

# Personal Beverage

## Capacity Report

Database, Channel, and Brand names have been anonymized.

# Personal Beverage

## *POS Data Sources*

### Sources

- Source 1: Home & Sports Channels
- Source 2: MULO
- Source 3: Sports

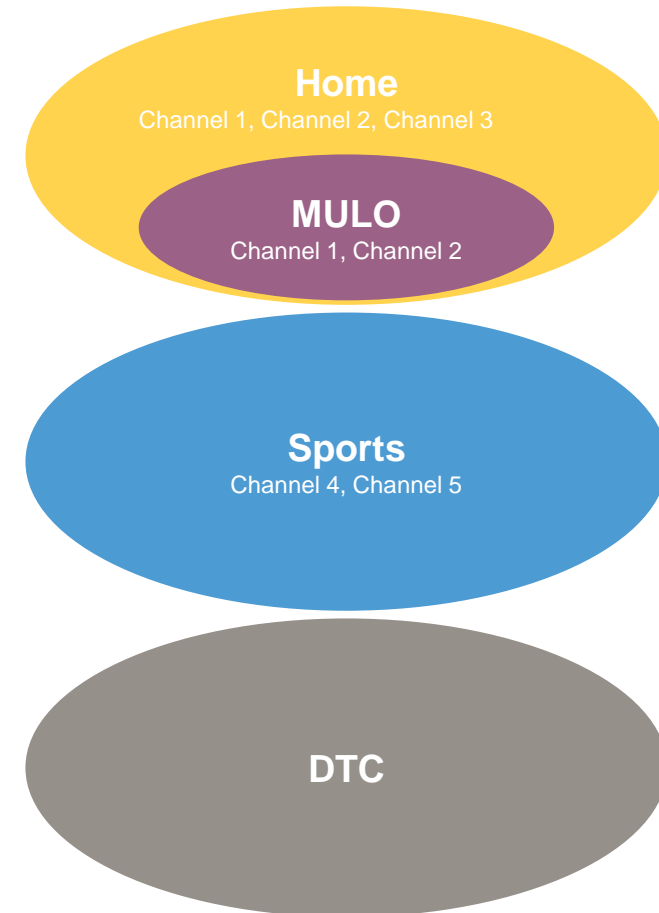
### Time Periods

- Source 1: CY – 12 ME June '23
- Source 2: CY - 52 WE 9-10-23
- Source 3: CY – 12 ME Aug '23

### Notes

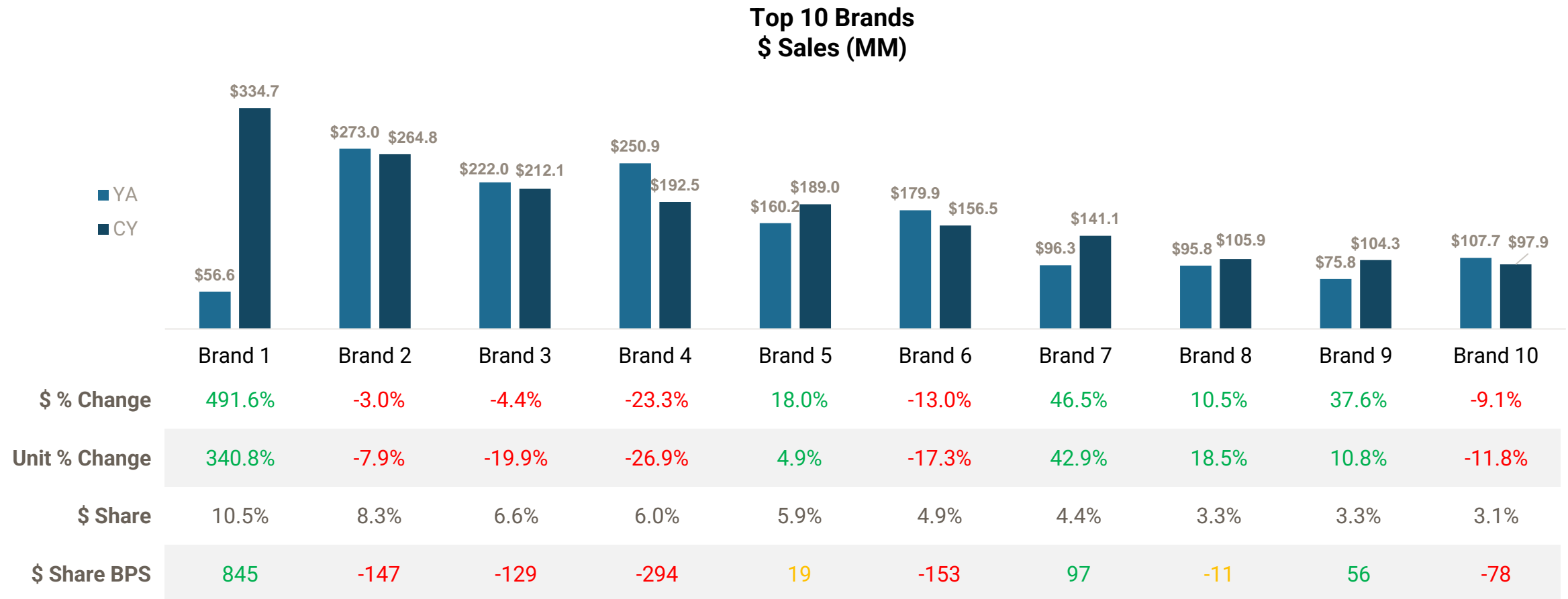
- Dollar and Unit Share for the capacity buckets is share of total market. Dollar and Unit Share for brands is share of capacity bucket, not total market.
- Source 2 data set includes filtered bottles.
- Source 1 includes data from both Home and Sports channels.
- Data sets do not include DTC sales.
- For this analysis and accompanying report, Undefined/AO volume is excluded.

