

CARBONATED SOFT DRINKS IN THE U.S. THROUGH 2022: EXCEL DATA SET

2018 EDITION (Published November 2018. Data through 2017. Market projections through 2022.) More than 120 Excel tables.

This comprehensive market research report on the number two beverage category (it was surpassed by bottled water in 2016) 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.

AVAILABLE FORMAT & PRICING

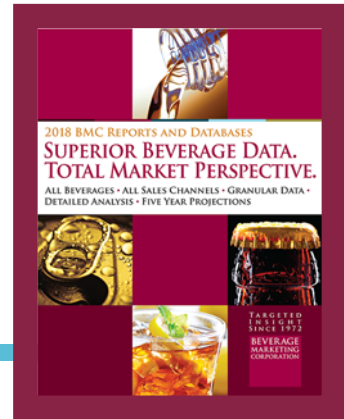


Direct Download

Excel sheets and Quarterly category and sub-category updates ((for 3 quarters) delivered via select access to BMC's DrinkTell database)

\$2,995

To learn more, to place an advance order or to inquire about additional user licenses **call**: Charlene Harvey +1 212.688.7640 ext. 1962 charvey@beveragemarketing.com



FOR A FULL CATALOG OF REPORTS AND DATABASES, GO TO bmcreports.com

INSIDE:

REPORT OVERVIEW

A brief discussion of key features of this report. 2

TABLE OF CONTENTS

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

SAMPLE TEXT AND INFOGRAPHICS

A few examples of this report's text, data content layout and style. 9



HAVE QUESTIONS?

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



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

THE ANSWERS YOU NEED

Carbonated Soft Drinks in the U.S. through 2022: Excel Data Set is the culmination of an extensive body of industry research conducted each year by Beverage Marketing Corporation. This comprehensive report provides in-depth market data, shedding light on various aspects of the CSD market, enabling users to gain insight into this huge and multi-faceted industry and its challenges. Questions answered in this report include:

- What are the growth prospects for regular and diet carbonated soft drinks (CSDs) in the United States?
- How many gallons of CSDs did U.S. residents consume in 2017, 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 2017 and which did not?
- Which flavors and segments of the market will gain share by 2022?
- 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 are the prospects for a turnaround in CSDs by 2022?

THIS REPORT FEATURES

The report provides a comprehensive view into the number two beverage category, including 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. Multiple facets 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, users of this data-driven market research report get a thorough understanding of all aspects of the CSD market including:

- A look at the all-sales-channel-inclusive historical and current statistics of the CSD market.
- Data comparing packaged versus fountain volume from both a national and regional standpoint.
- Volume, share and growth of overall and packaged diet versus regular CSD marketplace.
- Detailed sales statistics for the leading companies and brands. Coverage includes Coca-Cola Company, PepsiCo, Keurig Dr. Pepper, National Beverage Corporation, Cott Corporation and others. 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 outlets.

- Demographic profiles comparing consumers of key CSD brands and contrasting regular versus diet CSD users.
- A look at 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 2022 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 the reliable historical, current and projected data 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.

Carbonated Soft Drinks in the U.S. through 2022: Excel Data Set

November 2018



RESEARCH • DATA • CONSULTING

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

Copyright © 2018 Beverage Marketing Corporation of New York, 850 Third Avenue, New York, New York 10022, (212) 688—7640. All rights reserved. Reproductions in any form prohibited by law.

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

- 1.1 U.S. Carbonated Soft Drink Market Volume and Change 1960 – 2022
- 1.2 U.S. Carbonated Soft Drink Market Per Capita Consumption 1970 – 2022
- 1.3 U.S. Carbonated Soft Drink Market Compound Annual Growth 1970 – 2022
- 1.4 U.S. Carbonated Soft Drink Market Wholesale, Retail Dollars and Change 2000 – 2022
- 1.5 U.S. Carbonated Soft Drink Market Quarterly Volume Shares in Measured Channels 2003 – 2017
- 1.6 U.S. Q1 2018 Estimated Volume, Share and Growth by Diet vs. Regular CSDs
- 1.7 Regional Soft Drink Markets Gallonage/Case Volume 2012 – 2022
- 1.8 Regional Soft Drink Markets Gallonage/Case Share 2012 – 2022
- 1.9 Regional Soft Drink Markets Gallonage/Case Growth 2013 – 2022
- 1.10 Regional Soft Drink Markets Compound Annual Growth Rate 1997 – 2022
- 1.11 Regional Soft Drink Markets Per Capita Consumption 2012 – 2022

