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2025 Beverage Calories Initiative:

Report on 2018 Progress toward the National Calorie Goal

PREPARED FOR:

American Beverage Association
Alliance for a Healthier Generation

PREPARED BY:

Keybridge

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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 percent 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").

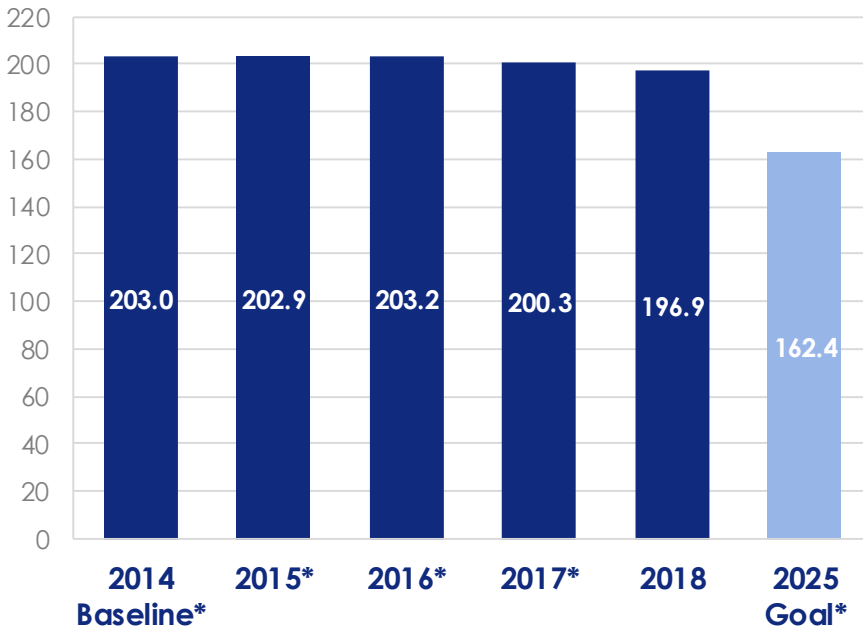
To measure progress over time, the ABA retained Keybridge as a third-party evaluator. This is the fourth report on progress toward the national calorie goal. The primary measure of progress for the national calorie goal is the change in beverage calories per person per day since the 2014 baseline.

From 2014 to 2018, LRB calories per person per day fell from 203.0 to 196.9. In order to achieve the national calorie goal, this measure must decline by 20 percent from baseline to 162.4 calories per person per day by 2025.

Based on the national calorie numbers, this report points to the following conclusions:

Beverage Calories Per Person Per Day

Average LRB Calories Per Person Per Day



*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; U.S. Census Bureau, 2018

(1) From 2017 to 2018, LRB calories fell by 3.3 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 second year in a row of notable calorie declines.

(2) The progress recorded in 2018 was driven by per person calorie reductions from carbonated soft drinks ("CSDs"), 100% juices, and juice drinks.

(3) Per person volumes of no- and low-calorie CSDs held steady in 2018, 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, continues to drive LRB volume growth.[2]

(5) For the first time since the BCI was initiated in 2014, the average calories per 8-ounce serving decreased in every beverage category in 2018 as lower calorie versions of all beverage categories grew relative to the higher calorie versions.

(6) 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 percent reduction by 2025.

(7) Calorie reduction progress was also achieved in the other market segments that are not included in the Nielsen dataset, which include fountain beverages, small and independent retail stores, and other segments. This too occurred for the first time since the BCI was launched.

(8) Despite the progress made in the past two years, reductions in LRB calories per person still need to accelerate to meet the national calorie goal in 2025.

[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 "waters" category includes all unsweetened, no-calorie still and carbonated waters.

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 of excess calories to rising obesity rates, 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 percent by 2025 (i.e., the national calorie goal).[3] 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 2018 progress toward the national calorie goal. Progress toward the community calorie goal will be featured in a forthcoming report. Previous reports are available at www.healthiergeneration.org/our-work/businesses/impact/beverage-calories-initiative. More detailed information about the calorie reduction strategies being implemented is available in previous progress reports and in downloadable summaries from each company available at the above link.

II. METHODOLOGY SUMMARY

The measurement approach has 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. The reasons for each of these choices are described in earlier BCI reports and in the detailed methodology.

As in previous reports, the main national calorie estimates shown are based on Beverage Marketing Corporation's DrinkTell database ("DrinkTell"), which provides data for all beverages included as LRB and sold through all channels. Data from the Beverage Digest Fact Book are used to corroborate trends in several beverage categories, including carbonated soft drinks ("CSDs"), the largest category in terms of both volume and calories. However, that dataset lacks coverage of other beverage categories important for monitoring this commitment. Finally, the Nielsen Company's Scantrack dataset ("Scantrack") provides detailed stock keeping unit ("SKU")-level

[3] 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.

product information that is used to examine container size changes. Scantrack is limited in its coverage of important market segments and sales channels and covers about 60 percent of the LRB volumes captured by DrinkTell. Most importantly, Scantrack does not include fountain sales volumes, which represent a large volume share of many beverage categories, especially CSDs.

This report on 2018 progress shows per person calorie estimates for 2018, the fourth year of BCI implementation at the national level. It also features revised estimates for 2014 (the baseline year), 2015, 2016, 2017, and the 2025 goal.[4] Updates to these estimates were due to (1) revisions in the underlying brand-level sales volume estimates in DrinkTell and Scantrack and (2) a change in methodology.

The change in methodology relates to how brand-level data is disaggregated to the sub-brand level. For the Report on 2017 Progress, Nielsen Scantrack and company-provided data supplemented DrinkTell data to provide a more accurate disaggregation of 100% juice and juice drinks brand-level volumes to the sub-brand level.[5] This more precise breakdown is important because calories per 8-ounce serving can differ greatly between products included under the same brand but different sub-brands.

This year's analysis expanded this methodology to include energy drinks, RTD coffees, RTD teas, and value-added waters. All of these categories include brands with multiple flavors or beverage products that differ significantly in their calories per 8-ounce serving and for which DrinkTell lacks precise sub-brand level volume estimates. To ensure consistency, this methodology was applied retroactively to previous years' estimates resulting in increased calories per person per day estimates for 2014-2017. The change had essentially no impact on estimated changes in calories per person per day from year to year.

One other change from previous reports is that the definition of water in this report now includes all unsweetened, no-calorie still and carbonated waters. Previously, these beverages had been divided among the water, value-added water, and CSD categories based more on historical trademark affiliations than ingredients. As the volume share of these beverages has grown, a more consistent categorization has become more important.

For an explanation of all revisions and the methodology generally, see the detailed methodology at www.healthiergeneration.org/our-work/businesses/impact/beverage-calories-initiative.

[4] The goal was revised because it is set at 20 percent below the 2014 estimate, which was revised.
[5] Brand-level data specify the total volumes for specific juice and juice drink brands such as Minute Maid, Tropicana, and Snapple. Sub-brand level data is more specific and distinguishes the beverage from others of the same brand. A few sub-brand examples include Minute Maid Fruit Punch, Tropicana No Pulp Orange Juice, and Snapple Pink Lemonade.

