

2025 Beverage Calories Initiative:

Report on 2018 Progress toward the Community Calorie Goal

COMMUNITY CALORIE GOAL

PREPARED FOR:

American Beverage Association
Alliance for a Healthier Generation

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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, 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 community calorie goal. A report on progress toward the national calorie goal released in November 2019 estimated that LRB calorie consumption fell by 1.7 percent in 2018 (roughly 3.3 calories per person per day). This was the largest decline seen since the BCI was launched and the second consecutive year of notable calorie declines. The report concluded that despite two years of progress, calorie reductions still need to accelerate.

Similarly, this report demonstrates that LRB calories per person declined in each of the five BCI Communities for the second straight year in 2018. This report points to the following conclusions:

- (1) Since baseline, per person volumes of full- and mid-calorie beverages have decreased and volumes of no- and low-calorie beverages have increased in all five communities.**
- (2) Since baseline, decreases in calories from Carbonated Soft Drinks (CSDs), 100% juice and juice drinks, and Ready-to-Drink (RTD) teas have been the main drivers of per person LRB calorie reduction in all five communities.**
- (3) Reductions in LRB calories per person since the baseline year have occurred despite growth in volumes per person in four of the five communities.**
- (4) The 2018 pace of LRB calorie reductions per person in each BCI Community nearly equaled or exceeded the average annual pace needed to achieve the community calorie goal.**
- (5) The average annual pace of LRB calorie reductions per person since the baseline year was faster or equal to the average annual pace needed in two BCI Communities and slower in the other three. However, the average pace over just the last two years exceeded the average pace needed in all five communities.**

I. INTRODUCTION

In September 2014, the American Beverage Association (“ABA”), The Coca-Cola Company, Dr Pepper Snapple Group (now Keurig Dr Pepper), PepsiCo, 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 narrower focus of the Communities Initiative aims to identify effective calorie reduction strategies that might be applied across a broader set of geographies or sales channels to achieve the national calorie goal. The collective effort to fulfill these commitments is called the 2025 Beverage Calories Initiative (“BCI”).

Since 2014, five communities have been selected for participation in the Communities Initiative. The first two BCI Communities, which include specific neighborhoods in Little Rock, AR and Eastern Los Angeles, CA, were announced at the signing of this commitment in September 2014. The next BCI Community, which includes the South Bronx and Brooklyn’s Bedford-Stuyvesant

Figure 1
Community Baseline & Implementation Years

BCI Community	2014	2015	2016	2017	2018
Eastern L.A.	Baseline	Year 1	Year 2	Year 3	Year 4
Little Rock	Baseline	Year 1	Year 2	Year 3	Year 4
Bronx-Brooklyn	-	Baseline	Year 1	Year 2	Year 3
Montgomery-Lowndes	-	Baseline	Year 1	Year 2	Year 3
Mississippi Delta	-	Baseline	Year 1	Year 2	Year 3

and Crown Heights neighborhoods in New York City, was announced in May 2015. Finally, two communities, comprised of two counties in Alabama (Montgomery and Lowndes) and four counties in the Delta area of Northwest Mississippi (Coahoma, Panola, Quitman, and Tunica), were announced in April 2016. Because these communities were selected at different times, the baseline years from which progress is measured in the communities differ. As shown in Figure 1, 2014 is the baseline year for the Eastern L.A. and Little Rock BCI Communities, while 2015 is the baseline year for the other three BCI Communities.

The five BCI Communities have diverse geographies and demographics, but share key socioeconomic characteristics, which contributed to their selection. All five communities have higher poverty rates and lower median incomes than the national average. Additionally, proprietary data from The Coca-Cola Company, Keurig Dr Pepper, and PepsiCo (“the BCI Companies”) show that reduced-calorie beverages represent a smaller share of sales in those communities than they do nationally.¹

The commitment also includes 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

¹ A more detailed description of each community can be found in the Baseline Communities Initiative report, available at www.healthiergeneration.org/our-work/businesses/impact/beverage-calories-initiative.

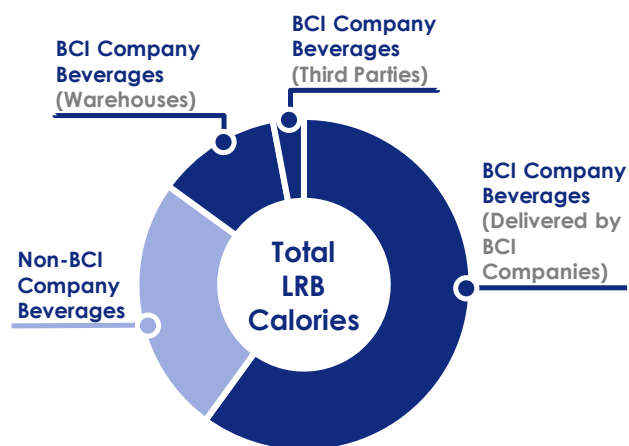
national and community calorie goals is reported publicly. This report features 2018 progress toward the community calorie goal. (Previous reports are available at www.healthiergeneration.org/our-work/businesses/impact/beverage-calories-initiative. In addition to earlier calorie consumption estimates, 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

Measuring calories per person at the community level presents additional challenges and greater uncertainties compared to measurement at the national level. The main challenge is that there are no existing datasets that report beverage volumes for the specific BCI Communities. Therefore, multiple custom datasets were used – and will continue to be used – to estimate LRB volumes at the community level. These datasets include BCI Company beverage volume data, custom Scantrack data, company customer lists, and Dun & Bradstreet store lists.

The various datasets and differing methodologies were used to estimate total LRB calories for each of the following four sources of beverage calories: (1) BCI Company-delivered beverages, (2) Non-BCI Company beverages, (3) BCI Company beverages delivered through warehouses, and (4) BCI Company beverages sourced from third parties. The methodologies used to estimate beverage calories from each source are included in the accompanying detailed methodology document. Figure 2 shows the average share of calories estimated to come from each of these sources among the five communities. Calories from each source were summed and divided by local population estimates to estimate calories per person.

Figure 2
Sources of Total LRB Calories in BCI Communities
Share of Total LRB Calories



Sources: BCI Company-Reported Volumes & Nielsen Scantrack

There are many uncertainties related to measuring LRB calories per person in narrow geographies, which increase the margins of error in comparison to the national estimates. These include, but are not limited to, the impact of commuters, store openings and closings, and a reliance on smaller, less representative samples to estimate the volumes of some beverages and annual population changes.² The Bronx-Brooklyn BCI community has a higher degree of uncertainty compared to the other communities due to the large number of commuters and other data limitations that are discussed in the detailed methodology. The 2018 calorie and volume estimates

² These uncertainties are discussed at length in the accompanying detailed methodology document available at www.healthiergeneration.org/our-work/businesses/impact/beverage-calories-initiative.

for the Montgomery-Lowndes BCI community are also less accurate than in previous years of analysis due to missing sales data from one of the smaller local bottlers.

