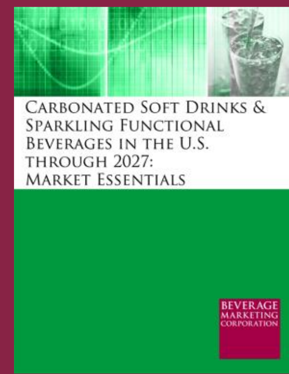
Carbonated Soft Drinks & Sparkling Functional Beverages in the U.S. through 2027: Market Essentials

2023 Edition (Published September 2023. Data through 2022. Market projections through 2027.) More than 120 Excel tables plus an executive summary detailing trends and comprehensive profiles of leading companies, their brands and their strategies.



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Beverage Marketing Corporation's comprehensive market research report on the number-two beverage category goes way beyond the headlines to examine trends and top companies' strategies in a segment that has been under extreme competitive pressure from all sides. From its fall from its traditional number one spot to its more recent achievements in key select metrics, this report examines all aspects of this huge and varied beverage segment. It offers reliable historical, current and projected data required to take advantage of opportunities for growth for those within, or those competing against, CSDs. This market study 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, the impact of the pandemic and more. ***New for 2023:*** discussion of sparkling functional beverages that have emerged in an attempt to revitalize the segment and add an innovative twist to the carbonated soft drink market.

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

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Inside:

Have Questions?

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The answers you need

Carbonated Soft Drinks and Sparkling Functional Beverages in the U.S. through 2027: 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 2022, 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 2022 and which did not?
- Which flavors and segments of the market will gain share by 2027?
- 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 sales channels?
- What are the prospects for a turnaround in CSDs by 2027?

This report features

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.

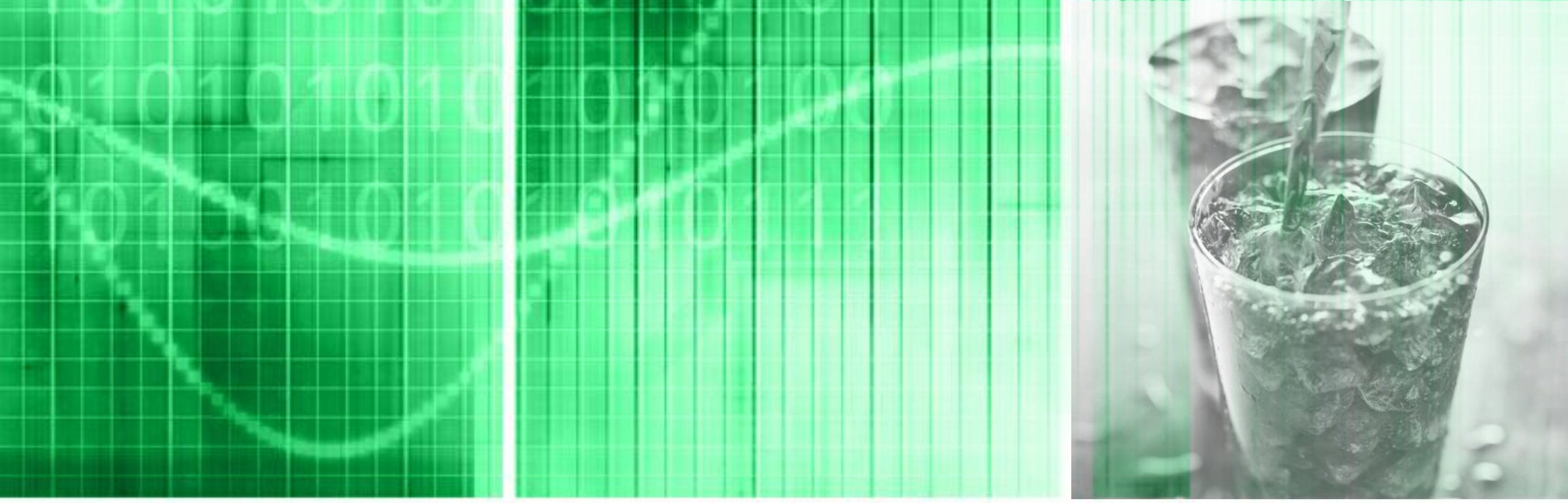
The bottom line: this is the most complete report on the carbonated soft drink market in the United States available anywhere. It offers relevant take-aways not only to those in the CSD space, but to anyone with an interest in non-alcohol drinks or the overall industry as it provides necessary insight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

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, Talking Rain, Jarritos, Zevia, Carolina Beverage, Nestle NA, Cascade, Big Red,etc.
- Data include volume and growth and market share statistics for key companies and their brands.
- High end brand coverage includes Sparkling Ice, San Pellegrino CSD, IZZE, Zevia, IBC, Spindrift, Reeds, Boylan's, Stewart's, Hansen's Natural Sodas (w/Blue Sky), Bai Bubbles, Fever Tree, Steas, Jones Soda, Caleb's/Stubborn/Lemon Lemon, Dr Enuf, Q Mixers, Ale 8 One, Orangina, Dry Soda, Thoas Kemper, Jeff's Egg Cream
- 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 2027 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.



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September 2023

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.