III. RESULTS: PROGRESS TOWARD THE NATIONAL CALORIE GOAL

3.1 Overall Progress

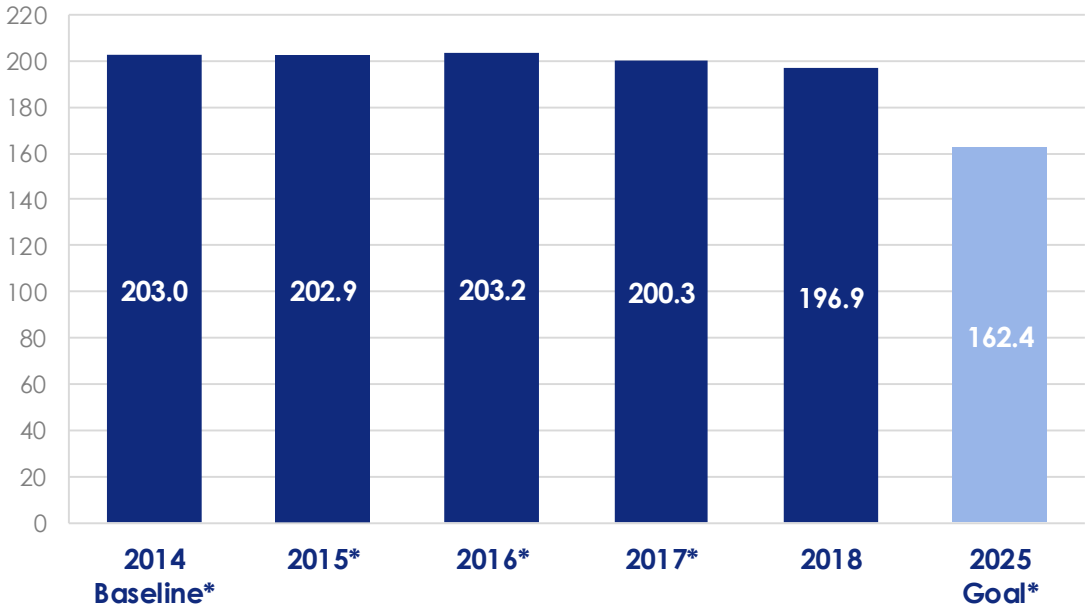
The primary measure of progress for the national calorie goal is the change in beverage calories per person per day. From 2014 to 2018, LRB calories per person per day fell by about 6 calories or 3 percent – from 203.0 to 196.9. Over this same period, LRB volumes per person rose by 7.4 percent and average calories per 8-ounce serving declined by 9.7 percent.

The entire calorie reduction observed occurred in the last two years. From 2016 to 2018, LRB calories per person per day declined by about 6 calories, whereas they were virtually flat from 2014 to 2016. As seen in Figure 1, in order to achieve the national calorie goal, this measure must decline by 20 percent from the baseline to 162.4 calories per person per day by 2025.

Figure 1

Beverage Calories Per Person Per Day

Average LRB Calories Per Person Per Day



*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; U.S. Census Bureau, 2018

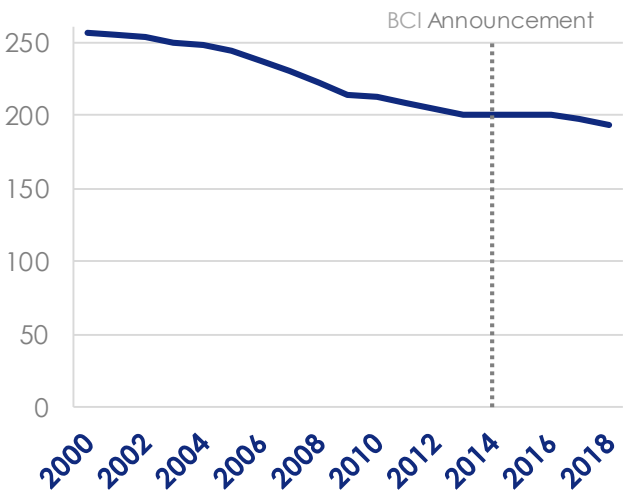
3.2 Long-Term Trend

Figure 2 shows BMC's estimated steady decreases in beverage calories per person from 2000 to 2013. BMC's estimates show LRB calories per person leveling off from 2013 – the year before the BCI agreement was adopted – to 2016. This suggests that the calorie reduction strategies and consumer preference shifts that drove LRB calories down from 2000 to 2013 were no longer having a substantial impact in the year before the national calorie goal was established. The six calorie per person per day reduction from 2016 to 2018 represents a change from the flat calorie trend of the previous three years and possible return to the earlier calorie reduction trend.[6]

Figure 2

LRB Calories Per Person Per Day

BMC Calories Estimates, 2000-2018



Source: Beverage Marketing Corporation.

[6] Beverage Digest data were used to corroborate this trend. Both sets of estimates show a long-term decline, but the Beverage Digest estimates show slight growth from 2013 to 2016 and a smaller decline from 2016 to 2018. The differences are mainly due to coverage gaps in Beverage Digest's data. Beverage Digest lacks full coverage of many beverages that have been sources of calorie declines, particularly 100% juices and juice drinks. Calorie trends among the beverage types where Beverage Digest has complete coverage, including CSDs and energy drinks, are consistent with the trends based on Beverage Marketing Corporation's DrinkTell dataset. A more detailed explanation of this can be found in the Detailed Methodology document.

3.3 Progress by Beverage Category

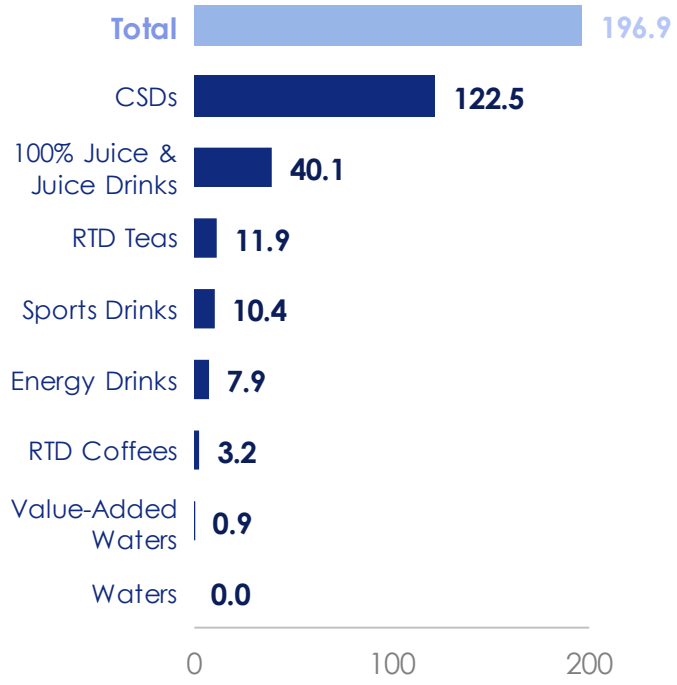
Change since Baseline (2014-2018)

As shown in Figure 3, calories per person per day declined by 6.1 calories (3.0 percent) between 2014 and 2018. Over this time, calories per person per day declined by 5.6 calories (4.4 percent) among CSDs and by 4.4 calories (9.8 percent) among 100% juices and juice drinks. This progress is particularly important as these beverage categories continue to account for more than 80 percent of total LRB calories. A portion of these calorie reductions were offset by growth in calories from smaller beverage categories including sports drinks, RTD teas & coffees, and energy drinks.

Figure 3

Beverage Calories Per Person Per Day

Average Calories by Beverage Category, 2018



	Change in Calories Per Person Per Day				
	2014-15	2015-16	2016-17	2017-18	2014-18
Total	-0.2	+0.4	-3.0	-3.3	**-6.1**
CSDs	-1.5	-0.5	-1.6	-2.0	**-5.6**
100% Juice & Juice Drinks	-0.5	-0.3	-1.9	-1.7	**-4.4**
RTD Teas	+0.4	+0.3	+0.0	-0.3	**+0.4**
Sports Drinks	+0.5	+0.4	-0.2	+0.1	**+0.7**
Energy Drinks	+0.7	+0.3	+0.3	+0.4	**+1.6**
RTD Coffees	+0.3	+0.2	+0.3	+0.2	**+1.1**
Value-Added Waters	+0.0	+0.0	+0.0	+0.0	**+0.1**
Waters	-	-	-	-	**-**

Source: Beverage Marketing Corporation: DrinkTell Database; U.S. Census Bureau, 2018

Change in 2018 (2017-2018)