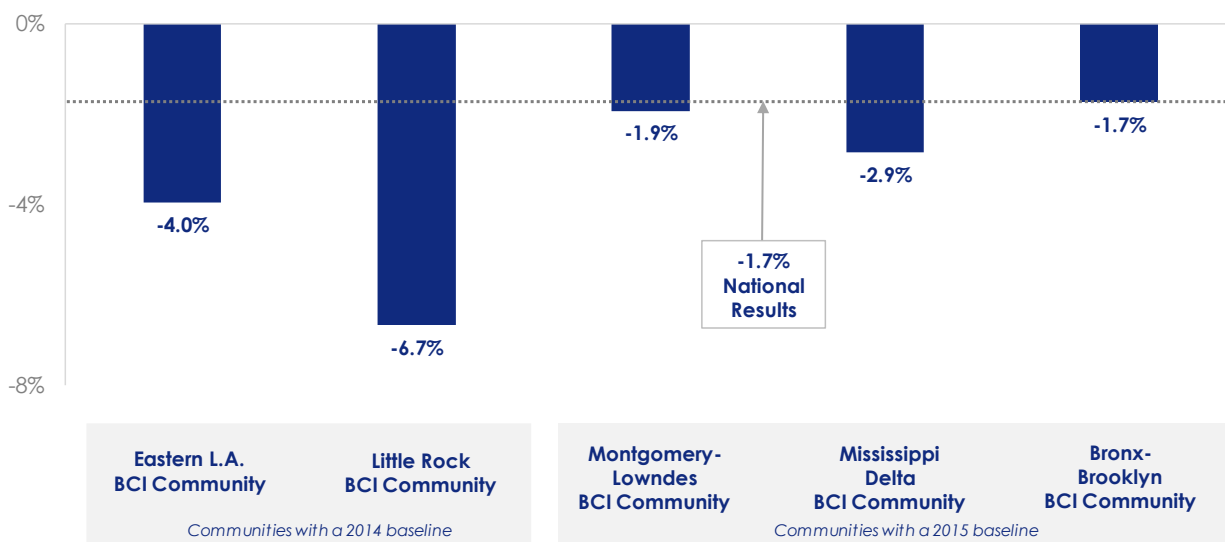
Calorie estimates for 2014-2017 have been updated from previously published estimates. The differences reflected in these updates are mostly due to revisions of beverage sales volume data, but some are due to slight revisions in the methodology. As the initiative continues, and progress is measured over longer periods of time, the degree of certainty regarding changes in LRB calories per person at the community level increases. More details about the methodology, revisions to the methodology, and key uncertainties are discussed in the detailed methodology document available at www.healthiergeneration.org/our-work/businesses/impact/beverage-calories-initiative.

III. RESULTS: PROGRESS TOWARD THE COMMUNITY CALORIE GOAL

3.1 Summary of Progress across BCI Communities in 2018

The primary measure of progress for the community calorie goal is the change in LRB calories per person per day. As shown in Figure 3, LRB calories per person per day declined in all five BCI Communities in 2018. In three communities, the pace of calorie reductions exceeded the 2 percent average annual pace needed to achieve the community calorie goal. In the two other communities, the 2018 calorie reduction pace nearly equaled the 2 percent pace. The pace in all communities equaled or exceeded the per person calorie reduction pace seen nationally.

Figure 3
Change in Calories Per Person Per Day
Total LRB, Percent Change from 2017 to 2018 by BCI Community



Sources: BCI Company-Reported Volumes & Nielsen Scantrack

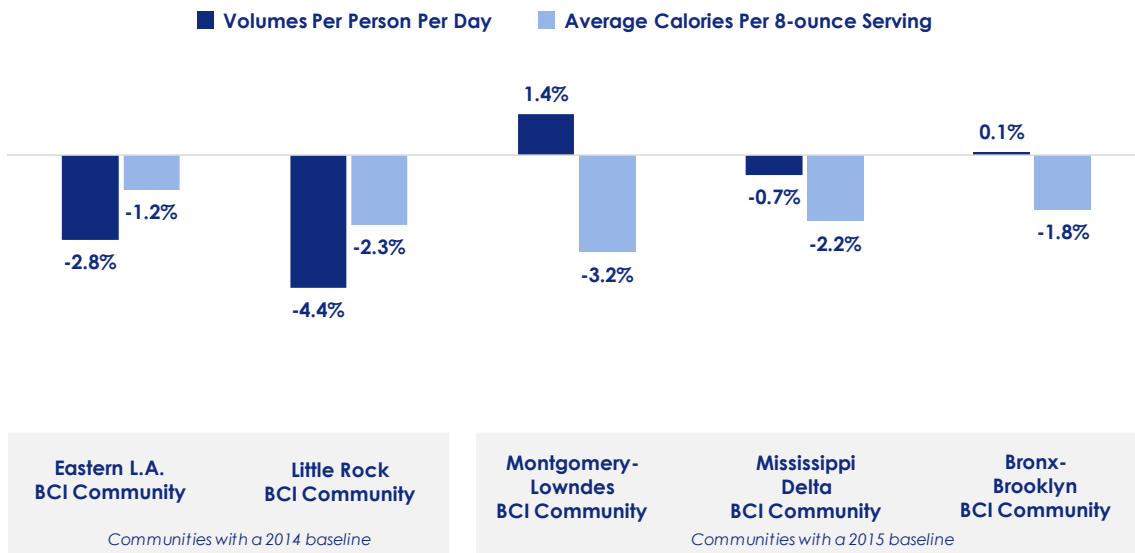
In 2018, per person calorie reductions were driven by reductions in calories per 8-ounce serving in all communities as well as reductions in volumes per person in three of the communities, as shown in Figure 4. Declining volumes per person of full-calorie beverages accounted for all or most of the

decline in each community. In fact, volumes of low- and no-calorie beverages continued to increase in three communities, and they fell at a much slower rate than full-calorie beverages in the other two. The resulting shift in the product mix helped drive reductions in average calories per 8-

Figure 4

Change in Volumes Per Person Per Day & Average Calories Per 8-ounce Serving

Total LRB, Percent Change from 2017 to 2018 by BCI Community



Sources: BCI Company-Reported Volumes & Nielsen Scantrack

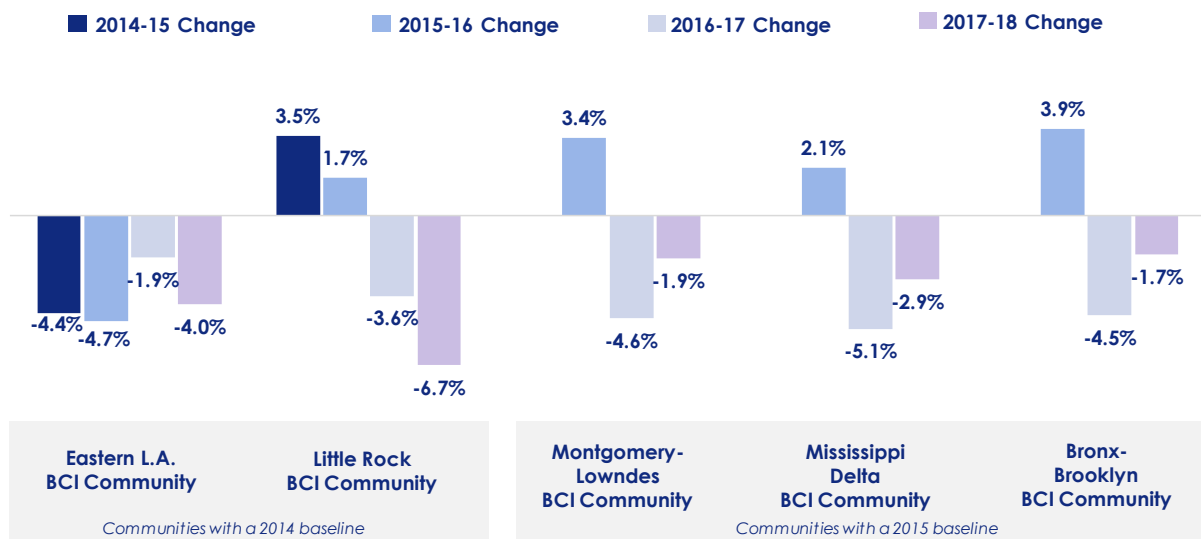
ounce serving in each of the five communities.

