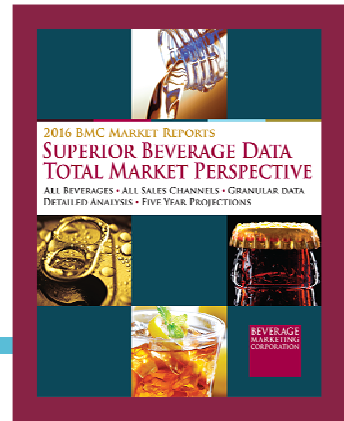


U.S. CARBONATED SOFT DRINKS THROUGH 2020

2016 EDITION (Published August 2016. Data through 2015. Market projections through 2020.) More than 400 pages, with extensive text analysis, graphs, charts and more than 120 tables.



This comprehensive market research report on the leading beverage category examines trends and top companies' strategies, provides up-to-date statistics and detailed analysis of leading brands, packaging, quarterly growth and channels of distribution. It also offers data on regional markets, pricing, demographics, advertising, five-year growth projections and more.

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INSIDE:

REPORT OVERVIEW

A brief discussion of this report's key features. 2

TABLE OF CONTENTS

A detailed outline of this report's contents and data tables. 6

SAMPLE TEXT AND INFOGRAPHICS

Examples of report text, data content, layout and style. 13



HAVE
QUESTIONS?

Contact Charlene Harvey: 212-688-7640 x 1962
charvey@beveragemarketing.com

BEVERAGE
MARKETING
CORPORATION

BEVERAGE MARKETING CORPORATION
850 Third Avenue, 13th Floor, New York, NY 10022
Tel: 212-688-7640 Fax: 212-826-1255

THE ANSWERS YOU NEED

U.S. Carbonated Soft Drinks through 2020 is the culmination of an extensive body of industry research conducted each year by Beverage Marketing Corporation. This extensive report provides in-depth data and market analysis, shedding light on various aspects of the CSD market through reliable data and discussions of what the numbers really mean. Questions answered in this report include:

- What are the growth prospects for regular and diet carbonated soft drinks (CSDs) in the United States, and what are the factors determining these developments?
- How will developments in the sweetener arena affect the soft drinks industry in the next five years?
- How many gallons of CSDs did U.S. residents consume in 2015, and how did that differ from previous years? Which U.S. regions were strongest in fountain? Which geographic region held the strongest soft drink share in the packaged market?
- Which CSD brands, flavors and segments grew in 2015 and which did not?
- Which flavors and segments of the market will gain share by 2020?
- How do trends in the premium soda market compare with those of traditional national brands and private label brands?
- Which are the leading distribution points for CSDs and how have inter-channel market share figures changed in the past five years? What will the next five years likely bring in terms of distribution?
- What the prospects for a turnaround in CSDs to 2020?

THIS REPORT FEATURES

The report provides a comprehensive view into the leading beverage category, backed by volume, retail dollar, wholesale dollar and per capita consumption figures. BMC's research provides an in-depth look at the leading companies and brands in the category and the drivers likely to propel consumption growth (or not) through 2020. All aspects of the CSD market including regional data, volume by package type, fountain gallonage, distribution channel breakdown and flavor type are covered in this industry report.

Advertising expenditures are broken down by 18 media types and demographic data is also considered, along with an overview of the premium CSD and private label segments. Backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, readers of this market research report get a thorough understanding of all facets of the CSD market including:

- A look at the all-sales-channel-inclusive historical and current statistics of the CSD market. As well as a discussion of the current trends moving the market and future trends which are likely to shape its evolution.
- Discussion of packaged versus fountain volume from both a national and regional standpoint.
- Volume, share and growth of overall and packaged diet versus regular CSD marketplace, as well as a comprehensive discussion of natural and artificial sweeteners in CSD formulations are included.

