



CREATING A SUSTAINABLE FUTURE



2018 REVIEW

OTHER INDUSTRIES TALK ABOUT SUSTAINABILITY—WE BUILD OUR INDUSTRY AROUND IT.

From creating innovative solutions to environmental issues, providing more beverage choices with less sugar and being active members of our communities, we are doing the hard work to encourage real and sustainable change across America.



The mark of
responsible forestry



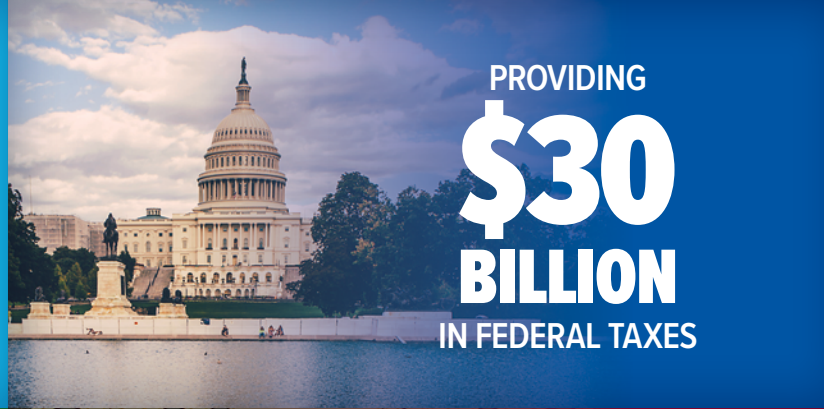
PROVIDING NEARLY
253,000
JOB
S
TO U.S. WORKERS



GENERATING
\$182
BILLION
IN DIRECT ECONOMIC IMPACT



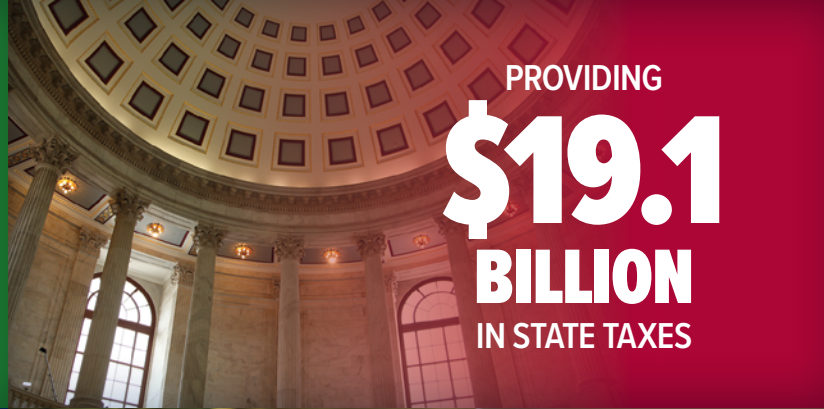
160+
ACTIVE
MEMBERS



PROVIDING
\$30
BILLION
IN FEDERAL TAXES



CONTRIBUTING
\$1.5
BILLION
TO CHARITABLE CAUSES



PROVIDING
\$19.1
BILLION
IN STATE TAXES



PRODUCING
100%
RECYCLABLE
BEVERAGE CONTAINERS



DIVERTING
93%
OF WASTE
FROM LANDFILLS

DEAR MEMBERS

Kirk Tyler

Chair, Board of Directors; Chairman and Chief Executive Officer,
Atlantic Coca-Cola Bottling Company



The beverage industry is constantly adapting, innovating and improving. With nearly 253,000 employees across the country that work hard to deliver our products to communities across the country, we continue to honor the trust that Americans place in us by supporting the issues that matter most to working families.

We are excited about the future of the industry and are pleased to welcome Katherine Lugar into our beverage family as ABA president and CEO, and we thank Susan Neely for her more than 13 years of incredible leadership. ABA, its member companies and the broader industry will benefit from Katherine's passion and strategic leadership as we work to create a sustainable future for our consumers, our communities and our planet.