3.2 Summary of Progress across BCI Communities since the Baseline Year

Figure 5

Change in Calories Per Person Per Day

Total LRB, Yearly Percent Change by BCI Community

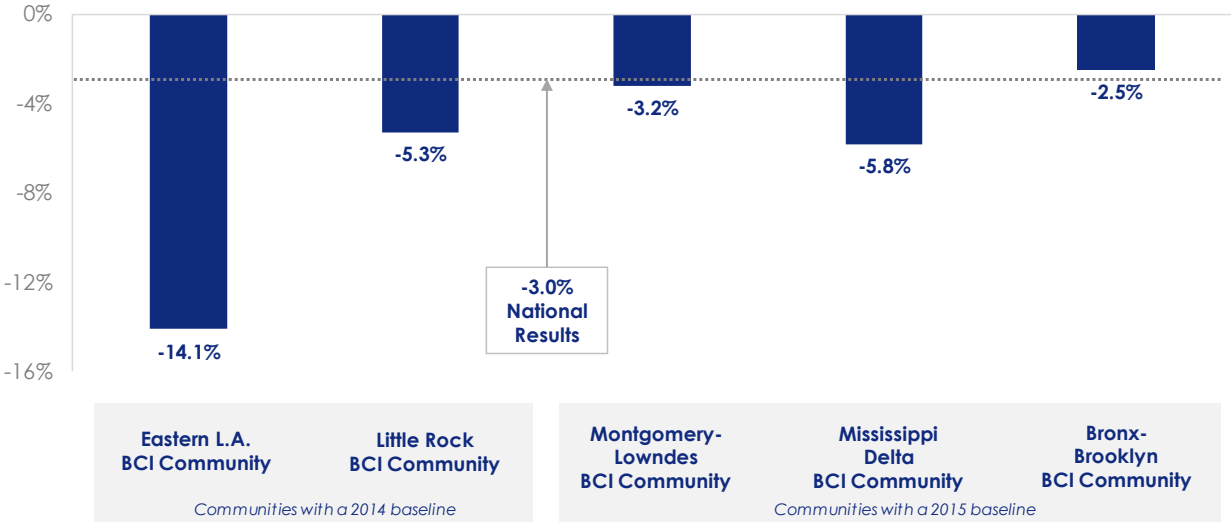


Sources: BCI Company-Reported Volumes & Nielsen Scantrack

2018 was the fourth consecutive year of per person LRB calorie decreases in the Eastern L.A. BCI Community, as shown in Figure 5. It was the second consecutive year of calorie decreases in the other four communities. In each of those communities, calories increased in the first 1-2 years of BCI implementation as a result of growing volumes per person that more than offset reductions in calories per 8-ounce serving. Since those initial years, calories per person have been declining.

As a result, LRB calories per person are lower than they were in the baseline year in every BCI Community. Figure 6 shows that the cumulative reductions since the baseline year vary from 2.5 to 14.1 percent. The 14.1 percent reduction since the baseline year in the Eastern L.A. BCI Community has greatly exceeded the calorie reductions observed nationally and in the other BCI Communities. Reductions of 5-6 percent since the baseline year in two other BCI Communities – Little Rock and Mississippi Delta – also exceeded the calorie reduction pace achieved nationally. Finally, reductions of roughly 3 percent since the baseline year in two BCI Communities – Montgomery-Lowndes and Bronx-Brooklyn – were in line with what has been achieved nationally.

Figure 6
Change in Calories Per Person Per Day
Total LRB, Percent Change from Baseline to 2018 by BCI Community



Sources: BCI Company-Reported Volumes & Nielsen Scantrack

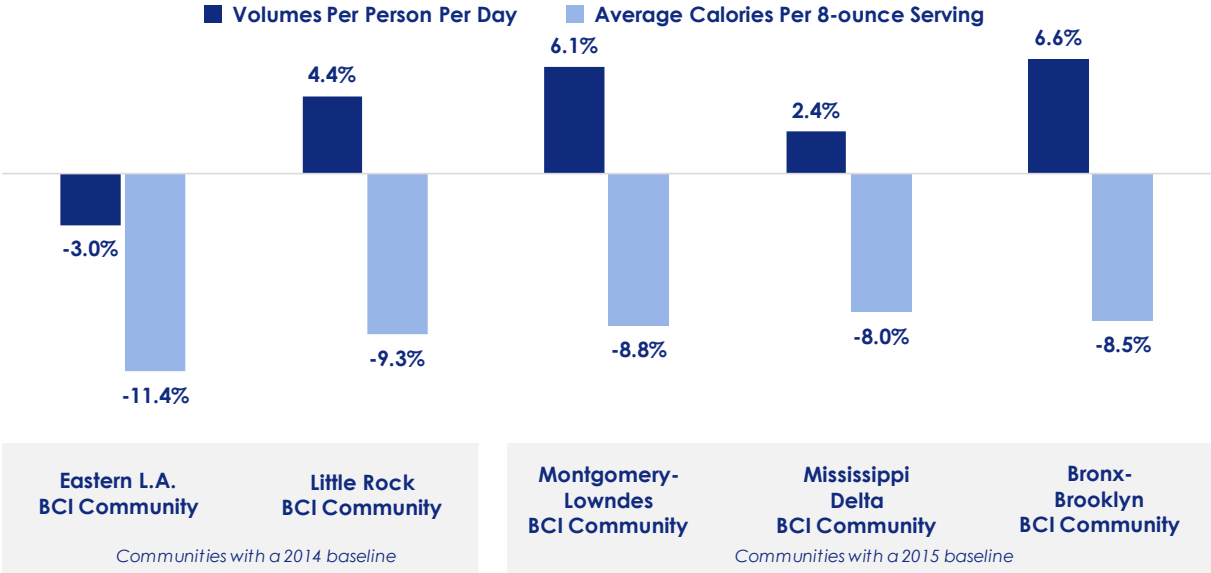
In order to meet the calorie reduction goals in each community, the average annual pace of per person calorie reductions will need to meet or exceed 2 percent per year over the course of the commitment period. These results show that the average pace achieved thus far in the Eastern L.A. BCI Community has greatly exceeded that pace. In the Mississippi Delta BCI Community, reductions have roughly equaled the average pace needed. Finally, the average pace in the other three BCI Communities has been slower than the pace needed. Therefore, when measuring from the baseline year, the average pace of calorie reductions needs to accelerate in three communities in order to meet the goal.

However, when looking just at the last two years, the average pace achieved has exceeded 3 percent per year in all five communities. Maintaining that pace for the remaining years of the commitment would be more than enough to meet the calorie goal in each community.

3.3 Drivers of the Change in Calories Per Person since the Baseline Year

Per person LRB calorie decreases since baseline have been driven almost entirely by reductions in calories per 8-ounce serving. Figure 7 shows that calorie reductions in four BCI Communities were entirely driven by changes in calories per 8-ounce serving. In fact, LRB volumes per person grew in those four communities. It was only in the Eastern L.A. community where volumes per person per day decreased. Even there, those volume reductions accounted for less than a quarter of the decline in LRB calories per person. The fall in calories per 8-ounce serving was the dominant factor.