- Detailed profiles and analysis of the leading companies and brands, discussions of their marketing strategies, financial data, brand volumes, international operations, management teams and bottler systems. Coverage includes Coca-Cola Company, PepsiCo, Dr. Pepper Snapple Group and Cott Corporation. Data includes volume and growth and market share statistics for key companies and brands.
- Flavor data, including drill-downs into diet and regular as well as packaged and fountain volume by flavor.
- An analysis of CSD volume by packaging type and distribution channel.
- Advertising expenditures of the leading CSD companies and brands and a look at category spending by media type (including Internet and Hispanic-targeted advertising).
- An understanding of the share of volume sold through key on-and-off channel.
- Demographic profiles comparing consumers of key CSD brands and contrasting regular versus diet CSD users.
- Overview of the premium-priced sub-segments and break-out of leading brands.
- A comparison of trends in branded vs. private label CSD segments.
- Five-year projections for the carbonated soft drink market and its sub-segments. Includes compound annual growth rates (CAGRs) through 2020 for packaged vs. fountain CSDs, regular vs. diet, flavors including break-out by packaged/fountain and diet/regular, regional fountain and packaged volume, distribution channels, CSD volume by container type, as well as national brand vs. private label CSD volume.

As CSD marketers shift their strategies and innovate to meet challenges brought on by changing consumer trends, carbonated beverages will continue to be a segment to watch. Beverage Marketing Corporation's report provides reliable historical, current and projected data as well as the category insight and perspective required to take advantage of opportunities for growth for those within, or competing against CSDs.

The bottom line: this is the most complete report on the carbonated soft drinks market in the United States available anywhere. It offers relevant take-aways not only to those in the CSD space, but to anyone with an interest in non-alcohol drinks or the overall industry as it provides necessary insight into the strengths, weaknesses, status and expectations for this key beverage category. CSDs continue to represent a significant part of the puzzle, holding the lion's share of stomach in the market, at least for the near term. Whether you are a CSD executive striving to improve performance and preserve market share or an emerging category hoping to further erode the category's share of stomach, this report provides invaluable information and insight.

U.S. Carbonated Soft Drinks through 2020

August 2016



NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

Contents

Table of Contents

TABLE OF CONTENTS

TABLE OF CONTENTS	i
DEFINITIONS USED IN THIS REPORT.....	viii
INTRODUCTION	xi

Chapter

1. THE U.S. CARBONATED SOFT DRINK MARKET

The National Soft Drink Market	1
• Overview	1
• Volume	1
• Per Capita Consumption.....	2
• Growth	3
• Dollar Sales	4
• Seasonality.....	4
• Quarterly Growth Trends.....	5
• Recent Trends in the CSD Market	5
The Regional Soft Drink Markets	13
• Overview	13
• Regional Per Capita Consumption	16
Exhibits	
1.1 U.S. Carbonated Soft Drink Market Volume and Change 1960 – 2020.....	18
1.2 U.S. Carbonated Soft Drink Market Per Capita Consumption 1970 – 2020	19
1.3 U.S. Carbonated Soft Drink Market Compound Annual Growth 1970 – 2020.....	20
1.4 U.S. Carbonated Soft Drink Market Wholesale and Retail Dollars and Change 2000 – 2020	21
1.5 U.S. Carbonated Soft Drink Market Quarterly Volume Shares in Measured Channels 2003 – 2015	22
1.6 U.S. Q1 2016 Estimated Volume, Share and Growth by Diet vs. Regular CSDs.....	23
1.7 Regional Soft Drink Markets Volume 2010 – 2020	24
1.8 Regional Soft Drink Markets Share of Volume 2010 – 2020	25
1.9 Regional Soft Drink Markets Change in Volume 2011 – 2020	26
1.10 Regional Soft Drink Markets Compound Annual Growth 1995 – 2020	27
1.11 Regional Soft Drink Markets Per Capita Consumption 2010 – 2020.....	28