America's beverage companies, led by The Coca-Cola Company, Keurig Dr Pepper and PepsiCo, are working to address environmental challenges nationwide. Plastic is being targeted and beverage companies are leading the drive to reduce and recycle plastic packaging. We produce 100 percent recyclable bottles and cans.

On other environmental fronts, we are decreasing our water use per product, improving fleet fuel efficiency and conserving energy as we seek to divert from landfills 100 percent of waste from production facilities.

This past year saw a continuation of our efforts to uphold consumer choice and promote balanced lifestyles. We've seen a sizable shift in public attitudes toward discriminatory beverage taxes. A successful ballot measure, along with legislative proposals passed in California and Arizona, affirmed that Americans believe there is a better way to solve complex public health challenges than through regressive taxes.

Across the country, we continue to take action to reduce sugar and calories consumed from beverages, and each company has intensified its efforts to increase awareness of and access to smaller portion sizes and beverages with less or zero sugar. We're encouraged that the latest independent analysis of this work shows the strongest progress yet toward our national calorie reduction goal.

Creating a sustainable future doesn't mean just one thing to us—it's about leading on several fronts to build stronger, vibrant communities across America.

A handwritten signature in black ink, reading "Kirk Tyler".

Katherine Lugar

President and Chief Executive Officer



Our members are companies that put their communities, customers and consumers first. This is an iconic industry woven into the fabric of America, touching every corner of the country. As such, our companies know they have a responsibility to serve and make positive contributions to society. It's this sense of community and service that makes me honored to lead the American Beverage Association into its second century of helping our companies achieve their high standards.

Beverage companies have shown real leadership, setting their competitive differences aside to tackle societal issues head on. With our successful partnerships we're striving to be an important and meaningful part of the solution when it comes to the environment, consumer choice and public health. We know our consumers want—and expect—us to do so. We're seeing increased validation that our initiatives are, in fact, the better way forward for

Americans. And they are beneficial for our member companies' businesses at the same time.

We know how important it is to have choices as we balance our families' nutrition and activity. To have clean water and responsible environmental stewardship for our neighborhoods. To have companies who care about the well-being of the communities in which we all live, work and play.

This is a vibrant, forward-thinking industry that shows no signs of slowing down—we're only gearing up for the opportunities and challenges that lay ahead in this ever-changing landscape.

On behalf of ABA we are thankful for the support of our members and I am excited to be leading our industry, customers, consumers and communities into the future.

A handwritten signature of Katherine Lugar in black ink. The signature is fluid and cursive, with the first name "Katherine" and the last name "Lugar" clearly legible.

GOING BIG AND BOLD FOR SUSTAINABLE SOLUTIONS

America's beverage companies have long been leaders when it comes to protecting the planet and preserving its natural resources for future generations. We pioneer best practices in sustainability by constantly innovating—as individual companies, as a united industry and with our partners. With local leaders and national environmental groups, we are working to reduce water usage, increase fuel efficiency, create innovative recyclable packaging and improve recycling infrastructure. We have also sought out partnerships with organizations that are equally committed to making a difference around the world. Working alongside our global partners, we are guiding efforts to increase the use of recycled content, eliminate ocean debris and develop more effective waste management systems. And working hard to do even more on sustainability.

AFTER ALL, THIS IS OUR PLANET, AND WE'RE ALL IN THIS TOGETHER.



America's leading
beverage companies are
founding members of
**THE RECYCLING
PARTNERSHIP**

which has
reached

33M
PEOPLE to date.



WATER

We've **REDUCED** our water use by

14%
PER UNIT
OVER FIVE YEARS.



ENERGY

We've **VOLUNTARILY PHASED OUT HFCs** equal to taking

15M
CARS OFF THE ROAD.



FLEETS

We've **IMPROVED** average fleet **MILES PER GALLON** by

13%
SINCE 2010.



PACKAGING

Through lightweighting and packaging reduction we've **SAVED**

100s
of **MILLIONS OF POUNDS**
of raw materials industry-wide.



RECYCLING

We're producing aluminum, plastic and glass containers that are

100%
RECYCLABLE—
even the caps can be recycled.