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

- 2.12 U.S. Soft Drink Market Packaged and Fountain Gallonage and Growth 1975 – 2022
- 2.13 U.S. Soft Drink Market Packaged and Fountain Share 1975 – 2022
- 2.14 Regional Soft Drink Packaged Volume 1985 – 2022
- 2.15 Regional Soft Drink Packaged Share 1985 – 2022
- 2.16 Regional Soft Drink Packaged Growth 1986 – 2022
- 2.17 Regional Soft Drink Fountain Gallonage 1985 – 2022
- 2.18 Regional Soft Drink Fountain Share 1985 – 2022
- 2.19 Regional Soft Drink Fountain Growth 1986 – 2022

3. THE U.S. SOFT DRINK REGULAR AND DIET MARKETS

- 3.20 U.S. Soft Drink Market Regular vs. Diet Volume and Share 1984 – 2022
- 3.21 U.S. Soft Drink Market Regular vs. Diet Growth 1985 – 2022
- 3.22 U.S. Soft Drink Packaged Market Regular vs. Diet Volume and Share 1975 – 2022
- 3.23 U.S. Soft Drink Packaged Market Regular vs. Diet Growth 1980 – 2022
- 3.24 U.S. Soft Drink Fountain Market Regular vs. Diet Volume and Share 1984 – 2022
- 3.25 U.S. Soft Drink Fountain Market Regular vs. Diet Growth 1985 – 2022
- 3.26 Regional Packaged Soft Drink Market Regular Volume 1985 – 2022
- 3.27 Regional Packaged Soft Drink Market Regular Share 1985 – 2022
- 3.28 Regional Packaged Soft Drink Market Regular Volume Growth 1986 – 2022
- 3.29 Regional Packaged Soft Drink Market Diet Volume 1985 – 2022
- 3.30 Regional Packaged Soft Drink Market Diet Share 1985 – 2022
- 3.31 Regional Packaged Soft Drink Market Diet Volume Growth 1986 – 2022

TABLE OF CONTENTS

Chapter

4. THE U.S. SOFT DRINK FLAVORS

- 4.32 U.S. Soft Drink Market Volume by Flavor 2012 – 2022
- 4.33 U.S. Soft Drink Market Share by Flavor 2012 – 2022
- 4.34 U.S. Soft Drink Market Growth by Flavor 2013 – 2022
- 4.35 U.S. Soft Drink Regular Packaged Volume by Flavor 2012 – 2022
- 4.36 U.S. Soft Drink Regular Packaged Share by Flavor 2012 – 2022
- 4.37 U.S. Soft Drink Regular Packaged Growth by Flavor 2013 – 2022
- 4.38 U.S. Soft Drink Diet Packaged Volume by Flavor 2012 – 2022
- 4.39 U.S. Soft Drink Diet Packaged Share by Flavor 2012 – 2022
- 4.40 U.S. Soft Drink Diet Packaged Growth by Flavor 2013 – 2022
- 4.41 U.S. Soft Drink Regular Fountain Volume by Flavor 2012 – 2022
- 4.42 U.S. Soft Drink Regular Fountain Share by Flavor 2012 – 2022
- 4.43 U.S. Soft Drink Regular Fountain Growth by Flavor 2013 – 2022
- 4.44 U.S. Soft Drink Diet Fountain Volume by Flavor 2012 – 2022
- 4.45 U.S. Soft Drink Diet Fountain Share by Flavor 2012 – 2022
- 4.46 U.S. Soft Drink Diet Fountain Growth by Flavor 2013 – 2022