2. THE U.S. SOFT DRINK PACKAGED AND FOUNTAIN MARKETS

National Packaged and Fountain Volume Trends	29
Regional Packaged Trends	31
Regional Fountain Trends	34
Exhibits	
2.12 U.S. Soft Drink Market Packaged and Fountain Gallonage and Growth 1975 – 2020	37
2.13 U.S. Soft Drink Market Packaged and Fountain Share 1975 – 2020	38

TABLE OF CONTENTS

Chapter

2. THE U.S. SOFT DRINK PACKAGED AND FOUNTAIN MARKETS (cont'd)	
<i>Exhibits (cont'd)</i>	
2.14 Regional Soft Drink Packaged Volume 1985 – 2020 -----	39
2.15 Regional Soft Drink Packaged Share 1985 – 2020 -----	40
2.16 Regional Soft Drink Packaged Growth 1986 – 2020-----	41
2.17 Regional Soft Drink Fountain Gallonage 1985 – 2020-----	42
2.18 Regional Soft Drink Fountain Share 1985 – 2020 -----	43
2.19 Regional Soft Drink Fountain Growth 1986 – 2020-----	44
3. THE U.S. SOFT DRINK REGULAR AND DIET MARKETS	
Regular and Diet Trends -----	45
• Overview -----	45
• Packaged CSDs -----	61
• Fountain CSDs -----	62
Regional Soft Drink Trends -----	63
• Packaged Regular CSDs -----	63
• Packaged Diet CSDs -----	64
<i>Exhibits</i>	
3.20 U.S. Soft Drink Market Regular vs. Diet Volume and Share 1984 – 2020 -----	66
3.21 U.S. Soft Drink Market Regular vs. Diet Growth 1985 – 2020-----	67
3.22 U.S. Soft Drink Packaged Market Regular vs. Diet Volume and Share 1975 – 2020	68
3.23 U.S. Soft Drink Packaged Market Regular vs. Diet Growth 1980 – 2020 -----	69
3.24 U.S. Soft Drink Fountain Market Regular vs. Diet Volume and Share 1984 – 2020 -	70
3.25 U.S. Soft Drink Fountain Market Regular vs. Diet Growth 1985 – 2020 -----	71
3.26 Regional Packaged Soft Drink Market Regular Volume 1985 – 2020-----	72
3.27 Regional Packaged Soft Drink Market Regular Share 1985 – 2020-----	73
3.28 Regional Packaged Soft Drink Market Regular Growth 1986 – 2020 -----	74
3.29 Regional Packaged Soft Drink Market Diet Volume 1985 – 2020-----	75
3.30 Regional Packaged Soft Drink Market Diet Share 1985 – 2020-----	76
3.31 Regional Packaged Soft Drink Market Diet Growth 1986 – 2020 -----	77
4. THE U.S. SOFT DRINK FLAVORS	
National Flavor Trends -----	78
Regular Packaged Flavor Trends -----	82
Diet Packaged Flavor Trends -----	84
Regular Fountain Flavor Trends -----	86
Diet Fountain Flavor Trends -----	87
<i>Exhibits</i>	
4.32 U.S. Soft Drink Market Volume by Flavor 2010 – 2020 -----	88
4.33 U.S. Soft Drink Market Share by Flavor 2010 – 2020 -----	89
4.34 U.S. Soft Drink Market Growth by Flavor 2011 – 2020 -----	90
4.35 U.S. Soft Drink Regular Packaged Volume by Flavor 2010 – 2020 -----	91
4.36 U.S. Soft Drink Regular Packaged Share by Flavor 2010 – 2020-----	92

TABLE OF CONTENTS

Chapter

4. THE U.S. SOFT DRINK FLAVORS (cont'd)

Exhibits (cont'd)

