0	0.0
Sports Drinks	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.1
Water	12.2	13.1	14.0	14.8	15.5	15.9	3.7	0.4
Subtotal	16.7	17.4	18.2	18.9	19.7	20.4	3.7	0.6
By Nielsen-Measured Channels and Non-Nielsen Channels								
Nielsen ²	20.9	21.2	21.6	21.6	21.9	22.0	1.1	0.1
Non-Nielsen ³	13.3	13.7	14.1	14.5	14.9	14.9	1.6	0.1

APPENDIX: SUMMARY NATIONAL DATA TABLES

Total LRB Volume Eight-Ounce Equivalent Servings, In Millions ¹								
Category	2014	2015	2016	2017	2018	2019	2014-2019 Change	2018-2019 Change
Total								
CSD	202,531	199,350	197,792	195,244	194,444	192,388	(10,143)	(2,056)
Juice	53,049	52,545	52,650	50,624	49,157	48,323	(4,726)	(833)
RTD Tea	24,842	25,803	26,662	26,942	26,876	26,362	1,520	(515)
RTD Coffee	1,924	2,230	2,514	2,835	3,086	3,281	1,357	196
Energy	9,249	10,068	10,553	10,942	11,881	12,909	3,661	1,029
Value Added Water	4,668	4,895	5,213	5,484	5,973	5,892	1,224	(81)
Sports Drinks	22,652	23,902	24,825	24,308	24,989	25,476	2,824	487
Water	176,924	190,916	206,545	219,806	231,182	238,268	61,344	7,086
Total	495,839	509,709	526,755	536,186	547,587	552,900	57,061	5,313
Full-Calorie (More than 67 Calories per 8 oz.)								
CSD	146,484	146,283	146,845	145,732	144,470	142,106	(4,378)	(2,364)
Juice	41,547	41,301	41,600	40,073	38,513	38,043	(3,505)	(470)
RTD Tea	10,129	11,035	11,596	11,615	11,441	11,469	1,340	28
RTD Coffee	1,865	2,086	2,362	2,623	2,778	2,909	1,044	131
Energy	6,933	7,754	8,192	8,511	8,735	8,394	1,460	(341)
Value Added Water	56	52	44	36	27	-	(56)	(27)
Sports Drinks	23	68	180	299	592	1	(23)	(591)
Water	-	-	-	-	-	-	-	-
Subtotal	207,038	208,581	210,819	208,889	206,555	202,921	(4,117)	(3,634)
Mid-Calorie (41-66 Calories per 8 oz.)								
CSD	-	-	-	-	-	-	-	-
Juice	9,782	9,526	9,196	8,711	8,895	8,639	(1,143)	(256)
RTD Tea	8,221	7,557	7,432	7,589	7,476	7,077	(1,144)	(399)
RTD Coffee	28	40	51	51	72	77	49	5
Energy	148	111	73	81	195	269	120	74
Value Added Water	1,492	1,537	1,622	1,687	1,744	1,705	213	(39)
Sports Drinks	19,949	21,208	22,053	21,473	21,267	20,580	630	(688)
Water	-	-	-	-	-	-	-	-
Subtotal	39,621	39,979	40,427	39,591	39,650	38,347	(1,275)	(1,304)
Low-Calorie (5-40 Calories per 8 oz.)								
CSD	1,202	990	827	592	500	371	(831)	(129)
Juice	1,193	1,200	1,332	1,331	1,265	1,178	(14)	(87)
RTD Tea	887	1,275	1,402	1,413	1,470	1,308	421	(162)
RTD Coffee	29	84	63	94	129	154	124	25
Energy	1,146	1,137	1,212	1,247	1,370	1,302	157	(67)
Value Added Water	459	494	628	673	741	775	316	34
Sports Drinks	1,600	1,502	1,464	1,387	1,538	1,412	(188)	(125)
Water	-	-	-	-	-	-	-	-
Subtotal	6,516	6,681	6,927	6,737	7,012	6,501	(15)	(511)
No-Calorie (Less than 5 calories per 8 oz.)								
CSD	54,845	52,076	50,120	48,919	49,474	49,911	(4,934)	437
Juice	527	518	522	510	483	463	(64)	(20)
RTD Tea	5,604	5,936	6,232	6,325	6,490	6,507	904	17
RTD Coffee	1	19	38	67	106	141	140	35
Energy	1,021	1,066	1,076	1,103	1,581	2,945	1,923	1,364
Value Added Water	2,661	2,812	2,920	3,087	3,462	3,412	751	(50)
Sports Drinks	1,079	1,124	1,129	1,149	1,593	3,484	2,404	1,891
Water	176,924	190,916	206,545	219,806	231,182	238,268	61,344	7,086
Subtotal	242,663	254,468	268,582	280,969	294,370	305,131	62,468	10,761
By Nielsen-Measured Channels and Non-Nielsen Channels								
Nielsen ²	302,797	309,711	317,997	320,885	326,055	329,136	26,339	3,080
Non-Nielsen ³	193,043	199,998	208,758	215,301	221,532	223,765	30,722	2,232

¹ Data from DrinkTell ² Data from Nielsen Scantrack ³ Represents the difference between DrinkTell and Nielsen Scantrack

Share of LRB Volume by Beverage Category ¹								
Category	2014	2015	2016	2017	2018	2019	2014-2019 Change	2018-2019 Change
Total								
CSD	41%	39%	38%	36%	36%	35%	-6%	-1%
Juice	11%	10%	10%	9%	9%	9%	-2%	0%
RTD Tea	5%	5%	5%	5%	5%	5%	0%	0%
RTD Coffee	0%	0%	0%	1%	1%	1%	0%	0%
Energy	2%	2%	2%	2%	2%	2%	0%	0%
Value Added Water	1%	1%	1%	1%	1%	1%	0%	0%
Sports Drinks	5%	5%	5%	5%	5%	5%	0%	0%
Water	36%	37%	39%	41%	42%	43%	7%	1%
Total	-	-	-	-	-	-	-	-
Full-Calorie (More than 67 Calories per 8 oz.)								
CSD	30%	29%	28%	27%	26%	26%	-4%	-1%
Juice	8%	8%	8%	7%	7%	7%	-1%	0%
RTD Tea	2%	2%	2%	2%	2%	2%	0%	0%
RTD Coffee	0%	0%	0%	0%	1%	1%	0%	0%
Energy	1%	2%	2%	2%	2%	2%	0%	0%
Value Added Water	0%	0%	0%	0%	0%	0%	0%	0%
Sports Drinks	0%	0%	0%	0%	0%	0%	0%	0%
Water	0%	0%	0%	0%	0%	0%	0%	0%
Subtotal	42%	41%	40%	39%	38%	37%	-5%	-1%
Mid-Calorie (41-66 Calories per 8 oz.)								
CSD	0%	0%	0%	0%	0%	0%	0%	0%
Juice	2%	2%	2%	2%	2%	2%	0%	0%
RTD Tea	2%	1%	1%	1%	1%	1%	0%	0%
RTD Coffee	0%	0%	0%	0%	0%	0%	0%	0%
Energy	0%	0%	0%	0%	0%	0%	0%	0%
Value Added Water	0%	0%	0%	0%	0%	0%	0%	0%
Sports Drinks	4%	4%	4%	4%	4%	4%	0%	0%
Water	0%	0%	0%	0%	0%	0%	0%	0%
Subtotal	8%	8%	8%	7%	7%	7%	-1%	0%
Low-Calorie (5-40 Calories per 8 oz.)								
CSD	0%	0%	0%	0%	0%	0%	0%	0%
Juice	0%	0%	0%	0%	0%	0%	0%	0%
RTD Tea	0%	0%	0%	0%	0%	0%	0%	0%
RTD Coffee	0%	0%	0%	0%	0%	0%	0%	0%
Energy	0%	0%	0%	0%	0%	0%	0%	0%
Value Added Water	0%	0%	0%	0%	0%	0%	0%	0%
Sports Drinks	0%	0%	0%	0%	0%	0%	0%	0%
Water	0%	0%	0%	0%	0%	0%	0%	0%
Subtotal	1%	1%	1%	1%	1%	1%	0%	0%
No-Calorie (Less than 5 calories per 8 oz.)								
CSD	11%	10%	10%	9%	9%	9%	-2%	0%
Juice	0%	0%	0%	0%	0%	0%	0%	0%
RTD Tea	1%	1%	1%	1%	1%	1%	0%	0%
RTD Coffee	0%	0%	0%	0%	0%	0%	0%	0%
Energy	0%	0%	0%	0%	0%	1%	0%	0%
Value Added Water	1%	1%	1%	1%	1%	1%	0%	0%
Sports Drinks	0%	0%	0%	0%	0%	1%	0%	0%
Water	36%	37%	39%	41%	42%	43%	7%	1%
Subtotal	49%	50%	51%	52%	54%	55%	6%	1%
By Nielsen-Measured Channels and Non-Nielsen Channels								
Nielsen ²	61%	61%	60%	60%	60%	60%	-2%	0%
Non-Nielsen ³	39%	39%	40%	40%	40%	40%	2%	0%

