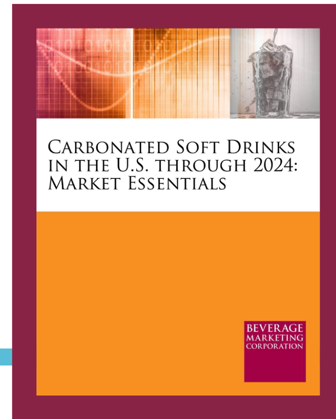
# Carbonated Soft Drinks in the U.S. through 2024: Market Essentials

2020 Edition (Published September 2020. Data through 2019. Market projections through 2024.) More than 120 Excel tables plus an executive summary detailing trends and comprehensive profiles of leading companies, their brands and their strategies.




This comprehensive market research report on the number two beverage category examines trends and top companies' strategies. It provides up-to-date statistics on 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.

The report presents the data in Excel spreadsheets, which it supplements with a concise executive summary highlighting key developments including the impact of the coronavirus pandemic as well as a detailed discussion of the leading carbonated soft drink (CSD) companies.

***New in 2020: Expanded coverage of the high-end segment of the CSD market.***

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## Inside:



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## The answers you need

*Carbonated Soft Drinks in the U.S. through 2024: Market Essentials* is the culmination of an extensive body of industry research conducted each year by Beverage Marketing Corporation. This 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 CSDs in the United States?
- How many gallons of CSDs did U.S. residents consume in 2019, 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 2019 and which did not?
- Which flavors and segments of the market will gain share by 2024?
- How did developments 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 2024?

## This report features

The report provides essential information on category volume, retail dollar and wholesale dollar sales, 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 and fountain volume as well as volume by distribution channel and flavor type, are covered in this industry report.

Advertising expenditures are broken down by 18 media types and demographic data are included, along with statistics regarding 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, Refresco and National Beverage Corporation. Data include 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.
- 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.

- Data on 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 2024 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 drink 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.

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BEVERAGE MARKETING CORPORATION

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September 2020

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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## Exhibits

In September 2020, Coca-Cola Company announced it would create nine new operating units and five global category teams to replace its old structure of groups and business units.

- Alfredo Rivera, who was only announced as president, Coca-Cola North America, in August 2020, replacing Jim Dinkins, is president of the North America operating unit, as it is now called.
- In August, Rivera had vacated his position of Latin America president in order to take the North America post. His successor, Henrique Braun, was named in September.
- Nikos Koumettis, who was the president of the Europe, Middle East and Africa (EMEA) Group, is now president of the Europe operating unit.
- Bruno Pietracci, president of the Africa & Middle East business unit (within EMEA), has become president of the Africa operating unit.
- Evguenia Stoichkova, president of EMEA's Turkey, Caucasus and Central Asia business unit, is now president of the Eurasia and Middle East operating unit.
- The Asia Pacific Group has been broken up into several operating units. Jorge Carduno, president of the Japan business unit, now holds that position in the Japan and South Korea operating unit. Vamsi Mohan Thati has transitioned from president of the South Pacific business unit to president of the Greater China operating unit. Claudia Lorenzo, current president of the ASEAN business unit, is now president of the ASEAN and South Pacific operating unit.
- Manuel Arroyo, who became president of the Asia Pacific Group at the beginning of 2019, can now concentrate on being chief marketing officer, a title he added at the beginning of 2020, replacing Francisco Crespo.
- Coca-Cola Company appointed executives to five global category teams. These categories are Coca-Cola; Sparkling Flavors; Hydration, Sports, Coffee and Tea; Nutrition, Juice, Dairy and Plant; and Emerging categories.
- It also created the Platform Services organization that would coordinate the operating units and five global category teams.