Table of Contents

Contents

TABLE OF CONTENTS

TABLE OF CONTENTS

Executive Summary

Leading Company Profiles

TABLE OF CONTENTS

Exhibits

TABLE OF CONTENTS

Exhibits

TABLE OF CONTENTS

Exhibits

TABLE OF CONTENTS

Exhibits

In 2020, after a brief pandemic-influenced hiatus from advertising, Coca-Cola, with the Anomaly agency, introduced the "Together Tastes Better" ad featuring people in their homes around the world cooking and eating together, savoring "the moments that were always there."

- In July of that year, it released a digital film with George the Poet riffing on covid-19 society under the "Open like never before" rubric. All told, in 2020, Coke reduced global ad spending by about 35%.
- In 2021, it ran a "Summer Tastes Better" campaign on TV and radio.
- It underwent a global agency review that took more than a year to conclude. In November 2021, the company chose WPP as global marketing network partner.
- A couple of months prior, Coke introduced a new brand platform for its flagship cola called "Real Magic," its first since 2016's "Taste the Feeling." It worked with advertising agency BETC London to create the "One Coke Away From Each Other" campaign. In 2022, it released a holiday ad as part of the "Real Magic" campaign.
- In April 2023, the company debuted a new ad called "A Recipe for Magic" with Gigi Hadid showing the model and her friends making homemade pasta and sitting down for a meal.
- In the summer, it launched Coke Studio, which would release original music and host music festivals like Lollapalooza and Coachella.

Under CEO James Quincey, Coca-Cola Company conducted a multi-year review of its global portfolio, reducing the number of brands from more than 500 to a reported 200 or so.

- The rationale for getting rid of "zombie brands" is to increase profitability by not having to plow resources into slow movers. In the U.S., legendary brand TaB was one of the casualties. Coca-Cola Life, a mid-calorie soda employing cane sugar and stevia leaf extract, was finally axed after several years of nugatory results.
- Hubert's, a lemonade brand acquired from Monster Beverage, was also discontinued although it would still be sold in some fountain accounts. Among other casualties have included TaB, Odwalla juices and Honest Tea.

In addition to flagship Coca-Cola and Caffeine-Free Coca-Cola, the company has a "Flavors" subline.

- These include mainstays Coca-Cola Cherry and Coca-Cola Vanilla.

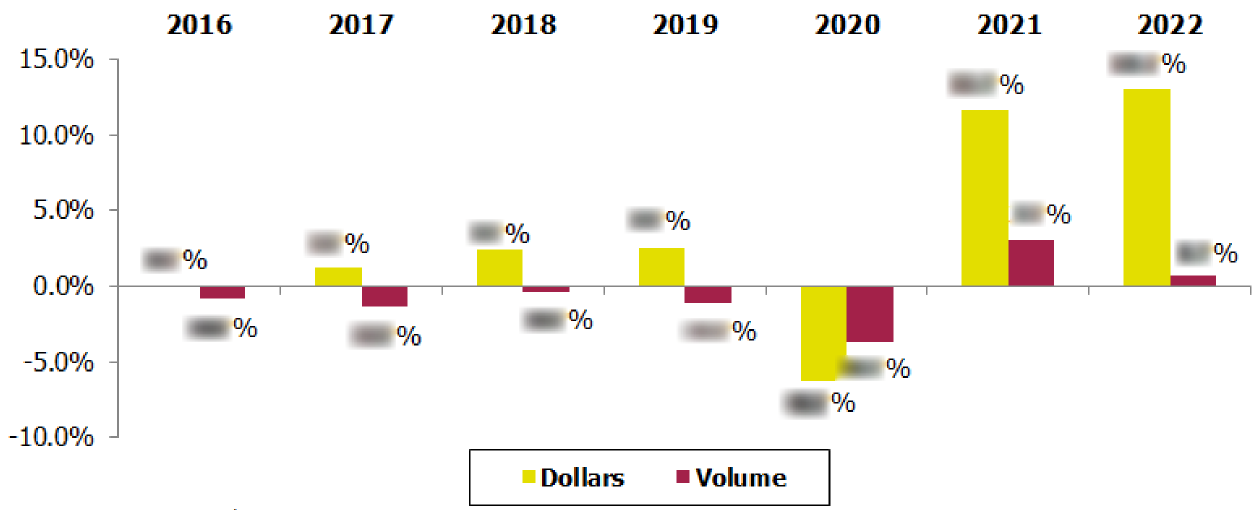
Exhibit 2.15

REGIONAL SOFT DRINK
PACKAGED SHARE
1985 – 2027(P)

Year	Northeast	South	E Central	W Central	Southwest	West	Pacific	TOTAL
1985	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
1986	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
1987	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
1988	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
1989	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
1990	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
1991	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
1992	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
1993	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
1994	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
1995	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
1996	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
1997	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
1998	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
1999	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2000	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2001	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2002	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2003	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2004	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2005	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2006	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2007	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2008	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2009	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2010	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2011	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2012	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2013	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2014	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2015	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2016	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2017	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2018	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2019	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2020	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2021	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2022	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
2027(P)	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%

(P) Projected
Source: Beverage Marketing Corporation

CSD Wholesale Dollar and Volume Growth
2016 – 2022



Source: Beverage Marketing Corporation