Where the Gains Are

Dollar sales of bottled water in convenience stores grew 3.1% in the 52 weeks ending Dec. 29, 2019, according to IRI. The increase was led by convenience/PET bottles, which grew in dollar sales but declined slightly in unit sales.

Dollar and units sales of sparkling and seltzer waters both grew, according to IRI and Nielsen data. Value-added—a segment that includes enhanced varieties—rose by more than 11% in dollars and more than 9% in units in the 52 weeks ending Dec. 28, 2019, according to Nielsen.

C-store sales, 52 weeks ending Dec. 29, 2019

WATER TYPE	C-STORE SALES ($ MILLIONS)	PCYA*	UNIT SALES (MILLIONS)	PCYA*
Convenience/PET**	$3,928.3	3.0%	2,232.4	(0.4%)
Seltzer/sparkling/mineral	$310.3	9.5%	193.8	5.1%
Jug/bulk	$286.7	(0.9%)	130.9	(4.5%)
Total category**	**$4,525.4**	**3.1%**	**2,557.1**	**(0.2%)**

Source: IRI

C-store sales, 52 weeks ending Dec. 28, 2019

Plain	$2,212.6	(3.4%)	1,290.2	(6.6%)
Value-added	$1,481.2	11.5%	755.1	9.1%
Sparkling	$226.1	11.2%	147.6	8.5%
Tonic	$2.7	(8.2%)	1.3	(11.7%)

Source: The Nielsen Co.

Latest Quarter: Bottled Water UPCs (Plain and Enhanced)

C-store sales, 13 weeks ending Dec. 29, 2019

Seven of the top 10 bottled water UPCs in c-stores gained dollar and unit sales in the fourth quarter of 2019. The biggest unit increases included the 33.8-ounce Dasani and Fiji and 30.4-ounce Core Hydration Natural, according to IRI.

UPC	C-STORE SALES ($ MILLIONS)	PCYA*	UNIT SALES (MILLIONS)	PCYA*
Glaceau smartwater (33.8-oz.)	$45.6	(2.5%)	20.3	(0.6%)
Aquafina (33.8-oz.)	$36.9	1.4%	22.3	0.3%
Dasani (20-oz.)	$34.4	3.2%	26.4	0.9%
Glaceau smartwater (23.7-oz.)	$32.4	0.4%	16.4	(3.1%)
Dasani (33.8-oz.)	$30.3	6.4%	17.4	6.3%
Aquafina (20-oz.)	$29.4	(4.7%)	23.2	(8.1%)
Fiji (33.8-oz.)	$21.1	11.0%	7.5	9.0%
Core Hydration Natural (30.4-oz.)	$19.7	10.4%	8.8	7.7%
Glaceau smartwater (20-oz.)	$15.1	8.5%	8.3	8.2%
Poland Spring (33.8-oz.)	$14.5	2.6%	9.3	0.4%
Total †	**$960.1**	**5.6%**	**540.6**	**2.1%**

Source: IRI

Sparkling and Mineral Waters

C-store sales, 52 weeks ending Dec. 29, 2019

In c-stores, sparkling water jumped more than 9% in dollar sales and more than 5% in unit sales in 2019, according to IRI. Perrier, which supplied more than 30% of the category's dollar sales, saw a 6% increase. Bubly and Topo Chico both experienced double-digit gains.

BRAND	C-STORE SALES ($ MILLIONS)	PCYA*	UNIT SALES (MILLIONS)	PCYA*
Perrier	$93.6	6.0%	56.4	2.6%
Topo Chico	$51.8	33.1%	29.0	28.0%
Sparkling Ice	$26.0	7.2%	17.2	3.4%
Bubly	$25.2	55.3%	18.4	47.8%
Schweppes	$15.0	(11.3%)	9.3	(16.5%)
Total †	**$310.3**	**9.5%**	**193.8**	**5.1%**