REDUCING OUR ENVIRONMENTAL FOOTPRINT

Our industry has a longstanding commitment to reducing its environmental footprint. Our member companies have taken unprecedented steps to do so through lightweighting packaging, diverting waste from landfills and encouraging recycling. Our industry already produces 100 percent recyclable containers and caps, and our companies have set ambitious goals to increase the amount of recycled content in their packaging. Each company works to eliminate waste to landfills. Our collective goal is to become the first industry to sustain zero waste status in all of its production facilities. A cleaner, greener planet is a shared responsibility. That's why we're working hard in communities across the country to raise awareness about the value of recycling and to reduce our environmental footprint. Recycling should be easy. It shouldn't be a difficult and time-consuming task. So we're partnering with local and state governments, such as in Florida and Montana, and environmental groups to promote recycling in residences, schools and public spaces across America.



CALIFORNIA

In California, we are encouraging people to “Keep the Cap On” their bottles when they recycle, to eliminate plastic debris. In 2018, we sponsored 100 “Keep the Cap On” branded barrels at major beaches in Los Angeles County. We also sponsored the California K-12 Recycling Challenge, a competition to promote waste reduction that included more than 300 schools across the state.



THE COCA-COLA COMPANY is saving annual emissions of **315,000 METRIC TONS of CO₂** thanks to its PlantBottle™ packaging.

KEURIG DR PEPPER has given **5,200 RECYCLING BINS** to communities to expand recycling in public places.

PEPSICO removed **100 MILLION POUNDS** of **PACKAGING** from the market **IN A SINGLE YEAR.**



18 COMPANY
FACILITIES
ALREADY
DIVERT 100%
WASTE FROM LANDFILLS

REAL PROGRESS IN REDUCING CALORIES AND SUGAR ACROSS AMERICA

Our nationwide initiative to reduce sugar consumed from beverages is making an impact. Coca-Cola, Dr Pepper and Pepsi have led the way—by innovating new and reformulated beverages as well as smaller package sizes; encouraging consumers to try beverages with less or zero sugar through television ads and in-store displays; and partnering with leading public health and community organizations to promote sustainable solutions. In retail stores where most beverages are sold, we are on pace toward reaching our goal of a 20 percent reduction in beverage calories consumed per person nationally by 2025, according to an independent evaluation. Even in communities where the need is highest, such as Eastern Los Angeles and the Mississippi Delta, the significant and meaningful actions these companies are taking are proving effective in cutting calories and sugar people get from beverages.

“We know there is more work to be done to achieve this ambitious goal, but these results are a testament to the power of evidence-driven agreements between corporations and non-profits to profoundly impact public health.”

Anne Ferree, Chief Strategy and Partnership Officer, Alliance for a Healthier Generation

SUPPORTING CONSUMERS ON THE GO

Convenience store customers primarily stop to purchase a beverage—so it’s important to support Americans in making informed beverage choices while they’re on the go. Announced at the 2018 Innovating a Healthier Future Summit, we partnered with the National Association of Convenience Stores (NACS) and two of the nation’s leading public health organizations—Alliance for a Healthier Generation and Partnership for a Healthier America—to support each other’s efforts to help reduce beverage calories and increase beverage options. By doing so, beverage manufacturers and retailers will work together on marketing, merchandising and distribution strategies to drive awareness and increase availability and purchases of zero- and reduced-sugar beverage choices, including waters, in convenience stores across the country.





**CNN with American Beverage ...
Association**

Sponsored • 🌐

Working with community partners to educate families about their beverage options. See the steps America's beverage companies are taking. Content by American Beverage Association.



838

84 Comments

105 Shares



Like



Comment



Share

63%
OF PRODUCTS
introduced since 2015 are
LOW-, NO- OR
MID-CALORIE CHOICES

TELLING OUR UNIQUE STORY

We ran a nationwide digital campaign with CNN to show how this large-scale, voluntary effort empowers individual families and communities across the United States. The stories shared in these videos explained how Coca-Cola, Dr Pepper and Pepsi are working together to encourage consumers to try new beverages with less sugar, develop partnerships to educate local communities and innovate to reduce calories consumed from their beverages. This is the support that parents want to make the choice that is right for their family.

Across the country, we continue to tell the story of this important work to legislators. We held beverage tastings with mayors; set up beverage showcases in state Capitols with our colleagues from state beverage associations; and coordinated tours of production facilities. Through these activities and more, local leaders gained a broader perspective of our industry and what we all can accomplish by working together to reduce sugar consumed from beverages.



INNOVATING MORE OPTIONS THAN EVER

Consumers told us what they wanted, and America's leading beverage companies responded: Today, the widest range of products in smaller portions and with reduced or zero sugar are available. Our companies never stop innovating to deliver refreshing new beverage choices that meet consumers' wants and needs.

PROTECTING FAMILIES BY PROMOTING A BETTER WAY

A cross-section of Americans are pushing back on regressive taxes and beverage restrictions with their most powerful tools: their voice and vote. They recognize, as we do, that there are more sustainable ways to make Americans healthier than adding to their already high cost of living and governing their grocery cart.

PROTECTING CALIFORNIANS AGAINST NEW GROCERY TAXES

Our industry is committed to protecting families from additional taxation on common grocery store items that single out one product or industry. In June, the California Legislature created a law that bans local taxes and fees on groceries, including beverages, through 2030. The beverage industry worked alongside the Service Employees International Union (SEIU) on behalf of a broad coalition of labor unions, businesses and consumers to pass this widely-supported legislation. After being signed into law by California Governor Jerry Brown, an overwhelming 71 percent of the state's voters said they approved of this new law.



**WORKING WITH OTHERS, WE PREVENTED LEGISLATION THAT WOULD HAVE BEEN
MORE HARMFUL TO THE ENVIRONMENT OR TOO IMPOSING ON CONSUMERS.**



RICK NELSON
RANCHER
TENINO, WA

CLOSING LOOPHOLES IN WASHINGTON

After Seattle's City Council passed a beverage tax in 2017, we took a proactive step to close the loophole in Washington state. A broad coalition of trade and labor unions, farmers, restaurant owners, consumers and more than 1,400 small businesses across the state united in support of Initiative 1634, commonly known as the "Yes! to Affordable Groceries" campaign to prohibit local taxes on groceries. On Election Day, 56 percent of the electorate supported the measure, with voters cutting across demographic and political lines to keep groceries affordable for Washington's working families. The Northwest Grocery Association led a ballot initiative in Oregon that we also helped to support.

"We think citizens of Washington have clearly seen what's taken place in Seattle and are not OK with this type of tax. This initiative gives the citizens of the state of Washington and our workers the ability and the right to vote on this because they are the ones shouldering the burden predominantly."

Pete Lamb, Senior Business Agent, Teamsters Local 174





PUSHING UNIFORMITY IN ARIZONA

Arizona legislators overwhelmingly passed legislation in March, with two-thirds of the vote in support, that requires local governments in the state to apply local taxes uniformly, thus prohibiting the singling out of one product or industry in the grocery cart for new taxation. The Arizona Beverage Association, along with the state's leading beverage companies, worked to gain widespread, bipartisan support of Bill 2484 from the Arizona Food Marketing Alliance, United Dairymen of Arizona, Association of Arizona Food Banks and other labor, agriculture and community organizations. The bill passed 30-0 in the Senate and cleared the House on a 47-13 vote, ensuring that Arizonians will not have their grocery carts governed through regressive and unfair taxation.

“We just can’t let government use tax rates to pick winners and losers in foods and beverages in what we consume today, and to have them try to influence consumers of what they deem to be a good or a bad food.”

Tim McCabe, President, Arizona Food Marketing Alliance

CHANGING THE GLOBAL CONVERSATION

In September, the United Nations hosted a High-Level Meeting on Non-Communicable Diseases, which culminated in a Political Declaration that rejected including taxes on sugar-sweetened beverages as the best path forward for combating public health problems. This Declaration reflected the consensus position of 193 countries, and was the culmination of continuing efforts by the International Council of Beverages Associations (ICBA) and a strong network of allied global and national food and beverage organizations. ICBA worked with beverage associations and member companies to promote evidence-based positions and encourage more collaborative ways to address public health challenges, such as obesity, through coordinated outreach in-country as well as to United Nations missions in New York City. ICBA continues to work diligently to address these global challenges, sharing industry best practices and ideas aligned with the ABA mission.