5. THE LEADING SOFT DRINK COMPANIES AND THEIR STRATEGIES

- 5.47 The Leading Soft Drink Companies Volume 2012 – 2017
- 5.48 The Leading Soft Drink Companies Share of Volume 2012 – 2017
- 5.49 The Leading Soft Drink Companies Change in Volume 2013 – 2017
- 5.50 Coca-Cola Company Volume by Brand 2012 – 2017
- 5.51 Coca-Cola Company Share of Volume by Brand 2012 – 2017
- 5.52 Coca-Cola Company Change in Volume by Brand 2013 – 2017
- 5.53 PepsiCo, Inc. Volume by Brand 2012 – 2017
- 5.54 PepsiCo, Inc. Share of Volume by Brand 2012 – 2017
- 5.55 PepsiCo, Inc. Change in Volume by Brand 2013 – 2017
- 5.56 Dr Pepper Snapple Group, Inc. Volume by Brand 2012 – 2017
- 5.57 Dr Pepper Snapple Group, Inc. Share of Volume by Brand 2012 – 2017
- 5.58 Dr Pepper Snapple Group, Inc. Change in Volume by Brand 2013 – 2017

6. THE LEADING SOFT DRINK BRANDS

- 6.59 The Leading Soft Drink Brands Volume 2012 – 2017
- 6.60 The Leading Soft Drink Brands Share of Volume 2012 – 2017
- 6.61 The Leading Soft Drink Brands Change in Volume 2013 – 2017
- 6.62 The Top 15 Diet Soft Drink Brands Volume 2012 – 2017
- 6.63 The Top 15 Diet Soft Drink Brands Share of Volume 2012 – 2017
- 6.64 The Top 15 Diet Soft Drink Brands Change in Volume 2013 – 2017
- 6.65 The Leading Soft Drink Flavor Brands Volume 2012 – 2017
- 6.66 The Leading Soft Drink Flavor Brands Share of Volume 2012 – 2017
- 6.67 The Leading Soft Drink Flavor Brands Change in Volume 2013 – 2017
- 6.68 Leading Carbonated Soft Drink Trademarks by Volume in Grocery Stores 2017
- 6.69 Leading Carbonated Soft Drink Trademarks by Retail Dollars in Grocery Stores 2017

TABLE OF CONTENTS

Chapter

- 7. THE PREMIUM SOFT DRINK MARKET**
 - 7.70 Leading Premium Soda Brands Estimated Wholesale Dollar Sales 2012 – 2017
 - 7.71 Leading Premium Soda Brands Share of Wholesale Dollar Sales 2012 – 2017
 - 7.72 Leading Premium Soda Brands Change in Wholesale Dollar Sales 2013 – 2017
 - 7.73 Leading Premium Soda Brands Estimated Volume 2012 – 2017
 - 7.74 Leading Premium Soda Brands Share of Volume 2012 – 2017
 - 7.75 Leading Premium Soda Brands Change in Volume 2013 – 2017

- 8. U.S. SOFT DRINK DISTRIBUTION CHANNELS**
 - 8.76 Carbonated Soft Drinks Volume by Distribution Channel 2012 – 2022
 - 8.77 Carbonated Soft Drinks Share by Distribution Channel 2012 – 2022
 - 8.78 Carbonated Soft Drinks Growth by Distribution Channel 2013 – 2022
 - 8.79 The Vended Soft Drink Segment Volume of Cans, Bottles and Cups 2012 – 2022
 - 8.80 The Vended Soft Drink Segment Share of Cans, Bottles and Cups 2012 – 2022
 - 8.81 The Vended Soft Drink Segment Growth of Cans, Bottles and Cups 2013 – 2022