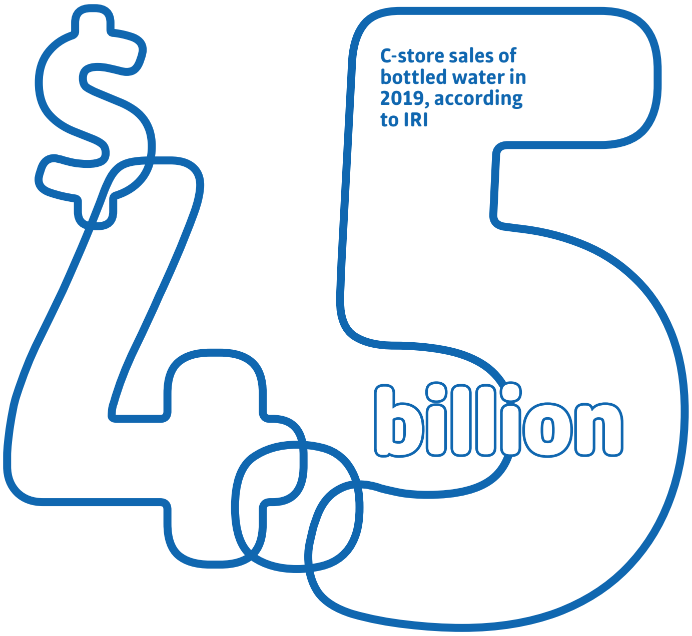
Source: IRI

Distributor Data: Bottled Water

McLane Co., which is a primary distributor of Nestle Waters North America's bottled water brands, increased shipments of Zephyrhills 1-liter bottles, as well as 1-liter Fiji.

ITEM	PCYA*
1. Poland Spring (1-liter)	(4.6%)
2. Zephyrhills (1-liter)	2.8%
3. Deer Park (1-liter)	(4.9%)
4. Fiji (1-liter)	1,202.1%
5. Ozarka (1-liter)	(1.1%)

Source: McLane Co.



* Percent change from a year ago | ** Includes sweetened/enhanced varieties | † Including UPCs/brands/families not shown

Where the Gains Are

The trend of declining sales of carbonated soft drinks (CSDs) in c-stores accelerated in 2019. Unit sales fell 4.5% in 2019, compared with a 2.3% decrease in unit sales in 2018, according to IRI.

Nielsen figures show a nearly 6% decline in unit sales for the 52 weeks ending Dec. 28, 2019. The negative four-year compound annual dollar growth rate for the category reflected CSDs' struggle against competing with better-for-you drinks such as bottled and sparkling waters.

Carbonated Soft Drinks

C-store sales, 52 weeks ending Dec. 29, 2019

DOLLAR SALES ($ MILLIONS)	PCYA*	UNIT SALES (MILLIONS)	PCYA*
$8,656.7	0.8%	4,586.6	(4.5%)

Source: IRI

C-store sales, 52 weeks ending Dec. 28, 2019

DOLLAR SALES ($ MILLIONS)	PCYA*	UNIT SALES (MILLIONS)	PCYA*	4-YEAR CAGR**
$7,549.0	(0.3%)	4,125.3	(5.9%)	(1.9%)

Source: The Nielsen Co.

CSD Sales Changes

The decline in unit sales for CSDs ramped up in 2019 even as the erosion in dollar sales dropped to a multiyear low, according to Nielsen figures.

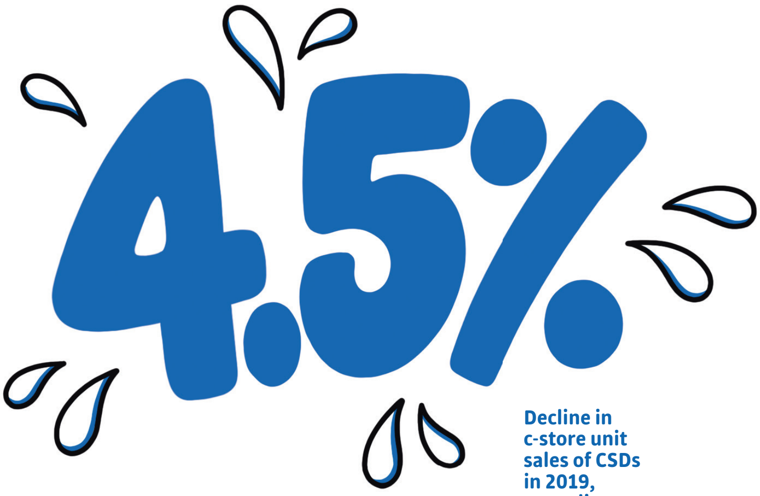
C-store dollar sales change

YEAR-END 2016	YEAR-END 2017	YEAR-END 2018	YEAR-END 2019
(2.0%)	(2.8%)	(2.5%)	(0.3%)

C-store unit sales change

YEAR-END 2016	YEAR-END 2017	YEAR-END 2018	YEAR-END 2019
(1.9%)	(5.4%)	(4.9%)	(5.9%)

Source: The Nielsen Co.



Decline in c-store unit sales of CSDs in 2019, according to IRI

Latest Quarter: CSD UPCs

C-store sales, 13 weeks ending Dec. 29, 2019

The 20-ounce plastic bottles of Coca-Cola were the top-selling brand of CSDs in c-stores for the 13 weeks ending Dec. 29, 2019, according to IRI. Overall, the CSD category in c-stores fell 4.3% in unit sales in that time, IRI data shows.