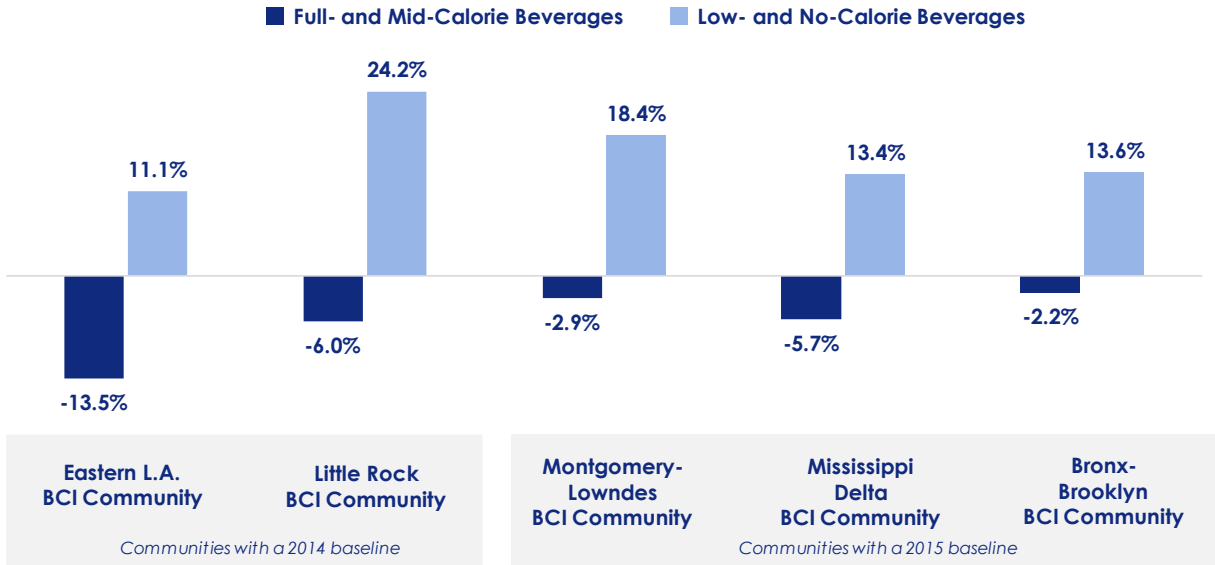
Figure 7
Change in Volumes Per Person Per Day & Average Calories Per 8-ounce Serving
Total LRB, Percent Change from Baseline to 2018 by BCI Community



Sources: BCI Company-Reported Volumes & Nielsen Scantrack

The main reason for this fall in calories per 8-ounce serving was a shift in the product mix. As shown in Figure 8, per person volumes of low- and no-calorie beverages have grown by more than 10 percent in each BCI Community, while per person volumes of full- and mid-calorie beverages have fallen. Water, in particular, has been a driver of this trend as it accounts for most or all of the growth in low- and no-calorie beverages. In contrast, the decreases in volumes of full-calorie beverages have primarily come from the CSD, juice, juice drink, and RTD tea categories.

Figure 8
Change in Volumes Per Person Per Day by Calorie Category
Total LRB, Percent Change from Baseline to 2018 by BCI Community



Sources: BCI Company-Reported Volumes & Nielsen Scantrack

3.4 Progress by Community

This section summarizes key results for each community and economic characteristics that explain why these geographies were selected as BCI Communities. Each set of results features the changes in LRB calories per person, LRB volumes per person, and average calories per 8-ounce serving and compares those with the national results published in the [BCI Report on 2018 Progress toward the National Calorie Goal](#). The results also show which beverage categories contributed the most toward calorie reductions and how the pace of reductions compares with the average annual pace needed to achieve the community calorie goal.

EASTERN L.A. BCI COMMUNITY

COMMUNITY CHARACTERISTICS



Baseline Year:
2014

Community:	Lincoln Heights, El Sereno, Boyle Heights and East Los Angeles, California
Population (2014):	286,898
Median Household Income (2014):	\$37,282 (30% below the Median U.S. Household Income)
Poverty Rate (2014):	28% vs. 16% nationally
Obesity:	Local data show that obesity rates in the selected neighborhoods are over 5 percentage points greater than in the county overall.

HEADLINE RESULTS

LRB calories per person per day declined by 4.0 percent in 2018 and by 14.1 percent since baseline. Calories per person have decreased at a much faster rate than they have nationally because (1) calories per 8-ounce serving decreased at a faster pace and (2) LRB volumes per person per day decreased. The biggest driver of both trends has been the much larger reductions in full- and mid-calorie beverage volumes since baseline in this BCI community (-13.1 percent) than in the nation as a whole (-2.8 percent). Similarly, low- and no-calorie volumes have grown more in this community.

	2017-18		2014 Baseline-2018	
	Community	National	Community	National
Calories per Person per Day	-4.0%	-1.7%	-14.1%	-3.0%
Volumes per Person per Day	-2.8%	+1.5%	-3.0%	+7.4%
- Full- and Mid-Calorie Beverages	-3.9%	-1.5%	-13.1%	-2.8%
- No- and Low-Calorie Beverages	-1.6%	+4.1%	+11.3%	+5.0%
Calories per 8-ounce Serving	-1.2%	-3.1%	-11.4%	-9.7%

CHANGE BY BEVERAGE CATEGORY

Declines in calories from 100% juice and juice drinks made the largest contribution to per person calorie reductions since 2014, followed closely by calorie reductions from CSDs.

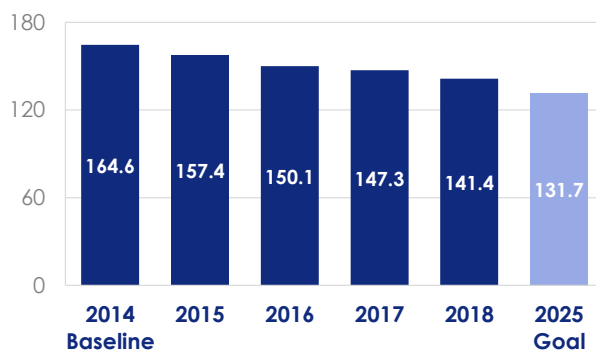
Change in Calories per Person per Day

	2017-2018	2014-2018
Carbonated Soft Drinks (CSDs)	-2.9	-8.5
100% Juice & Juice Drinks	-2.2	-13.8
Ready to Drink (RTD) Teas	-0.8	-2.3
All Other Beverages	+0.0	+1.4

PROGRESS TOWARD THE CALORIE GOAL

LRB calories per person in the Eastern L.A. BCI Community have fallen faster than the average pace needed to achieve the community calorie goal in each of the first four years of BCI implementation.

Average LRB Calories Per Person Per Day



LITTLE ROCK BCI COMMUNITY

COMMUNITY CHARACTERISTICS



Baseline Year:
2014

Community:	The four lowest income zip codes in Little Rock, Arkansas: 72202, 72204, 72206, and 72209
Population (2014):	98,277
Median Household Income (2014):	\$31,749 (41% below the Median U.S. Household Income)
Poverty Rate (2014):	27% vs. 16% nationally
Obesity:	The city of Little Rock ranks in the top 20% of metropolitan areas in the country in terms of obesity rate.