APPENDIX: SUMMARY NATIONAL DATA TABLES

Average Calories Per Eight-Ounce Serving ¹								
Category	2014	2015	2016	2017	2018	2019	2014-2019 Change	2018-2019 Change
Total								
CSD	73.5	74.4	75.4	75.7	75.0	74.5	0.9	-0.6
Juice	97.0	97.5	97.2	97.1	96.6	97.4	0.4	0.7
RTD Tea	52.2	52.0	52.1	52.0	51.2	51.3	-0.9	0.1
RTD Coffee	133.4	130.5	129.1	127.8	124.8	122.4	-11.0	-2.4
Energy	82.7	84.7	84.7	84.7	80.6	71.5	-11.2	-9.2
Value Added Water	21.1	20.1	19.7	19.0	17.8	17.3	-3.8	-0.5
Sports Drinks	49.9	50.4	50.9	51.1	50.7	45.8	-4.2	-4.9
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	47.6	46.6	45.6	44.3	42.8	41.6	-6.0	-1.2
Full-Calorie (More than 67 Calories per 8 oz.)								
CSD	101.3	101.0	101.3	101.2	100.7	100.6	-0.7	-0.2
Juice	110.1	110.5	110.3	110.1	110.1	110.4	0.4	0.4
RTD Tea	82.9	82.9	82.8	82.7	82.2	82.1	-0.9	-0.2
RTD Coffee	136.3	137.2	135.7	136.6	136.6	136.1	-0.3	-0.5
Energy	107.2	107.5	106.9	106.8	106.8	106.7	-0.5	-0.1
Value Added Water	120.1	120.7	120.8	121.2	121.2	-	-	-
Sports Drinks	95.0	95.0	95.0	95.0	95.0	95.0	0.0	0.0
Water	-	-	-	-	-	-	-	-
Subtotal	102.7	102.5	102.6	102.5	102.2	102.1	-0.6	0.0
Mid-Calorie (41-66 Calories per 8 oz.)								
CSD	-	-	-	-	-	-	-	-
Juice	56.1	56.0	54.7	54.6	54.5	55.4	-0.7	0.9
RTD Tea	52.0	50.6	50.8	51.3	51.4	51.5	-0.5	0.1
RTD Coffee	52.9	52.9	50.8	48.3	48.1	47.2	-5.7	-0.9
Energy	60.0	60.1	60.0	55.7	51.5	50.6	-9.4	-0.9
Value Added Water	49.0	49.0	48.9	48.9	48.8	48.8	-0.3	0.0
Sports Drinks	55.0	55.1	55.1	55.2	55.4	55.3	0.2	-0.2
Water	-	-	-	-	-	-	-	-
Subtotal	54.4	54.2	54.0	54.0	54.1	54.3	-0.2	0.1
Low-Calorie (5-40 Calories per 8 oz.)								
CSD	24.6	26.3	30.7	33.2	34.8	35.5	10.9	0.7
Juice	18.9	19.2	18.6	18.9	19.1	19.4	0.6	0.4
RTD Tea	29.1	32.7	33.8	33.9	33.5	34.0	4.8	0.4
RTD Coffee	27.5	30.2	21.0	15.9	15.5	13.5	-13.9	-2.0
Energy	11.1	11.2	11.0	10.8	10.5	10.0	-1.0	-0.5
Value Added Water	35.7	31.7	25.7	22.8	21.5	21.5	-14.2	0.0
Sports Drinks	19.7	20.7	20.7	20.9	20.9	20.7	1.0	-0.1
Water	-	-	-	-	-	-	-	-
Subtotal	21.4	22.9	22.9	22.6	22.1	21.8	0.4	-0.4
No-Calorie (Less than 5 calories per 8 oz.)								
CSD	0.4	0.4	0.5	0.4	0.4	0.4	0.0	0.0
Juice	3.4	3.2	3.2	3.2	3.2	3.1	-0.3	0.0
RTD Tea	0.6	0.6	0.5	0.5	0.4	0.4	-0.3	-0.1
RTD Coffee	1.5	0.2	0.2	0.2	0.2	0.1	-1.4	0.0
Energy	0.0	0.2	0.2	0.2	0.2	0.1	0.1	0.0
Value Added Water	0.9	0.4	0.6	0.6	0.5	0.6	-0.3	0.1
Sports Drinks	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
Subtotal	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 ²	47.5	46.2	44.7	43.2	42.0	40.8	-6.7	-1.2
Non-Nielsen ³	47.8	47.1	46.9	45.8	44.0	42.7	-5.1	-1.3

¹ Data from DrinkTell ² Data from Nielsen Scantrack ³ Represents the difference between DrinkTell and Nielsen Scantrack

