



**SCHOOL BEVERAGE GUIDELINES
PROGRESS REPORT
2007-2008**

SEPTEMBER 10, 2008



2007-2008 School Beverage Guidelines Progress Report

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School Beverage Guidelines Progress Report 2007-2008

Executive Summary

This School Beverage Guidelines Progress Report marks the second annual assessment of the impact and status of the School Beverage Guidelines. In May 2006, leading members of the beverage industry and the Alliance for a Healthier Generation announced a landmark voluntary policy that accelerates the shift to lower-calorie and smaller-portion beverages.¹ These School Beverage Guidelines are embodied in a memorandum of understanding (MOU) between the Alliance (a joint initiative of the American Heart Association and the William J. Clinton Foundation), the American Beverage Association (ABA) and three beverage producers: Cadbury Schweppes Americas Beverages (now Dr Pepper Snapple Group), The Coca-Cola Company and PepsiCo, Inc.

This Progress Report builds on the very extensive 2006-2007 Progress Report, available on ABA's website.²

As with the 2006-07 Report, it measures:

- The volumes of different products sold in schools at the elementary, middle and high school levels; and
- The percent of all school contracts complying with the MOU guidelines, broken down for the different categories of schools.

This Report was prepared by ABA in conjunction with Keybridge Research LLC, an independent policy research firm that performed the data analysis.³ The report has been reviewed by representatives of the Alliance. ABA members, including the three MOU signatories and their principal bottlers, collected and submitted the data presented in the report and also reviewed the report's findings and conclusions.

As with the 2006-07 Report, this current Report demonstrates that the beverage producers and their bottlers continue to make strong progress toward full implementation of the guidelines:

¹ A copy of the Guidelines is attached as Appendix A.

² Available at <http://www.ameribev.org/industry-issues/school-beverage-guidelines/download.aspx?id=157>

³ More on Keybridge Research LLC and the project team is available in Appendix B.

- ***School contract compliance has surpassed the benchmark goal:*** The MOU set forth a year-two goal of having 75 percent of schools under contract in compliance with the guidelines by the start of the 2008-09 school year. The industry has surpassed this benchmark, with **79 percent of schools under contract in compliance with the guidelines**. This percentage more than doubles the percentage of compliant contracts achieved one year ago (35%).
- ***Calories are coming out of the schools:*** The major swing toward lower-calorie beverages and the sharp drop in shipments of beverages such as full-calorie carbonated soft drinks (CSDs) resulted in a 58 percent decrease in total beverage calories shipped to schools between 2004 and the 2007-08 school year.
- ***The school beverage landscape has changed:*** There has been a shift in schools toward lower-calorie and higher nutrient beverages, including waters, 100% juices, and portion-controlled sports drinks, as envisioned under the guidelines. In addition, shipments of full-calorie CSDs to schools were 65 percent lower during the 2007-08 school year than they were in 2004, before the MOU went into effect.⁴

In light of the MOU’s three year implementation timeline, the gains made during the first two years are particularly noteworthy given the challenges associated with educating and training bottlers and schools alike, revising financial arrangements between bottlers and schools, and reconfiguring product lines and equipment.⁵ These results demonstrate that the beverage companies and their bottlers are committed to bringing this policy to full fruition and promoting a healthy school environment.

* * * * *

⁴ In 2005, Dr. Robert Wescott, an independent economist with Keybridge Research LLC, conducted a study for ABA of beverage shipments to schools in 2004. This study, which is cited in the MOU as an example of the type of product analysis necessary to determine the impact of the guidelines, is used as the basis for comparison of the school product mix and shipments levels in 2004, 2006-07, and 2007-08.

⁵ For a full discussion of the challenges associated with implementation of the guidelines, please review the 2006-2007 Progress report, available on ABA’s website.



School Beverage Guidelines Progress Report **2007-2008**

In accordance with the MOU, this second Annual Progress Report analyzes the impact and status of the School Beverage Guidelines after the second year of implementation. As set forth below, the data demonstrates that the bottlers have made significant changes to the beverages available in America's schools.

With 125,000 schools and 53 million students in the United States, implementation of the guidelines has been – and will continue to be – a challenging undertaking. As detailed in the 2006-07 Progress Report, the changes in product mix set forth in the MOU are far-reaching, extending not just to removal from all schools of certain beverages including full-calorie carbonated soft drinks, many juice drinks and teas, but to myriad adjustments in the caloric contents and package sizes of various products. In order for these changes in the product mix to be implemented in schools, the bottlers and the schools have had to amend the existing financial and legal relationships (*i.e.*, contracts), which is often not an easy task. These relationships are complex, and cannot be changed overnight or without the agreement of both parties—the bottler and the school.⁶

Because of the complexity of the task, the MOU recognizes that implementation of the guidelines would be a phased process over three years, with a goal of full implementation by the beginning of the 2009-10 school year.

From the start, meeting the letter and spirit of the School Beverage Guidelines has been a top priority for the beverage companies and their bottlers. Reflecting this commitment, the beverage industry has invested thousands of hours and millions of dollars in MOU implementation. The results, set forth below, are a reflection of this full-bodied commitment.

I. *Impact of the School Beverage Guidelines—Changes in the Volume of Beverages and the Product Mix Sold in Schools*

In order to measure the impact of the School Beverage Guidelines, the MOU requires that the Annual Progress Report measure the volumes of different beverages sold in elementary, middle

⁶ While the bottlers can use (and are using) their best efforts to renegotiate contracts, schools ultimately have the right to insist the original contract be honored in full if the parties cannot come to an agreement.

and high schools. This information is important to evaluate whether the school beverage mix is changing in the direction that the parties to the School Beverage Guidelines envisioned.

ABA commissioned Keybridge Research LLC, an independent Washington, DC-based economic analysis and public policy research company, to collect and analyze data on school beverage shipments and contracts.⁷

Keybridge quantified “school channel” sales of beverages to all schools, public and private, broken down into three school categories—high schools, middle schools, and elementary schools. Shipments included sales made through vending machines, fountains, lunch lines, school stores, or any other outlets at schools that were accessible by students during the normal or extended school day, and were all converted to total ounces of consumable beverage. The product universe encompassed full-calorie and diet carbonated soft drinks, juices, waters, sports drinks, teas, and milks, broken down with sufficient detail to measure compliance with the MOU product categories. Using the results of the 2005 study (based upon 2004 data) to represent the “pre-MOU” shipments, Keybridge compared school volumes and product mixes in 2004, in the 2006-07 school year, and in the 2007-08 school year.⁸

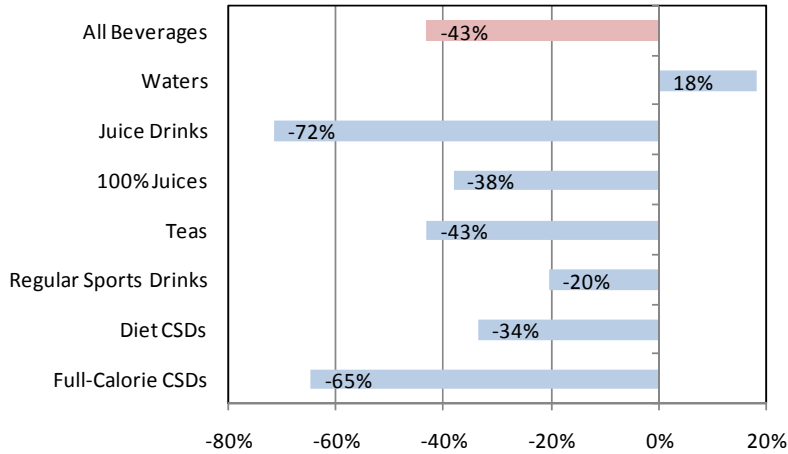
The methodology employed by Keybridge is described in Appendix C and tables detailing the results are presented in Appendix D. Keybridge collected shipment information from 13 bottling companies representing almost 90 percent of industry sales. This shipments data was scaled up to account for 100 percent of bottler shipments to schools. As explained further in Appendix C, it was refined to exclude shipments to three locations within schools that are not deemed to be student accessible during the regular or extended school day—faculty lounges, sports complexes, and fundraisers—thus allowed under the MOU.

The data show dramatic declines in the shipments of full-calorie CSDs to schools between 2004 (pre-MOU) and the 2007-08 school year, as envisioned by the MOU. Chart 1 and Tables D-5 to D-8 (Appendix D) indicate sharp changes in both the absolute volume of beverage shipments between 2004 and 2007-08, and also in the product mix.

⁷ See Appendix B for a description of the Keybridge Research project team.

⁸ The 2005 study was based on data for the 2004 calendar year. While it would be desirable to compare shipments for the full 2004-05 and 2005-06 school years, comprehensive data to make this comparison was not available.

**Chart 1: Total Volume of Beverage Shipments
All Schools, Percent Change, 2004 to 2007-08**



Bottler shipments to all schools fell by a sharp 43 percent. High school volumes were down by 42 percent, while middle and elementary school volumes declined by 51 and 37 percent respectively. The volume of full-calorie CSD shipments to all schools was down almost two-thirds (65 percent) from pre-MOU levels. Shipments of juice drinks, most of which are also to be phased out over the implementation period, are down 72 percent. Shipments of teas, 100 percent juices, and diet CSDs are also down 30 to 45 percent. The volume of regular sports drinks has decreased by 20 percent.

Full-calorie CSDs and full-calorie juice drinks are scheduled to be phased out of all schools by the 2009-10 school year. Shipments of these products have declined sharply in elementary, middle and high schools. Sports drinks, however, are being phased out of middle and elementary schools, but consistent with the guidelines will remain available in high schools (capped at a 12 ounce package size). The data show that sports drink shipments to middle and elementary schools have decreased by 37 and 43 percent, while shipments to high schools have declined by 13 percent.

The data indicate that a shift in the beverage landscape has occurred. Shipments of beverages not permitted under the guidelines are falling rapidly. In contrast, the only beverage category showing growth is waters. Table 1 shows the product mix in high schools by volume in 2004 (pre-MOU), 2006-07, and 2007-08.

Table 1: Percent of Product Mix in High Schools*

Beverage Type	2004	2006-07	2007-08
Full-calorie CSD	46.9%	32.1%	26.5%
Diet CSD	7.3%	7.2%	8.1%
Waters	11.5%	21.5%	26.2%
Regular Sports Drinks	12.8%	21.1%	20.3%
Juice Drinks	14.3%	9.9%	8.7%
100% Juice	2.6%	2.8%	2.6%
Teas	4.2%	4.7%	4.8%
All Other Non-CSD**	0.3%	0.8%	2.8%
Total***	99.9%	100.1%	100.0%

**Comparisons include data from 13 bottlers representing nearly 90 percent of the market and estimates of shipments from the remaining bottlers by scaling up estimates from the same bottling systems as the missing bottlers.*

***Regular sports drinks exclude diet sports drinks with 10 calories or less per 8 oz in the 2006-07 and 2007-08 data. In these years, diet sports drinks are included in the "all other non-CSDs" category and represent more than half of the volume in that category.*

****Percentages may not sum to 100% due to rounding.*

The trend is clear. The share of full-calorie soft drinks in the overall product mix in high schools has declined substantially, falling more than 20 percentage points from 46.9 percent of all shipments in 2004 to 26.5 percent in the 2007-08 school year, while shipments of waters, and to a lesser extent regular sports drinks, have increased. Middle and elementary schools experienced similar shifts in product mix as high schools (see Table D10 in Appendix D).

Another way of analyzing the data is to report shipment levels for different beverages per student per week and then determine the calorie content of the ounces shipped on a per student basis. Total student-accessible beverage shipments in the 2007-08 school year were 14.9 ounces per week (36 school weeks per year) for high school students, 4.5 ounces per week for middle school students, and 0.9 ounce per week for elementary school students (see Tables D1-D4 in Appendix D).

At the high school level in the 2007-08 school year, shipments of full-calorie CSDs amounted to just 4.0 ounces per student per week. Shipments of waters were 3.8 ounces per student per week—2.7 ounces of that being bottled water (no flavors, no fortification, and no sweeteners), 0.8 ounce being flavored or fortified waters with no more than 10 calories per 8 ounces, and 0.3 ounce being waters with more than 10 calories per 8 ounces. Regular sports drinks amounted to 3.0 ounces per student per week and diet carbonated soft drinks totaled 1.2 ounces per student per week.

The shift in consumption is highlighted by the fact that in 2004 the average high school student purchased 12.5 ounces of full-calorie CSDs per week in school, or about one can of soda per school week. By the 2007-08 school year, just two years after the MOU went into effect, these purchases had declined by two-thirds to just one-third of a can per student per week.

The combination of the 43 percent decline in total shipments of beverages to schools from 2004 to 2007-08 and the major swing of the product mix away from full-calorie beverages to lower calorie alternatives has resulted in a major decrease in total beverage calories shipped to schools. The total calories from all beverages delivered to schools by the 13 largest bottlers (representing nearly 90 percent of total shipments to schools) declined by 58 percent from 2004 to the 2007-08 school year. For perspective, for the average high school student, calories from all beverages shipped to schools now represent about one half of one percent of the annual dietary reference calorie intake for high school students, assuming a sedentary lifestyle.⁹ The percentages are even lower for middle school and elementary school students.

II. Status of the School Beverage Guidelines—Contract Compliance

The Progress Report on implementation of the guidelines must also provide information on the total number of school beverage contracts that are compliant with the MOU. Reporting is to include new contracts executed after the signing of the MOU, and contracts executed before the signing of the MOU that have been amended to comply with the guidelines.¹⁰

To prepare this portion of the report, ABA surveyed 12 bottlers representing nearly 90 percent of industry sales. This is the same number of bottlers that were surveyed for the 2006-07 Report.

With the 2008-09 school year beginning in late August or early September in most parts of the country, negotiations between bottlers and school administrators continued throughout the summer. ABA and the bottlers made every effort to capture all such contracts entered into as of August 15, although several new contracts complying with the guidelines are not reflected in this Progress Report. It should be noted that in measuring contract compliance, the package size limitations set forth in the guidelines have been taken into account. Thus, to the extent that a school account contains the proper package sizes (*e.g.*, 12 ounce sports drinks for high schools), it is considered compliant. If the school contract permits 20 ounce sports drinks, it is not considered compliant. Similar package size limitations apply to juices and certain other beverages.

⁹ The average high school student purchased beverages containing 3,817 calories during the 2007-08 school year. The dietary reference intakes published by the Institutes of Medicine and the U.S. Department of Agriculture cite calorie requirements of 1,800 per day for the average sedentary girl aged 14-18 and 2,200 calories per day for the average sedentary boy aged 14-18. See Dietary Guidelines for Americans, 2005, page 12, <http://www.kidsnutrition.org/consumer/archives/percentDVA.htm>.

¹⁰ Most contracts do not specify the product mix that the bottler must provide to the school and therefore allow the bottler to implement the guidelines without changing the contract. In these instances, the bottler and school may enter into an understanding that only beverages complying with the guidelines will be supplied (and may in fact adjust their financial arrangements to reflect this change in product mix) but the parties may not formally amend the written contract. For purposes of this Progress Report, instances where the contract has been amended in practice (by converting the product mix to conform to the guidelines) are treated as “complying” contracts. Formal, written amendments of existing contracts have been relatively infrequent, and have been limited to contracts that are unusually large in scope and contain complex financial terms.

Table 2 shows that the overall level of compliance for school contracts (including both new and existing contracts) is 79 percent¹¹:

Table 2: Total School Contracts in Effect for the 2008-09 School Year			
Type of School/Entity	Total Number of Contracts	Total Number of Compliant Contracts	Percent in Compliance
School Districts	1,981	1,490	75%
Elementary Schools	2,980	2,728	92%
Middle Schools	2,847	2,347	82%
High Schools	10,557	7,891	75%
Middle/High Schools	351	278	79%
Total	18,716	14,734	79%

This table demonstrates that the bottlers have not only achieved, but exceeded the 75 percent benchmark for the start of the 2008-09 school year, as set forth in the MOU. This positions the bottlers strongly to work toward full compliance with contracts at the start of the 2009-10 school year. Notably, this percentage is more than double the percentage of total compliant school contracts achieved in the 2006-07 School Beverage Guidelines Progress Report (35 percent).

The MOU does not address non-contract school sales for the year two goal of 75 percent. However, the year three benchmark is 100 percent compliance for all schools served by the bottlers, not just those under contract. Although not required, ABA collected compliance data for this sales category to the extent it was available. A majority of the bottlers were able to provide information on MOU compliance for non-contract school sales. As shown in Table 3, the high level of compliance for schools without contracts is consistent with the substantial drop in sales of full-calorie CSDs and other beverages not permitted under the guidelines reported in Part I above. It also bodes well for the final year of implementation.

Table 3: Schools without Contracts in Effect for the 2008-09 School Year			
Type of School/Entity	Total Number of Schools/Districts Served without Contracts	Total Number that are in Compliance	Percent in Compliance
School Districts	516	386	75%
Elementary Schools	17,006	16,149	95%
Middle Schools	5,352	4,187	78%
High Schools	3,811	2,713	71%
Middle/High Schools	221	185	84%
Total	26,906	23,620	88%

¹¹ Some bottlers reported the number of contracts and some reported the number of schools under contract. The totals in this table reflect the sum of both without any adjustment to reflect the difference. Nevertheless, even when aggregated separately, more than 75 percent of schools that were reported individually are compliant and more than 75 percent of contracts that represent multiple schools are compliant.

Conclusion

This second year report demonstrates without a doubt that the beverage industry is strongly committed to full implementation of the School Beverage Guidelines and is well-positioned for the final year of implementation. Shipments of full-calorie CSDs and other beverages not compliant with the guidelines continue to drop sharply. The product mix continues to shift toward options permitted by the guidelines. Of greater significance, 79 percent of schools under contract are in compliance with the guidelines. This success is due to the massive nationwide effort by the beverage industry, in concert with their school partners, to overhaul school beverage choices. The beverage industry remains committed to the goal of full implementation of the Guidelines by the 2009-10 school year.

Appendix A: School Beverage Guidelines

Elementary School

- Bottled Water
- Up to 8 ounce servings of milk and 100% juice
 - Fat-free or low fat regular and flavored milk and nutritionally equivalent (per USDA) milk alternatives with up to 150 calories / 8 ounces
 - 100% juice with no added sweeteners, up to 120 calories / 8 ounces, and with at least 10 percent of the recommended daily value for three or more vitamins and minerals

Middle School

- Same as elementary school, except juice and milk may be sold in 10 ounce servings
- As a practical matter, if middle school and high school students have shared access to areas on a common campus or in common buildings, then the school community has the option to adopt the high school standard

High School

- Bottled water
- No- or low-calorie beverages with up to 10 calories / 8 ounces
- Up to 12 ounce servings of milk, 100% juice, and certain other drinks
 - Fat-free or low fat regular and flavored milk and nutritionally equivalent (per USDA) milk alternatives with up to 150 calories / 8 ounces
 - 100% juice with no added sweeteners, up to 120 calories / 8 ounces, and with at least 10 percent of the recommended daily value for three or more vitamins and minerals
 - Other drinks with no more than 66 calories / 8 ounces
- At least 50 percent of non-milk beverages must be water and no- or low-calorie options

These guidelines apply to beverages sold on school grounds during the regular **and** extended school day. (The extended school day includes before and after school activities like clubs, band, student government, drama, and childcare/latchkey programs.) These guidelines do not apply to school-related events where parents and other adults are part of an audience or are selling beverages as boosters during intermission, as well as immediately before or after an event. Examples of these events include school plays and band concerts.

Appendix B: Project Team

Keybridge Research LLC is a Washington-DC based economic and public policy research firm. Since 2001 the firm has served G-7 governments, major financial institutions and companies, and leading industry associations. Among the firm's clients are well-known international financial-sector firms and leading energy, service-sector, and consumer product companies in the U.S., Europe, and Asia. Keybridge employs world renowned economists, public policy experts, and statisticians. The firm is particularly well known for its quantitative analysis, statistical capabilities, and ability to assist clients with economic analysis that supports public policy positions. Keybridge Research maintains a network of high-profile experts, including Nobel-prize winning economists, leading academics, and former senior G-7, Federal Reserve, White House, Treasury, and International Monetary Fund officials, who assist with projects and participate in strategic planning activities.

Dr. Robert Wescott, Principal Investigator, is president of Keybridge Research LLC. He has more than 25 years of experience with macroeconomic, industry, and financial data and analysis. Previously Dr. Wescott served as Chief Economist at the Council of Economic Advisers and as Special Assistant to the President for Economic Policy at the White House. He also spent four years in the Research Department at the International Monetary Fund. Between 1982 and 1993 Wescott was Senior Vice President and Chief Economist at WEFA Group (Wharton Econometric Forecasting Associates), the Philadelphia-based economic forecasting and consulting firm, where he oversaw all data analysis, forecasting, economic modeling, consulting, and research activities for the U.S. Group. Wescott holds a Ph.D. in Economics from the University of Pennsylvania.

Brendan Fitzpatrick, Senior Economist, specializes in international economics, environment, and public policy. Prior to joining Keybridge, Mr. Fitzpatrick worked in the Office of the Chief Economist of the World Bank where he focused on development finance, aid effectiveness, environment, and production of the 2006-08 Global Monitoring Reports. He also worked with USAID's Agriculture and Rural Enterprise Development team in Rwanda and worked in education and community development with Fundacion Rostro de Cristo in Ecuador. Fitzpatrick holds a Master's degree in Public Administration in International Development from Harvard University's Kennedy School of Government and Bachelor's degrees in Bioengineering and Economics from the University of Illinois at Urbana-Champaign.

Karen Wise, Data Analyst and Statistician has 20 years experience as a data analyst and statistician. She has worked on a range of projects for financial institutions, corporations, and Washington, D.C.-based industry associations. These projects include the development of databases and statistical analysis of economic outlook surveys and other surveys for Fortune 500 companies. For a number of years, she was a programmer/analyst for the Office of Administrative Computing at American University in Washington, D.C., and did similar work for Arcadia University in Glenside, Pennsylvania, customizing data management software. She has experience with a wide range of applications, including economic and industry databases, financial databases, scientific model building, and computer simulations. She has taught at the university level in the fields of mathematics and computer science. Ms. Wise holds a Master's degree in Applied Mathematics from Drexel University and a Bachelor's degree in Mathematics from Bucknell University, cum laude.

Appendix C: Methodology

Altogether 13 bottling companies representing almost 90 percent of the national shipments of the MOU partners (The Coca-Cola Company, Dr Pepper Snapple Group, and PepsiCo, Inc.) provided beverage shipment data to Keybridge Research LLC. During the course of the 2007-08 school year, Keybridge Research staff held dozens of conference calls with company data system experts, and exchanged hundreds of emails with company representatives to confirm data details and corroborate data processing methods.

Bottlers reported “school channel” sales of beverages to all schools, public and private, broken down into three school categories—high schools, middle schools, and elementary schools. Shipments included sales made through vending machines, fountains, lunch lines, school stores, or any other outlets at schools that were accessible by students during the normal or extended school day. Beverage shipment data were converted to “total student accessible ounces” to allow results to be presented in a unified format and to support trend analysis.¹² Based upon independently published industry shipments data, all shipments data from study participants—collectively representing roughly 91 percent of the market—was scaled up to approximate 100 percent of shipments for the whole bottling industry.¹³ All bottlers made multiple data submissions during the course of the school year. In particular, reports on shipments in the first half of the school year allowed Keybridge to analyze and validate results and also allowed data reporting procedures to be tested and honed.

A four-step research process was employed. The first step was to develop a beverage classification system that would allow the key requirements of the MOU to be measured and tracked. As in the 2006-07 annual report, bottlers reported their shipments in the 22 product categories needed to allow full measurement of compliance with the MOU, including but not limited to:

- Full-calorie carbonated soft drinks
- Diet carbonated soft drinks
- Waters (no flavors, no fortification, no sweeteners)
- Waters (flavored, fortified, or fitness with less than 10 calories per 8 ounces)
- Waters (flavored, fortified, or fitness with between 10 and 66 calories per 8 ounces)
- Waters (flavored, fortified, or fitness with more than 66 calories per 8 ounces)

¹² Any shipments of beverages made by so-called third party vendors, such as food contractors, were not included in this study because such vendors are not signatories to the MOU. Any beverage bought by a student or his or her parents outside of school or packed in a lunch from home was not included in this study, as it is not within the control of MOU signatories.

¹³ Data collection systems for some of the smaller bottlers are still being improved. Some have begun reporting current year data, for example, but are still not able to report complete historical data. The small missing market share of Coca Cola bottlers was assumed to mirror the product shipments of reporting Coca Cola bottlers and the small missing market share of Pepsi bottlers was assumed to mirror the product shipments of reporting Pepsi bottlers. Bottlers that reported data but whose data were not included in this analysis represent about 3 percent of the national market. Bottlers who do not report any data represent about 9 percent of the market.

The second step was to update package size/container count configurations used by bottlers. Bottlers reported shipments in 30 to 50 configurations, including, for example: 8 ounce/40 pack, 10 ounce/24 pack, 0.30 liter/24 pack, 12 ounce/24 pack, 0.50 liter/24 pack, etc. Bottlers also reported all fountain shipments to schools with appropriate pre-mix and post-mix conversion factors.

The third step was to account for shipments not deemed to be student accessible during the normal or extended school day. Because bottlers are not able to track purchases by time of day, the only adjustment possible was to exclude shipments to certain locations/functions that were determined to be non-student accessible during the normal or extended school day. These included shipments to three specific locations/functions: faculty lounges, sports complexes, and fundraisers, all of which are outside the scope of the MOU. Bottlers responsible for more than half of all beverage shipments to schools had data systems that allowed them to report their school channel shipments net of shipments to faculty lounges, sports complexes, and fundraisers. Other bottlers, however, did not have data systems capable of netting out their shipments to these locations. In these cases the bottlers were asked to supply sample-based estimates of the portion of their shipments that went to these three locations. These bottlers were asked to provide estimates of these shipments based upon a sample of either their 35 largest school district customers or 5-10 percent of their school channel volume. Most were able to comply. School shipments data of these latter bottlers were then adjusted downward by estimated percentages so they could then be aggregated with the shipments of the bottlers that did net out these shipments.

- At the high school level, bottlers that could not net out such shipments supplied statistical data that showed that approximately 25 percent of their total school shipments went to faculty areas, sports complexes, or fundraisers with an even greater percentage of carbonated soft drinks (CSDs) going to these locations/functions. In the 2005 study it was judged that 25 percent of CSD shipments and 15 percent of other beverage shipments were well supported downward adjustments for beverage shipments to these three locations.¹⁴ This year's survey data support these estimates and the same adjustments were used for high school shipments in the present study.
- For middle schools, bottler statistical data samples suggested that 10 to 35 percent of beverages went to faculty lounges, sports complexes, or fundraisers and therefore were not student accessible during the school day, and the same 35 and 15 percent adjustments for CSDs and other beverages as in the 2005 study were used.¹⁵
- And for elementary schools, bottlers reported that 40 to 80 percent of beverages, especially of CSDs, went to non-student accessible areas—mainly faculty lounges. The same 70 and 30 percent downward adjustments for CSDs and other beverages,

¹⁴ These estimates were deemed reasonable in light of a 2004 survey of vending machine locations in 16,000 middle schools and high schools by a leading market research company that found that 13 percent of all vending machines in high schools were in faculty lounges. They also appeared to be confirmed by a detailed field survey in 2005 of more than 12,000 school beverage delivery personnel by one of the nation's largest bottlers that found that 27.5 percent of deliveries to high schools were not student accessible.

¹⁵ A 2004 survey by a leading market research firm of 16,000 high schools and middle schools determined that 29 percent of vending machines in middle schools were located in faculty areas, and a 2005 survey of 12,000 school beverage delivery personnel found that 49.5 percent of beverages delivered to middle schools were not student accessible.

respectively, as in the 2005 study were used in this study for elementary school shipments.¹⁶

Some purchases from school vending machines in student accessible areas would have been made by adult members of the community who use schools at nights or on weekends. To the extent that adults from the community make purchases at schools, actual shipments to students may be lower than reported in this study. This is particularly likely to have been true for elementary schools, where machines in hallways are typically on timers and are turned off during the school day.

The fourth step was to perform a series of consistency checks and validation tests on the data. Keybridge had performed detailed analyses of the same bottlers' school shipments data in 2005 and in 2006-07 and could match up data to the data from these earlier periods. Also because all bottlers made multiple data submissions (first half 2007-08 school year data, second half data, full year, prior year, etc.), data submissions were scrutinized for consistency, adding up constraints, and unusual patterns. In a couple of instances Keybridge detected data processing errors, brought them to the attention of the relevant bottler, and the problems were quickly corrected. Keybridge also calculated each major bottler's theoretical share of total industry shipments (school and non-school) based upon data published by independent beverage industry sources.¹⁷ The bottlers' reported school shipment shares were then compared to these theoretical total industry shares. All of the major bottling companies' school shipments were within a few percentage points of their theoretical shares, suggesting that the data aggregates reported here are robust and of the proper order of magnitude.

Data Reliability and Robustness

The quality of the school shipments data in this report appears to be even higher than the quality of the data used in the 2005 study and in the 2006- 2007 School Beverage Guidelines Report. In 2005 some bottlers could not offer a split between their elementary and middle school shipments, or between their middle and high school shipments, and had to supply rule of thumb formulas for breaking these data into school categories. In the current study nearly all of the 70 bottling companies were able to provide actual school category breakdowns.¹⁸ All bottlers were able to report data with a high degree of granularity, including by detailed container size/package configuration. This reduced the chances of data processing errors at the bottler level. Finally Keybridge engaged in follow up discussions with management teams of all major bottling companies after each bottler's data had been processed. This allowed Keybridge to spot check results, obtain management confirmation of any results that showed noticeable differences from typical bottler results, and to corroborate data patterns.

¹⁶ The 2005 survey of 12,000 school beverage delivery personnel found that 76 percent of beverages delivered to elementary schools were not student accessible.

¹⁷ The 2006 annual data books and reports of *Beverage Digest* were important sources of information.

¹⁸ One medium-sized company was unable to separate their shipments to elementary and middle schools. The assumption was made that 64 percent of the total volume shipped to middle and elementary schools went to middle schools and 36 percent to elementary schools. These percentages are similar to what was observed for some of the bottlers that provided the breakdown.

School Population Data

U.S. student population data from the U.S. Census Bureau was used to determine the average number of ounces of beverages shipped per student and also calorie intake per student. The U.S. Census provides detailed public and private school enrollment data by grade level.¹⁹ The most recent grade breakdown of school population is based upon the October 2006 Current Population Survey, released in May 2008. In October 2006 there were 23,764,000 students in grades K-5; 12,364,000 students in grades 6-8; and 17,149,000 students in grades 9-12; or 53,277,000 U.S. students altogether. Although the number of school students would have changed slightly from late 2006 to late 2007, the changes would not have been large enough to materially affect the per student calculations in this study.

Beverage Calories

In order to determine the likely calorie count of beverages, the simple unweighted average calorie content (per 8 ounces) of the three top selling brands/products in each soft drink category was used.

¹⁹ See Current Population Survey of October 2006, Table 1, released May 2008, available online at <http://www.census.gov/population/socdemo/school/cps2005/tab02-01.xls>

Appendix D: Data Tables & Charts

Table D1. High School Beverage Volume - 2007-08 School Year*
(Enrollment: 17,149,000)

Beverage Type	Total Student Accessible Ounces	Product Mix (Percent)	Ounces per Student per Year	Ounces per Student per Week (36 Weeks per Year)	Average Calories per 8 Ounces	Calories per Student per Year
Carbonated soft drinks, full calorie	2,441,277,561	26.5%	142.4	4.0	99	1762
Carbonated soft drinks, diet	742,156,462	8.1%	43.3	1.2	0	0
Sports drinks that are ≤ 10 cal/8 oz.	152,959,831	1.7%	8.9	0.2	10	11
Sports drinks that are > 10 cal/8 oz. and ≤ 66 cal/8 oz.	1,870,918,988	20.3%	109.1	3.0	57	777
Sports drinks that are greater than 66 cal/8 oz.	-	0.0%	0.0	0.0	72	0
Teas that are ≤ 10 cal/8 oz.	42,944,788	0.5%	2.5	0.1	2.6	1
Teas that are > 10 cal/8 oz. and ≤ 66 cal/8 oz.	11,076,333	0.1%	0.6	0.0	62.5	5
Teas that are greater than 66 cal/8 oz.	387,486,479	4.2%	22.6	0.6	83.3	235
100% juices with no added sweeteners, ≥ 10% DV for ≥ 3 micronutrients, that are ≤ 120 cal/8 oz.	126,855,593	1.4%	7.4	0.2	113.3	105
Other 100% juices (that do not meet above criteria)	113,292,149	1.2%	6.6	0.2	113.3	94
Juice drinks that are ≤ 10 cal/8 oz.	32,635,474	0.4%	1.9	0.1	6	1
Juice drinks that are > 10 cal/8 oz. and ≤ 66 cal/8 oz.	21,594,163	0.2%	1.3	0.0	38	6
Juice drinks that are greater than 66 cal/8 oz.	747,065,566	8.1%	43.6	1.2	123.3	671
Waters (no flavors, no fortification, no sweeteners)	1,686,994,806	18.3%	98.4	2.7	0	0
Waters, (flavored, fortified, or fitness waters that are ≤ 10 cal/8oz.)	496,926,732	5.4%	29.0	0.8	10	36
Waters (flavored, fortified, or fitness waters that are > 10 cal/8 oz. and ≤ 66 cal/8oz.)	207,085,067	2.2%	12.1	0.3	35	53
Waters (flavored, fortified, or fitness waters that are greater than 66 cal/ 8 oz.)	24,003,296	0.3%	1.4	0.0	66	12
Milks or milk alternatives, fat free or low fat, non-flavored	-	0.0%	0.0	0.0	90	0
Milks or milk alternatives, fat free or low fat, flavored (less than/equal 150 cal/8 oz.)	-	0.0%	0.0	0.0	140	0
Milks, other	3,086,993	0.0%	0.2	0.0	170	4
Other drinks that are ≤ 10 cal/8 oz.	776,389	0.0%	0.0	0.0	10	0
Other drinks that are > 10 cal/8 oz. and ≤ 66 cal/ 8 oz.	15,239,747	0.2%	0.9	0.0	38	4
Other drinks that are greater than 66 cal/ 8 oz.	82,574,964	0.9%	4.8	0.1	66	40
Total	9,206,951,379	100%	536.9	14.9	NA	3817

*Data is based on reports from bottlers representing 91% of industry shipments, but has been scaled upwards to reflect 100% of bottler shipments to schools.

Table D2. Middle School Beverage Volume - 2007-08 School Year*
(Enrollment: 12,364,000)

Beverage Type	Total Student Accessible Ounces	Product Mix (Percent)	Ounces per Student per Year	Ounces per Student per Week (36 Weeks per Year)	Average Calories per 8 Ounces	Calories per Student per Year
Carbonated soft drinks, full calorie	386,178,808	19.2%	31.2	0.9	99	387
Carbonated soft drinks, diet	169,842,555	8.5%	13.7	0.4	0	0
Sports drinks that are ≤ 10 cal/8 oz.	20,457,109	1.0%	1.7	0.0	10	2
Sports drinks that are > 10 cal/8 oz. and ≤ 66 cal/8 oz.	472,508,677	23.6%	38.2	1.1	57	272
Sports drinks that are greater than 66 cal/8 oz.	-	0.0%	0.0	0.0	72	0
Teas that are ≤ 10 cal/8 oz.	8,128,533	0.4%	0.7	0.0	2.6	0
Teas that are > 10 cal/8 oz. and ≤ 66 cal/8 oz.	3,738,731	0.2%	0.3	0.0	62.5	2
Teas that are greater than 66 cal/8 oz.	74,319,889	3.7%	6.0	0.2	83.3	63
100% juices with no added sweeteners, ≥ 10% DV for ≥ 3 micronutrients, that are ≤ 120 cal/8 oz.	58,857,600	2.9%	4.8	0.1	113.3	67
Other 100% juices (that do not meet above criteria)	25,802,081	1.3%	2.1	0.1	113.3	30
Juice drinks that are ≤ 10 cal/8 oz.	15,527,299	0.8%	1.3	0.0	6	1
Juice drinks that are > 10 cal/8 oz. and ≤ 66 cal/8 oz.	7,874,694	0.4%	0.6	0.0	38	3
Juice drinks that are greater than 66 cal/8 oz.	156,474,752	7.8%	12.7	0.4	123.3	195
Waters (no flavors, no fortification, no sweeteners)	437,694,885	21.8%	35.4	1.0	0	0
Waters, (flavored, fortified, or fitness waters that are ≤ 10 cal/8oz.)	128,051,635	6.4%	10.4	0.3	10	13
Waters (flavored, fortified, or fitness waters that are > 10 cal/8 oz. and ≤ 66 cal/8oz.)	21,501,060	1.1%	1.7	0.0	35	8
Waters (flavored, fortified, or fitness waters that are greater than 66 cal/ 8 oz.)	4,901,358	0.2%	0.4	0.0	66	3
Milks or milk alternatives, fat free or low fat, non-flavored	-	0.0%	0.0	0.0	90	0
Milks or milk alternatives, fat free or low fat, flavored (less than/equal 150 cal/8 oz.)	-	0.0%	0.0	0.0	140	0
Milks, other	401,439	0.0%	0.0	0.0	170	1
Other drinks that are ≤ 10 cal/8 oz.	41,019	0.0%	0.0	0.0	10	0
Other drinks that are > 10 cal/8 oz. and ≤ 66 cal/ 8 oz.	645,143	0.0%	0.1	0.0	38	0
Other drinks that are greater than 66 cal/ 8 oz.	13,261,232	0.7%	1.1	0.0	66	9
Total	2,006,208,499	100%	162.3	4.5	NA	1056

*Data is based on reports from bottlers representing 91% of industry shipments, but has been scaled upwards to reflect 100% of bottler shipments to schools.

Table D3. Elementary School Beverage Volume - 2007-08 School Year*
(Enrollment: 23,764,000)

Beverage Type	Total Student Accessible Ounces	Product Mix (Percent)	Ounces per Student per Year	Ounces per Student per Week (36 Weeks per Year)	Average Calories per 8 Ounces	Calories per Student per Year
Carbonated soft drinks, full calorie	156,441,346	20.7%	6.6	0.2	99	81
Carbonated soft drinks, diet	84,705,707	11.2%	3.6	0.1	0	0
Sports drinks that are ≤ 10 cal/8 oz.	1,809,507	0.2%	0.1	0.0	10	0
Sports drinks that are > 10 cal/8 oz. and ≤ 66 cal/8 oz.	99,979,912	13.2%	4.2	0.1	57	30
Sports drinks that are greater than 66 cal/8 oz.	-	0.0%	0.0	0.0	72	0
Teas that are ≤ 10 cal/8 oz.	4,841,286	0.6%	0.2	0.0	2.6	0
Teas that are > 10 cal/8 oz. and ≤ 66 cal/8 oz.	701,403	0.1%	0.0	0.0	62.5	0
Teas that are greater than 66 cal/8 oz.	28,948,946	3.8%	1.2	0.0	83.3	13
100% juices with no added sweeteners, ≥ 10% DV for ≥ 3 micronutrients, that are ≤ 120 cal/8 oz.	30,382,095	4.0%	1.3	0.0	113.3	18
Other 100% juices (that do not meet above criteria)	11,168,683	1.5%	0.5	0.0	113.3	7
Juice drinks that are ≤ 10 cal/8 oz.	4,831,228	0.6%	0.2	0.0	6	0
Juice drinks that are > 10 cal/8 oz. and ≤ 66 cal/8 oz.	1,491,427	0.2%	0.1	0.0	38	0
Juice drinks that are greater than 66 cal/8 oz.	41,992,206	5.6%	1.8	0.0	123.3	27
Waters (no flavors, no fortification, no sweeteners)	235,467,435	31.2%	9.9	0.3	0	0
Waters, (flavored, fortified, or fitness waters that are ≤ 10 cal/8oz.)	40,163,481	5.3%	1.7	0.0	10	2
Waters (flavored, fortified, or fitness waters that are > 10 cal/8 oz. and ≤ 66 cal/8oz.)	6,062,911	0.8%	0.3	0.0	35	1
Waters (flavored, fortified, or fitness waters that are greater than 66 cal/ 8 oz.)	565,410	0.1%	0.0	0.0	66	0
Milks or milk alternatives, fat free or low fat, non-flavored	-	0.0%	0.0	0.0	90	0
Milks or milk alternatives, fat free or low fat, flavored (less than/equal 150 cal/8 oz.)	-	0.0%	0.0	0.0	140	0
Milks, other	1,029,217	0.1%	0.0	0.0	170	1
Other drinks that are ≤ 10 cal/8 oz.	27,793	0.0%	0.0	0.0	10	0
Other drinks that are > 10 cal/8 oz. and ≤ 66 cal/ 8 oz.	189,180	0.0%	0.0	0.0	38	0
Other drinks that are greater than 66 cal/ 8 oz.	5,031,701	0.7%	0.2	0.0	66	2
Total	755,830,874	100%	31.8	0.9	NA	183

*Data is based on reports from bottlers representing 91% of industry shipments, but has been scaled upwards to reflect 100% of bottler shipments to schools.

Table D4. Total School Beverage Volume - 2007-08 School Year*
(Enrollment: 53,277,000)

Beverage Type	Total Student Accessible Ounces	Product Mix (Percent)	Ounces per Student per Year	Ounces per Student per Week (36 Weeks per Year)	Average Calories per 8 Ounces	Calories per Student per Year
Carbonated soft drinks, full calorie	2,983,897,715	24.9%	56.0	1.6	99	693
Carbonated soft drinks, diet	996,704,723	8.3%	18.7	0.5	0	0
Sports drinks that are ≤ 10 cal/8 oz.	175,226,447	1.5%	3.3	0.1	10	4
Sports drinks that are > 10 cal/8 oz. and ≤ 66 cal/8 oz.	2,443,407,578	20.4%	45.9	1.3	57	327
Sports drinks that are greater than 66 cal/8 oz.	-	0.0%	0.0	0.0	72	0
Teas that are ≤ 10 cal/8 oz.	55,914,606	0.5%	1.0	0.0	2.6	0
Teas that are > 10 cal/8 oz. and ≤ 66 cal/8 oz.	15,516,467	0.1%	0.3	0.0	62.5	2
Teas that are greater than 66 cal/8 oz.	490,755,314	4.1%	9.2	0.3	83.3	96
100% juices with no added sweeteners, ≥ 10% DV for ≥ 3 micronutrients, that are ≤ 120 cal/8 oz.	216,095,289	1.8%	4.1	0.1	113.3	57
Other 100% juices (that do not meet above criteria)	150,262,913	1.3%	2.8	0.1	113.3	40
Juice drinks that are ≤ 10 cal/8 oz.	52,994,001	0.4%	1.0	0.0	6	1
Juice drinks that are > 10 cal/8 oz. and ≤ 66 cal/8 oz.	30,960,284	0.3%	0.6	0.0	38	3
Juice drinks that are greater than 66 cal/8 oz.	945,532,524	7.9%	17.7	0.5	123.3	274
Waters (no flavors, no fortification, no sweeteners)	2,360,157,126	19.7%	44.3	1.2	0	0
Waters, (flavored, fortified, or fitness waters that are ≤ 10 cal/8oz.)	665,141,848	5.6%	12.5	0.3	10	16
Waters (flavored, fortified, or fitness waters that are > 10 cal/8 oz. and ≤ 66 cal/8oz.)	234,649,038	2.0%	4.4	0.1	35	19
Waters (flavored, fortified, or fitness waters that are greater than 66 cal/ 8 oz.)	29,470,064	0.2%	0.6	0.0	66	5
Milks or milk alternatives, fat free or low fat, non-flavored	-	0.0%	0.0	0.0	90	0
Milks or milk alternatives, fat free or low fat, flavored (less than/equal 150 cal/8 oz.)	-	0.0%	0.0	0.0	140	0
Milks, other	4,517,649	0.0%	0.1	0.0	170	2
Other drinks that are ≤ 10 cal/8 oz.	845,201	0.0%	0.0	0.0	10	0
Other drinks that are > 10 cal/8 oz. and ≤ 66 cal/ 8 oz.	16,074,070	0.1%	0.3	0.0	38	1
Other drinks that are greater than 66 cal/ 8 oz.	100,867,897	0.8%	1.9	0.1	66	16
Total	11,968,990,753	100%	224.7	6.2	NA	1555

*Data is based on reports from bottlers representing 91% of industry shipments, but has been scaled upwards to reflect 100% of bottler shipments to schools.