HEADLINE RESULTS

LRB calories per person decreased by 6.7 percent in 2018 while volumes per person decreased by 4.4 percent. This decrease pushed calorie consumption per person below the baseline level for the first time since BCI implementation. For the past two years, the calorie decline in this community was larger than the national rate. Calories per 8-ounce serving moved at about the same pace in the community as it did nationally. Additionally, volume declines in full- and mid-calorie beverages caused the sharp decrease in calorie consumption this year.

	2017-18		2014 Baseline-2018	
	Community	National	Community	National
Calories per Person per Day	-6.7%	-1.7%	-5.3%	-3.0%
Volumes per Person per Day	-4.4%	+1.5%	+4.4%	+7.4%
- Full- and Mid-Calorie Beverages	-6.6%	-1.5%	-6.1%	-2.8%
- No- and Low-Calorie Beverages	-1.2%	+4.1%	+24.1%	+5.0%
Calories per 8-ounce Serving	-2.3%	-3.1%	-9.3%	-9.7%

CHANGE BY BEVERAGE CATEGORY

Calorie reductions per person per day since 2014 were driven by reductions in calories from CSDs and RTD teas. These declines were slightly curbed by growth in calories from other beverages.

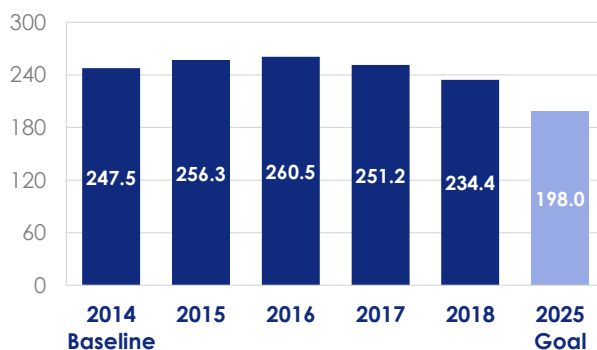
Change in Calories per Person per Day

	2017-2018	2014-2018
Carbonated Soft Drinks (CSDs)	-10.4	-8.7
100% Juice & Juice Drinks	-4.2	0.0
Ready to Drink (RTD) Teas	-1.6	-5.7
All Other Beverages	-0.6	+1.4

PROGRESS TOWARD THE CALORIE GOAL

Since 2016, calories per person have fallen by roughly 5 percent per year, much faster than is needed to meet the calorie goal if continued over the remaining commitment period.

Average LRB Calories Per Person Per Day



MONTGOMERY-LOWNDES BCI COMMUNITY

COMMUNITY CHARACTERISTICS



Baseline Year:
2015

Community:	Lowndes and Montgomery Counties, Alabama
Population (2015):	238,964
Median Household Income (2015):	\$45,483 (16% below the Median U.S. Household Income)
Poverty Rate (2015):	23% vs. 15% nationally
Obesity:	Montgomery and Lowndes counties have a combined adult obesity rate of 34%, while Lowndes County is ranked as the 2nd most obese county in the U.S.

HEADLINE RESULTS

LRB calories per person declined by 1.9 percent in 2018, the third year and second full year of the BCI focus on this community. Changes in all of the key metrics – LRB calories per person, volumes per person, and calories per 8-ounce serving – align closely with the national results in 2017-2018 and since the baseline year. Growth since baseline of no- and low-calorie beverages in this community (18.4 percent) surpasses growth at the national level (12.9 percent). It is important to note that there is a higher level of uncertainty with regard to estimates in this community in 2018.*

	2017-18		2015 Baseline-2018	
	Community	National	Community	National
Calories per Person per Day	-1.9%	-1.7%	-3.2%	-2.9%
Volumes per Person per Day	+1.4%	+1.5%	+6.1%	+5.3%
- Full- and Mid-Calorie Beverages	-1.3%	-1.5%	-2.9%	-2.7%
- No- and Low-Calorie Beverages	+4.5%	+4.1%	+18.4%	+12.9%
Calories per 8-ounce Serving	-3.2%	-3.1%	-8.8%	-7.8%

CHANGE BY BEVERAGE CATEGORY

Declines in calories from RTD teas made the largest contribution to per person calorie reductions since 2015, followed by calorie reductions from carbonated soft drinks.

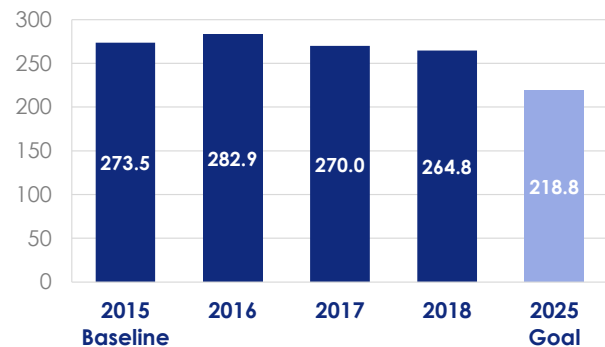
Change in Calories per Person per Day

	2017-2018	2015-2018
Carbonated Soft Drinks (CSDs)	-3.9	-3.6
100% Juice & Juice Drinks	-2.0	-0.4
Ready to Drink (RTD) Teas	-0.3	-5.4
All Other Beverages	+0.9	+0.6

PROGRESS TOWARD THE CALORIE GOAL

The pace of per person LRB calorie reductions since baseline needs to accelerate to achieve the calorie goal. The 1.9 percent reduction pace achieved in 2018 nearly equals the average annual pace needed to meet the calorie goal.

Average LRB Calories Per Person Per Day



* Estimates of per person LRB calorie consumption in the Montgomery-Lowndes BCI Community for 2018 are more uncertain than estimates in other markets due to missing volume data from a small local bottler.

MISSISSIPPI DELTA BCI COMMUNITY

COMMUNITY CHARACTERISTICS



Baseline Year:
2015

Community:	Coahoma, Quitman, Panola, and Tunica Counties, Mississippi
Population (2015):	79,093
Median Household Income (2015):	\$32,198 (40% below the Median U.S. Household Income)
Poverty Rate (2015):	29% vs. 15% nationally
Obesity:	With a combined adult obesity rate of 40%, all four counties' obesity rates are in the top 15% of counties in the U.S. Three of them rank in the top 1%.

HEADLINE RESULTS

LRB calories per person declined by 2.9 percent in 2018, the third year and second full year of the BCI focus on this community, netting an overall decrease of 5.8 percent since baseline. This decrease was faster than the average decrease nationally due primarily to a faster decrease in the volume of full- and mid-calorie beverages in 2015-2018. Slight net volume decreases from 2017 to 2018 also contributed to sharper decreases in calories per person compared to national trends.

	2017-18		2015 Baseline-2018	
	Community	National	Community	National
Calories per Person per Day	-2.9%	-1.7%	-5.8%	-2.9%
Volumes per Person per Day	-0.7%	+1.5%	+2.4%	+5.3%
- Full- and Mid-Calorie Beverages	-2.6%	-1.5%	-5.7%	-2.7%
- No- and Low-Calorie Beverages	+1.6%	+4.1%	+13.4%	+12.9%
Calories per 8-ounce Serving	-2.2%	-3.1%	-8.0%	-7.8%

CHANGE BY BEVERAGE CATEGORY

Calorie reductions from carbonated soft drinks and RTD teas were major drivers of overall reductions since 2015. Most of the calorie reductions in CSDs occurred in 2018.

