

Nielsen Competitive Analysis through 8/10

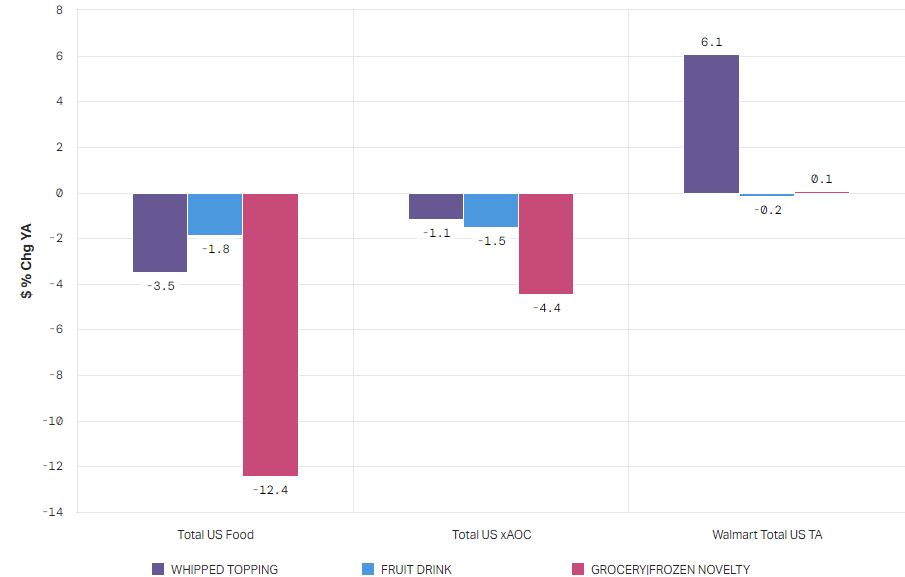
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4 attachments (883 KB)
Nielsen Competitive Analysis 8.20.24.xlsx; Skittles Drinks 8.20.24.xlsx; Vegan Whipped Topping 8.20.24.xlsx; Cold Foam Stats 8.20.24.xlsx;

Hi team,

Category Performance

\$ % Chg YA during YTD - 32 w/e 08/10/24 ...



Alamance Overview:

Alamance YTD

		Units	Units % Chg YA	\$	\$ % Chg YA	%ACV	%ACV YA
Markets	Products	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24
Total US xAOC	ALAMANCE FOODS INC	23,554,949	3.6%	\$ 65,343,693	(1.2)	42.0%	41.7%
Total US xAOC	Alamance Pops (brand + PL)	20,400,257	(0.5)%	\$ 57,087,637	(3.9)	36.4%	34.4%
Total US xAOC	Fun Pops Brand (Pops)	20,294,086	(0.4)%	\$ 56,684,154	(3.9)	36.2%	34.2%
Total US xAOC	Fun Pops Drinks	2,199,592	108.6%	\$ 4,818,422	98.2	20.4%	9.3%
Total US xAOC	Alamance Brand Aerosol	1,060,971	(1.5)%	\$ 3,840,777	(5.8)	3.9%	7.1%
Total US xAOC	Classic Cream	734,198	(14.8)%	\$ 2,493,196	(20.8)	1.0%	2.2%
Total US xAOC	Coffee Toppers	268,538	123.6%	\$ 1,106,688	112.2	2.2%	1.6%
Total US xAOC	CT Melty Mocha 15oz	31,771	(8.0)%	\$ 125,516	(14.7)	0.8%	1.3%
Total US xAOC	CT Salted Caramel 15oz	87,068	42.4%	\$ 372,104	38.8	1.7%	1.5%
Total US xAOC	CT Very Vanilla 15oz	76,830	214.6%	\$ 316,845	198.5	1.6%	0.4%
Total US xAOC	CT White Chocolate 15oz	29,692		\$ 118,864		0.6%	
Total US xAOC	CT Marshmallow 15oz	43,178		\$ 173,359		0.7%	
Total US xAOC	Whipt	57,167	(21.4)%	\$ 238,494	(25.1)	1.1%	3.3%
Total US xAOC	Whipt Almond	17,834	54.2%	\$ 75,937	46.4	0.6%	0.4%
Total US xAOC	Whipt Coconut	8,302	(40.3)%	\$ 35,144	(43.7)	0.3%	0.4%
Total US xAOC	Whipt Oat	31,031	(34.3)%	\$ 127,413	(37.7)	1.0%	3.2%

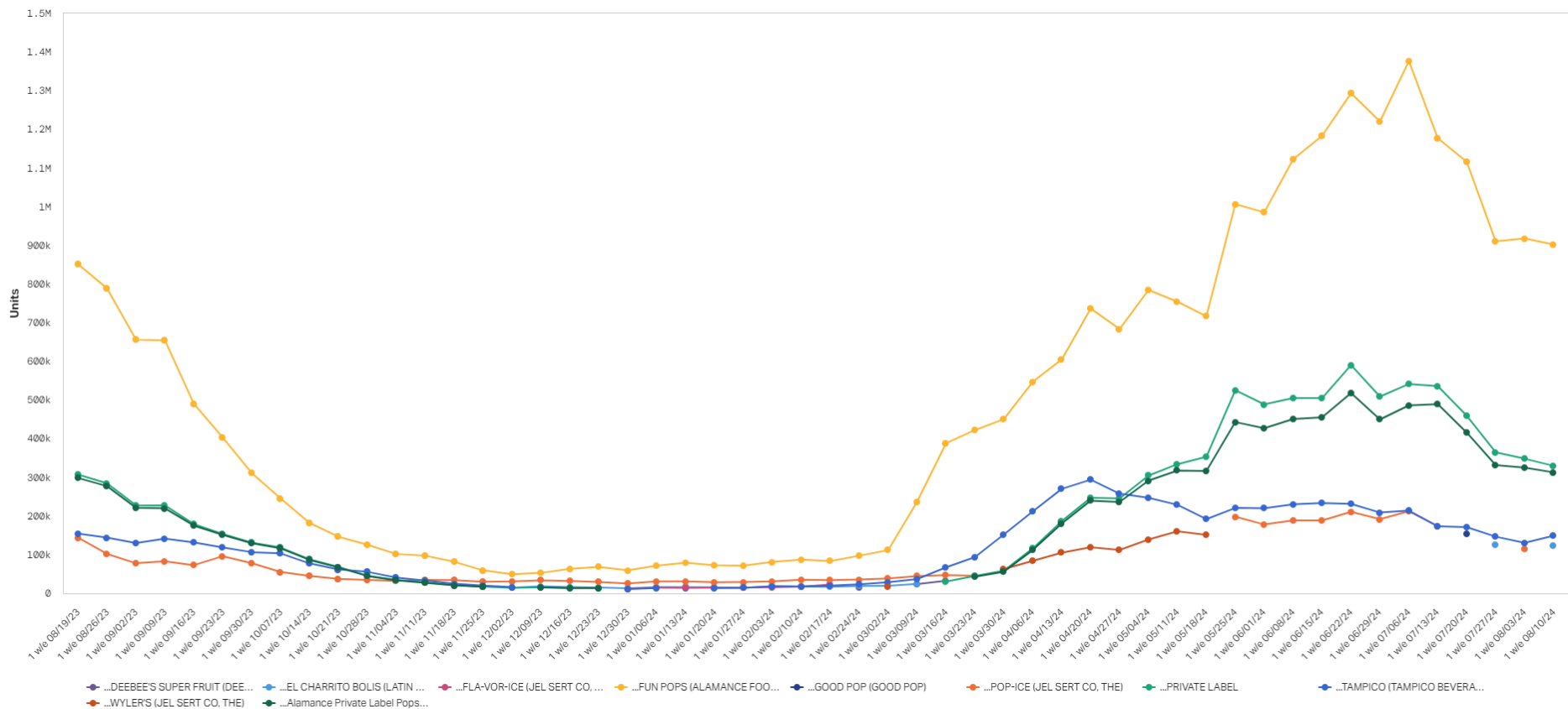
- Pops:
- Fun Pops are -2% in unit sales in the Total US during the latest 13 weeks compared to same time last year, while Jel Sert is -18% in unit sales.
 - The Shelf Stable Pops category is -11% in unit sales in the latest 4 weeks and -2% latest 13 weeks.
 - **Fun Pops are moving 20 u/s/w**, the category is moving 10 u/s/w, and Jel Sert is moving 5 u/s/w in the latest 4 weeks.
 - In Walmart, Fun Pops unit sales are +1% YTD while Pop-Ice is -9% in unit sales.
 - *Good Pop unit sales are +162% in the latest 13 weeks.*
 - *DeeBee's Super Fruit pops unit sales are -40% in the latest 13 weeks.*
 - *Lisy Corp is selling an 8ct pop bag (UPC: 009678607789) at ShopRite, and their unit sales are +2,654% in the latest 13 weeks.*