- 9. U.S. SOFT DRINK INDUSTRY PRICING**
 - 9.82 Growth in Consumer Price Index All Items vs Carbonated Soft Drinks 1979 – 2017
 - 9.83 Growth in Producer Price Index All Commodities vs Carbonated Soft Drinks 1979 – 2017
 - 9.84 Average Wholesale Non-Discounted Price Per Packaged Case 1993 – 2017
 - 9.85 Average Wholesale Non-Discounted Bulk Price Per Five-Gallon Transfer Tank 1993 – 2017

- 10. PRIVATE LABEL SOFT DRINKS**
 - 10.86 U.S. Soft Drink Market National Brands vs. Private Label Gallonage and Share 1993 – 2022
 - 10.87 U.S. Soft Drink Market National Brands vs. Private Label Growth 1994 – 2022

- 11. U.S. SOFT DRINK PACKAGING**
 - 11.88 U.S. Soft Drink Packaged Volume by Type 1975 – 2022
 - 11.89 U.S. Soft Drink Packaged Share by Type 1975 – 2022
 - 11.90 U.S. Soft Drink Packaged Annual Growth by Type 1985 – 2022
 - 11.91 Carbonated Soft Drink Packaging Volume by Size and Type 2012 – 2022
 - 11.92 Carbonated Soft Drink Packaging Share of Volume by Size and Type 2012 – 2022
 - 11.93 Carbonated Soft Drink Packaging Change in Volume by Size and Type 2013 – 2022

- 12. SOFT DRINK ADVERTISING EXPENDITURES**
 - 12.94 The Leading Soft Drink Companies Estimated Advertising Expenditures 2012 – 2017
 - 12.95 The Leading Soft Drink Companies Estimated Share of Advertising Expenditures 2012 – 2017
 - 12.96 The Leading Soft Drink Companies Advertising Expenditures Annual Growth 2013 – 2017
 - 12.97 The Leading Soft Drink Companies Advertising Cents Per Gallon 2012 – 2017
 - 12.98 Coca-Cola Company Estimated Advertising Expenditures by Brand 2012 – 2017
 - 12.99 Coca-Cola Company Share of Advertising Expenditures by Brand 2012 – 2017

TABLE OF CONTENTS

Chapter

12. SOFT DRINK ADVERTISING EXPENDITURES (cont'd)

- 12.100 Coca-Cola Company Change in Advertising Expenditures by Brand 2013 – 2017
- 12.101 PepsiCo, Inc. Estimated Advertising Expenditures by Brand 2012 – 2017
- 12.102 PepsiCo, Inc. Share of Advertising Expenditures by Brand 2012 – 2017
- 12.103 PepsiCo, Inc. Change in Advertising Expenditures by Brand 2013 – 2017
- 12.104 Dr Pepper Snapple Group, Inc. Estimated Advertising Expenditures by Brand 2012 – 2017
- 12.105 Dr Pepper Snapple Group, Inc. Share of Advertising Expenditures by Brand 2012 – 2017
- 12.106 Dr Pepper Snapple Group, Inc. Change in Advertising Expenditures by Brand 2013 – 2017
- 12.107 The Top Twenty Soft Drink Brands by Advertising Expenditures 2012 – 2017
- 12.108 U.S. Soft Drink Market Expenditures by Media 2012 – 2017
- 12.109 U.S. Soft Drink Market Share of Expenditures by Media 2012 – 2017
- 12.110 U.S. Soft Drink Market Change in Expenditures by Media 2013 – 2017

13. DEMOGRAPHICS OF THE SOFT DRINK CONSUMER

- 13.111 Demographics of the Regular CSD Consumer 2017
- 13.112 Demographics of the Diet CSD Consumer 2017
- 13.113 Demographics of the Coca-Cola Consumer 2017
- 13.114 Demographics of the Pepsi-Cola Consumer 2017
- 13.115 Demographics of the Dr Pepper Consumer 2017
- 13.116 Demographics of the Mountain Dew Consumer 2017
- 13.117 Demographics of the Store Brand Regular CSD Consumer 2017
- 13.118 Demographics of the Diet Coke Consumer 2017
- 13.119 Demographics of the Coca-Cola Zero Consumer 2017
- 13.120 Demographics of the Diet Pepsi Consumer 2017
- 13.121 Demographics of the Diet Dr Pepper Consumer 2017
- 13.122 Demographics of the Diet Mountain Dew Consumer 2017