EMPOWERING PARENTS TO DO WHAT'S BEST FOR THEIR FAMILY

Parents have repeatedly made clear that they are more than capable of choosing what's right for their family, and they don't need government to choose for them. But when it comes to their youngest children, we have heard from parents that they believe that water, milk and juice are the best options. That's why we fully supported proposed legislation, championed by New York City Council Speaker Corey Johnson, that would make water, milk or 100 percent juice the default beverages in children's meals. Like our National School Beverage Guidelines we successfully implemented almost a decade ago, the NYC Healthy Kids Meals Bill keeps parents in the driver's seat to decide what's best when it comes to making food and beverage choices for their children.



“The beverage industry understands how important it is to support parents’ decisions about what their young children eat and drink... This is an example of how government and industry can work together to have an impact.”

Corey Johnson, New York City Council Speaker

PROTECTING BEVERAGE CHOICES FOR ALL FAMILIES

We think government mandates imposed on everyday grocery items are unfair for all households, but especially those that can least afford it. During Floor consideration of the House Farm Bill, two amendments were filed that aimed to restrict the purchase of carbonated beverages under the Supplemental Nutrition Assistance Program (SNAP). ABA worked closely with allied trade associations including the Food Marketing Institute, NACS and the Snack Food Association, as well as anti-hunger advocates, to reject these oversimplified, discriminatory measures. After all, SNAP recipients should be able to choose from a broad array of beverage choices to suit the needs of their households, like any other American family. In the end, neither amendment made it to a vote.



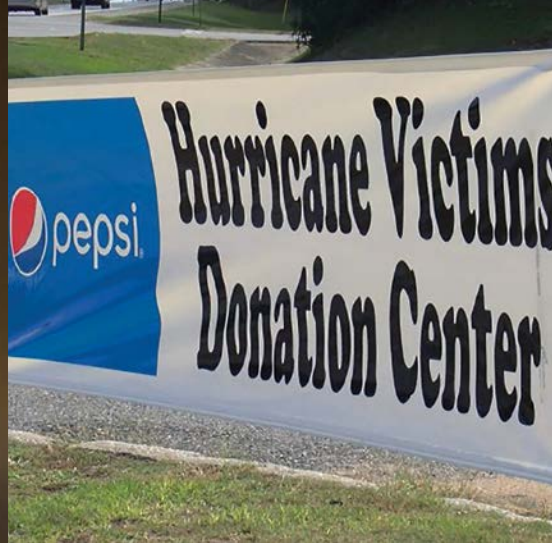
IN TIMES OF CRISIS, WE JUMP INTO ACTION

When Hurricanes Florence and Michael and the California wildfires devastated regions of the United States, it affected our industry to its core. Millions of our customers, employees, neighbors, friends and fellow Americans were impacted. The beverage industry donated thousands of bottles of water, hours of volunteer time and millions of dollars in funds to support the recovery efforts and our nation's dedicated first responders.

The shocking images of the wildfires destroying California neighborhoods up and down the coast rallied beverage companies across the state and country. California's beverage companies were there to provide valuable resources to first responders and the millions of victims.

During and after the devastating hurricanes, local bottlers and national concentrate companies mobilized to help those affected across the Carolinas, Georgia and Florida. Keurig Dr Pepper donated bottled water to the United Way Association of South Carolina and Second Harvest, a partner of United Way of Big Bend in Tallahassee, Fla. The Coca-Cola Foundation pledged \$2 million to support relief efforts. The PepsiCo Foundation pledged \$1 million in relief funds and supported the distribution of 350,000 meals to hurricane victims.

In the wake of natural disasters, it's important to mobilize quickly to provide emergency relief across state lines. We are part of a coalition advocating for the U.S. Department of Transportation to lift the current weight restrictions on six-axle trucks for the beverage industry and other industries. This way we can more easily provide emergency relief to communities in times of need.