L52wks-

Top Pops Retailers	\$ % Chg YA	Units % Chg YA	U/S/W
Walmart	+3%	+9%	24
Food Lion	-13%	-10%	13
Publix	+28%	+12%	9
Target	+35%	+55%	9
Whole Foods	-28%	+10%	33

Top 5 Pops Units L52Wks

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Top Fun Pops Retailers YTD

	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24
Markets	\$	\$ % Chg YA	↓ Units	Units % Chg YA	Units / Item / Store Wks Selling	Units / Item / Store Wks Selling YA
Walmart Total US TA	\$ 45,295,425	(4.7)	16,084,431	0.7%	66	112
Dol Gen Total TA	\$ 2,254,958	(2.6)	969,290	(3.9)%	4	4
Publix Total TA	\$ 2,322,086	37.0	813,801	22.8%	32	31
Family Dollar Total TA	\$ 1,511,197	53.0	506,180	53.3%	3	3
UNFI CONVL Total Enterprise TA	\$ 799,993	(13.9)	237,959	(15.6)%	27	26
ShopRite Total TA	\$ 579,345	24.8	236,460	27.8%	64	65
ALBSCO Total Company Incl SLC TA	\$ 297,328	97.9	129,397	95.1%	30	37
IGA Supermarket Total TA	\$ 372,643	(13.2)	116,005	(14.2)%	14	16
Alliance Retail Group Total TA	\$ 337,956	(28.2)	112,760	(24.9)%	20	26
KVAT Food City TA	\$ 167,109	(10.0)	84,018	(10.0)%	33	39
Fiesta Total TA	\$ 191,057	(8.4)	83,453	(14.7)%	56	77
SpartanNash Total Wholesale & Retail TA	\$ 182,296	(27.5)	56,721	(23.3)%	19	24
Harps Total TA	\$ 175,944	4.3	55,718	(6.2)%	16	20
Mitchell Grocery Total TA	\$ 163,446	9.1	54,127	4.6%	21	21
Stater Bros Total TA	\$ 158,726	26.2	54,056	11.1%	11	10

blue=Jel-Sert

Shelf Stable Pops category L13wks

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	Latest 13 Wks - w/e 08/10...	Latest 13 Wks - w/e 08/10...	Latest 13 Wks - w/e 08/10...	Latest 13 Wks - w/e 08/10...	Latest 13 Wks - w/e 08/10...	Latest 13 Wks - w/e 08/10...	Latest 13 Wks - w/e 08/10...	Latest 13 Wks - w/e 08/10...
	Total US xAOC	Total US xAOC	Total US xAOC	Total US xAOC	Total US xAOC	Total US xAOC	Total US xAOC	Total US xAOC
Products	↓ Units	Units YA	Units % Chg YA	\$	\$ YA	\$ % Chg YA	Units / Item / Store Wks Selling	Units / Item / Store Wks Selling YA
SHELF STABLE POPS CATEGORY	37,281,309	37,980,069	(1.8)%	\$114,856,222	\$121,752,411	(5.7)	11	12
FUN POPS (ALAMANCE FOODS INC)	13,929,451	14,166,778	(1.7)%	\$38,058,947	\$40,886,259	(6.9)	20	37
PRIVATE LABEL	6,056,640	5,703,374	6.2%	\$19,066,046	\$18,908,095	0.8	44	51
TAMPICO (TAMPICO BEVERAGES INC)	2,521,672	1,953,957	29.1%	\$3,059,514	\$2,295,268	33.3	24	28
POP-ICE (JEL SERT CO, THE)	2,160,800	2,389,257	(9.6)%	\$9,585,187	\$10,575,682	(9.4)	6	7
WYLER'S (JEL SERT CO, THE)	1,702,517	1,610,968	5.7%	\$9,824,953	\$8,570,418	14.6	5	6
EL CHARRITO BOLIS (LATIN SPECIALTI...	1,492,123	1,155,039	29.2%	\$1,282,570	\$960,772	33.5	68	59
GOOD POP (GOOD POP)	1,362,144	519,185	162.4%	\$8,463,451	\$5,428,225	55.9	22	22
OTTER POPS (JEL SERT CO, THE)	1,010,610	1,075,581	(6.0)%	\$5,804,729	\$6,250,682	(7.1)	13	13
BOLIS (GRAMIC ENTERPRISES INC)	904,699	834,333	8.4%	\$1,958,870	\$1,780,397	10.0	76	71
KOOL POPS (JEL SERT CO, THE)	889,499	1,402,257	(36.6)%	\$2,089,024	\$3,426,139	(39.0)	15	19
DEEBEE'S SUPER FRUIT (DEEBEE'S SP...	745,516	1,249,050	(40.3)%	\$3,435,657	\$7,278,030	(52.8)	10	9
FLA-VOR-ICE (JEL SERT CO, THE)	600,111	638,540	(6.0)%	\$2,197,646	\$2,047,731	7.3	3	6
JOLLY RANCHER (JEL SERT CO, THE)	476,658	683,778	(30.3)%	\$804,683	\$1,120,980	(28.2)	2	3
EL MEXICANO (MARQUEZ BROTHERS I...	450,950	361,169	24.9%	\$413,125	\$339,152	21.8	30	26
POWERADE (JEL SERT CO, THE)	424,235	778,246	(45.5)%	\$1,402,335	\$2,598,430	(46.0)	3	3
SUNKIST (JEL SERT CO, THE)	390,030	519,793	(25.0)%	\$496,310	\$568,017	(12.6)	3	3
WARHEADS (JEL SERT CO, THE)	293,464	400,744	(26.8)%	\$369,633	\$464,395	(20.4)	2	3

- Drinks:
- **Fun Pops Drinks are +171% in unit sales** in the latest 13 weeks, while Little Hugs are -1% in unit sales.
 - The Single Serve Fruit Drink category is flat in unit sales but down in \$ sales (-5%) in the latest 13 weeks.
 - *Kool-Aid and Capri Sun are the top two brands in the Single Serve Fruit Drink category based on \$ and unit sales. Kool-Aid is -7% and Capri Sun is -15% in unit sales in the latest 13 weeks.*
 - *Skittles fruit drinks have sold 1.5MM units YTD (manufactured by Jel-Sert). **Their sour drink is moving an average of 37 U/S/W at Walmart.***

		YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24
Markets	Drinks	Units	\$	Units / Item / Store Wks Selling	Avg Unit Price	%ACV
Total US xAOC	Skittles Drinks 14oz (4 SKUs)	1,454,483	\$2,431,516	19	\$1.67	2.3%
Total US xAOC	Skittles Original Drink 14oz	516,678	\$863,374	20	\$1.67	2.1%
Total US xAOC	Skittles Sour Drink 14oz	406,839	\$679,062	16	\$1.67	2.0%
Total US xAOC	Skittles Wild Berry Drink 14oz	405,253	\$677,427	16	\$1.67	2.0%
Total US xAOC	Skittles Tropical Drink 14oz	532,454	\$890,555	21	\$1.67	2.0%

		YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24
Markets ▾	Drinks	Units	\$	Units / Item / Store Wks Selling	Avg Unit Price	%ACV
Walmart Total US TA	Skittles Drinks 14oz (4 SKUs)	517,741	\$ 869,015	43	\$ 1.68	3.2%
Walmart Total US TA	Skittles Original Drink 14oz	182,001	\$ 305,496	44	\$ 1.68	2.9%
Walmart Total US TA	Skittles Sour Drink 14oz	144,319	\$ 242,140	37	\$ 1.68	2.7%
Walmart Total US TA	Skittles Wild Berry Drink 14oz	146,225	\$ 245,261	37	\$ 1.68	2.8%
Walmart Total US TA	Skittles Tropical Drink 14oz	189,515	\$ 318,258	47	\$ 1.68	2.8%

L52wks-

Top Drinks Retailers	\$ % Chg YA	Units % Chg YA	U/S/W
Walmart	-3%	-3%	12
Dollar General	-3%	-4%	3
Food Lion	-6%	-2%	6
Publix	-4%	+5%	6
Bjs	-15%	-16%	31

Top FP Drinks Retailers YTD

	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24	YTD - 32 w/e 08/10/24
Markets	\$	\$ % Chg YA	↓ Units	Units % Chg YA	Units / Item / Store Wks Selling	Units / Item / Store Wks Selling YA
Walmart Total US TA	\$ 3,237,007	634.8	1,255,311	946.5%	14	6
Dol Gen Total TA	\$ 539,510	18.0	542,900	18.2%	2	2
Save-A-Lot Core TA	\$ 124,960	(43.6)	55,533	8.8%	4	7
IGA Supermarket Total TA	\$ 143,218	(37.6)	43,317	(38.1)%	3	3
Alliance Retail Group Total TA	\$ 119,448	(27.9)	36,648	(29.7)%	3	3
UNFI CONVL Total Enterprise TA	\$ 78,337	(35.4)	27,018	(16.5)%	5	5
KVAT Food City TA	\$ 35,352	9.9	25,586	33.3%	3	2
AWG Aim Group TA	\$ 43,512	(31.3)	21,593	(24.8)%	2	2
AWG Gulf Coast TA	\$ 76,901	(9.0)	21,042	(10.2)%	3	3
Mitchell Grocery Total TA	\$ 28,671	(40.9)	9,344	(24.8)%	2	3

Aerosol:

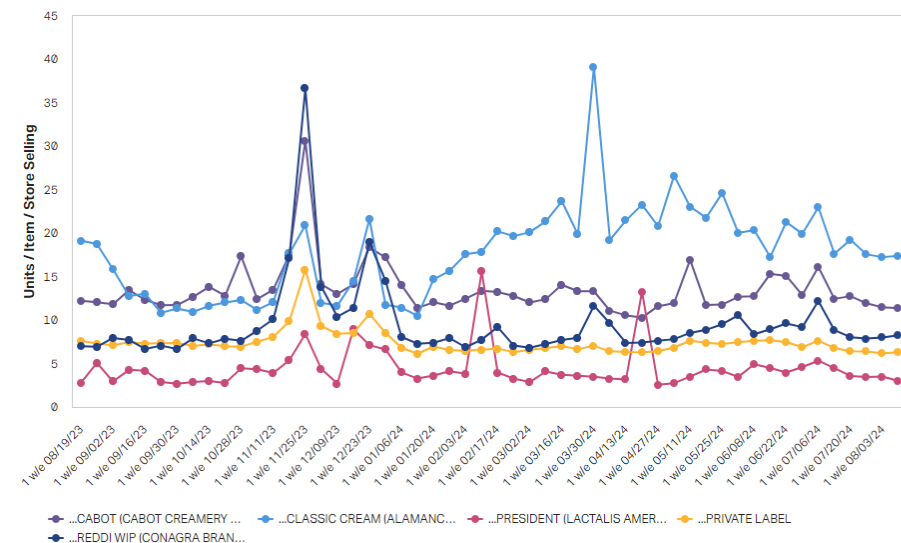
- The whipped topping category is -1% in unit sales while the aerosol whipped topping category is +2% in unit sales in the latest 13 weeks.
- In the latest 13 weeks, unit sales for Reddi Wip are flat while private label is +5%.
- Out of the top 5 aerosol brands, **Classic Cream has the highest movement in the last 13 weeks at 20 U/S/W**. The next highest brand is Cabot at 13 U/S/W.
- Whipnotic unit sales are +738% in the latest 13 weeks.
- President unit sales are +300% in the latest 13 weeks.

L52wks-

Top Aerosol Retailers	\$ % Chg YA	Units % Chg YA	U/S/W
Walmart	+7%	+11%	20
Publix	-6%	-3%	11
Target	+3%	+7%	12
Albertsons	-4%	-4%	13
ShopRite	-2%	+2%	23