**Exhibit 2.16**

# U.S. SOFT DRINK MARKET
## PACKAGED AND FOUNTAIN SHARE
## 1975 – 2024(P)

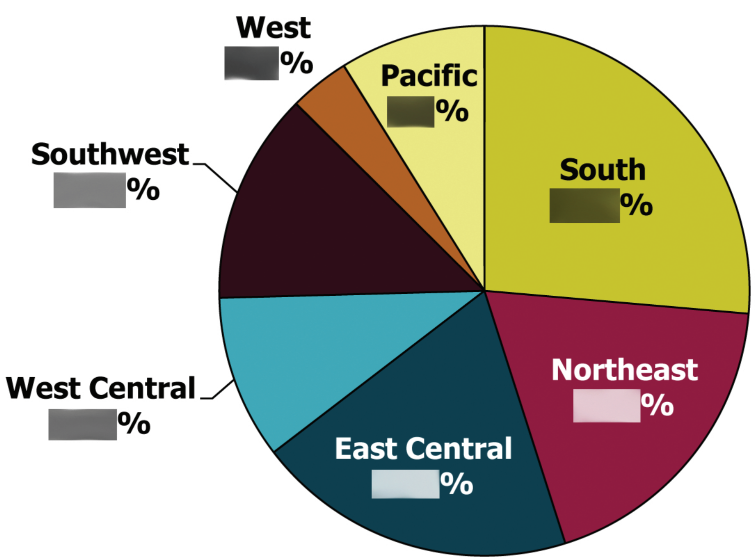
| Year | Packaged | Fountain | Total |
|---|---|---|---|
| 1975 | [redacted] % | [redacted] % | [redacted] % |
| 1980 | [redacted] % | [redacted] % | [redacted] % |
| 1981 | [redacted] % | [redacted] % | [redacted] % |
| 1982 | [redacted] % | [redacted] % | [redacted] % |
| 1983 | [redacted] % | [redacted] % | [redacted] % |
| 1984 | [redacted] % | [redacted] % | [redacted] % |
| 1985 | [redacted] % | [redacted] % | [redacted] % |
| 1986 | [redacted] % | [redacted] % | [redacted] % |
| 1987 | [redacted] % | [redacted] % | [redacted] % |
| 1988 | [redacted] % | [redacted] % | [redacted] % |
| 1989 | [redacted] % | [redacted] % | [redacted] % |
| 1990 | [redacted] % | [redacted] % | [redacted] % |
| 1991 | [redacted] % | [redacted] % | [redacted] % |
| 1992 | [redacted] % | [redacted] % | [redacted] % |
| 1993 | [redacted] % | [redacted] % | [redacted] % |
| 1994 | [redacted] % | [redacted] % | [redacted] % |
| 1995 | [redacted] % | [redacted] % | [redacted] % |
| 1996 | [redacted] % | [redacted] % | [redacted] % |
| 1997 | [redacted] % | [redacted] % | [redacted] % |
| 1998 | [redacted] % | [redacted] % | [redacted] % |
| 1999 | [redacted] % | [redacted] % | [redacted] % |
| 2000 | [redacted] % | [redacted] % | [redacted] % |
| 2001 | [redacted] % | [redacted] % | [redacted] % |
| 2002 | [redacted] % | [redacted] % | [redacted] % |
| 2003 | [redacted] % | [redacted] % | [redacted] % |
| 2004 | [redacted] % | [redacted] % | [redacted] % |
| 2005 | [redacted] % | [redacted] % | [redacted] % |
| 2006 | [redacted] % | [redacted] % | [redacted] % |
| 2007 | [redacted] % | [redacted] % | [redacted] % |
| 2008 | [redacted] % | [redacted] % | [redacted] % |
| 2009 | [redacted] % | [redacted] % | [redacted] % |
| 2010 | [redacted] % | [redacted] % | [redacted] % |
| 2011 | [redacted] % | [redacted] % | [redacted] % |
| 2012 | [redacted] % | [redacted] % | [redacted] % |
| 2013 | [redacted] % | [redacted] % | [redacted] % |
| 2014 | [redacted] % | [redacted] % | [redacted] % |
| 2015 | [redacted] % | [redacted] % | [redacted] % |
| 2016 | [redacted] % | [redacted] % | [redacted] % |
| 2017 | [redacted] % | [redacted] % | [redacted] % |
| 2018 | [redacted] % | [redacted] % | [redacted] % |
| 2019 | [redacted] % | [redacted] % | [redacted] % |
| 2024(P) | [redacted] % | [redacted] % | [redacted] % |

*(P) Projected*
*Source: Beverage Marketing Corporation*

## CSD Regional Trends

- The populous South region maintained its regional lead in CSD volume in 2019, accounting for [redacted]% of the total market. The East Central and Northeast came in second and third place, respectively, with volume shares of [redacted]% and [redacted]%.
- The only other regions with double-digit shares of CSD volume are the Southwest ([redacted]% share) and West Central ([redacted]%).
- In the Pacific, CSDs face competition from many other beverages. As a result, the region only accounts for [redacted]% of national volume. The West brings up the rear with [redacted]% of CSD volume.

**CSD Regional Shares
2019**




*Source: Beverage Marketing Corporation*