IT'S ALL ABOUT IMPROVING THE COMMUNITIES WHERE WE LIVE, WORK AND PLAY

The American Beverage Foundation for a Healthy America supports local communities by providing grants to community organizations that work to advance both the physical health of their local citizens and the environmental health of their communities. As part of an ongoing partnership with the U.S. Conference of Mayors, the foundation supports mayoral initiatives that tackle childhood obesity in creative, yet cost-effective, ways. This year, six cities shared \$445,000 in grants through the U.S. Conference of Mayors 2018 Childhood Obesity Prevention Awards.

Grant recipients included Boston Mayor Martin J. Walsh for “BOSFoodLove,” which aims to increase public school students’ consumption of healthy school meals; Houston Mayor Sylvester Turner for the “Get Moving” Houston Farmers Market that brings locally-sourced fresh fruits and vegetables and nutrition education to sites throughout the city; and Knoxville Mayor Madeline Anne Rogero for “Neighborhoods to Nature,” developed to incorporate park visits and physical activity into residents’ daily lives.

The Foundation also works with state associations to provide matching grants for local programs that advance the overall physical and environmental health of their communities. These programs ranged from building food gardens at local schools, faith-based organizations and residential shared spaces; to providing free and low-cost fitness opportunities in neighborhood parks and community centers; to educating teenagers in underserved areas about how to make better informed food and beverage choices. Grantees included the South Shore YMCA’s “Healthy Weight & Your Child” program in Massachusetts; the Maricopa County Food System Coalition (MarCo), the largest food coalition in Arizona; and the City of Tampa’s “Stay and Play” program in Florida.



Childhood Obesity Prevention Award winner Mayor Madeline Rogero of Knoxville, Tenn., cheers on participants of her “Neighborhoods to Nature” program.



Florida Beverage Association and member company representatives award a grant to Tampa Bay’s “Stay and Play” program.



Mayor Michael Vargas of the city of Perris, Calif., receives a Childhood Obesity Prevention Award for his "Green City Farm" program.



Through the support from USCM and ABFHA, the city of Perris, Calif., will be able to build 30 new gardens throughout the city.




TO DATE
35 CITIES
 have been awarded a total of
\$2.6 MILLION
 in grants through the
**CHILDHOOD OBESITY
 PREVENTION AWARDS PROGRAM.**



Mayor Randall Woodfin of Birmingham, Ala., discusses how Childhood Obesity Prevention Awards have a positive impact in communities across the country.



ABA's Steve Lodge and Mayor Madeline Rogero (see bottom left photo) join Knoxville students for an afternoon of outdoor play and recreation (see middle left photo).



Childhood Obesity Prevention Award winner Mayor Marty Walsh of Boston, Mass., with "BOSFoodLove" program participants.

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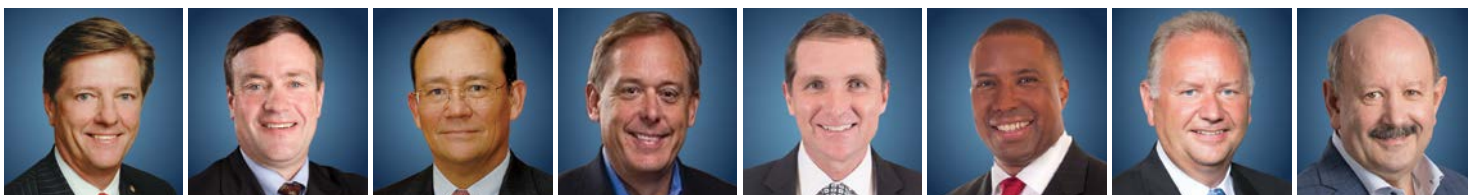
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Coca-Cola Bottling Company
 of International Falls

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Pepsi-Cola Bottling Company
 of Bennettsville, Inc.
Pepsi-Cola Bottling Company of Billings