### Retail Universe (not to scale)



# Total Market

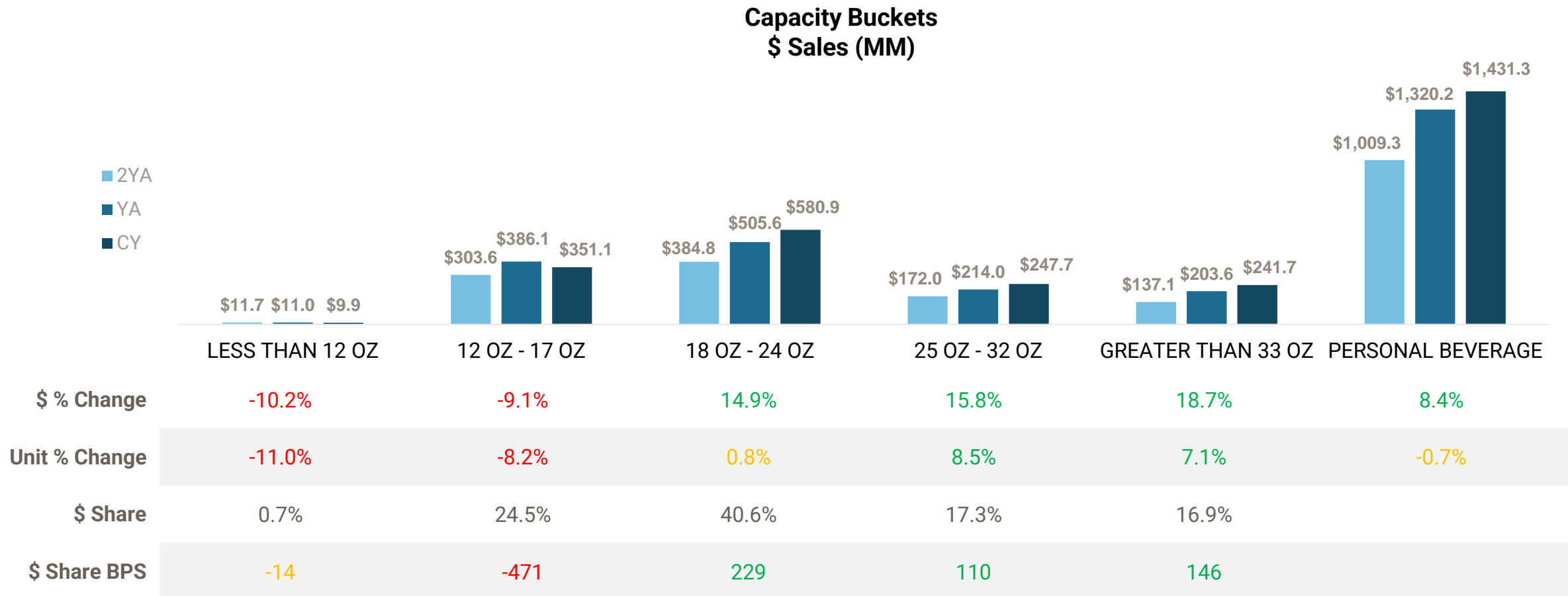
Brand 1 has seen the largest increase in dollar sales at +\$278.1MM (+491.6%), leading to 10.5% market share dominance.



# MULO

## Capacity

>33oz saw the fastest increase in sales volume at +18.7%, leading to +146 \$ share BPS.

