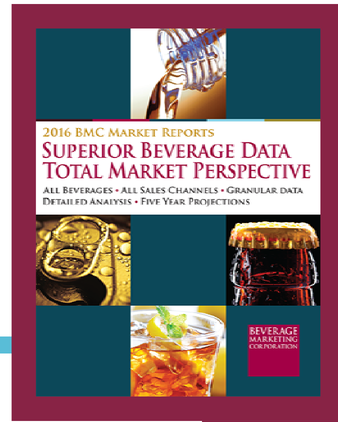
U.S. Carbonated Soft Drinks through 2020

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:

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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.

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August 2016

BEVERAGE MARKETING CORPORATION

RESEARCH ● DATA ● CONSULTING

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

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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.

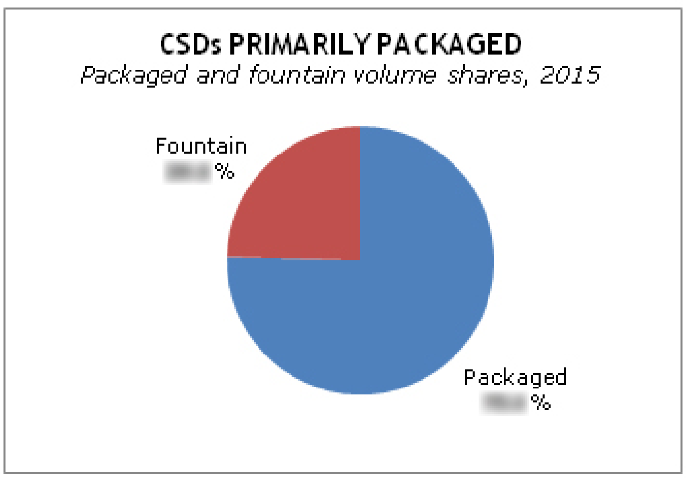
Exhibit 1.8

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

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

(P) Projected

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation