

\$79 REPORT / FREE EXAMPLE / UNITED STATES

GT's Kombucha

Find the lost demand. Back the next repeat.

GT's units held up better than the category, but retail value per unit fell faster. First identify whether price, pack, promotion or distribution explains the gap; then test repeat demand and feasible supply. [15]

1 / AI HYPOTHESIS

Recover demand

Find distribution, selling-rate and value gaps before choosing a fix.

2 / AI HYPOTHESIS

Validate repeat

Separate lasting new-format demand from trial and core-item substitution.

3 / AI HYPOTHESIS

Plan feasible batches

Connect sell-through to fermentation, usable age and approved capacity.

WHY THESE THREE

The latest matched window shows a value question as well as weaker category demand. The new Enlightened cans launched on 17 July 2026, after that window ended; they are a response to changing occasions, not an explanation for the earlier decline. [15,17]



01 / AI HYPOTHESIS: RECOVER DEMAND

Find the demand loss before choosing the fix.

**1****Locate the change****2****Separate the driver****3****Test the action****HYPOTHESIS AND EVIDENCE**

Tracked GT's retail dollars fell 10% and units 4% in the latest reported window. Distinguish fewer selling stores, slower sales in available stores and lower dollars per unit before changing production or adding promotions. [15]

WHAT AI CHANGES

Use retailer/item/location demand and availability data to detect changes, group affected stores and rank explanations. Estimate how distribution, base selling rate, promotion, pack and price contribute. A simple variance bridge comes first; use models only for interactions and predictions that change a sales or merchant decision.

A CONCRETE DECISION

A region loses dollars while units hold up. Check smaller packs and promotions before assuming demand collapsed. A different region loses active doors: sales coverage or retailer acceptance may matter more than a discount.

TEST AND DECISION

Build a time-based comparison with current account reviews and a transparent distribution/velocity bridge. Stage a feasible action in matched retailer/store groups. Measure sustained units per available selling store, retained distribution and net contribution after trade spend, credits and channel costs.

OWNER AND GUARDRAILS

Sales and category management; revenue management and finance validate price and trade costs. Do not infer a lost shelf from a zero sale or use retail dollars as company revenue. Retailer data rights and action ownership must be clear.

Compare: Current account review; Distribution x sales-rate bridge; Changed demand pattern + action ranking.

02 / AI HYPOTHESIS: VALIDATE REPEAT

Choose the launch that earns repeat demand.

1**Read trial and access****2****Check retained repeat****3****Extend, change or stop****HYPOTHESIS AND EVIDENCE**

Enlightened launched in refrigerated 12 oz cans with fiber, initially at Sprouts in July. Test whether the new format reaches new buyers or shifts spending from core SYNERGY. The public launch record does not prove repeat demand. [17]

WHAT AI CHANGES

Combine availability-adjusted retailer sell-through, permitted household repeat, approved product attributes and feedback to rank keep/extend/change decisions. Estimate substitution from core items, distinguishing distribution gains and launch promotion from lasting demand. Sensory and quality testing remain human decisions.

A CONCRETE DECISION

A proposed flavor performs strongly in an initial test but fades after the promotion. The analysis compares repeat sales and substitution from existing flavors before recommending wider distribution.

TEST AND DECISION

Use a limited retailer or region test with comparable assortment and promotion exposure. Separate trial, repeat, distributor loading and sales moved from current products. Evaluate contribution after trade spend and credits.

OWNER AND GUARDRAILS

Innovation and category teams; sales, quality and finance share approval. Do not infer medical needs or promise health effects. Keep adult-only products separate and respect retailer data rights.

Compare: Current operating process; Seasonal or structured-review rule; Predictions or text classification.

03 / AI HYPOTHESIS: PLAN FEASIBLE BATCHES

Make the batch the market can use.

**1****Separate the signals****2****Respect the batch****3****Track sell-through****HYPOTHESIS AND EVIDENCE**

SYNERGY's published 30-day ferment makes the decision horizon important when demand moves across flavors and formats. That is a constraint to model, not evidence of current excess stock. [1]

WHAT AI CHANGES

Predict demand by product, retailer and region; combine the forecast with batch capacity, approved shelf life and release rules in a constrained plan. Keep customer-provided forecasts as inputs, not unquestioned truth.

A CONCRETE DECISION

A promotion raises distributor orders. The planner checks whether retailer sell-through supports a larger batch and whether capacity and usable life permit it. The model proposes options rather than a blind volume increase.

TEST AND DECISION

Compare current planning, a seasonal rule and model forecasts using time-based tests that exclude future information. Then review feasible plan recommendations in parallel before a staged operating test. Measure service and age, not forecast error alone.

OWNER AND GUARDRAILS

Demand planning and production; sales and finance validate trade assumptions. Quality release and food rules override recommendations. Verify cold handling; do not combine incompatible product families.

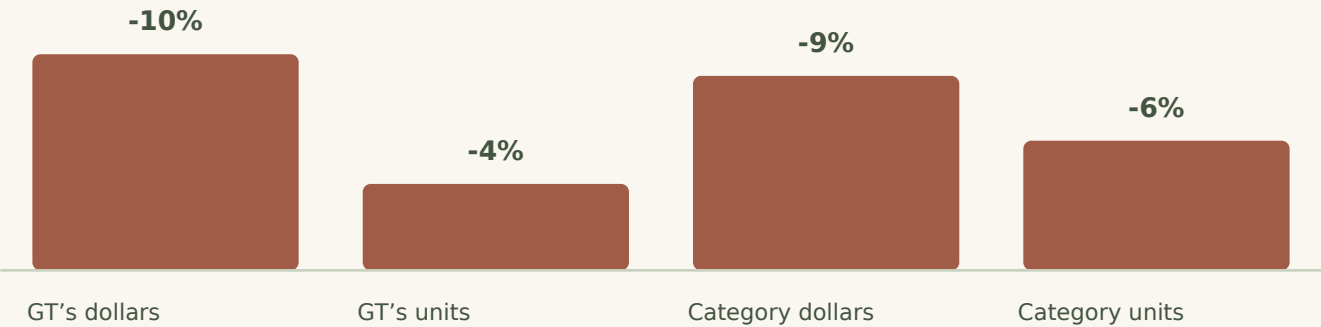
Compare: Current operating process; Seasonal forecast + constrained planning rule; Demand estimate + feasible batch allocation.

04 / FINANCIAL AND OPERATING DIAGNOSIS

Retail demand is the diagnostic evidence.

US refrigerated kombucha / same 52-week window

Year-on-year change / %



Source: Circana via Dairy Foods [15], 52 weeks to 12 July 2026. Tracked retail demand; not company net sales.

Latest tracked US measure	GT's	Category
Retail dollars / USD millions	302	703
Retail units / millions	72	172
Dollar change / year on year	-10%	-9%
Unit change / year on year	-4%	-6%

READ THE DIFFERENCE

Circana’s US Multi Outlet+ with convenience-store window ended 12 July 2026. Rounded growth implies retail dollars per unit fell about 6.3% for GT’s versus 3.2% for the total category. Subtracting GT’s from both current and implied prior totals gives about 0.9% for the rest of the category. These calculated ratios mix price, pack, promotions and channels; they are not same-item price changes. [15]

FINANCIAL SCOPE

These are tracked retail sales, not GT’s invoices, net revenue or profit. Manufacturer net sales need trade deductions, retailer margins and channel coverage; audited company profit cannot be reconstructed responsibly from these inputs. Use actual account contribution for the proposed tests.

THE OPERATING CONSEQUENCE

Lower unit demand and shifting pack mix change batch needs, retailer buying depth and usable age. Split distributor orders from consumer sell-through. A planning model must preserve quality release, cold handling and capacity constraints; extra inventory is not a growth strategy.

05 / COMPETITIVE LANDSCAPE

Keep the business distinct. Learn from the market.

Competitor / US role	Evidence of its approach	Decision for GT's
Health-Ade / direct kombucha	Generous Brands completed acquisition August 2025; also plays across cans and soda occasions.	Compare retailer access, repeat and pack value. Ownership scale is not better shelves.
Brew Dr / direct raw kombucha	Tea-led raw product, cold storage and a published 2-4 week ferment.	Raw craft is not unique. Compare taste, occasion and availability.
KeVita / direct; Poppi / adjacent	PepsiCo's portfolio competes across fermented beverages and prebiotic soda.	Track the shopper occasion and price per ounce; do not equate beverage types.
Humm / direct kombucha	Competes in kombucha formats; category definitions differ between refrigerated and shelf-stable data.	Match channel, format and window before interpreting competitor growth.

WHAT THE INDUSTRY SIGNAL SAYS

The -9% category dollar and -6% unit results are a measured market benchmark, not an average company margin. GT's dollar decline is slightly worse while its unit decline is smaller. Ask where distribution, mix and value differ; the national result cannot identify a local cause. [15]

WHERE TO LOOK BEYOND THE FINANCIALS

Compare pack size, occasions, certified attributes, cooler space and repeat. GT's Culture Club already collects qualifying purchase receipts through Brandmovers. Begin with permitted receipts and retailer panels, recognizing that receipt uploaders are self-selected. Confirm the existing tools before buying a new platform. [19]

INVENTORY COMPARISON

Public sources do not provide matched competitor lot age, shelf availability or inventory days. Measure age at retailer receipt, unavailable hours, credits and sell-through locally. Less book inventory can mean either healthier stock or weaker service.

06 / HYPOTHESIS DEVELOPMENT

Let the constraint change the order.

Demand is absent

Test product, value or account access.

Demand is blocked

Fix capacity, usable stock or service.

HOW WE REACHED THE HYPOTHESES

Demand diagnosis comes first because the public market evidence is stronger than evidence of batch or quality failure. If the decline is mostly lost distribution, account recovery moves ahead of promotion. If stable distribution hides weak repeat, product relevance and launch review move first. If demand is present but age or fill prevents buying, batch and allocation move first.

WHAT WOULD DISPROVE THEM

Reject or reorder an opportunity if the suspected constraint does not appear in the company data, if a simpler rule performs as well, or if incremental contribution disappears after full operating costs.

Priority	Decision changed	Data to establish first
1 / Recover demand	Changed demand pattern + action ranking	Store-item sales, active distribution, stock availability, pack size, base/promoted price, trade terms, returns and competitor shelf observations.
2 / Validate repeat	Predictions or text classification	Product attributes, retailer demand, launch dates, promotions, repeat periods, sensory results, distribution changes and trade costs. Use permitted Culture Club receipts alongside representative retailer/panel data; receipt uploaders alone do not represent all buyers. [19]
3 / Plan feasible batches	Demand estimate + feasible batch allocation	Retail sell-through, orders, promotions, product age, batch capacity, quality release, lead times, credits and distribution costs.

WHOLE-BUSINESS CHECK

Research includes ownership and financial scope, customers and buying occasions, trends and product development, price and range, suppliers and production, stock and fulfillment, stores and digital channels, service and customers returning. The reader edition keeps the evidence that changes the decision; the supporting research holds the detail.

07 / OUTSIDE-COMPANY CASES

Borrow the mechanism. Test the outcome.

ANORA / RELEX

3 September 2026 / provider account Channel-level forecasting made demand changes easier to locate. [6]

Use retail/account granularity to focus the demand review. Nordic wine/spirits forecasting is not a controlled kombucha share-recovery test.

UNILEVER / KNORR

2026 / company account [18] AI-assisted recipe screening preceded physical trials; Unilever reports shorter development time.

Use models to narrow variants, then verify with sensory tests and real repeat. Recipe development speed does not prove product-market fit.

VITA COCO / RELEX

Undated case / 2022 company context [4] A constrained digital supply model connects sourcing, factories and logistics into an 18-month plan.

Model usable age and fermentation constraints for GT's. Shelf-stable coconut-water logistics and self-reported benefits do not transfer.

PROVIDER FIT AND OVERLAP

Current systems and staff decisions are the starting point. Require a demonstration with the company's own permitted sample, working integrations, human overrides and traceable recommendations. Match the full cost of data, configuration, training, support and exit to a worthwhile operating decision. A vendor case does not validate the proposed result.

08 / FINAL DECISION

Start with the decision, then choose the tool.

RECOMMENDED STARTING MOVE

Begin with a retailer/item/region demand bridge and agree one actionable account or assortment decision. Validate existing data and simpler rules before buying software. Run a bounded new-format repeat test alongside it; bring batch planning forward where fill, age or credits demonstrate a constraint.

Opportunity	Decision owner	Result worth measuring
Recover demand	Sales and category management; revenue management and finance validate price and trade costs.	A better account, assortment or price/pack decision with sustained demand and contribution.
Validate repeat	Innovation and category teams; sales, quality and finance share approval.	A clearer launch or assortment decision supported by sustained sell-through and contribution, rather than social attention alone.
Plan feasible batches	Demand planning and production; sales and finance validate trade assumptions.	Better service and less avoidable expiry or credits, without increased excess stock or infeasible production.

IMPLEMENTATION SEQUENCE

Reconcile the data and permissions; establish current practice and a simpler comparison; test recommendations in parallel; then stage a bounded operating test. Finance and the owner agree a minimum worthwhile contribution change before seeing results. Allow enough time to observe repeat buying and seasonal effects.

FULL COST AND STOP RULES

Count data preparation, integrations, licenses/model use, staff review, training, evaluation and ongoing support. Stop for unsafe product advice, incorrect joins, unwelcome contact or extra staff burden without worthwhile improvement. Track effects on customers and other channels, not just the model score.

REVIEW AND SCOPE

Claude critiqued the whole-business draft and the reader edition in two passes. The Retail Lab verified sources, resolved conflicts and applied editorial changes. Recommendations are hypotheses, not projected company sales or profit. Independent public-source example, not commissioned or endorsed by the company. Internal root causes, data readiness and implementation cost require validation. Full research and reviewer decisions are retained separately.

SOURCES / 1

Evidence you can trace.

[1] GT's SYNERGY Sacred Life product

Accessed 9 October 2026

[2] GT's SYNERGY collection and storage guidance

Accessed 9 October 2026

[3] GT's CLASSIC landing page

Accessed 9 October 2026

[4] Vita Coco / RELEX

Provider case; 2022 business context; accessed 9 October 2026

[5] Coca-Cola İçecek / AWS

Historical provider case; accessed 9 October 2026

[6] Anora / RELEX channel forecasting

3 September 2026

[7] GT's CLASSIC collection

Accessed 10 October 2026

[8] GT's product families / SYNERGY HARD

Accessed 10 October 2026

[9] GT leadership

Verified 9 October 2026

[10] GT company portfolio / scale

Verified 9 October 2026

[11] Circana reported via BevNET

Verified 9 October 2026

[12] Brew Dr operating process

Verified 9 October 2026

[13] Generous Brands / completed Health-Ade acquisition

5 August 2025

SOURCES / 2

Evidence you can trace.

[14] Poppi parent acquisition

Verified 9 October 2026

[15] Circana US category and GT's sales / Dairy Foods

52 weeks ended 12 July 2026; October market report

[16] Circana category / producer and retailer interviews

11 December 2025; 52 weeks ended 5 October 2025

[17] SYNERGY Enlightened can launch

17 July 2026

[18] Unilever AI food development / company account

2026 account; accessed 9 October 2026

[19] GT's Culture Club / installed receipt-based loyalty

Terms effective 16 September 2024; accessed 9 October 2026