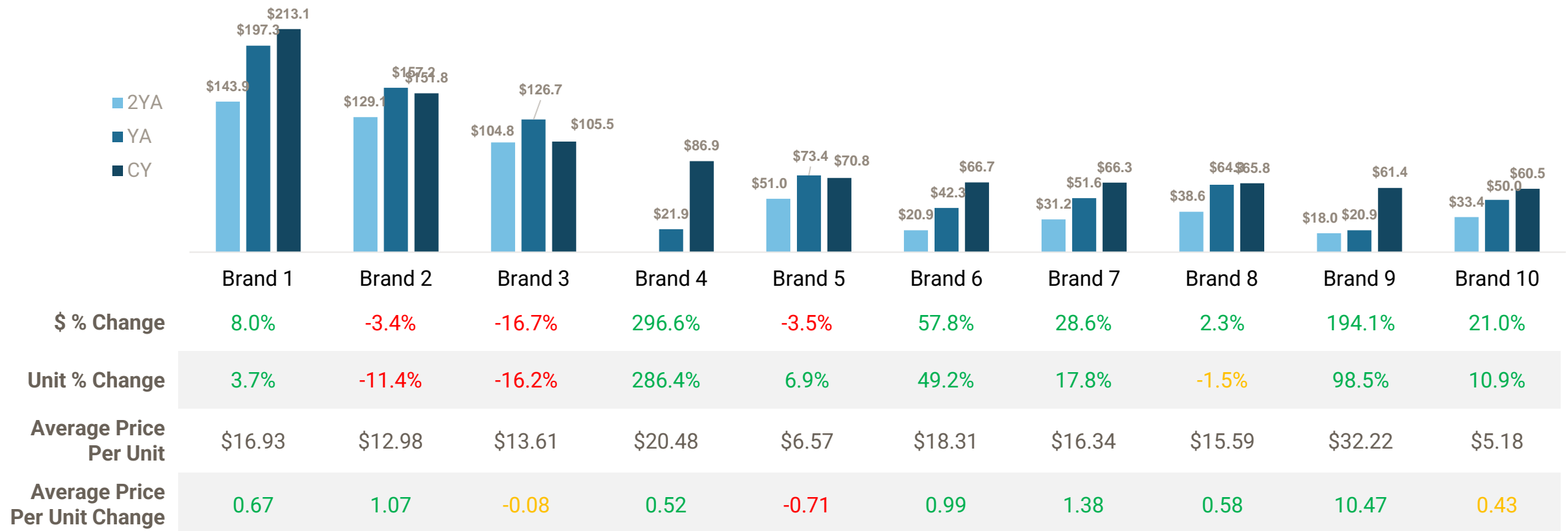


# MULO

## Brand

Brands 9 and 4 saw the fastest \$ growth at +194.1% and +296.6% respectively.

**Top 10 Brands  
\$ Sales (MM)**

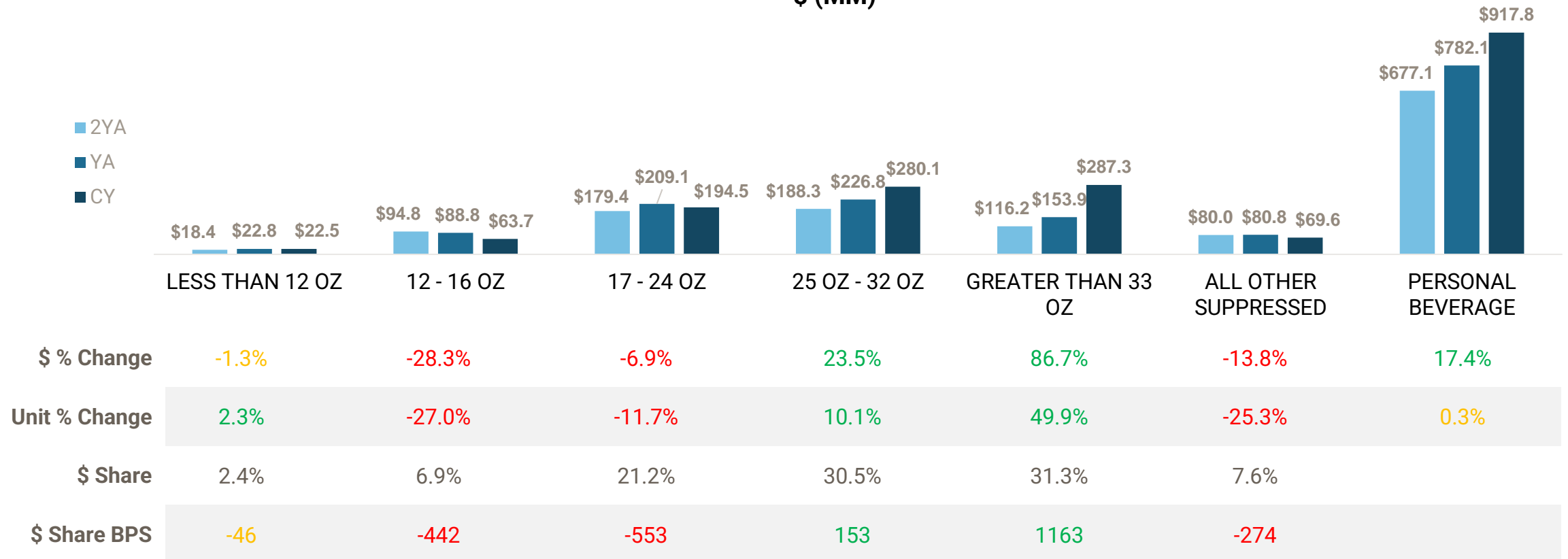


# Sports

## Capacity

>33oz is the fastest growing capacity bucket at +86.7% and has gained the most CY \$ share at +1163 BPS.

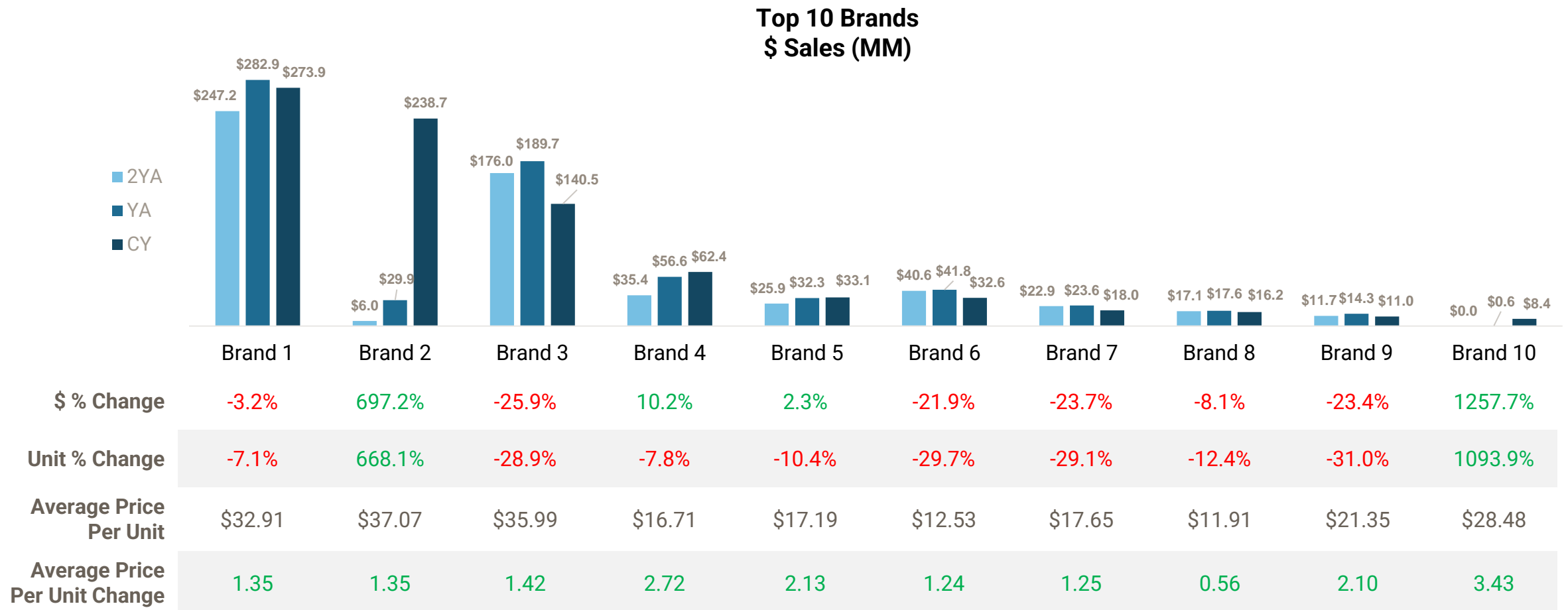
Capacity Buckets  
\$ (MM)



# Sports

## Brand

Brand 2 saw the fastest dollar and unit growth at +697.2% and +668.1% respectively.



# Additional Questions to Consider

- Are there specific lid technologies that have led to increased consumer demand for larger capacities items?
- Is growth in larger capacity buckets driven by product innovation or better market execution (e.g., distribution/velocity)?
- Is Brand X responsible for this shift or are they merely capitalizing on existing consumer demand for larger capacities?
- Fast-reacting brands like Brand Y and Brand Z have already made big gains in the larger capacity buckets; can slow adopters have the same impact?
- Kids items are included in the datasets. Are trends within smaller capacity buckets driven by capacity or by kid's brands?