**U.S. SOFT DRINK MARKET
REGULAR VS. DIET GROWTH
1985 – 2022(P)**

Year	Regular	Diet	Total
1984/85	███%	███%	███%
1985/86	███%	███%	███%
1986/87	███%	███%	███%
1987/88	███%	███%	███%
1988/89	███%	███%	███%
1989/90	███%	███%	███%
1990/91	███%	███%	███%
1991/92	███%	███%	███%
1992/93	███%	███%	███%
1993/94	███%	███%	███%
1994/95	███%	███%	███%
1995/96	███%	███%	███%
1996/97	███%	███%	███%
1997/98	███%	███%	███%
1998/99	███%	███%	███%
1999/00	███%	███%	███%
2000/01	███%	███%	███%
2001/02	███%	███%	███%
2002/03	███%	███%	███%
2003/04	███%	███%	███%
2004/05	███%	███%	███%
2005/06	███%	███%	███%
2006/07	███%	███%	███%
2007/08	███%	███%	███%
2008/09	███%	███%	███%
2009/10	███%	███%	███%
2010/11	███%	███%	███%
2011/12	███%	███%	███%
2012/13	███%	███%	███%
2013/14	███%	███%	███%
2014/15	███%	███%	███%
2015/16	███%	███%	███%
2016/17	███%	███%	███%
2017/18(P)	███%	███%	███%
2018(P)/19(P)	███%	███%	███%
2019(P)/20(P)	███%	███%	███%
2020(P)/21(P)	███%	███%	███%
2021(P)/22(P)	███%	███%	███%

(P) Projected

Source: Beverage Marketing Corporation

**U.S. SOFT DRINK MARKET
SHARE BY FLAVOR
2012 – 2022(P)**

Flavors	2012	2013	2014	2015	2016	2017	2022(P)
Cola*	58%	57%	56%	55%	54%	53%	52%
Heavy Citrus	12%	12%	12%	12%	12%	12%	12%
Pepper	3%	3%	3%	3%	3%	3%	3%
Lemon-Lime	10%	10%	10%	10%	10%	10%	10%
Orange/Flavor Lines	1%	1%	1%	1%	1%	1%	1%
Root Beer	1%	1%	1%	1%	1%	1%	1%
Other	15%	15%	15%	15%	15%	15%	15%
TOTAL	100%	100%	100%	100%	100%	100%	100%

(P) Projected

Note: Includes packaged and fountain, regular and diet soft drinks.

* Includes caffeine free, cherry, lemon and vanilla cola.

Source: Beverage Marketing Corporation

**CARBONATED SOFT DRINKS
GROWTH BY DISTRIBUTION CHANNEL
2013 – 2022(P)**

Distribution Channels	2012/13	2013/14	2014/15	2015/16	2016/17	CAGR 2017/22(P)
OFF-PREMISE						
Supermarkets	12%	12%	12%	12%	12%	12%
Mass Merchandisers	12%	12%	12%	12%	12%	12%
Convenience Stores	12%	12%	12%	12%	12%	12%
Drug Stores	3%	3%	3%	3%	3%	3%
All Other*	12%	12%	12%	12%	12%	12%
Subtotal	51%	51%	51%	51%	51%	51%
ON-PREMISE						
Foodservice	12%	12%	12%	12%	12%	12%
Vending	3%	3%	3%	3%	3%	3%
All Other**	12%	12%	12%	12%	12%	12%
Subtotal	27%	27%	27%	27%	27%	27%
TOTAL ALL CHANNELS	78%	78%	78%	78%	78%	78%

(P) Projected

CAGR: Compound annual growth rate

* Includes club stores, dollar stores, health-food stores, military and online retailers.

** Includes schools, airlines, stadiums, etc.

Source: Beverage Marketing Corporation