4.37	U.S. Soft Drink Regular Packaged Growth by Flavor 2011 – 2020 -----	93
4.38	U.S. Soft Drink Diet Packaged Volume by Flavor 2010 – 2020 -----	94
4.39	U.S. Soft Drink Diet Packaged Share by Flavor 2010 – 2020-----	95
4.40	U.S. Soft Drink Diet Packaged Growth by Flavor 2011 – 2020 -----	96
4.41	U.S. Soft Drink Regular Fountain Volume by Flavor 2010 – 2020-----	97
4.42	U.S. Soft Drink Regular Fountain Share by Flavor 2010 – 2020-----	98
4.43	U.S. Soft Drink Regular Fountain Growth by Flavor 2011 – 2020 -----	99
4.44	U.S. Soft Drink Diet Fountain Volume by Flavor 2010 – 2020-----	100
4.45	U.S. Soft Drink Diet Fountain Share by Flavor 2010 – 2020-----	101
4.46	U.S. Soft Drink Diet Fountain Growth by Flavor 2011 – 2020 -----	102

5. THE LEADING SOFT DRINK COMPANIES AND THEIR STRATEGIES

The Leading Companies-----	103
• Overview -----	103
Coca-Cola Company	
• Overview -----	113
• Marketing -----	123
• Bottling System-----	158
PepsiCo, Inc.	
• Overview -----	163
• Marketing -----	172
• Bottling System-----	209
Dr Pepper Snapple Group, Inc.	
• Overview -----	213
• Marketing -----	217
• Bottling System-----	229
Cott Corporation	
• Overview -----	234
• Marketing -----	244
• International -----	247

Exhibits

5.47	The Leading Soft Drink Companies Gallonage 2010 – 2015 -----	251
5.48	The Leading Soft Drink Companies Share 2010 – 2015-----	252
5.49	The Leading Soft Drink Companies Growth 2011 – 2015 -----	253
5.50	Coca-Cola Company Gallonage by Brand 2010 – 2015 -----	254
5.51	Coca-Cola Company Industry Share by Brand 2010 – 2015-----	255
5.52	Coca-Cola Company Annual Growth by Brand 2011 – 2015 -----	256
5.53	PepsiCo, Inc. Gallonage by Brand 2010 – 2015 -----	257
5.54	PepsiCo, Inc. Industry Share by Brand 2010 – 2015-----	258
5.55	PepsiCo, Inc. Annual Growth by Brand 2011 – 2015-----	259

TABLE OF CONTENTS

Chapter

5. THE LEADING SOFT DRINK COMPANIES AND THEIR STRATEGIES (cont'd)	
<i>Exhibits (cont'd)</i>	
5.56 Dr Pepper Snapple Group, Inc. Gallonage by Brand 2010 – 2015-----	260
5.57 Dr Pepper Snapple Group, Inc. Industry Share by Brand 2010 – 2015 -----	262
5.58 Dr Pepper Snapple Group, Inc. Annual Growth by Brand 2011 – 2015 -----	264
6. THE LEADING SOFT DRINK BRANDS	
The Top Twenty Soft Drink Brands-----	266
The Top Fifteen Diet Soft Drink Brands -----	269
Leading Soft Drink Brands by Flavor -----	271
• Cola-----	271
• Heavy Citrus -----	272
• Lemon-Lime-----	273
• Pepper-----	273
• Orange/Flavor Lines -----	274
• Root Beer -----	275
Leading Soft Drink Brands by Channel-----	277
<i>Exhibits</i>	
6.59 The Top 20 Soft Drink Brands Gallonage 2010 – 2015-----	278
6.60 The Top 20 Soft Drink Brands Share 2010 – 2015 -----	279
6.61 The Top 20 Soft Drink Brands Growth 2011 – 2015 -----	280
6.62 The Top 15 Diet Soft Drink Brands Volume 2010 – 2015 -----	281
6.63 The Top 15 Diet Soft Drink Brands Share of Volume 2010 – 2015 -----	282
6.64 The Top 15 Diet Soft Drink Brands Change in Volume 2011 – 2015 -----	283
6.65 The Leading Soft Drink Flavor Brands Gallonage 2010 – 2015 -----	284
6.66 The Leading Soft Drink Flavor Brands Category Share 2010 – 2015-----	286
6.67 The Leading Soft Drink Flavor Brands Volume Growth 2011 – 2015-----	288
6.68 Leading Carbonated Soft Drink Trademarks by Volume in Grocery Stores 2015 ----	290
6.69 Leading Carbonated Soft Drink Trademarks by Retail Dollars in Supermarkets 2015-----	291
7. THE PREMIUM SOFT DRINK MARKET	
Premium Soft Drinks -----	292
• Overview -----	292
• Leading Brands -----	293
<i>Exhibits</i>	
7.70 Leading Premium Soda Brands Estimated Wholesale Dollar Sales 2010 – 2015 ----	303
7.71 Leading Premium Soda Brands Share of Wholesale Dollar Sales 2010 – 2015 -----	304
7.72 Leading Premium Soda Brands Change in Wholesale Dollar Sales 2011 – 2015 ----	305
7.73 Leading Premium Soda Brands Volume 2010 – 2015 -----	306
7.74 Leading Premium Soda Brands Share of Volume 2010 – 2015 -----	307
7.75 Leading Premium Soda Brands Change in Volume 2011 – 2015 -----	308