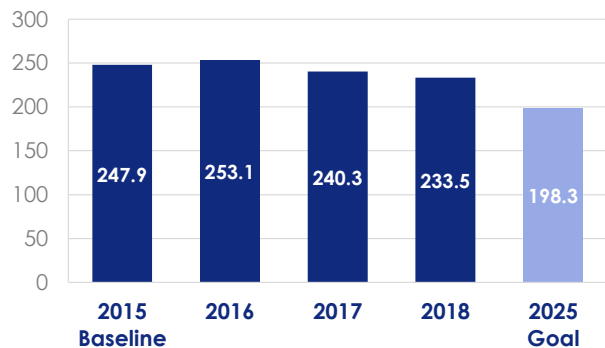
Change in Calories per Person per Day

	2017-2018	2015-2018
Carbonated Soft Drinks (CSDs)	-8.9	-10.2
100% Juice & Juice Drinks	+2.5	-0.7
Ready to Drink (RTD) Teas	0.0	-3.7
All Other Beverages	-0.5	+0.2

PROGRESS TOWARD THE CALORIE GOAL

Per person LRB calorie reductions since baseline have exceeded the calorie reduction pace achieved nationally and roughly equaled the average annual pace needed to achieve the calorie goal.

Average LRB Calories Per Person Per Day



BRONX-BROOKLYN BCI COMMUNITY

COMMUNITY CHARACTERISTICS



Baseline Year:
2015

Community:	South Bronx and Bedford-Stuyvesant/Crown Heights in Brooklyn, New York
Population (2015):	312,434
Median Household Income (2015):	\$37,648 (30% below the Median U.S. Household Income)
Poverty Rate (2015):	31% vs. 16% nationally
Obesity:	Local data show the selected neighborhoods in the Bronx and Brooklyn have notably higher adult obesity rates (34% and 36%) than the city average (24%).

HEADLINE RESULTS

LRB calories per person per day declined by 1.7 percent in 2018, equal to the 1.7 percent calorie reductions at the national level. Changes since baseline in all key metrics – LRB calories per person, volumes per person, and calories per 8-ounce serving – closely mirror national trends. It is important to note that there is a higher level of uncertainty with regard to estimates in this community, which is explained in the methodology document.*

	2017-18		2015 Baseline-2018	
	Community	National	Community	National
Calories per Person per Day	-1.7%	-1.7%	-2.5%	-2.9%
Volumes per Person per Day	+0.1%	+1.5%	+6.6%	+5.3%
- Full- and Mid-Calorie Beverages	-1.1%	-1.5%	-2.0%	-2.7%
- No- and Low-Calorie Beverages	+0.9%	+4.1%	+13.6%	+12.9%
Calories per 8-ounce Serving	-1.8%	-3.1%	-8.5%	-7.8%

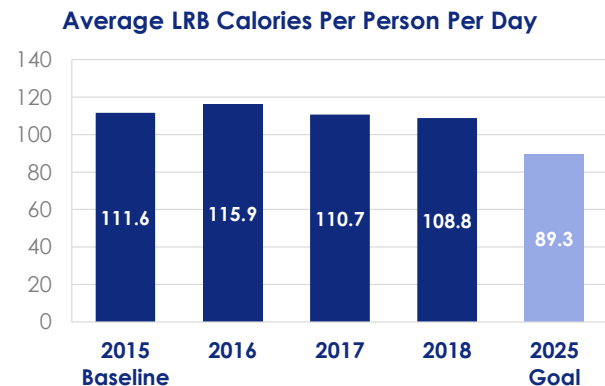
CHANGE BY BEVERAGE CATEGORY

Calories per person per day were driven primarily by reductions in calories from 100% juice and juice drinks and RTD Teas, resulting in a net decrease since 2015.

	2017-2018	2015-2018
Carbonated Soft Drinks (CSDs)	-0.0	-0.0
100% Juice & Juice Drinks	-2.0	-1.7
Ready to Drink (RTD) Teas	-0.4	-0.9
All Other Beverages	+0.4	-0.2

PROGRESS TOWARD THE CALORIE GOAL

The pace of per person LRB calorie reductions since baseline will need to accelerate to achieve the calorie goal. The 1.7 percent reduction pace achieved in 2018 must accelerate to meet the calorie goal by 2025.



* Estimates of per person LRB calorie consumption in the Bronx-Brooklyn BCI Community are more uncertain than estimates in other markets due to data coverage limitations. More details included in the Detailed Methodology.

IV. CONCLUSIONS

- (1) Since baseline, volumes of full- and mid-calorie beverages have decreased and volumes of no- and low-calorie beverages have increased in all five communities.**

All BCI communities have experienced a major shift in product mix since the baseline year. Per person volumes of low- and no-calorie beverages, particularly bottled waters, have grown in every community while volumes of full- and mid-calorie beverages have declined. Together these trends have driven 8 to 12 percent reductions in calories per 8-ounce serving from baseline to 2018 across the five BCI Communities. These changes align well with the national level changes in calories per 8-ounce serving.

- (2) Since baseline, decreases in calories from CSDs, 100% juice and juice drinks, and RTD teas have been the main drivers of per person LRB calorie reduction in all five communities.**

In each of the five communities, calorie reductions in these categories account entirely for, or for the vast majority of, per person LRB calorie reductions. The categories driving the largest calorie reductions varied between communities with CSDs, 100% juices and juice drinks, and RTD teas each accounting for the largest reductions in at least one community.

- (3) Reductions in LRB calories per person since the baseline year have occurred despite growth in volumes per person in four of the five communities.**

LRB volumes per person have grown by 2.4 to 6.6 percentage points since the baseline year in four BCI Communities. This means that reductions in calories per 8-ounce serving accounted for the entire reduction in LRB calories per person.

- (4) The 2018 pace of LRB calorie reductions per person in each BCI Community nearly equaled or exceeded the average annual pace needed to achieve the community calorie goal.**

The 2018 per person LRB calorie reduction pace achieved in three communities exceeded the 2 percent average annual pace needed to achieve the calorie goal. In the other two communities, progress nearly achieved that pace. It was the second consecutive year of calorie reductions that mostly exceeded the average calorie reduction pace needed.

- (5) The average annual pace of LRB calorie reductions per person since the baseline year was faster or equal to the average annual pace needed in two BCI Communities and slower in the other three. The average pace over just the last two years, however, exceeded the average pace needed in all five communities.**

The average pace of per person LRB calorie reductions since the baseline year exceeded or equaled the 2 percent per year pace in two of the five BCI communities, but was slower in the other three. This slower pace in three communities is due primarily to the impact of per person calorie increases that occurred there from the baseline year to 2016. From 2016 to 2018, the average pace of per person LRB calorie reductions exceeded 3 percent per year in all five communities – a pace that, if maintained, would be more than enough to reach the 20 percent calorie reduction goal in every community by 2025.