Pepsi-Cola Bottling Company of Brookfield, Inc.
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 Pepsi-Cola Bottling Company of Hickory, Inc.
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 of Northeast Wisconsin, Inc.
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 Seven-Up Bottling Company, West Bend, WI
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 Ardagh Metal—Beverage North America
 Arrowhead Systems, Inc.
Avista Technologies, Inc.
 Azeus Convene Board Portal
 B & P Manufacturing
 Ball Corporation
 Bedford Industries, Inc.
 Bell Flavors & Fragrances, Inc.
 Beverage Digest Co. LLC
 Beverage Industry BNP Media
 Beverage Marketing Corporation
 Blue Horseshoe Solutions, Inc.
BlumShapiro
 Bright Technologies, Division
 of Sebright Products, Inc.
 Can Manufacturers Institute
 Cargill Incorporated
 CDF Corporation
 Closure Systems International

Donaldson Company
 The Drink Ink
 Emart Club Inc.
 First Beverage Group
 Flavor Dynamics, Inc.
 Foam Supplies, Inc.
Foxtrot Systems, Inc.
 Foxx Equipment Company
 Franklin Baker, Inc.
 Global Essence, Inc.
 Glover Capital, Inc.
 Halo
 IT Authorities
 ITW Paxton Products
 Kaps-All Packaging Systems, Inc.
 Lytx DriveCam
 M.G. Newell Corporation
 Micropure Filtration Inc.
 NewAge Industries, Inc.
 Nexosis, Inc.
PolyCera, Inc.
 Power Brands Consulting LLC
 Preform Solutions, Inc.
 Rutherford & Associates, Inc.
 Sacmi USA Ltd.
 Semi-Bulk Systems, Inc.
 Soft Drinks International
 Steinfurth, Inc.
STS of NYS, Inc.
 Sustainable Decarbonization Services LLC
 Twinlode Corporation
 VHI Transport
 Virginia Dare Extract Co., Inc.
 Western Container Corporation
 Whittle & Mutch, Inc.
 Zenith Global Ltd.



Secretary of Agriculture Sonny Perdue is joined by representatives of the ABA Board, member companies and executive team during ABA's Annual Fly-In.



Senator Joe Donnelly, D-Ind., meets with industry representatives during ABA's Annual Fly-In.



Congressman Ralph Norman, R-S.C. (center), joins ABA Board Chair Kirk Tyler (right) and ABA's Mark Hammond (left) at ABA's congressional reception.



Former White House Chief of Staff Reince Priebus speaks to attendees of the Board of Directors and Fly-In Dinner.



Congresswoman Joyce Beatty, D-Ohio, discusses industry's efforts in her state.



Senator Bill Cassidy, R-La., engages in conversation around industry issues with ABA Fly-In attendees.



Food Marketing Institute's Hannah Walker (center), Walmart's Tres Bailey (right) and ABA's Franklin Davis (left) participate in a panel discussion on the relationship between industry and its customers.

FLY-IN

In April, more than 220 industry representatives convened in the nation's capital for ABA's Annual Fly-In, holding more than 200 meetings with Members of Congress and their staff.



ABA's Barbara Hiden (left) and ABA Board Chair Kirk Tyler kick off NGAC with a discussion on critical industry issues.



ABA's Kevin Keane gets the day going by setting the issues for an ambitious conference.



Public Affairs Council's Chris Bender speaks to conference attendees about how social issues are impacting advocacy.



Beverage Digest's Duane Stanford discusses future trends and opportunities for the beverage industry.



ABA's Fredericka McGee welcomes conference attendees to Dana Point, Calif.



State association executives (from left) Kimberly McConville of Ohio, Kelly McDowell of Wisconsin and Diane Masariu Carter of Indiana socialize after several days of strategizing.



ABA staff (from left) Charmi Oza, Maia Jack and Sean Krispinsky gather during a beverage break.

NATIONAL GOVERNMENT AFFAIRS CONFERENCE

Beverage company representatives from around the country gathered for a two-day conference in Dana Point, Calif., to discuss key industry issues and share insights.

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CHEERS TO 100 YEARS!

We are celebrating 100 years as an association in 2019.

We're making plans for our Centennial Celebration in October, to commemorate a long history of supporting our customers, consumers and communities across America.



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