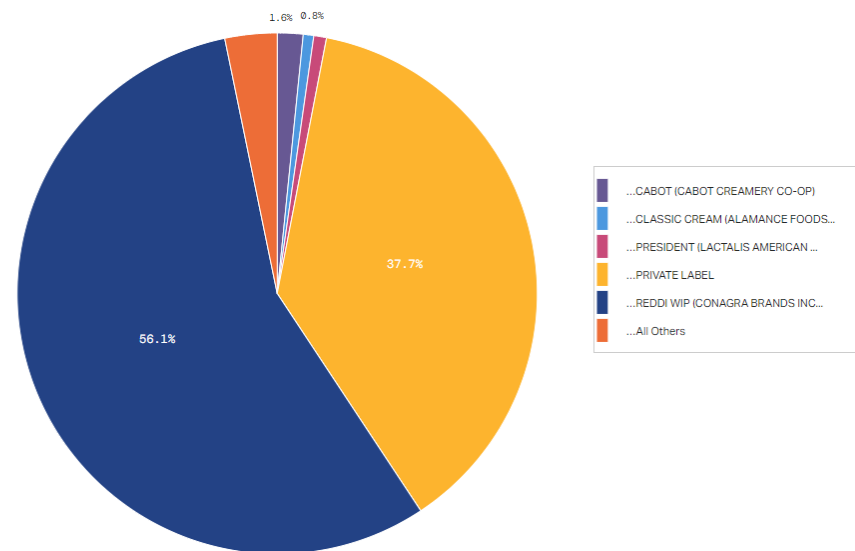
Aerosol Movement of Top 5 Brands

Units / Item / Store Selling of WHIPPED TOPPING, AEROSOL CAN, ALL BRAND * in Total US xAOC during 1 w/e 08/19/23 To 1 w/e 08/10/24



Aerosol Brand Breakdown

\$ of WHIPPED TOPPING, AEROSOL CAN, ALL BRAND * in Total US xAOC during Latest 52 Wks - w/e 08/10/24



Cold Foam (Reddi Wip Sweet Foam+Coffee Toppers+International Delight):

- In the latest 4 weeks, unit sales for Reddi Wip Sweet Foam are -9%, while unit sales for Coffee Toppers are +171% (Salted Caramel, Vanilla, and Marshmallow are the top flavors).
- International Delight has sold about 3.2MM units of cold foam in the latest 13 weeks with Sweet & Creamy and Caramel Macchiato being the top flavors.

YTD-

Top Cold Foam Retailers	\$	Units	U/S/W
Walmart	\$13.2MM	2.8MM	9
Target	\$4.9MM	995k	7
Publix	\$1.7MM	361k	6
Albertsons	\$2.8MM	561k	3
Meijer	\$1MM	217k	9

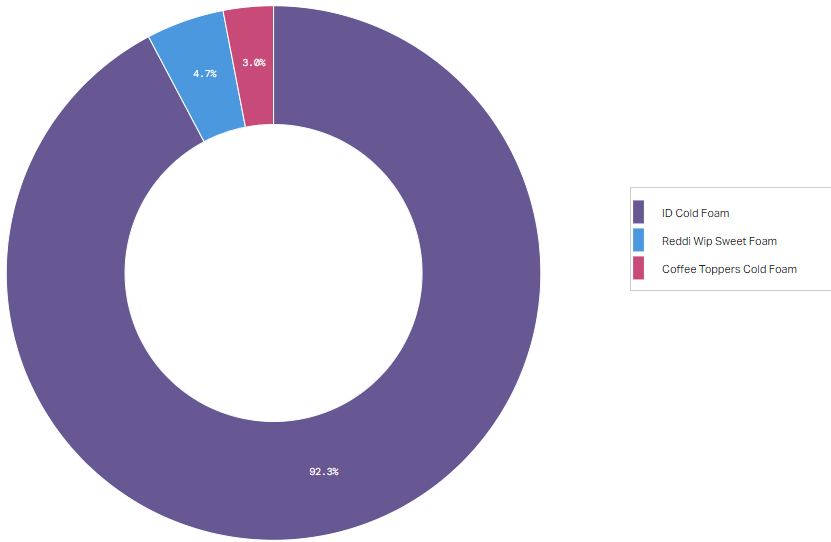
Coffee Toppers:

YTD-

Coffee Toppers Flavors	\$	Units	% Units Any Promo	U/S/W
Salted Caramel	\$372k	87k	4%	7
Very Vanilla	\$317k	77k	5%	7
Marshmallow	\$173k	43k	1%	7
Melty Mocha	\$125k	32k	6%	5
White Chocolate	\$119k	30k	0.3%	5
Total	\$1.1MM	269k	4%	6

YTD Unit Share - Cold Foams

Units Shr - Product of 3 Aerosol in Total US xAOC during YTD - 32 w/e 08/10/24



*** For all sales forecasting inquiries, please contact us at: salesforecasting@alamancefoods.com***

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