UPC	C-STORE SALES ($ MILLIONS)	PCYA*	UNIT SALES (MILLIONS)	PCYA*
Coca-Cola (20-oz.)	$167.7	1.0%	92.1	(1.0%)
Mountain Dew (20-oz.)	$155.4	(7.1%)	87.9	(10.0%)
Dr Pepper (20-oz.)	$105.2	(1.0%)	58.5	(4.0%)
Pepsi (20-oz.)	$78.1	(6.1%)	43.7	(9.6%)
Sprite (20-oz.)	$67.9	3.3%	37.0	1.0%
Diet Coke (20-oz.)	$67.5	(0.5%)	37.2	(2.5%)
Diet Mountain Dew (20-oz.)	$54.6	(4.8%)	31.1	(7.8%)
Coca-Cola (12 12-oz. cans)	$41.7	0.3%	7.2	(2.6%)
Mountain Dew (1-liter)	$39.0	(3.8%)	18.3	(6.8%)
Diet Dr Pepper (20-oz.)	$37.6	0.7%	21.1	(2.4%)
Coca-Cola (2-liter)	$37.0	(3.2%)	18.5	(5.7%)
Diet Pepsi (20-oz.)	$36.8	0.3%	20.7	(3.0%)
Coca-Cola Zero (20-oz.)	$36.5	5.1%	20.1	3.5%
Coca-Cola (16-oz. can)	$35.7	(2.3%)	27.0	(7.8%)
Cherry Coca-Cola (20-oz.)	$24.7	(0.7%)	13.6	(2.6%)
Canada Dry Ginger Ale (20-oz.)	$23.3	6.3%	13.6	3.0%
Pepsi (33.9-oz.)	$22.2	0.5%	10.4	(2.9%)
Mountain Dew Code Red Cherry (20-oz.)	$21.4	0.6%	12.1	(2.8%)
Dr Pepper (33.8-oz.)	$21.2	(0.1%)	9.7	(3.4%)
Coca-Cola (1-liter)	$21.1	(4.1%)	9.3	(7.8%)
Total †	**$2,104.7**	**(0.4%)**	**1,108.4**	**(4.3%)**

Source: IRI

Channel Comparison: CSDs

C-store sales, 52 weeks ending Dec. 29, 2019

All channels saw increases in dollar sales of CSDs in 2019—and drops in unit sales, according to IRI. The unit sale decline was steepest for c-stores.

CHANNEL	DOLLAR SALES ($ MILLIONS)	PCYA*	UNIT SALES (MILLIONS)	PCYA*
Multioutlet***	$20,018.9	3.7%	7,748.7	(1.5%)
Food	$11,045.5	3.3%	4,366.3	(1.7%)
C-store	**$8,656.7**	**0.8%**	**4,586.6**	**(4.5%)**
Drug	$853.3	3.1%	363.8	(3.5%)

Source: IRI

* Percent change from a year ago | ** Compound annual dollar growth rate | *** Includes grocery, drug, mass market, military commissaries and select club and dollar retail chains | † Including UPCs not shown

Where the Gains Are

C-store sales, 52 weeks ending Dec. 29, 2019

Energy drink sales in c-stores rose more than 10% in 2019, with unit sales up more than 7%, according to IRI data. Unit growth for sports drinks was flat, after nearly 3% growth in 2018. Cappuccino/iced coffees and refrigerated teas both grew in dollars and units, while canned and bottled tea continued to struggle.

DRINK TYPE	C-STORE SALES ($ MILLIONS)	PCYA*	UNIT SALES (MILLIONS)	PCYA*
Energy drinks**	$9,271.0	10.8%	3,544.0	7.6%
Sports drinks	$3,143.0	7.4%	1,632.4	0.4%
Canned and bottled tea	$1,676.8	(4.5%)	1,091.0	(7.1%)
Cappuccino/iced coffee	$1,762.0	5.3%	593.3	1.8%
Refrigerated teas	$216.9	6.0%	113.4	1.8%
Refrigerated ready-to-drink coffee	$12.8	(16.6%)	3.8	(19.0%)

Energy Drink Brands

C-store sales, 52 weeks ending Dec. 29, 2019

Energy drink brands such as VPX Bang and Red Bull The Summer Edition saw dollar and unit sales growth in 2019.

BRAND	C-STORE SALES ($ MILLIONS)	PCYA*	UNIT SALES (MILLIONS)	PCYA*
Red Bull	$2,129.0	(3.3%)	679.8	(3.2%)
Monster Energy	$1,187.1	(0.9%)	484.1	(6.7%)
VPX Bang	$843.6	250.8%	330.6	239.9%
Red Bull Sugar Free	$550.8	(0.5%)	180.0	0.0%
Monster Energy Zero Ultra	$450.3	(2.3%)	172.5	(8.1%)
Nos	$364.4	(0.6%)	147.2	(8.0%)
Reign	$217.1	N/A	93.0	N/A
Monster Mega Energy	$207.9	2.5%	59.0	(2.4%)
Red Bull The Summer Edition	$189.7	84.9%	65.4	87.1%
Monster Energy Lo Carb	$176.5	(10.0%)	68.0	(15.0%)
Total †	**$9,271.0**	**10.8%**	**3,544.0**	**7.6%**

Latest Quarter: Energy Drink UPCs

C-store sales, 13 weeks ending Dec. 29, 2019

The top energy drink UPC in c-stores in the final quarter of 2019 was the 16-ounce Monster, according to IRI.

UPC	C-STORE SALES ($ MILLIONS)	PCYA*	UNIT SALES (MILLIONS)	PCYA*
Monster Energy (16-oz.)	$229.7	(4.4%)	95.4	(7.1%)
Red Bull (12-oz.)	$215.8	0.6%	72.2	(0.3%)
Red Bull (8.3-oz.)	$126.7	(3.6%)	53.6	(4.2%)
Red Bull (16-oz.)	$91.6	(9.3%)	22.7	(11.3%)
Monster Energy Zero Ultra (16-oz.)	$81.7	(4.6%)	34.4	(7.1%)
Total †	**$2,427.4**	**7.1%**	**918.6**	**5.5%**

Sports Drink Brands

C-store sales, 52 weeks ending Dec. 29, 2019

The BodyArmor brand posted triple-digit dollar and unit growth in c-stores in 2019, according to IRI.

BRAND	C-STORE SALES ($ MILLIONS)	PCYA*	UNIT SALES (MILLIONS)	PCYA*
Gatorade Perform	$584.4	(0.8%)	302.1	(5.3%)
Gatorade	$507.9	(1.3%)	261.2	(7.0%)
Gatorade Frost	$433.1	(13.3%)	220.1	(18.3%)
BodyArmor Superdrink	$337.1	113.0%	141.5	100.5%
Powerade Ion4	$320.0	(4.7%)	203.4	(8.2%)
Total †	**$3,143.0**	**7.4%**	**1,632.4**	**0.4%**

Latest Quarter: Sports Drink UPCs

C-store sales, 13 weeks ending Dec. 29, 2019

Four of the top five sports drink UPCs saw unit growth in fourth-quarter 2019.

UPC	C-STORE SALES ($ MILLIONS)	PCYA*	UNIT SALES (MILLIONS)	PCYA*
Gatorade Perform Thirst Quencher (Cool Blue, 28-oz.)	$29.7	7.2%	14.0	3.2%
Gatorade Thirst Quencher (Lemon Lime, 28-oz.)	$28.9	9.9%	13.8	6.2%
Gatorade Thirst Quencher (Fruit Punch, 28-oz.)	$28.3	6.9%	13.6	3.2%
Gatorade Frost Thirst Quencher (Glacier Freeze, 28-oz.)	$26.2	(11.4%)	12.2	(14.7%)
Gatorade Thirst Quencher (Orange, 28-oz.)	$23.6	9.9%	11.3	6.0%
Total †	**$631.3**	**13.1%**	**317.4**	**7.6%**

Ready-to-Drink Tea and Coffee

C-store sales, 52 weeks ending Dec. 29, 2019

Unit sales of canned and bottled tea were down more than 7% in 2019, per IRI.

Canned and Bottled Tea Brands

BRAND	C-STORE SALES ($ MILLIONS)	PCYA*	UNIT SALES (MILLIONS)	PCYA*
Lipton Pure Leaf	$347.1	3.8%	186.5	1.7%
Lipton Brisk	$224.3	(5.7%)	186.9	(9.3%)
AriZona	$206.7	(3.4%)	192.1	(6.4%)
Gold Peak	$196.8	2.2%	108.2	0.4%
Monster Rehab	$193.7	(17.1%)	82.7	(21.2%)
Total †	**$1,676.8**	**(4.5%)**	**1,091.0**	**(7.1%)**

Cappuccino/Iced Coffee Brands

Starbucks Frappuccino and Java Monster grew by dollar and unit sales.

Starbucks Frappuccino	$628.4	7.8%	202.9	5.1%
Starbucks Doubleshot	$400.2	(10.2%)	136.8	(11.9%)
Java Monster	$363.6	8.0%	127.1	3.2%
Coca-Cola Dunkin' Donuts	$86.8	(4.0%)	30.9	(5.1%)
Starbucks Tripleshot	$70.2	N/A	22.8	N/A
Total †	**$1,762.0**	**5.3%**	**593.3**	**1.8%**

Source for all charts on this page: IRI | * Percent change from a year ago | ** Does not include energy shots. See p. 113 for brand ranking | † Including UPCs/brands/families not shown