Average Oz. Per Container (Containers ≤ 1L Only) by Beverage Category ²								
Category	2014	2015	2016	2017	2018	2019	2014-2019 Change	2018-2019 Change
Total								
CSD	13.5	13.6	13.7	13.7	13.7	13.6	0.1	0.0
Juice	9.4	9.6	9.7	9.6	9.6	9.6	0.2	0.0
RTD Tea	18.5	18.4	18.4	18.5	18.4	18.2	-0.3	-0.2
RTD Coffee	12.6	12.6	12.7	12.7	12.7	12.8	0.2	0.1
Energy	14.2	14.5	14.5	14.6	14.6	14.5	0.3	-0.1
Value Added Water	16.2	16.1	16.4	16.6	16.7	16.7	0.5	0.0
Sports Drinks	23.1	22.7	22.4	22.1	21.9	21.8	-1.4	-0.1
Water	17.1	17.0	16.9	16.9	16.8	16.8	-0.3	0.0
Total	15.1	15.2	15.3	15.3	15.3	15.3	0.3	0.0
Full-Calorie (More than 67 Calories per 8 oz.)								
CSD	13.4	13.4	13.5	13.5	13.4	13.4	0.1	0.0
Juice	10.4	10.8	11.0	11.2	11.3	11.3	0.8	0.0
RTD Tea	19.1	18.9	18.8	18.8	18.6	18.3	-0.7	-0.3
RTD Coffee	12.6	12.6	12.7	12.7	12.7	12.8	0.1	0.1
Energy	14.0	14.2	14.3	14.4	14.3	14.0	0.1	-0.2
Value Added Water	19.8	19.7	19.5	19.4	20.0	-	-	-
Sports Drinks	14.6	15.3	15.8	18.2	19.7	19.8	5.2	0.1
Water	-	-	-	-	-	-	-	-
Subtotal	13.2	13.3	13.4	13.5	13.4	13.4	0.3	0.0
Mid-Calorie (41-66 Calories per 8 oz.)								
CSD	-	-	-	-	-	-	-	-
Juice	8.8	9.1	9.4	8.6	8.4	8.4	-0.4	0.1
RTD Tea	18.3	18.1	17.9	18.4	18.5	18.4	0.1	-0.1
RTD Coffee	14.6	13.9	13.0	9.5	10.7	11.4	-3.2	0.7
Energy	14.9	15.4	15.0	15.7	20.2	23.0	8.1	2.9
Value Added Water	20.3	20.3	20.0	20.1	19.9	19.7	-0.6	-0.3
Sports Drinks	23.2	22.7	22.4	22.3	22.0	21.9	-1.3	-0.2
Water	-	-	-	-	-	-	-	-
Subtotal	18.8	18.9	18.9	18.7	18.3	18.1	-0.7	-0.2
Low-Calorie (5-40 Calories per 8 oz.)								
CSD	13.5	13.0	13.2	13.2	13.2	13.1	-0.3	-0.1
Juice	7.0	6.9	6.8	6.8	6.7	6.7	-0.3	0.0
RTD Tea	21.2	21.5	22.7	22.0	20.6	19.5	-1.6	-1.0
RTD Coffee	11.2	11.9	12.3	11.4	11.3	11.1	0.0	-0.2
Energy	13.3	13.5	13.4	13.3	13.2	12.8	-0.4	-0.3
Value Added Water	7.3	7.6	8.7	9.6	10.2	10.4	3.2	0.3
Sports Drinks	20.5	20.1	19.6	18.2	18.0	18.6	-2.0	0.5
Water	-	-	-	-	-	-	-	-
Subtotal	10.6	10.4	10.4	10.3	10.3	10.0	-0.6	-0.3
No-Calorie (Less than 5 calories per 8 oz.)								
CSD	14.0	14.1	14.2	14.2	14.2	14.1	0.2	0.0
Juice	12.7	11.5	11.4	11.5	11.5	11.5	-1.2	0.0
RTD Tea	17.3	17.4	17.4	17.4	17.5	17.4	0.1	-0.1
RTD Coffee	7.4	11.8	11.8	12.7	13.2	14.3	7.0	1.2
Energy	15.9	15.9	16.1	16.0	16.2	16.2	0.3	0.1
Value Added Water	18.7	17.7	17.6	17.6	17.6	17.8	-0.9	0.1
Sports Drinks	28.2	27.7	27.4	27.5	27.0	23.5	-4.6	-3.5
Water	17.1	17.0	16.9	16.9	16.8	16.8	-0.3	0.0
Subtotal	16.3	16.4	16.4	16.4	16.4	16.4	0.1	0.0
By Nielsen-Measured Channels and Non-Nielsen Channels								
Nielsen ²	<i>DrinkTell does not report container size information, thus all container size information reported above is reflective of beverages sold in Nielsen-measured channels.</i>							
Non-Nielsen ³								