Table D5: Beverage Volume Comparison – 2004 (Pre-MOU) to 2007-08 School Year*
High School

Beverage Type	Total Student Accessible Ounces Pre-MOU - 2004	Total Student Accessible Ounces 2006-2007	Total Student Accessible Ounces 2007-2008	Percent Change from Pre-MOU levels
Carbonated soft drinks, full calorie	6,023,588,820	3,256,999,323	2,112,130,869	-64.9%
Carbonated soft drinks, diet	931,130,300	723,103,601	644,458,197	-30.8%
Regular Sports Drinks**	1,885,561,855	1,935,812,700	1,636,439,017	-13.2%
Teas	610,839,408	477,527,376	373,757,227	-38.8%
100% Juices	376,523,210	284,730,823	210,015,131	-44.2%
Juice Drinks	2,093,618,305	1,017,015,405	693,506,011	-66.9%
Waters	1,762,764,552	2,228,120,274	2,117,036,296	20.1%
All other non-CSDs	60,699,069	348,950,480	231,329,397	281.1%
Total	13,744,725,520	10,272,260,515	8,018,672,145	-41.7%
Student Enrollment	16,673,974	17,354,000	17,149,000	2.8%

Table D6: Beverage Volume Comparison – 2004 (Pre-MOU) to 2007-08 School Year*
Middle School

Beverage Type	Total Student Accessible Ounces Pre-MOU - 2004	Total Student Accessible Ounces 2006-2007	Total Student Accessible Ounces 2007-2008	Percent Change Since Adoption of MOU
Carbonated soft drinks, full calorie	1,024,225,512	532,653,877	336,427,350	-67.2%
Carbonated soft drinks, diet	251,957,330	188,909,590	147,009,142	-41.7%
Regular Sports Drinks**	653,046,505	608,612,930	414,547,752	-36.5%
Teas	181,899,244	94,197,379	72,903,935	-59.9%
100% Juices	101,692,014	79,669,404	75,834,292	-25.4%
Juice Drinks	843,050,751	292,429,184	154,921,086	-81.6%
Waters	481,034,003	554,552,412	518,441,154	7.8%
All other non-CSDs	31,107,273	58,672,718	31,172,960	0.2%
Total	3,568,012,633	2,409,697,492	1,751,257,672	-50.9%
Student Enrollment	12,215,157	12,521,000	12,364,000	1.2%

Table D7: Beverage Volume Comparison – 2004 (Pre-MOU) to 2007-08 School Year*
Elementary School

Beverage Type	Total Student Accessible Ounces Pre-MOU - 2004	Total Student Accessible Ounces 2006-2007	Total Student Accessible Ounces 2007-2008	Percent Change Since Adoption of MOU
Carbonated soft drinks, full calorie	276,416,785	232,296,421	133,781,001	-51.6%
Carbonated soft drinks, diet	118,969,669	128,335,542	72,318,472	-39.2%
Regular Sports Drinks**	147,120,572	101,298,500	84,238,550	-42.7%
Teas	43,752,507	22,272,901	28,375,002	-35.1%
100% Juices	46,005,656	30,346,402	37,545,230	-18.4%
Juice Drinks	194,821,037	61,411,970	40,762,065	-79.1%
Waters	195,132,203	212,433,169	244,667,421	25.4%
All other non-CSDs	8,474,566	10,909,310	7,036,749	-17.0%
Total	1,030,692,996	799,304,226	648,724,490	-37.1%
Student Enrollment	23,881,408	23,829,000	23,764,000	-0.5%

Table D8: Beverage Volume Comparison – 2004 (Pre-MOU) to 2007-08 School Year*
All Schools

Beverage Type	Total Student Accessible Ounces Pre-MOU - 2004	Total Student Accessible Ounces 2006-2007	Total Student Accessible Ounces 2007-2008	Percent Change Since Adoption of MOU
Carbonated soft drinks, full calorie	7,324,231,117	4,021,949,621	2,582,339,220	-64.7%
Carbonated soft drinks, diet	1,302,057,300	1,040,348,733	863,785,811	-33.7%
Regular Sports Drinks**	2,685,728,932	2,645,724,100	2,135,225,319	-20.5%
Teas	836,491,159	593,997,656	475,036,164	-43.2%
100% Juices	524,220,881	394,746,630	323,394,653	-38.3%
Juice Drinks	3,131,490,093	1,370,856,559	889,189,162	-71.6%
Waters	2,438,930,758	2,995,105,855	2,880,144,870	18.1%
All other non-CSDs**	100,280,909	418,532,510	269,539,107	168.8%
Total	18,343,431,149	13,481,262,233	10,418,654,306	-43.2%
Student Enrollment	52,770,539	53,704,000	53,277,000	1.0%

*Volumes are for the 13 bottling groups, representing nearly 90% of total industry shipments, which also participated in the 2005 and 2007 studies. All volumes are expressed as ounces of finished product.

**Regular sports drinks exclude diet sports drinks with 10 calories or less per 8 oz in the 2006-07 and 2007-08 data. In these years, diet sports drinks are included in the "all other non-CSDs" category and represent more than half of the volume in that category.

Table D9: Percent of Product Mix in High Schools*

Beverage Type	2004	2006-07	2007-08
Carbonated soft drinks, full calorie	43.8%	31.7%	26.3%
Carbonated soft drinks, diet	6.8%	7.0%	8.0%
Regular Sports Drinks**	13.7%	18.8%	20.4%
Teas	4.4%	4.6%	4.7%
100% Juices	2.7%	2.8%	2.6%
Juice Drinks	15.2%	9.9%	8.6%
Waters	12.8%	21.7%	26.4%
All other non-CSDs	0.4%	3.4%	2.9%
Total	100.0%	100.0%	100.0%

Table D10: Percent of Product Mix in Elementary and Middle Schools Combined*

Beverage Type	2004	2006-07	2007-08
Carbonated soft drinks, full calorie	28.3%	23.8%	19.6%
Carbonated soft drinks, diet	8.1%	9.9%	9.1%
Regular Sports Drinks**	17.4%	22.1%	20.8%
Teas	4.9%	3.6%	4.2%
100% Juices	3.2%	3.4%	4.7%
Juice Drinks	22.6%	11.0%	8.2%
Waters	14.7%	23.9%	31.8%
All other non-CSDs	0.9%	2.2%	1.6%
Total	100.0%	100.0%	100.0%

Table D11: Percent of Product Mix in All Schools*

Beverage Type	2004	2006-07	2007-08
Carbonated soft drinks, full calorie	39.9%	29.8%	24.8%
Carbonated soft drinks, diet	7.1%	7.7%	8.3%
Regular Sports Drinks**	14.6%	19.6%	20.5%
Teas	4.6%	4.4%	4.6%
100% Juices	2.9%	2.9%	3.1%
Juice Drinks	17.1%	10.2%	8.5%
Waters	13.3%	22.2%	27.6%
All other non-CSDs**	0.5%	3.1%	2.6%
Total	100.0%	100.0%	100.0%

*Comparisons between 2004 and the 2006-07 and 2007-08 school years are based upon data from the 13 bottling groups that participated in the 2005, 2007 and present studies. Data may differ slightly from data in Tables 1 and D1-D4, which are based on data which is scaled up to represent all bottlers.

**Regular sports drinks exclude diet sports drinks with 10 calories or less per 8 oz in the 2006-07 and 2007-08 data. In these years, diet sports drinks are included in the "all other non-CSDs" category and represent more than half of the volume in that category.