APPENDIX: SUMMARY BCI COMMUNITY DATA TABLES

EASTERN L.A. BCI COMMUNITY SUMMARY DATA TABLE

Category	Average Calories Per Person Per Day					Total Volumes Per Person Per Day (Ounces)				
	2014 Baseline Estimate	2017 Year 3 Estimate	2018 Year 4 Estimate	2017-18 Percent Change	2014-18 Percent Change	2014 Baseline Estimate	2017 Year 3 Estimate	2018 Year 4 Estimate	2017-18 Percent Change	2014-18 Percent Change
Total	164.6	147.3	141.4	-4.0%	-14.1%	23.5	23.5	22.8	-2.8%	-3.0%
Full-Calorie (>67 Calories per 8 oz.)	148.4	131.5	125.9	-4.2%	-15.2%	11.6	10.3	9.9	-4.2%	-14.6%
Mid-Calorie (41-67 Calories per 8 oz.)	15.3	14.6	14.2	-2.6%	-7.1%	2.2	2.2	2.1	-2.4%	-5.0%
Low-Calorie (5-40 Calories per 8 oz.)	0.9	1.2	1.3	7.5%	38.4%	0.3	0.4	0.4	1.5%	14.1%
No-Calorie (<5 calories per 8 oz.)	0.0	0.0	0.0	-10.7%	-24.2%	9.4	10.6	10.4	-1.7%	11.2%
CSD	91.3	85.6	82.7	-3.4%	-9.4%	8.1	7.6	7.4	-3.0%	-9.4%
Full-Calorie CSD	91.1	85.5	82.6	-3.4%	-9.4%	7.3	6.9	6.7	-3.0%	-8.8%
No- & Low-Calorie CSD	0.0	0.0	0.0	-13.3%	-23.3%	0.8	0.7	0.7	-3.2%	-15.5%
100% Juice & Juice Drinks	54.2	42.6	40.4	-5.2%	-25.5%	4.4	3.5	3.3	-5.4%	-23.9%
RTD Tea	7.5	6.0	5.3	-12.7%	-30.4%	0.9	0.8	0.8	-8.9%	-18.2%
RTD Coffee	0.8	1.2	1.2	2.9%	44.4%	0.0	0.1	0.1	5.4%	45.5%
Energy	2.8	2.8	2.9	2.5%	1.7%	0.3	0.3	0.3	2.8%	2.8%
Value-Added Water	0.5	0.8	0.9	17.0%	93.1%	0.2	0.3	0.4	17.2%	89.7%
Sports Drinks	7.5	8.3	8.1	-2.4%	7.8%	1.1	1.2	1.2	-1.3%	8.2%
Water	0.0	0.0	0.0	-	-	8.4	9.6	9.4	-2.3%	11.8%

LITTLE ROCK BCI COMMUNITY SUMMARY DATA TABLE

Category	Average Calories Per Person Per Day					Total Volumes Per Person Per Day (Ounces)				
	2014 Baseline Estimate	2017 Year 3 Estimate	2018 Year 4 Estimate	2017-18 Percent Change	2014-18 Percent Change	2014 Baseline Estimate	2017 Year 3 Estimate	2018 Year 4 Estimate	2017-18 Percent Change	2014-18 Percent Change
Total	247.5	251.2	234.4	-6.7%	-5.3%	31.2	34.1	32.6	-4.4%	4.4%
Full-Calorie (>67 Calories per 8 oz.)	225.4	228.6	213.2	-6.7%	-5.4%	17.3	17.4	16.3	-6.4%	-6.1%
Mid-Calorie (41-67 Calories per 8 oz.)	20.2	20.5	18.9	-7.8%	-6.7%	2.9	3.0	2.8	-7.9%	-6.3%
Low-Calorie (5-40 Calories per 8 oz.)	1.8	2.0	2.2	10.1%	25.6%	0.6	0.6	0.7	4.9%	18.3%
No-Calorie (<5 calories per 8 oz.)	0.1	0.1	0.1	-21.9%	-37.7%	10.4	13.1	12.9	-1.5%	24.4%
CSD	152.9	154.6	144.1	-6.7%	-5.7%	14.3	14.4	13.0	-9.3%	-9.1%
Full-Calorie CSD	152.3	153.8	143.3	-6.8%	-5.9%	11.7	11.9	11.1	-6.5%	-5.6%
No- & Low-Calorie CSD	0.2	0.3	0.2	-20.9%	14.4%	2.5	2.4	1.8	-23.8%	-26.6%
100% Juice & Juice Drinks	66.5	70.6	66.5	-5.9%	-0.1%	5.7	5.9	5.6	-5.4%	-2.9%
RTD Tea	15.6	11.5	9.9	-13.7%	-36.7%	1.9	1.8	1.6	-10.3%	-16.4%
RTD Coffee	1.3	1.8	1.7	-4.6%	31.8%	0.1	0.1	0.1	-2.6%	31.3%
Energy	3.0	3.4	3.1	-7.3%	4.1%	0.3	0.3	0.3	-5.1%	2.8%
Value-Added Water	0.4	0.4	0.4	8.4%	3.7%	0.3	0.3	0.3	4.3%	4.4%
Sports Drinks	7.9	9.0	8.7	-3.4%	11.0%	1.2	1.4	1.4	-2.7%	12.2%
Water	0.0	0.0	0.0	-	-	7.3	10.0	10.3	3.7%	40.6%

Estimates of per person LRB calorie consumption in the Bronx-Brooklyn BCI Community are more uncertain than estimates in other markets due to data coverage limitations. More details about the limitations of the Bronx-Brooklyn analysis can be found in call-out box 4 of the 2025 Beverage Calories Initiative: Communities Initiative Baseline Report & 2015 Update.

APPENDIX: SUMMARY BCI COMMUNITY DATA TABLES

MONTGOMERY-LOWNDES BCI COMMUNITY SUMMARY DATA TABLE

Category	Average Calories Per Person Per Day					Total Volumes Per Person Per Day (Ounces)				
	2015 Baseline Estimate	2017 Year 2 Estimate	2018 Year 3 Estimate	2017-18 Percent Change	2015-18 Percent Change	2015 Baseline Estimate	2017 Year 2 Estimate	2018 Year 3 Estimate	2017-18 Percent Change	2015-18 Percent Change
Total	273.5	270.0	264.8	-1.9%	-3.2%	39.6	41.5	42.0	1.4%	6.1%
Full-Calorie (>67 Calories per 8 oz.)	242.1	239.5	233.8	-2.4%	-3.4%	18.7	18.4	18.1	-1.9%	-3.3%
Mid-Calorie (41-67 Calories per 8 oz.)	28.1	27.0	27.4	1.4%	-2.5%	4.1	4.0	4.0	1.5%	-1.4%
Low-Calorie (5-40 Calories per 8 oz.)	3.1	3.3	3.4	2.3%	9.4%	0.9	1.0	1.0	1.1%	9.7%
No-Calorie (<5 calories per 8 oz.)	0.2	0.2	0.1	-9.4%	-26.2%	15.9	18.0	18.9	4.7%	18.9%
CSD	152.6	152.8	148.9	-2.5%	-2.4%	15.2	15.0	14.8	-1.4%	-2.8%
Full-Calorie CSD	152.1	151.9	147.8	-2.7%	-2.8%	11.9	11.9	11.7	-2.0%	-2.0%
No- & Low-Calorie CSD	0.2	0.4	0.3	-28.8%	12.2%	3.3	3.0	3.0	-0.1%	-7.9%
100% Juice & Juice Drinks	80.2	81.9	79.9	-2.4%	-0.5%	7.0	7.0	6.9	-2.2%	-2.2%
RTD Tea	20.1	14.9	14.7	-1.8%	-26.9%	2.6	2.5	2.5	0.5%	-1.6%
RTD Coffee	1.7	2.1	2.2	3.9%	29.8%	0.1	0.1	0.1	12.7%	47.2%
Energy	3.6	3.5	3.6	3.2%	1.5%	0.4	0.4	0.4	4.2%	2.9%
Value-Added Water	0.6	0.7	0.8	4.3%	17.7%	0.5	0.6	0.7	6.3%	22.5%
Sports Drinks	14.7	14.0	14.7	5.0%	-0.2%	2.3	2.2	2.3	6.0%	1.9%
Water	0.0	0.0	0.0	-	-	11.5	13.6	14.3	5.2%	24.6%

MISSISSIPPI DELTA BCI COMMUNITY SUMMARY DATA TABLE

Category	Average Calories Per Person Per Day					Total Volumes Per Person Per Day (Ounces)				
	2015 Baseline Estimate	2017 Year 2 Estimate	2018 Year 3 Estimate	2017-18 Percent Change	2015-18 Percent Change	2015 Baseline Estimate	2017 Year 2 Estimate	2018 Year 3 Estimate	2017-18 Percent Change	2015-18 Percent Change
Total	247.9	240.3	233.5	-2.9%	-5.8%	35.7	36.9	36.6	-0.7%	2.4%
Full-Calorie (>67 Calories per 8 oz.)	223.5	216.9	209.8	-3.3%	-6.1%	17.3	16.7	16.3	-2.8%	-5.9%
Mid-Calorie (41-67 Calories per 8 oz.)	22.0	21.2	20.8	-1.8%	-5.4%	3.2	3.1	3.0	-1.9%	-5.0%
Low-Calorie (5-40 Calories per 8 oz.)	2.2	2.1	2.7	26.6%	25.2%	0.7	0.7	0.8	14.6%	21.3%
No-Calorie (<5 calories per 8 oz.)	0.1	0.1	0.1	-3.3%	-17.5%	14.6	16.3	16.5	1.0%	13.0%
CSD	160.2	158.9	150.0	-5.6%	-6.4%	15.2	15.0	14.4	-3.8%	-5.4%
Full-Calorie CSD	159.6	158.2	148.8	-5.9%	-6.7%	12.4	12.3	11.7	-4.9%	-5.7%
No- & Low-Calorie CSD	0.2	0.2	0.2	-4.1%	11.5%	2.8	2.6	2.6	-0.5%	-6.5%
100% Juice & Juice Drinks	58.0	54.8	57.3	4.6%	-1.2%	5.2	4.9	5.1	4.4%	-2.6%
RTD Tea	14.6	10.9	10.9	0.2%	-25.4%	1.8	1.9	1.9	1.4%	7.0%
RTD Coffee	0.9	1.3	1.4	13.7%	63.8%	0.1	0.1	0.1	15.4%	64.9%
Energy	2.4	2.8	3.0	6.9%	23.3%	0.2	0.3	0.3	8.9%	27.2%
Value-Added Water	0.3	0.3	0.3	0.3%	7.0%	0.3	0.5	0.4	-4.3%	28.4%
Sports Drinks	11.5	11.4	10.6	-7.2%	-7.9%	1.7	1.7	1.6	-5.7%	-5.7%
Water	0.0	0.0	0.0	-	-	11.2	12.6	12.8	1.3%	14.3%

Estimates of per person LRB calorie consumption in the Bronx-Brooklyn BCI Community are more uncertain than estimates in other markets due to data coverage limitations. More details about the limitations of the Bronx-Brooklyn analysis can be found in call-out box 4 of the 2025 Beverage Calories Initiative: Communities Initiative Baseline Report & 2015 Update.

APPENDIX: SUMMARY BCI COMMUNITY DATA TABLES

BRONX-BROOKLYN BCI COMMUNITY SUMMARY DATA TABLE

Category	Average Calories Per Person Per Day					Total Volumes Per Person Per Day (Ounces)				
	2015 Baseline Estimate	2017 Year 2 Estimate	2018 Year 3 Estimate	2017-18 Percent Change	2015-18 Percent Change	2015 Baseline Estimate	2017 Year 2 Estimate	2018 Year 3 Estimate	2017-18 Percent Change	2015-18 Percent Change
Total	111.6	110.7	108.8	-1.7%	-2.5%	20.3	21.6	21.6	0.1%	6.6%
Full-Calorie (>67 Calories per 8 oz.)	103.5	102.8	100.5	-2.2%	-2.9%	8.0	7.9	7.8	-1.8%	-2.6%
Mid-Calorie (41-67 Calories per 8 oz.)	7.4	7.2	7.5	4.2%	1.1%	1.1	1.1	1.1	4.4%	2.6%
Low-Calorie (5-40 Calories per 8 oz.)	0.6	0.7	0.7	10.7%	25.3%	0.2	0.2	0.2	-3.7%	1.1%
No-Calorie (<5 calories per 8 oz.)	0.0	0.0	0.0	8.9%	5.2%	11.0	12.4	12.5	1.0%	13.8%
CSD	58.7	58.8	58.8	0.0%	0.1%	5.4	5.5	5.5	0.2%	2.6%
Full-Calorie CSD	58.7	58.7	58.6	-0.1%	-0.1%	4.7	4.7	4.7	0.3%	0.4%
No- & Low-Calorie CSD	0.0	0.0	0.1	11.2%	31.2%	0.7	0.8	0.8	-1.4%	16.7%
100% Juice & Juice Drinks	40.0	40.3	38.3	-4.9%	-4.3%	3.2	3.2	3.1	-3.7%	-3.3%
RTD Tea	7.9	7.3	6.9	-5.3%	-11.7%	0.9	0.9	0.8	-7.2%	-9.9%
RTD Coffee	0.5	0.8	0.8	1.1%	59.1%	0.0	0.1	0.1	4.0%	76.6%
Energy	1.7	1.2	1.4	17.1%	-17.9%	0.2	0.1	0.2	14.7%	-14.3%
Value-Added Water	0.6	0.5	0.5	10.4%	-12.3%	0.5	0.6	0.7	15.9%	33.7%
Sports Drinks	2.2	1.9	2.1	9.5%	-4.7%	0.3	0.3	0.3	9.9%	-3.3%
Water	0.0	0.0	0.0	-	-	9.8	11.0	11.0	0.5%	12.6%

Estimates of per person LRB calorie consumption in the Bronx-Brooklyn BCI Community are more uncertain than estimates in other markets due to data coverage limitations. More details about the limitations of the Bronx-Brooklyn analysis can be found in call-out box 4 of the 2025 Beverage Calories Initiative: Communities Initiative Baseline Report & 2015 Update.

UNITED STATES AND BCI COMMUNITY POPULATION SUMMARY TABLE

Time Period	United States Total ¹	Eastern L.A. BCI Community ²	Little Rock BCI Community ²	Montgomery-Lowndes BCI Community ²	Mississippi Delta BCI Community ²	Bronx-Brooklyn BCI Community ²
2014	318,386,421	286,898	98,277	N/A	N/A	N/A
2015	320,742,673	288,418	98,267	238,964	79,093	312,434
2016	323,071,342	287,499	98,414	238,615	78,381	311,876
2017	325,147,121	288,225	98,591	238,735	77,675	314,553
2018	327,167,434	286,581	98,271	237,642	76,844	306,539
2014-2015 percent change	0.7%	0.5%	0.0%	N/A	N/A	N/A
2015-2016 percent change	0.7%	-0.3%	0.1%	-0.1%	-0.9%	-0.2%
2016-2017 percent change	0.6%	0.3%	0.2%	0.1%	-0.9%	0.9%
2017-2018 percent change	0.6%	-0.6%	-0.3%	-0.5%	-1.1%	-2.5%
Percent Change from Baseline	2.8%	-0.1%	0.0%	-0.6%	-2.8%	-1.9%

¹ 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, 2018 (NST-EST2018-01). Washington, DC: U. S. Government Printing Office.

² Keybridge estimate using U.S. Census Bureau American Community Survey data. See detailed methodology document for full estimation methodology and data sources.