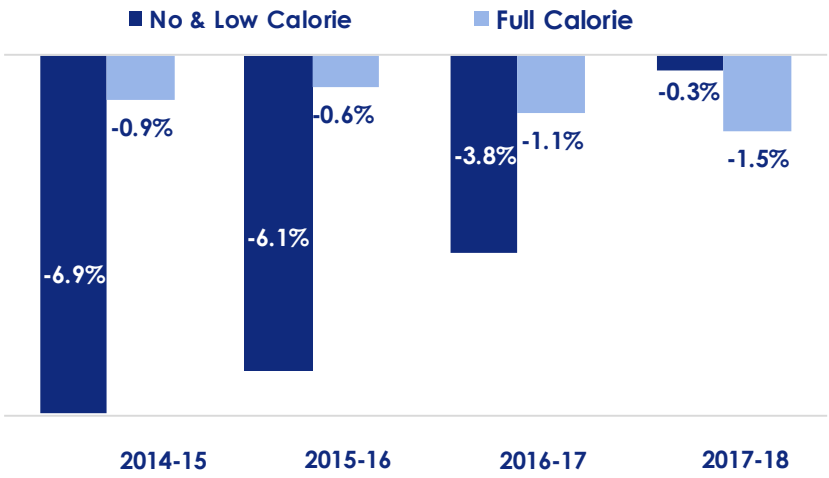
In 2018, calories per person per day fell by 3.3 calories, the largest decline since the launch of the BCI and the second consecutive year of notable calorie declines. Calories from CSDs contributed the most to these declines (-2.0 calories per person per day), as they also fell at their fastest pace since the BCI was launched. This was despite a slowing of CSD volume reductions to their slowest pace since the BCI was launched.

The biggest difference from previous years was that full-calorie CSDs accounted for nearly all of the CSD volume reductions in 2018 while per person volumes of no- and low-calorie CSDs stabilized. As Figure 4 shows, this represents a change from previous years when declining volumes of no- and low-calorie CSDs had been a headwind to calorie reduction progress.

Figure 4

Change in Volume of CSDs

Percent Change in Volume Per Person Per Day, 2014-2018



Sources: Beverage Marketing Corporation: DrinkTell Database; U.S. Census Bureau, 2018

Per person calories from 100% juice and juice drinks fell in 2018 at a similar, though slightly slower, pace than in 2017. This was the result of declines in both volumes per person and calories per serving. Together, calories per person per day from CSDs, 100% juices, and juice drinks declined by 3.7 calories, similar to the 3.5 calorie decrease achieved in 2017, but much bigger than the 2.0 and 0.8 calorie decreases achieved in 2015 and 2016, respectively.

Meanwhile, some of those calorie decreases were offset by a collective 0.4 calorie per person per day increase from other categories in 2018. The caloric growth came mainly from energy drinks and RTD coffees. In both categories, per person calorie growth was driven by volume increases, which more than offset decreases in calories per 8-ounce serving. The volume growth in both categories as well as the decrease in calories per serving of RTD coffees continue previous trends. The decrease in calories per serving of energy drinks, however, represents a change from the previous trend. (Figure 10 shows changes in calories per 8-ounce serving by beverage category.)

Per person sports drink volumes also grew in 2018. The largest contributors to that growth were zero-calorie flavors, which mitigated the caloric impact of the volume growth. Finally, calories from RTD teas decreased slightly for the first time since the BCI was launched, driven by decreases in both volumes per person and calories per serving.

3.4 Progress by Market Segment

Change since Baseline (2014-2018)

From 2014 to 2018, significant progress was made in reducing calories from packaged beverages sold through Nielsen-measured channels: chain grocery, convenience, dollar, drug, club, and big

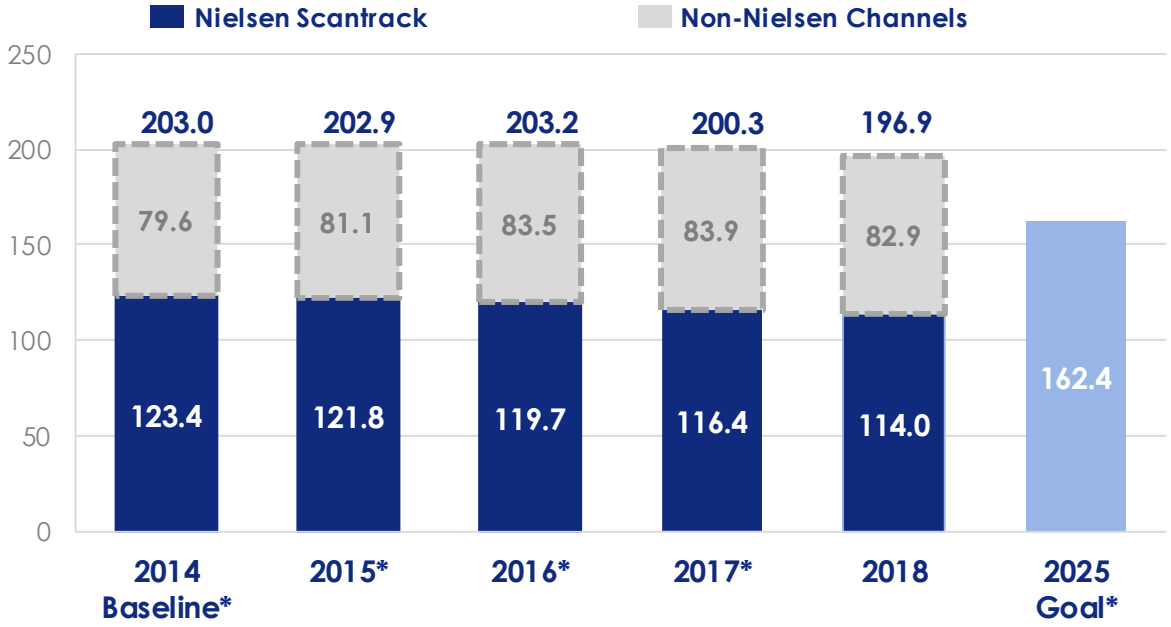
box stores tracked by Nielsen Scantrack.[7] These represented about 60 percent of LRB calories sold in the 2014 baseline year. As shown in Figure 5, since 2014, calories from these beverages declined by 9.4 calories per person per day, or 7.6 percent. This occurred even while LRB volumes per person in these channels grew by 4.8 percent. This pace, if sustained, would achieve a 20 percent reduction of beverage calories sold within these channels by 2025.

Calories per person from beverages sold through the other market segments (i.e., those that are not measured by Nielsen, including restaurants, vending, small independent stores, and other channels) have not followed the same trajectory. In fact, over the same period, more than a third of the calorie reductions discussed above – specifically, 3.4 of the 9.4 calories per person per day – were offset by calorie growth in beverage calories sold through market segments not measured by Nielsen. This calorie growth was driven by per person volume growth of 11.4 percent in these market segments.

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, 2018

[7] 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 2018 (2017-2018)

In 2018, calories from Nielsen-measured channels continued to decline, dropping by 2.4 calories per person or 2.1 percent. Unlike previous years, however, calories from non-Nielsen market segments decreased in 2018, dropping by 0.9 calories per person or 1.1 percent. It is too early to say that this represents a change in the trend, but it is the first indication that progress towards the calorie goal is being achieved across a broader spectrum of market segments, including possibly in fountain, foodservice market segments, and among small, independent retail outlets.

3.5 Examining the Factors Contributing to Calorie Reductions

Change in per person beverage calories is a function of three key factors: the number of beverages consumed per person, the number of calories per ounce, and 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.