TABLE OF CONTENTS

Chapter

8. U.S. SOFT DRINK DISTRIBUTION CHANNELS	
Soft Drink Distribution Channels -----	309
• Overview -----	309
• Supermarkets -----	310
• Mass Merchandisers -----	311
• Foodservice -----	311
• Vending -----	312
• Convenience/Gas Stores -----	312
Vended Can, Bottle and Cup Volume-----	314
Exhibits	
8.76 U.S. Soft Drink Market Volume by Distribution Channels 2010 – 2020 -----	316
8.77 U.S. Soft Drink Market Share by Distribution Channels 2010 – 2020 -----	317
8.78 U.S. Soft Drink Market Growth by Distribution Channels 2011 – 2020 -----	318
8.79 The Vended Soft Drink Segment Volume of Cans, Bottles and Cups 2010 – 2020 --	319
8.80 The Vended Soft Drink Segment Share of Cans, Bottles and Cups 2010 – 2020 ----	320
8.81 The Vended Soft Drink Segment Growth of Cans, Bottles and Cups 2011 – 2020 --	321
9. U.S. SOFT DRINK INDUSTRY PRICING	
Soft Drink Pricing-----	322
• Overview -----	322
• Consumer Prices-----	322
• Producer Prices -----	324
• Wholesale Prices-----	325
Exhibits	
9.82 Growth in Consumer Price Index Carbonated Drinks vs. All Items 1980 – 2015 ----	326
9.83 Growth in Producer Price Index Soft Drinks vs. All Commodities 1980 – 2015 -----	327
9.84 Average Wholesale Non-Discounted Price Per Packaged Case 1993 – 2015 -----	328
9.85 Average Wholesale Non-Discounted Bulk Price Per Five Gallon Transfer Tank 1993 – 2015 -----	329
10. PRIVATE LABEL SOFT DRINKS	
Private Label Soft Drinks-----	330
Exhibits	
10.86 U.S. Soft Drink Market National Brands vs. Private Label Gallonage and Share 1993 – 2020 -----	334
10.87 U.S. Soft Drink Market National Brands vs. Private Label Growth 1994 – 2020 -----	335
11. U.S. SOFT DRINK PACKAGING	
Soft Drink Packaging Trends-----	336
Soft Drink Volume by Container Size -----	341
Exhibits	
11.88 U.S. Soft Drink Packaged Volume by Type 1975 – 2020-----	344
11.89 U.S. Soft Drink Packaged Share by Type 1975 – 2020 -----	345