3.5.1 Beverage Volumes Per Person

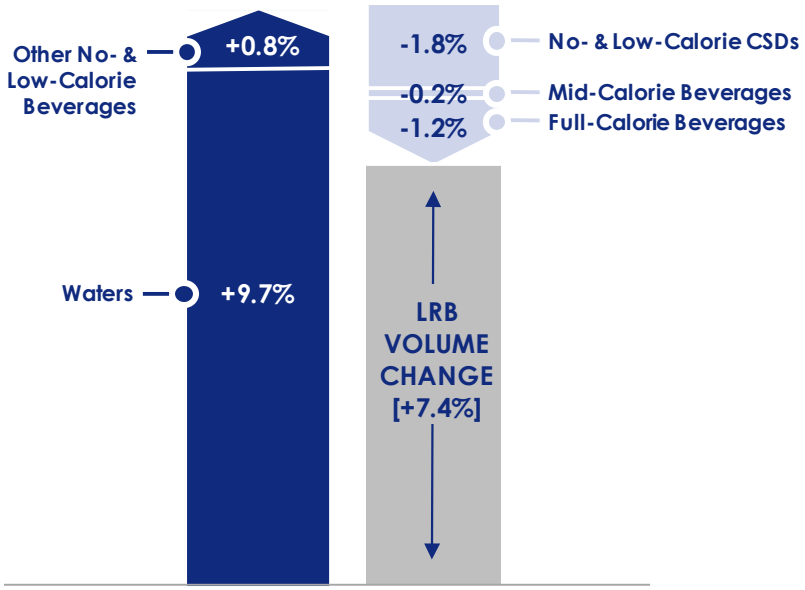
Change since Baseline (2014-2018)

From 2014 to 2018, total LRB volumes grew by 10.3 percent while the U.S. population grew by 2.8 percent.[8] LRB volumes per person grew by 7.4 percent or 2.5 ounces per person per day. Figure 6 shows that the growth of waters more than accounts for the entire observed LRB volume growth. Only a small portion of waters' growth was offset by decreases in the volumes of other beverages – including both no- and low-calorie CSDs as well as full-and mid-calorie beverages. Importantly, some portion of LRB volume growth may be due to consumer shifts from unmeasured beverages that are not included in LRB (e.g. tap water, brewed teas and

Figure 6

Change in LRB Volumes Per Person

Contributions to LRB Volume Change by Category, 2014-2018



Sources: Beverage Marketing Corporation: DrinkTell Database; U.S. Census Bureau, 2018

[8] United States Census Bureau, (2018). Annual Estimates of the Resident Population for the United States, Regions, States, and Puerto Rico: April 1, 2010 to July 1, 2018 (NST-EST2018-01). Washington, DC: U.S. Government Printing Office. 2018: 327,167,434; 2017: 325,147,121; 2016: 323,071,342; 2015: 320,742,673; 2014: 318,386,421

coffees, and powdered drink mixes) to beverages that are included in LRB.

Change in 2018 (2017-2018)

In 2018, overall LRB volume per person continued to grow. Growth in volume was driven by water in 2018 just as in previous years. While still water remains the main driver of growth, an increasing share of waters' growth can be attributed to the sharp growth of carbonated waters, which include both unflavored and flavored unsweetened carbonated waters. From 2014 to 2015, growth in per person volumes of carbonated waters represented 8 percent of overall water growth, while from 2017 to 2018, it represented 19 percent of water growth. Furthermore, since 2016, carbonated waters have grown faster than any other LRB category.

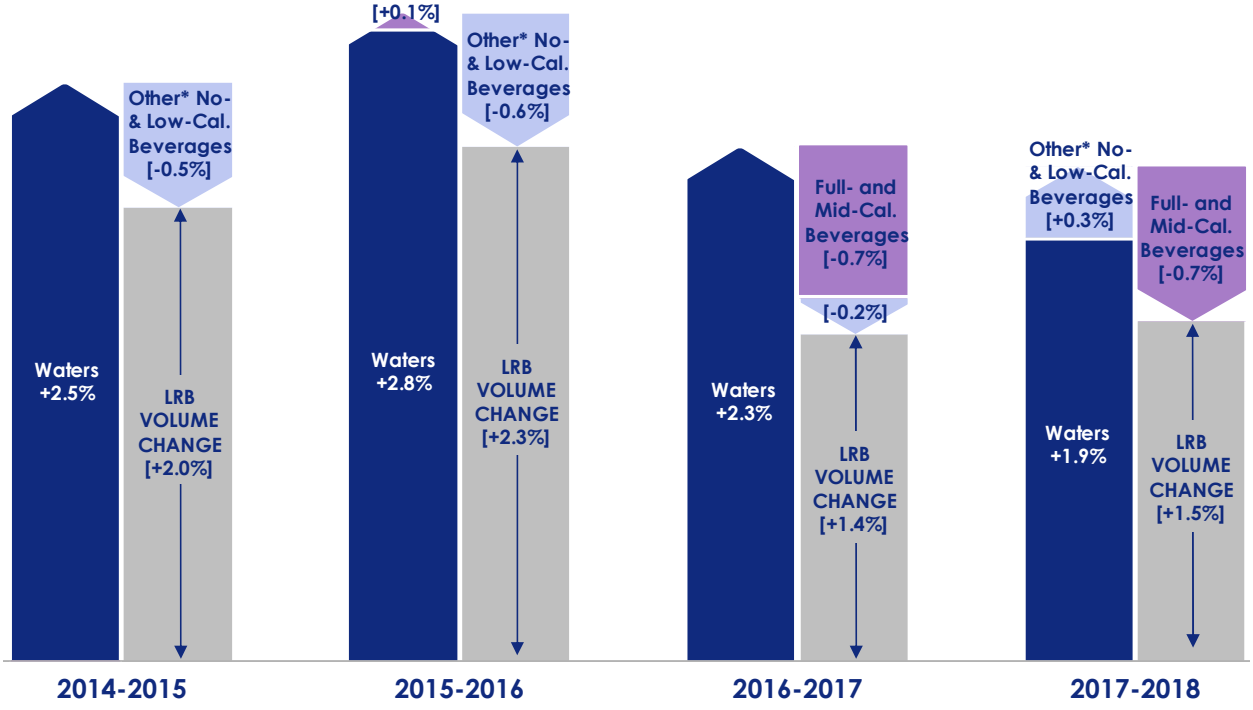
In 2018, volume growth was also driven by growth in per person volumes of other no- and low-calorie beverages. As shown in Figure 7, this contrasts with the trend over previous years, when no- and low-calorie beverage volumes other than water were rapidly declining. Falling volumes of no- and low-calorie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

Another important change in 2018 was that the partially offsetting decreases in beverage volumes were driven by full- and mid-calorie beverages rather than no-and low-calorie CSDs. In 2014 to 2016, the reverse had been true, meaning that the only offsetting declines in volumes were among no- and low-calorie beverages. This is a key reason why total calories per person did not change substantially in those first two years of the BCI initiative.

Figure 7

Annual Contributions to LRB Volume Change

Contributions to Volume Change by Calorie Category, 2014-2018



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

3.5.2 Calories Per 8-Ounce Serving

Change since Baseline (2014-2018)

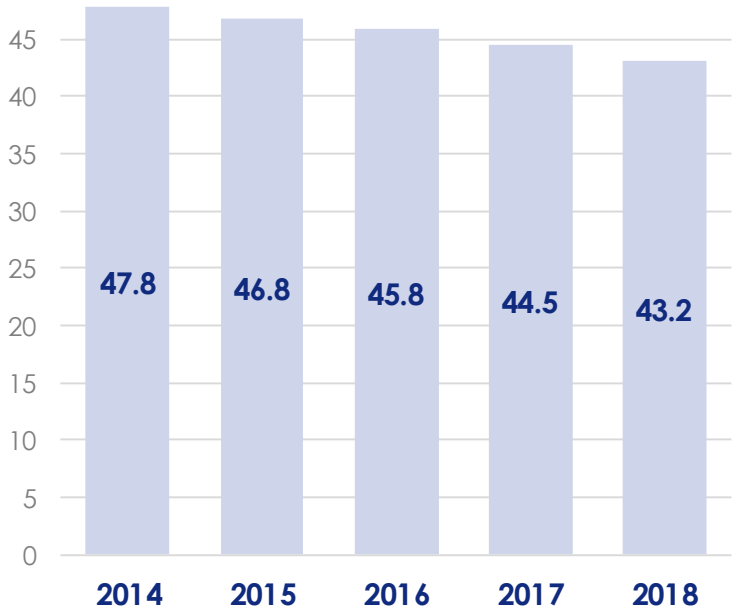
The average number of calories per 8-ounce serving declined by 9.6 percent from 47.8 in 2014 to 43.2 in 2018, as shown in Figure 8. This decrease was driven primarily by the continued growth of waters as a share of the overall product mix. Because waters have no calories, an increase in their share helped drive average calories down.

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. Because their average calories per ounce are higher than the average overall, the decrease in their share helped to bring the average down.

Figure 8

Change in Calories per 8-Ounce Serving

Average Calories per 8-Ounce Serving, 2014-2018



Source: Beverage Marketing Corporation: DrinkTell Database

In the first 3 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 pull average calories per 8-ounce serving down. However, their volume share declined sharply from 2014 to 2018, driving average calories per 8-ounce serving up and inhibiting improvements in this metric.

Change in 2018 (2017-2018)

Calories per 8-ounce serving continued to decline at an accelerated pace in 2018, dropping 1.38 calories compared to 0.97 in 2015, 0.95 in 2016, and 1.31 in 2017. Figure 9 shows the contributions of key trends toward the annual change in calories per 8-ounce serving in 2014-2018. In all four years, growing volumes of waters and declining volumes of full-calorie CSDs, 100% juices, and juice drinks made significant contributions toward these reductions. In 2018 as in 2017, the reduction in calories per 8-ounce serving were larger than in previous years, though for different reasons. In 2018, growth in per person water volumes played a smaller role in reducing calories per 8-ounce serving than in previous years. However, the counteracting impact of a falling of no- and low-calorie CSD volume share was greatly diminished.

Figure 9

Change in Calories per 8-Ounce Serving

Contributions to Changes in Calories Per 8-Ounce Serving, 2014-2018

Change in Calories per 8-oz Serving Due to:	2014-15	2015-16	2016-17	2017-18
Volume Declines of Full-Calorie CSDs	-0.44	-0.44	-0.39	-0.45
Volume Declines of 100% Juice & Juice Drinks	-0.19	-0.16 →	-0.29	-0.25
Volume Growth of Waters	-0.86	-0.83	-0.82 →	-0.55
Volume Decline of No- & Low-Calorie CSDs	0.44	0.37 →	0.21 →	0.07
Other Volume Shifts*	0.08	0.03	0.02	0.03
Impact of Caloric Shifts**	0.01	0.08 →	-0.04 →	-0.23
TOTAL	**-0.97**	**-0.95**	**-1.31**	**-1.38**

→ 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.

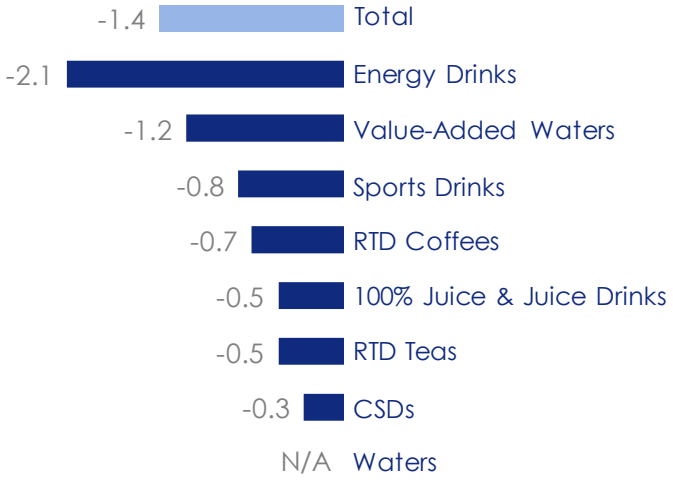
Source: Beverage Marketing Corporation: DrinkTell Database

Caloric shifts within other beverage categories also had a substantial impact in 2018 for the first time since the BCI was launched. This was because the volume shares of lower calorie versions of all beverage categories – not just CSDs – grew relative to the higher calorie versions. As Figure 10 shows, this contributed to reductions in average calories per ounce within every beverage category in 2017-2018.

Figure 10

Change in Calories per 8-ounce Serving

Average Change by Category, 2017-2018



Change in Share of Volume Per Person Per Day Within Beverage Categories, 2017-2018

	No-Calorie	Low-Calorie	Mid-Calorie	Full-Calorie
Total	+1.4%	0.0%	-0.2%	-1.2%
Energy Drinks	+3.2%	-1.1%	-0.4%	-1.8%
Value-Added Waters	+2.6%	-0.6%	-2.0%	0.0%
Sports Drinks	+1.7%	+0.3%	-3.4%	+1.4%
RTD Coffees	+0.1%	+1.0%	+0.5%	-1.5%
100% Juice & Juice Drinks	0.0%	0.0%	+1.1%	-1.0%
RTD Teas	+0.7%	+0.2%	-0.3%	-0.6%
CSDs	+0.3%	0.0%	0.0%	-0.2%
Waters	N/A	N/A	N/A	N/A

Sources: Beverage Marketing Corporation: DrinkTell, Database; U.S. Census Bureau, 2018

One other change in 2018 versus previous years was that the progress in reducing calories per 8-ounce serving was similar in both Nielsen and non-Nielsen channels. In previous years, this metric declined by roughly 3 percent per year in Nielsen channels and by 1 percent per year in non-Nielsen channels, as shown in the Appendix tables. In 2018, calories per 8-ounce serving in non-Nielsen market segments decreased by 3.3 percent, slightly exceeding the steady decline of 3 percent annually that has been achieved in Nielsen channels since 2014.

3.5.3 Portion Sizes

In 2018 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 some volume 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 growth among 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.

IV. CONCLUSIONS

(1) From 2017 to 2018, LRB calories fell by 3.3 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 second year in a row of notable calorie declines.

From 2014 to 2016, average LRB calories per person per day remained at roughly 203. In 2017, this metric dropped to 200.3, and in 2018 it dropped again to 196.9, showing meaningful progress towards the national calorie goal for the second year in a row. Significantly, the 2018 calorie reduction occurred despite nearly 1.5 percent growth in per person LRB volumes.

(2) The progress recorded in 2018 was driven by calorie reductions from carbonated soft drinks, 100% juices, and juice drinks.

Calories from CSDs, 100% juices, and juice drinks declined by 3.5 calories per person per day in 2018, which was a faster rate than in previous years.

(3) Per person volumes of no- and low-calorie CSDs held steady in 2018, 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 3 years of the BCI, declining volumes of no- and low-calorie CSDs represented a headwind toward achieving the national calorie goal. In 2018, volumes of no- and low-calorie CSDs stabilized, likely contributing toward the improved calorie reduction progress observed in 2018.

(4) The growth of waters, defined as unsweetened, no-calorie still and carbonated waters, continues to drive LRB volume growth.

The growth of waters alone was large enough to account for the entire observed LRB volume growth. Per person consumption grew by 4.5 percent in 2018 and by 27.0 percent from 2014 to 2018. 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 2018 was that waters' growth was accompanied by a larger decline in caloric beverage volumes than in past years.

(5) For the first time since the BCI was initiated, the average calories per 8-ounce serving decreased in every beverage category in 2018, as lower calorie versions of all beverage categories grew relative to the higher calorie versions.

Calories per 8-ounce serving decreased by between 0.3 and 2.3 calories across all beverage categories, not just CSDs. Product reformulations contributed to this reduction in some categories, but changes in the mix of beverages within categories occurred in all categories and was the primary driver of category-specific reductions in calories per 8-ounce serving. From 2017 to 2018, the volume shares of no- and low-calorie beverages rose relative to higher calorie beverages in all categories other than 100% juices and juice drinks. In that category, calories per 8-ounce

serving declined because the share of mid-calorie beverages rose relative to full-calorie beverages.

(6) 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 percent 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 percent of LRB volumes and calories in the 2014 baseline year. Calories per person from these beverages have declined by roughly 2 percent in each of the past four years even while volumes per person increased every year. As a result, calories from these channels are on pace for a 20 percent reduction by 2025.

(7) Calorie reduction progress was also achieved in market segments that are not included in the Nielsen dataset. This too occurred for the first time since the BCI was launched.

Calories decreased by 0.9 calories per person or 1.1 percent in 2018 in the market segments not covered by Nielsen, which include all fountain beverages in addition to packaged beverages sold in food service outlets and small independent retailers, among other places. Calories per person from these beverages had grown in previous years, offsetting all of the calorie reduction progress achieved in retail stores covered by Nielsen from 2014 to 2016.

(8) Despite the progress made in the past two years, reductions in LRB calories per person still need to accelerate to meet the national calorie goal in 2025.

The progress made in 2018 represents a second year of solid progress toward achieving the national calorie goal of reducing calories per person per day by 20 percent by 2025. Nevertheless, meeting the goal will still require accelerated progress in the coming years.

APPENDIX: SUMMARY NATIONAL DATA TABLES

Average Calories Per Person Per Day (Average Per Capita Daily Calories)[1]

Category	2014	2015	2016	2017	2018	2014-2018 Change	2017-2018 Change
Total							
CSD	128.1	126.6	126.1	124.6	122.5	-5.6	-2.0
Juice	44.5	43.9	43.6	41.8	40.1	-4.4	-1.7
RTD Tea	11.5	11.9	12.2	12.2	11.9	0.4	-0.3
RTD Coffee	2.1	2.5	2.7	3.0	3.2	1.1	0.2
Energy	6.2	6.9	7.2	7.5	7.9	1.6	0.4
Value Added Water	0.8	0.8	0.8	0.9	0.9	0.1	0.0
Sports Drinks	9.7	10.3	10.6	10.4	10.4	0.7	0.1
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	**203.0**	**202.9**	**203.2**	**200.3**	**196.9**	**-6.1**	**-3.3**
Full-Calorie (More than 67 Calories per 8 oz.)							
CSD	127.7	126.2	125.7	124.2	122.2	-5.4	-2.0
Juice	39.5	39.2	39.1	37.5	35.7	-3.9	-1.8
RTD Tea	7.8	8.3	8.6	8.5	8.3	0.5	-0.2
RTD Coffee	2.1	2.4	2.6	3.0	3.2	1.1	0.2
Energy	6.0	6.7	7.0	7.3	7.7	1.7	0.4
Value Added Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sports Drinks	0.0	0.0	0.1	0.2	0.4	0.4	0.2
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Subtotal	**183.2**	**182.9**	**183.2**	**180.7**	**177.5**	**-5.7**	**-3.2**
Mid-Calorie (41-66 Calories per 8 oz.)							
CSD	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Juice	4.8	4.6	4.3	4.1	4.2	-0.5	0.1
RTD Tea	3.5	3.2	3.2	3.2	3.2	-0.3	-0.1
RTD Coffee	0.0	0.0	0.0	0.0	0.1	0.0	0.0
Energy	0.1	0.1	0.0	0.0	0.0	-0.1	0.0
Value Added Water	0.6	0.6	0.7	0.7	0.7	0.1	0.0
Sports Drinks	9.4	10.0	10.3	9.9	9.8	0.3	-0.2
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Subtotal	**18.4**	**18.5**	**18.5**	**18.1**	**18.0**	**-0.4**	**-0.1**
Low-Calorie (5-40 Calories per 8 oz.)							
CSD	0.3	0.2	0.2	0.2	0.2	-0.1	0.0
Juice	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	0.2	0.0
RTD Coffee	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	0.0	0.0
Value Added Water	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	0.0	0.0
Water	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**	**0.1**	**0.0**
No-Calorie (Less than 5 calories per 8 oz.)							
CSD	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
RTD Tea	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
Energy	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
Sports Drinks	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
Subtotal	**0.3**	**0.2**	**0.2**	**0.2**	**0.2**	**0.0**	**0.0**
By Nielsen-Measured Channels and Non-Nielsen Channels							
Nielsen[2]	123.4	121.8	119.7	116.4	114.0	-9.4	-2.4
Non-Nielsen[3]	79.6	81.0	83.6	83.9	82.9	3.4	-0.9

Daily Volume Per Person, Ounces Per Person Per Day[1]

Category	2014	2015	2016	2017	2018	2014-2018 Change	2017-2018 Change
Total							
CSD	13.8	13.4	13.2	12.9	12.8	-1.0	-0.2
Juice	3.6	3.6	3.6	3.4	3.3	-0.4	-0.1
RTD Tea	1.7	1.8	1.8	1.9	1.8	0.1	0.0
RTD Coffee	0.1	0.2	0.2	0.2	0.2	0.1	0.0
Energy	0.6	0.7	0.7	0.7	0.8	0.2	0.1
Value Added Water	0.3	0.3	0.4	0.4	0.4	0.1	0.0
Sports Drinks	1.6	1.6	1.7	1.6	1.7	0.1	0.0
Water	12.2	13.0	14.0	14.8	15.5	3.3	0.7
Total	**34.0**	**34.7**	**35.5**	**36.0**	**36.5**	**2.5**	**0.5**
Full-Calorie (More than 67 Calories per 8 oz.)							
CSD	10.1	10.0	9.9	9.8	9.7	-0.4	-0.1
Juice	2.9	2.8	2.8	2.7	2.6	-0.3	-0.1
RTD Tea	0.8	0.8	0.8	0.8	0.8	0.0	0.0
RTD Coffee	0.1	0.1	0.2	0.2	0.2	0.1	0.0
Energy	0.5	0.5	0.5	0.5	0.6	0.1	0.0
Value Added Water	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
Water	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**	**-0.4**	**-0.2**
Mid-Calorie (41-66 Calories per 8 oz.)							
CSD	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Juice	0.7	0.6	0.6	0.6	0.6	-0.1	0.0
RTD Tea	0.5	0.5	0.5	0.5	0.5	0.0	0.0
RTD Coffee	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
Value Added Water	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	0.0	0.0
Water	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**	**-0.1**	**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
Juice	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	0.0	0.0
RTD Coffee	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	0.0	0.0
Value Added Water	0.0	0.0	0.1	0.1	0.1	0.0	0.0
Sports Drinks	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
Subtotal	**0.5**	**0.5**	**0.5**	**0.5**	**0.5**	**0.0**	**0.0**
No-Calorie (Less than 5 calories per 8 oz.)							
CSD	3.6	3.4	3.2	3.1	3.1	-0.5	0.0
Juice	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	0.1	0.0
RTD Coffee	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	0.0	0.0
Value Added Water	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	0.0	0.0
Water	12.2	13.0	14.0	14.8	15.5	3.3	0.7
Subtotal	**16.6**	**17.2**	**18.0**	**18.7**	**19.5**	**2.9**	**0.8**
By Nielsen-Measured Channels and Non-Nielsen Channels							
Nielsen[2]	20.8	21.2	21.5	21.6	21.8	1.0	0.2
Non-Nielsen[3]	13.2	13.5	13.9	14.3	14.7	1.5	0.3

[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.

APPENDIX: SUMMARY NATIONAL DATA TABLES

Total LRB Volume Eight-Ounce Equivalent Servings, In Millions[1]

Category	2014	2015	2016	2017	2018	2014-2018 Change	2017-2018 Change
Total							
CSD	200,016	196,471	194,439	191,676	190,566	(9,449)	(1,109)
Juice	53,017	52,521	52,631	50,608	49,142	(3,875)	(1,466)
RTD Tea	25,349	26,344	27,235	27,533	27,457	2,109	(76)
RTD Coffee	1,902	2,208	2,500	2,823	3,073	1,171	250
Energy	9,246	10,067	10,554	10,926	11,853	2,606	926
Value Added Water	4,788	5,042	5,429	5,962	6,713	1,926	752
Sports Drinks	22,651	23,902	24,824	24,309	24,990	2,339	682
Water	176,924	190,916	206,545	219,806	231,182	54,258	11,376
Total	**493,893**	**507,473**	**524,157**	**533,643**	**544,977**	**51,084**	**11,334**
Full-Calorie (More than 67 Calories per 8 oz.)							
CSD	146,483	146,283	146,845	145,733	144,470	(2,013)	(1,262)
Juice	41,645	41,426	41,811	40,246	38,573	(3,072)	(1,673)
RTD Tea	10,993	11,746	12,293	12,235	12,035	1,042	(200)
RTD Coffee	1,818	2,088	2,339	2,623	2,808	990	185
Energy	6,551	7,318	7,744	8,132	8,610	2,060	479
Value Added Water	0	0	0	0	-	(0)	(0)
Sports Drinks	24	69	179	315	675	651	360
Water	-	-	-	-	-	-	-
Subtotal	**207,514**	**208,930**	**211,211**	**209,285**	**207,173**	**(341)**	**(2,112)**
Mid-Calorie (41-66 Calories per 8 oz.)							
CSD	-	-	-	-	-	-	-
Juice	9,797	9,479	9,170	8,744	9,038	(759)	294
RTD Tea	7,853	7,291	7,232	7,505	7,401	(452)	(104)
RTD Coffee	54	71	100	102	125	71	23
Energy	147	112	77	86	49	(98)	(37)
Value Added Water	1,494	1,539	1,623	1,711	1,794	300	83
Sports Drinks	19,949	21,208	22,053	21,458	21,208	1,259	(250)
Water	-	-	-	-	-	-	-
Subtotal	**39,293**	**39,700**	**40,254**	**39,605**	**39,615**	**321**	**9**
Low-Calorie (5-40 Calories per 8 oz.)							
CSD	1,210	995	830	594	504	(706)	(90)
Juice	1,040	1,072	1,107	1,101	1,046	6	(55)
RTD Tea	881	1,267	1,391	1,404	1,466	585	61
RTD Coffee	29	46	53	84	122	93	38
Energy	1,247	1,289	1,355	1,384	1,371	125	(12)
Value Added Water	555	642	900	984	1,068	512	84
Sports Drinks	1,600	1,501	1,464	1,379	1,502	(98)	123
Water	-	-	-	-	-	-	-
Subtotal	**6,561**	**6,812**	**7,101**	**6,930**	**7,079**	**518**	**150**
No-Calorie (Less than 5 calories per 8 oz.)							
CSD	52,323	49,192	46,764	45,350	45,592	(6,731)	243
Juice	534	544	544	516	484	(50)	(32)
RTD Tea	5,622	6,040	6,319	6,388	6,555	933	168
RTD Coffee	1	3	8	14	18	17	3
Energy	1,302	1,348	1,378	1,325	1,822	520	497
Value Added Water	2,738	2,861	2,906	3,267	3,852	1,114	585
Sports Drinks	1,078	1,125	1,128	1,157	1,605	526	448
Water	176,924	190,916	206,545	219,806	231,182	54,258	11,376
Subtotal	**240,524**	**252,030**	**265,591**	**277,823**	**291,110**	**50,586**	**13,287**
By Nielsen-Measured Channels and Non-Nielsen Channels							
Nielsen[2]	302,797	309,909	318,066	321,002	326,154	23,357	5,152
Non-Nielsen[3]	191,095	197,563	206,091	212,641	218,823	27,728	6,182

Share of LRB Volume by Beverage Category[1]

Category	2014	2015	2016	2017	2018	2014-2018 Change	2017-2018 Change
Total							
CSD	40%	39%	37%	36%	35%	-6%	-1%
Juice	11%	10%	10%	9%	9%	-2%	0%
RTD Tea	5%	5%	5%	5%	5%	0%	0%
RTD Coffee	0%	0%	0%	1%	1%	0%	0%
Energy	2%	2%	2%	2%	2%	0%	0%
Value Added Water	1%	1%	1%	1%	1%	0%	0%
Sports Drinks	5%	5%	5%	5%	5%	0%	0%
Water	36%	38%	39%	41%	42%	7%	1%
Total	**-**	**-**	**-**	**-**	**-**	**-**	**-**
Full-Calorie (More than 67 Calories per 8 oz.)							
CSD	30%	29%	28%	27%	27%	-3%	-1%
Juice	8%	8%	8%	8%	7%	-1%	0%
RTD Tea	2%	2%	2%	2%	2%	0%	0%
RTD Coffee	0%	0%	0%	0%	1%	0%	0%
Energy	1%	1%	1%	2%	2%	0%	0%
Value Added Water	0%	0%	0%	0%	0%	0%	0%
Sports Drinks	0%	0%	0%	0%	0%	0%	0%
Water	0%	0%	0%	0%	0%	0%	0%
Subtotal	**42%**	**41%**	**40%**	**39%**	**38%**	**-4%**	**-1%**
Mid-Calorie (41-66 Calories per 8 oz.)							
CSD	0%	0%	0%	0%	0%	0%	0%
Juice	2%	2%	2%	2%	2%	0%	0%
RTD Tea	2%	1%	1%	1%	1%	0%	0%
RTD Coffee	0%	0%	0%	0%	0%	0%	0%
Energy	0%	0%	0%	0%	0%	0%	0%
Value Added Water	0%	0%	0%	0%	0%	0%	0%
Sports Drinks	4%	4%	4%	4%	4%	0%	0%
Water	0%	0%	0%	0%	0%	0%	0%
Subtotal	**8%**	**8%**	**8%**	**7%**	**7%**	**-1%**	**0%**
Low-Calorie (5-40 Calories per 8 oz.)							
CSD	0%	0%	0%	0%	0%	0%	0%
Juice	0%	0%	0%	0%	0%	0%	0%
RTD Tea	0%	0%	0%	0%	0%	0%	0%
RTD Coffee	0%	0%	0%	0%	0%	0%	0%
Energy	0%	0%	0%	0%	0%	0%	0%
Value Added Water	0%	0%	0%	0%	0%	0%	0%
Sports Drinks	0%	0%	0%	0%	0%	0%	0%
Water	0%	0%	0%	0%	0%	0%	0%
Subtotal	**1%**	**1%**	**1%**	**1%**	**1%**	**0%**	**0%**
No-Calorie (Less than 5 calories per 8 oz.)							
CSD	11%	10%	9%	8%	8%	-2%	0%
Juice	0%	0%	0%	0%	0%	0%	0%
RTD Tea	1%	1%	1%	1%	1%	0%	0%
RTD Coffee	0%	0%	0%	0%	0%	0%	0%
Energy	0%	0%	0%	0%	0%	0%	0%
Value Added Water	1%	1%	1%	1%	1%	0%	0%
Sports Drinks	0%	0%	0%	0%	0%	0%	0%
Water	36%	38%	39%	41%	42%	7%	1%
Subtotal	**49%**	**50%**	**51%**	**52%**	**53%**	**5%**	**1%**
By Nielsen-Measured Channels and Non-Nielsen Channels							
Nielsen[2]	61%	61%	61%	60%	60%	-1%	0%
Non-Nielsen[3]	39%	39%	39%	40%	40%	1%	0%

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

APPENDIX: SUMMARY NATIONAL DATA TABLES

Average Calories Per Eight-Ounce Serving[1]

Category	2014	2015	2016	2017	2018	2014-2018 Change	2017-2018 Change
Total							
CSD	74.4	75.4	76.7	77.1	76.8	2.4	-0.3
Juice	97.5	98.0	98.0	97.9	97.4	-0.1	-0.5
RTD Tea	52.8	52.9	52.9	52.5	51.8	-1.0	-0.7
RTD Coffee	131.0	130.3	127.6	128.0	125.8	-5.2	-2.2
Energy	78.3	80.1	80.3	81.3	79.2	1.0	-2.1
Value Added Water	19.3	18.3	18.0	17.1	15.8	-3.4	-1.2
Sports Drinks	49.9	50.3	50.6	50.6	49.8	-0.1	-0.8
Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	**47.8**	**46.8**	**45.8**	**44.5**	**43.2**	**-4.6**	**-1.4**
Full-Calorie (More than 67 Calories per 8 oz.)							
CSD	101.3	101.0	101.2	101.2	101.0	-0.3	-0.1
Juice	110.3	110.8	110.7	110.4	110.4	0.1	0.0
RTD Tea	82.4	82.6	82.6	82.5	82.1	-0.3	-0.4
RTD Coffee	135.1	135.5	133.8	135.4	134.8	-0.2	-0.5
Energy	107.1	107.4	107.0	106.9	107.1	-0.1	0.2
Value Added Water	100.0	100.0	100.0	100.0	-	-	-
Sports Drinks	71.7	70.6	70.0	70.0	70.2	-1.4	0.2
Water	-	-	-	-	-	-	-
Subtotal	**102.6**	**102.5**	**102.6**	**102.5**	**102.3**	**-0.3**	**-0.2**
Mid-Calorie (41-66 Calories per 8 oz.)							
CSD	-	-	-	-	-	-	-
Juice	56.5	56.3	55.3	55.7	55.8	-0.7	0.1
RTD Tea	51.5	51.8	51.8	51.3	51.5	-0.1	0.1
RTD Coffee	53.0	53.0	51.3	50.4	50.5	-2.5	0.1
Energy	60.1	60.0	60.0	56.0	57.3	-2.8	1.3
Value Added Water	49.0	49.0	48.9	48.8	48.8	-0.2	-0.1
Sports Drinks	55.0	55.0	55.0	55.0	55.0	0.0	0.0
Water	-	-	-	-	-	-	-
Subtotal	**54.5**	**54.5**	**54.3**	**54.2**	**54.2**	**-0.2**	**0.1**
Low-Calorie (5-40 Calories per 8 oz.)							
CSD	24.6	26.3	30.7	33.2	35.6	11.1	2.4
Juice	20.2	20.1	20.1	20.3	20.5	0.4	0.2
RTD Tea	28.9	32.8	34.0	34.1	34.1	5.2	0.0
RTD Coffee	23.1	22.8	17.8	13.2	12.5	-10.6	-0.7
Energy	10.5	10.4	10.3	10.2	10.5	0.1	0.3
Value Added Water	30.3	25.6	19.5	17.4	16.4	-13.9	-1.0
Sports Drinks	19.7	20.7	20.7	20.9	20.9	1.2	0.0
Water	-	-	-	-	-	-	-
Subtotal	**21.1**	**22.2**	**22.2**	**21.8**	**21.8**	**0.7**	**0.0**
No-Calorie (Less than 5 calories per 8 oz.)							
CSD	0.4	0.4	0.5	0.4	0.4	0.0	0.0
Juice	3.4	3.2	3.2	3.2	3.2	-0.2	0.0
RTD Tea	0.4	0.4	0.4	0.4	0.3	-0.1	0.0
RTD Coffee	1.7	1.3	0.7	1.3	1.5	-0.3	0.2
Energy	0.1	0.1	0.2	0.1	0.0	-0.1	-0.1
Value Added Water	0.8	0.2	0.2	0.3	0.3	-0.5	0.0
Sports Drinks	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
Subtotal	**0.1**	**0.1**	**0.1**	**0.1**	**0.1**	**0.0**	**0.0**
By Nielsen-Measured Channels and Non-Nielsen Channels							
Nielsen[2]	47.4	46.0	44.5	43.0	41.7	-5.6	-1.3
Non-Nielsen[3]	48.4	48.0	47.9	46.8	45.3	-3.1	-1.5

[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	2014-2018 Change	2017-2018 Change
Total							
CSD	13.5	13.5	13.6	13.6	13.6	0.0	0.0
Juice	9.4	9.6	9.7	9.7	9.6	0.2	-0.1
RTD Tea	18.5	18.4	18.4	18.5	18.4	-0.1	-0.1
RTD Coffee	12.6	12.6	12.7	12.7	12.7	0.1	0.0
Energy	14.2	14.4	14.5	14.6	14.6	0.4	0.0
Value Added Water	16.1	16.4	16.8	17.0	17.1	1.0	0.1
Sports Drinks	23.1	22.7	22.4	22.1	21.9	-1.2	-0.2
Water	17.1	17.0	16.9	16.9	16.8	-0.2	0.0
Total	**15.1**	**15.2**	**15.3**	**15.3**	**15.3**	**0.2**	**0.0**
Full-Calorie (More than 67 Calories per 8 oz.)							
CSD	13.4	13.4	13.4	13.4	13.4	0.0	0.0
Juice	10.5	10.9	11.0	11.2	11.2	0.8	0.0
RTD Tea	19.1	19.0	18.9	18.8	18.7	-0.4	-0.2
RTD Coffee	12.6	12.7	12.7	12.7	12.7	0.1	0.0
Energy	14.0	14.2	14.3	14.4	14.3	0.3	-0.1
Value Added Water	10.6	11.3	12.8	12.6	-	-	-
Sports Drinks	14.6	15.3	15.8	18.2	19.7	5.1	1.5
Water	-	-	-	-	-	-	-
Subtotal	**13.2**	**13.3**	**13.3**	**13.4**	**13.4**	**0.2**	**0.0**
Mid-Calorie (41-66 Calories per 8 oz.)							
CSD	-	-	-	-	-	-	-
Juice	8.8	9.2	9.4	8.7	8.4	-0.4	-0.3
RTD Tea	18.3	18.3	18.0	18.5	18.5	0.2	0.0
RTD Coffee	14.6	13.9	13.0	9.5	10.7	-3.9	1.2
Energy	14.9	15.4	15.0	15.7	15.6	0.7	-0.1
Value Added Water	20.3	20.5	20.5	20.2	19.9	-0.3	-0.3
Sports Drinks	23.2	22.7	22.4	22.3	22.0	-1.1	-0.3
Water	-	-	-	-	-	-	-
Subtotal	**18.8**	**18.9**	**19.0**	**18.7**	**18.4**	**-0.4**	**-0.4**
Low-Calorie (5-40 Calories per 8 oz.)							
CSD	13.5	13.1	13.2	13.2	13.2	-0.3	0.0
Juice	7.0	6.9	6.8	6.8	6.7	-0.3	-0.1
RTD Tea	21.3	21.6	22.8	22.2	20.6	-0.7	-1.6
RTD Coffee	11.0	11.0	11.0	11.0	10.8	-0.2	-0.1
Energy	13.3	13.3	13.3	13.3	13.2	-0.1	-0.1
Value Added Water	7.4	7.7	8.8	9.5	10.1	2.6	0.5
Sports Drinks	20.5	20.1	19.6	18.2	18.0	-2.5	-0.2
Water	-	-	-	-	-	-	-
Subtotal	**10.6**	**10.4**	**10.4**	**10.3**	**10.3**	**-0.3**	**0.0**
No-Calorie (Less than 5 calories per 8 oz.)							
CSD	13.9	14.0	14.1	14.1	14.0	0.1	0.0
Juice	12.7	11.5	11.4	11.5	11.5	-1.2	0.0
RTD Tea	17.3	17.2	17.3	17.3	17.3	0.0	0.0
RTD Coffee	9.0	10.5	12.0	11.7	11.6	2.6	0.0
Energy	15.9	15.9	16.2	16.0	16.4	0.5	0.4
Value Added Water	18.9	18.4	18.2	18.3	18.4	-0.5	0.1
Sports Drinks	28.1	27.6	27.4	27.4	27.1	-1.1	-0.4
Water	17.1	17.0	16.9	16.9	16.8	-0.2	0.0
Subtotal	**16.3**	**16.3**	**16.4**	**16.4**	**16.4**	**0.1**	**0.0**
By Nielsen-Measured Channels and Non-Nielsen Channels							
Nielsen[2]	*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[3]							