TABLE OF CONTENTS

Chapter

11. U.S. SOFT DRINK PACKAGING (cont'd)	
11.90 U.S. Soft Drink Packaged Growth by Type 1985 – 2020-----	346
11.91 U.S. Soft Drink Packaged Volume by Size and Type 2010 – 2020 -----	347
11.92 U.S. Soft Drink Packaged Share by Size and Type 2010 – 2020 -----	348
11.93 U.S. Soft Drink Packaged Growth by Size and Type 2011 – 2020-----	349
12. SOFT DRINK ADVERTISING EXPENDITURES	
Advertising Expenditures of the Leading CSD Companies -----	350
• Overview -----	350
• Coca-Cola Company -----	355
• PepsiCo, Inc. -----	356
• Dr Pepper Snapple Group, Inc. -----	357
Advertising Expenditures of the Leading CSD Brands-----	358
Soft Drink Advertising by Medium-----	359
<i>Exhibits</i>	
12.94 The Leading Soft Drink Companies Estimated Advertising Expenditures 2010 – 2015 -----	361
12.95 The Leading Soft Drink Companies Share of Advertising Expenditures 2010 – 2015 -----	362
12.96 The Leading Soft Drink Companies Change in Advertising Expenditures 2011 – 2015 -----	363
12.97 The Leading Soft Drink Companies Advertising Cents Per Gallon 2010 – 2015 -----	364
12.98 Coca-Cola Company Estimated Advertising Expenditures by Brand 2010 – 2015 ---	365
12.99 Coca-Cola Company Share of Advertising Expenditures by Brand 2010 – 2015-----	366
12.100 Coca-Cola Company Change in Advertising Expenditures by Brand 2011 – 2015 ---	367
12.101 PepsiCo, Inc. Estimated Advertising Expenditures by Brand 2010 – 2015-----	368
12.102 PepsiCo, Inc. Share of Advertising Expenditures by Brand 2010 – 2015 -----	369
12.103 PepsiCo, Inc. Change in Advertising Expenditures by Brand 2011 – 2015-----	370
12.104 Dr Pepper Snapple Group, Inc. Estimated Advertising Expenditures by Brand 2010 – 2015 -----	371
12.105 Dr Pepper Snapple Group, Inc. Share of Advertising Expenditures by Brand 2010 – 2015 -----	372
12.106 Dr Pepper Snapple Group, Inc. Change in Advertising Expenditures by Brand 2011 – 2015 -----	373
12.107 The Top 20 Soft Drink Brands by Advertising Expenditures 2010 – 2015 -----	374
12.108 U.S. Soft Drink Market Expenditures by Media 2010 – 2015 -----	375
12.109 U.S. Soft Drink Market Share of Expenditures by Media 2010 – 2015 -----	376
12.110 U.S. Soft Drink Market Change in Expenditures by Media 2011 – 2015 -----	377
13. DEMOGRAPHICS OF THE SOFT DRINK CONSUMER	
Adult Regular and Diet CSD Consumers -----	378
Adult Regular CSD Consumers -----	386
Adult Diet CSD Consumers -----	389

TABLE OF CONTENTS

Chapter

13. DEMOGRAPHICS OF THE SOFT DRINK CONSUMER (cont'd)

Exhibits

13.111 Demographics of the Regular CSD Consumer 2015 -----	391
13.112 Demographics of the Diet CSD Consumer 2015 -----	393
13.113 Demographics of the Coca-Cola Consumer 2015 -----	395
13.114 Demographics of the Pepsi-Cola Consumer 2015 -----	397
13.115 Demographics of the Dr Pepper Consumer 2015 -----	399
13.116 Demographics of the Mountain Dew Consumer 2015 -----	401
13.117 Demographics of the Store Brand CSD Consumer 2015 -----	403
13.118 Demographics of the Diet Coke Consumer 2015 -----	405
13.119 Demographics of the Coca-Cola Zero Consumer 2015 -----	407
13.120 Demographics of the Diet Pepsi Consumer 2015 -----	409
13.121 Demographics of the Diet Dr Pepper Consumer 2015-----	411
13.122 Demographics of the Diet Mountain Dew Consumer 2015 -----	413

Appendix

A. U.S. Population by Region 1977 – 2015 -----	415
--	-----

In the past few years, a new segment of sweetened sparkling waters has emerged. These drinks straddle the bottled water and CSD categories and thus have impacted sales of the latter, especially.

- Washington State's Talking Rain has toiled in the New Age beverage segment for more than 20 years, but never had much success until Sparkling ICE emerged as a sleeper hit.
- The Sparkling ICE line is a zero-calorie blend of sparkling spring water, vitamins and green tea extract. It is sweetened with Splenda and packaged in skinny, straight-walled 17-ounce and 1-liter PET bottles, with a picture of fruit trapped inside an ice cube on the transparent label.
- In 2013, in the wake of the unexpected success of Sparkling ICE brand, Coke re-envisioned Fruitwater as a similar product – namely, carbonated, zero-calorie water sweetened with Splenda. A rash of other copycats has emerged in the sweetened sparkling water segment, including several private labels. None has gotten much traction, including a PepsiCo effort under the Aquafina FlavorSplash brand that was discontinued. Fruitwater too has been phased out and effectively replaced by the Minute Maid Sparkling brand.
- The unsweetened seltzer segment, as well as sparkling waters, has enjoyed strong growth of late as well. Since these beverages are fizzy just like CSDs, it suggests that a small, but growing, segment of the population are moving to healthier beverage options without foregoing bubbles altogether.

The long-term decline in CSDs has continued unabated.

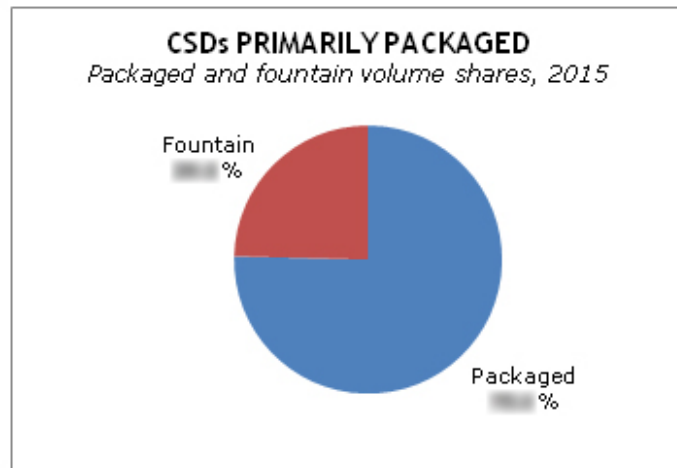
- A troubling sign continues to be the poor performance of diet CSDs for the past several years. The most feasible explanation is that consumers are wary of the artificial sweeteners in diet CSDs, partly because of the rapid dissemination of negative information via social media.
- There has also been a perceived delay in the launch of next-generation diets employing natural sweeteners, which has exacerbated consumers' feeling of cognitive dissonance between what is and what should already be.

**REGIONAL SOFT DRINK MARKETS
SHARE OF VOLUME
2010 – 2020(P)**

Region	2010	2011	2012	2013	2014	2015	2020(P)
South	18.1%	18.1%	18.1%	18.1%	18.1%	18.1%	18.1%
East Central	18.1%	18.1%	18.1%	18.1%	18.1%	18.1%	18.1%
Northeast	18.1%	18.1%	18.1%	18.1%	18.1%	18.1%	18.1%
Southwest	18.1%	18.1%	18.1%	18.1%	18.1%	18.1%	18.1%
Pacific	18.1%	18.1%	18.1%	18.1%	18.1%	18.1%	18.1%
West Central	18.1%	18.1%	18.1%	18.1%	18.1%	18.1%	18.1%
West	18.1%	18.1%	18.1%	18.1%	18.1%	18.1%	18.1%
TOTAL U.S.	18.1%	18.1%	18.1%	18.1%	18.1%	18.1%	18.1%

(P) Projected

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation