

DTMx Insights—U.S.

Creative Intelligence Approach

Cultural Context

The U.S. is the world's largest and most culturally complex soft drinks market, with nonalcoholic beverage revenue exceeding \$215 billion (Statista, 2025)—a market defined by competing behaviors (health-conscious habits and indulgent routines). Coca-Cola sits at the center as one of America's most income-neutral and most nostalgic brands (YouGov BrandIndex 2024).

Key Cultural Distinctions for Beverage

Coca-Cola and other sodas are habitually ingrained in the U.S.—Americans drink soda as a daily staple. Consumption is distributed across meals, commutes, work breaks, and leisure. Fountain drinks at Quick Serve Restaurants (QSRs) and convenience-store refills drive enormous volume year-round. Yet, per capita consumption is in long-term decline as health consciousness rises.

Treat culture is a dominant river—Most U.S. CSD consumers say they drink soft drinks to treat themselves. This “little treats” culture sees inexpensive indulgences like a specialty soda or customized drink serving as mood regulation for Gen Z and millennials. VinePair identifies “little treat” drinks as Gen Z's dominant self-reward ritual—layered, customizable, engineered for high visibility on TikTok and Instagram.

Health-conscious modulation—American consumers crave a mix of health-conscious choices and indulgent experiences. “Zebra striping”—alternating alcoholic and nonalcoholic drinks through a session—is common; 47% of U.S. on-premise visitors do some form of it. Zero-sugar soft drinks and functional beverages are surging as health awareness grows, while also leaning into novel flavors. About 32% of consumers express interest in functional CSD innovations, and 58% are willing to pay more for healthier alternatives. Coca-Cola's launch of Simply Pop in early 2025 signals its direct entry into the prebiotic soda space. Zero sugar variants are the fastest-growing segment—Coke Zero Sugar sales rose 14% in 2024.

Nostalgia vs. novelty—Heritage brands are updating core SKUs with cleaner recipes; challenger brands are expanding into functional and bold-flavor territory. Retro flavors like apricot, baked apple, banana, churro, and cotton candy are spotlighting old-school formats with modern twists. Coca-Cola's Orange Cream soda launch (February 2025) taps the same nostalgic impulse as its Oreo collaboration.

Sports and entertainment culture—The U.S. is defined by its sports and entertainment ecosystem—NFL, NBA, MLB, NHL, NCAA, NASCAR, MLS—and a booming live music and festival circuit. Stadium and arena pouring rights are among the most valuable beverage contracts globally. Stadium concessions are

among the highest-volume single-serve occasions, and tailgating, watch parties, and game-day rituals are deeply embedded consumption moments.

Personalization is the new default—Personalization is a dominant trend and expectation in the U.S. soda market, driven by consumer demand for tailored experiences, healthier options, and unique flavors. Nearly three-quarters of Gen Z try a new beverage every month (Keurig Dr Pepper 2025 trend report). Coca-Cola Freestyle 9100 offers 175+ drink choices with Bluetooth pairing and AI-driven recommendations. Popularized by chains like Swig and Sodalicious, “dirty soda” involves customizing fountain drinks with creams, flavored syrups, and fruit additions, making tailored, indulgent beverages a cultural staple. 80% of Swig’s business is customized drinks.

Convenience-first, car-dependent lifestyle—With 150,000+ convenience stores, 150,000+ gas stations, and a car-dominant culture outside a handful of transit-oriented cities, the forecourt and c-store channel is a critical impulse-purchase battleground. The grab-and-go 20oz bottle and the fountain drink are foundational formats. Drive-through accounts for ~70% of QSR transactions. Drive-through culture extends from QSR to coffee to pharmacy. Americans spend more time in cars than almost any other nation.

Economic and Regulatory Considerations

- **Sugar taxes: local, not federal**—No national soda tax exists. Taxes are local, adding complexity.
- **Packaging & EPR regulations**—Seven U.S. states now have Extended Producer Responsibility packaging programs: California, Oregon, Maine, Colorado, Minnesota, Maryland, and Washington. Oregon became the first to formally launch its program in July 2025. California requires plastic beverage bottles to contain at least 25% recycled content as of January 2025, rising to 50% by 2030. California’s SB 343 (effective October 2026) bans misleading recyclability claims. Coca-Cola, Walmart, PepsiCo, and others fund the Circular Action Alliance PRO.
- **Bottle deposit systems**—10 states have bottle deposit programs. These states account for 60% of all PET bottles recycled and 60% of glass cullet that can go back into bottles. Deposit return systems achieve 80–90% recovery vs. ~30% national average. New York’s “Bigger Better Bottle Bill” would double deposit values.

On-Premise—Bars, Restaurants & Venues

What are the Key Venues and Spaces? What POS Formats Work Here?

America’s on-premise is vast, standardized, and franchise-driven, but regionally distinct in character. We will need to demonstrate how we can serve both national chain consistency and local independent personality.

Quick-Service Restaurants (QSR) and Fast Casual

- QSR remains the dominant on-trade channel for CSD consumption.

- The QSR channel is defined by drive-through dominance (75% of traffic involves takeout), combo meal bundling, and Freestyle machine deployment. Digital ordering and delivery via DoorDash, Uber Eats, and Grubhub have made the beverage add-on a default feature of app-based ordering.
- QSR beverage strategies are now at its core. Due to the mainstreaming of dirty soda and the nationalization of beverage-first QSR chains like Swig, focusing on customization and variety is central to many QSR objectives.
- Fast Casual is defined by counter-order, made-to-order formats with higher-quality food, strong customization, and dine-in-led occasions. Fountain dispensers and Freestyle machines drive volume.
- Coca-Cola's Freestyle platform—now in its 9100 generation—offers 175+ beverage choices with POS integration, Bluetooth connectivity, and AI-driven recommendations.
- The newer Coca-Cola Flex delivers 40+ choices in a standard six-valve footprint, specifically designed for drive-thru speed.

Dirty soda customization has entered QSR: Sonic Drive-In added "dirty soda"-style options, allowing customers to add sweet cream and flavored syrups. Taco Bell, Jack in the Box, and Topgolf have introduced their own versions.

Dirty Soda Shops

A new venue category in its own right. Swig (140+ locations, 16 states, plans for 1,000), FiiZ (65+ locations, 10+ states), and a growing wave of regional operators. These shops have made the beverage purchase a standalone destination occasion, not a side order. The format originated in Utah's LDS culture, went viral via TikTok and Hulu's "The Secret Lives of Mormon Wives," and is now a national phenomenon.

Casual Dining and Family Restaurants

Applebee's, Chili's, Olive Garden, Denny's, Cracker Barrel, plus thousands of regional independents. Occasion-led, seated dining environments focused on hosting, socializing, and celebration. Full service with table ordering, free refills as standard. Beverage contributes ~20% of check average.

Malls, Food Courts & Food Halls

Enclosed malls, open-air lifestyle centers, and a growing wave of curated food halls (e.g., Eataly, Time Out Market, Ponce City Market) create concentrated, multi-operator beverage occasions. Food courts remain a high-volume fountain moment, where combo meals often default to soda. Food halls skew more premium and experiential, attracting younger audiences with communal dining and discovery-led trial. Cinema lobbies within mall complexes extend beverage occasions into entertainment-led purchase moments. Post-pandemic footfall has stabilized in many markets as malls pivot toward dining, services, and experiential retail.

Bowling, Arcades & Entertainment (FECs)

Experience-led venues such as bowling alleys, arcades, and family entertainment centers (FECs) combine food service with long dwell time, group bookings, and party occasions. Beverage moments are driven by bundles (party packages, pitchers, refillable fountain), impulse purchases between activities, and add-ons at point-of-order. The environment supports both family/daytime traffic and adult evenings depending on format, making zero-sugar, mixers, and "treat" beverages relevant across sessions.

Sports Bars

High-energy, social venues built around live sport viewing and group occasions. Beverage consumption is central to the experience, with CSDs playing a role as mixers and nonalcoholic options during game-led sessions.

Bars & Nightlife

Late-night, social-led venues focused on music, dancing, and alcohol-first occasions. Beverage consumption is round-based and sessional, with CSDs primarily used as mixers, chasers, and nonalcoholic alternatives. Cocktail bars, dive bars, brewery taprooms, rooftop lounges, live music venues, hi-fi bars. Concentrated in metros and college towns. Mixers (Coke + Jack Daniel's, Coke + rum) are a core volume driver.

Bars often function as community hubs tied to identity, not just consumption.

Premium Dining & Hotels—White-tablecloth restaurants, boutique hotels, resort pool bars, rooftop lounges. Premium mixers (Topo Chico, Q Mixers) index high. Minibar and room service represent steady volume at premium margins.

Stadiums & Sports Venues

High-margin, high-volume CSD occasions. The U.S. has 150+ major professional sports venues plus hundreds of college stadiums and arenas. Pouring rights contracts (Coca-Cola vs. PepsiCo) are multi-year, multi-million-dollar exclusive deals covering fountains, vending, concessions, and signage. NFL stadiums alone serve tens of millions of fans annually. Tailgating culture extends consumption occasions into parking lots and surrounding areas.

Live Music, Festivals & Experiential Venues

Coachella, Lollapalooza, SXSW, Bonnaroo, Essence Festival and hundreds of regional festivals create massive experiential beverage activation opportunities. Theme parks (Disney, Universal, Six Flags) operate year-round with exclusive pouring rights. The U.S. live events industry is a multi-billion-dollar sector where beverage sponsorship is central to the fan experience.

POS Formats On-Premise

Across all venue types, America's on-premise uses a highly standardized POS toolkit with strong digital integration.

Zone 1: QSR & Drive-Through

POS formats: Digital menu boards, branded cups/lids and cup wraps, drive-through window clings, Freestyle/fountain wraps, combo-meal signage pairing food + beverage, tray liners, delivery-platform menu imagery, app-integrated promotions.

Challenge: Franchise standardization limits bespoke creative; the drive-through window is a seconds-long impression, so clarity and speed matter.

HH Global value: Template-driven, franchise-compliant toolkits and digital signage assets deployed at national scale across in-store, drive-through, and delivery/app touchpoints.

Zone 2: Casual Dining & Independents



POS formats: Table tents, menu inserts, branded glassware, beverage menu boards, seasonal and LTO signage, window graphics, kids' meal tie-in displays.

HH Global value: Standardized POS kits for chain accounts with modular local customization, including multicultural and Spanish-language versioning for seasonal and LTO calendars.

Zone 3: Stadiums, Arenas & Mega-Events

POS formats: Concourse banners, LED perimeter/ribbon boards, cup branding, vending-corridor wraps, fan-zone signage, branded hydration stations, replay/sponsorship signage, sampling stations.

HH Global value: End-to-end event activation production with modular kits and a reusable asset library to maintain consistency and reduce rework across recurring venue deployments.

Zone 4: Bars, Nightlife & Premium

POS formats: Branded glassware, bar runners/mats, tap decals, neon/illuminated signage, cocktail/mocktail menu inserts, back-bar LED displays, branded coolers, coasters, ice buckets.

HH Global value: Standardized bar-kit production deployed nationally, with campaign calendar management and cocktail/mocktail program materials that support premiumization.

Zone 5: Malls & Food Courts

POS formats: Fountain dispenser branding, food-court digital screens, tray liners, combo-meal signage, cinema-lobby standees, cup branding, queue-rail graphics, food-hall communal-area displays, window clings, seasonal promotional bays.

HH Global value: Template-driven content and production for food courts and cinema-adjacent venues, tied to retail moments (Back-to-School → Holiday → Summer) with fountain and cup branding delivered at scale via modular kits that work for both traditional food courts and premium food-hall formats.

Zone 6: Eatertainment (Bowling, Arcades & FECs)

POS formats: Counter/menu boards and price bundling, lane/game-area screens, party-package menus, tabletop prompts, self-serve fountain visibility, branded cups, birthday/group-booking signage, event-night kits.

HH Global value: High-dwell-time venue toolkits that drive attachment (bundles, refills, and group occasions) with modular assets that work across food, beverage, and gameplay touchpoints.

Key Cultural Drinking/Dining Occasions for On-Trade

Peak Occasions

- Super Bowl Sunday
- Fourth of July/Independence Day
- Thanksgiving
- March Madness (NCAA Basketball Tournament)

- NFL Season/College Football Saturdays
- NBA/NHL/MLB Playoffs
- Memorial Day/Labor Day (Summer Bookends)
- Halloween
- New Year's Eve
- Major Music Festivals (Coachella, Lollapalooza, etc.)
- NASCAR Race Weekends

Always On

- Meal occasions
- Family dining
- Work lunch
- Sports watching—NFL, NBA, MLB, NHL, college sports. Bars and restaurants are primary venues for group sports viewing
- Happy hour
- Dinner
- Late-night
- Group occasions & parties—birthdays, group bookings, and shared-order bundles (common in entertainment venues)
- Brunch
- Drive-through—morning coffee and afternoon beverage runs; single-serve CSD and iced tea via QSR drive-throughs
- Takeout & delivery—beverage add-on prompts and “make it a meal” mechanics

Third Space Positioning

Bars, restaurants, and cafés are leaning into their purpose by creating spaces and products that foster community among their customers. Venues are becoming community hubs rather than just food-and-beverage spaces. As people's socializing and leisure becomes more intentional, it's now common for cafés to double as coworking spaces by day and event spaces in the evenings, hosting live music, comedy nights, board game evenings, or workshops as regular offerings.

Off-Trade & Retail

Retail Landscape—Dominant Retailers, Shelf/Display Norms, and the Convenience Store Landscape

The U.S. retail landscape is dominated by large-format grocery chains, mass merchants, and convenience/gas stations. The U.S. is highly consolidated, shaping how brands win via standardized shelf rules, paid displays, and retail media. Shelf norms, display mechanics, and brand visibility requirements differ significantly by channel.

Convenience & Gas Stations

There are 150,000+ convenience stores in the U.S., making the channel a critical single-serve, cold-chain battleground in a car-dependent culture. Fountain dispensers, cooler doors, and checkout impulse are the key visibility moments, with energy drinks, functional beverages, and ready-to-drink coffee competing for the same chilled real estate. Interestingly, in 2026 Coca-Cola is rolling out a mini-can in convenience to meet a lower cost-entry price point.

- Cooler-door dominance—branded cooler doors and wraps are primary visibility tools, with planogram expectations typically managed via bottlers and category sets.
- Fountain dispensers & Freestyle machines—high-margin, high-volume touchpoints often paired with foodservice offers.
- Checkout impulse—counter displays, single-serve racks, and promotional price cards at register.
- Window and forecourt signage—pump toppers and window clings build awareness before store entry.
- Floor stands and stackouts—seasonal and promotional displays near entrance and main traffic paths.

Grocery & Mass Merchants

Walmart, Kroger, Costco, Target, Albertsons/Safeway, Publix, and HEB shape the national baseline for at-home beverage shopping, with discounters and club formats reinforcing value and multipack purchasing. End-cap and feature activity, plus promotional pricing, drive volume spikes around key retail windows (e.g., Super Bowl, Memorial Day, Fourth of July).

- Standardized gondola shelving—category-managed sets with planogram compliance; beverage aisles typically organized by need-state (water, isotonic, CSDs, energy, juice, tea/coffee).
- End-cap displays—paid secondary placements and seasonal features drive incremental volume.
- Checkout impulse zones—single-serve cold bottles and cans in register lanes and front-of-store coolers.
- Shelf-edge labels and digital shelf tags—price and promotion communication at point of decision, increasingly integrated with loyalty.

- Cold vault/chilled door sets—a major impulse driver along store perimeters; single-serve cold availability is critical.
- Retail media networks (e.g., Walmart Connect, Kroger Precision Marketing, Target Roundel)—fast-growing digital advertising channels in-store and online.
- Loyalty program integration (e.g., Kroger Plus, Albertsons for U, Walmart+)—drives personalized pricing and promotional offers.
- Pallet displays—displays need to be thought out as modular and not one-size-fits-all. These need to be easy to put up from 1–4 pallet displays, for both in the lobby/entrance and aisle intersections, for high-impact seasonal promotions.

Drug Stores

CVS, Walgreens, and Rite Aid operate a large national store network and serve as high-frequency stops for pharmacy-led trips and quick convenience missions. Beverage competes for limited shelf and cooler space alongside personal care and front-store snacks, making planogram placement and single-serve cold availability especially important. Functional, hydration, and zero-sugar SKUs often fit naturally with health-oriented shopping occasions.

- Front-end checkout coolers—single-serve chilled bottles and cans at register are the primary impulse moment; space is extremely limited.
- Cooler door sets—tightly managed planograms; cold single-serve and select multi-serve packs often sit adjacent to grab-and-go food.
- Endcaps and promotional wings—seasonal secondary placements near high-traffic pharmacy and beauty aisles.
- Shelf-stable beverage aisle—compact sets organized by segment (water, CSD, juice, energy, tea) where planogram wins are high-value.
- Digital circulars and loyalty integration (e.g., CVS ExtraCare, myWalgreens)—promotional pricing and personalized offers increasingly drive purchase.

Value Stores

Dollar General, Dollar Tree, Family Dollar, and Five Below collectively represent a very large national footprint, with particular strength in small towns, rural areas, and value-led suburban trade areas. Small-format stores can mean constrained shelf space and limited refrigeration, though cooler-door distribution has been expanding across fleets. The channel rewards sharp price architecture and low-labor, ship-ready merchandizing that can turn quickly.

- Limited cooler door sets—growing but still constrained; single-serve cold availability is the key unlock.

- Shelf-stable beverage aisle—compact planograms dominated by value multipacks and smaller-size CSDs, water, and juice; each facing carries outsized importance.
- PDQ trays and clip strips—primary activation tools in a channel with minimal labor for custom merchandising.
- Pallet drops and stack-outs—the highest-impact promotional vehicle; must be simple, pre-built, and ship-ready.
- Price-point signage—bold, clear value messaging (e.g., “2 for \X”) is critical; shelf-edge and display callouts must reinforce deal architecture.

E-Commerce & Delivery

Online grocery and delivery (e.g., Instacart, Amazon Fresh, Walmart+; plus restaurant delivery platforms) is the fastest-growing visibility arena. Digital shelf visibility (search ranking, sponsored placements, banners, and retail media networks) increasingly functions like the new planogram, influencing discovery and conversion for both multi-pack and immediate-consumption missions.

At-Home vs. Away-From-Home Consumption (Off-Premise Lens)

At-Home Consumption

- Game-day gatherings—NFL Sundays, Super Bowl, March Madness, playoffs; multipacks and 2-liter bottles for groups.
- Cookouts and BBQs—Memorial Day to Labor Day; cases and multipacks as seasonal staples.
- Holiday entertaining—large formats and variety packs.
- Thanksgiving
- New Year’s
- Mixer and DIY occasions—home cocktail culture and at-home experimentation (including “dirty soda” style customization with syrups/cream).
- Weeknight family meals—routine with dinner, refills, and “something fizzy” as a default.
- After-school and kids’ moments—lunchbox restocks, snacks, and family movie treats.
- Streaming and movie nights—“snack + sip” routines with single-serve cans and multipacks.
- At-home entertainment—gaming sessions, board games, and casual hosting where beverages stay on the table.
- Midday pick-me-up.
- At-home wellness routines—hydration, workouts, and “better-for-you” choices (zero sugar, electrolytes, functional).
- Stocking and “always in the fridge” behavior—weekly shop replenishment that keeps core SKUs on-hand.

Away-From-Home Consumption

- Commute and car-based occasions—convenience-store grab-and-go and drive-through beverage runs.
- Work lunch—vending, cafeterias, office micro-markets, and nearby QSR combos.
- Travel and road trips—airports, travel plazas, highway rest stops, and forecourts; single-serve cold is the default.
- Shopping missions—malls/food courts and big-box trips where beverage attaches to meals and snack breaks.
- Entertainment and attractions—cinemas, theme parks, concerts, and sports.

Merchandise and Collectibles

Are There Any Viral/Culturally Relevant Products?

Nostalgia & Americana

Coca-Cola's vintage Americana aesthetic (heritage logos, glass bottles, diner iconography) fuels steady demand for branded goods like retro signage, diner-style glassware, and heritage apparel. These items sell through mass retailers, e-commerce, and specialty gift channels, and they function as décor and "identity signaling" as much as consumption.

Sports, Venues & On-Premise Collectability

Sports fandom creates a durable merchandise ecosystem: team-branded packaging, event-led limited editions, and stadium-exclusive cups and refill vessels that people keep as souvenirs. Pouring-rights environments make cups, boards, and concession touchpoints highly visible, turning packaging and serveware into collectible "proof of attendance."

Charm Culture Micro-Collectibles

Small, personalized accessories have become a highly visible collectible format in U.S. youth culture (bag charms, keychains, phone straps, and "clip-on" tokens). For beverage brands, miniature icons (caps, cans, glass bottles, fruit/flavor cues, mascots) translate well into charm-scale objects that can be mixed, traded, and displayed as part of everyday carry.

Car Accessories

In a car-dependent culture, compact car items are both practical and high-frequency brand reminders. Beverage-adjacent car accessories often center on cupholder life (coasters, cupholder organizers, reusable straw cases) and quick refresh moments (vent clips, dashboard mini organizers) and can be seasonalized for road-trip and summer travel rituals.

Cooling Accessories

Cooling accessories are culturally linked to summer, outdoor events, and queueing moments (sports, festivals, theme parks). Items like handheld fans, cooling towels/bandanas, and portable misting tools can carry strong visual branding while remaining functional, making them likely to be kept, photographed, and reused across hot-weather occasions.

Are There Any Collaboration Trends?

Sports & Marquee Event Partnerships

Sports and national events remain one of the most durable collaboration platforms in the U.S., using co-branded packaging, venue activations, and limited-edition retail programming to convert fandom into purchase. Partnerships often anchor around collegiate sport (NCAA), motorsport (NASCAR), and global moments like the Olympic and Paralympic Games, with collectible cups and event-specific packs extending the collaboration into souvenirs.

Pop culture & IP drops

Pop culture collaborations (film, music, gaming, fashion, streetwear) translate beverage brands into hype culture through time-bound “drops” and collectible packaging. Recent examples include Coca-Cola x OREO (“Besties”) with limited-edition crossover products and on-pack QR that unlocks a shared Spotify “Bestie Mode” experience, and Coca-Cola x Star Wars (“Refresh Your Galaxy”) featuring character-led collectible cans/bottles tied to scannable AR content. Coca-Cola Creations has also used culture-led drops such as KWave (KPop fandom), which combine limited packaging with digital and live experiences.

The Coca-Cola Zero Sugar x Highsnobiety capsule (2023) is a case study in activation execution: 12-piece workwear collection launched ahead of NYFW, with a delivery-truck activation outside Highsnobiety's SoHo pop-up and patch customization stations inside. “Est. 2005” embroidered across pieces, referencing their shared founding year. The collaboration shows that fashion credibility lives in the physical activation around the drop—not just the product.

Coca-Cola Starlight became a genuine cult favorite—petitions circulated to bring it back; Sporked called it “the holy grail of defunct sodas.”

Digital-First Collaboration Mechanics

A growing number of collaborations now include a digital layer: QR-linked experiences, customization tools, and shareable “participation” mechanics (filters, playlists, digital badges) that make packaging feel interactive. This approach is common in campaigns that blend pop culture with product, and it supports personalization and user-generated content at scale.

Alcohol-Adjacent and RTD Extensions

Collaboration trends also include alcohol-adjacent moves: classic mixer pairings packaged as ready-to-drink (RTD) serves, and brand-led extensions into hard seltzer or spiked formats. These collaborations use familiar brand equities (taste pairing, ritual, recognition) to lower trial barriers and recruit new occasions.

Appendix

U.S. Grocery & Retailer Landscape (Reference)

RETAILER	SCALE	KEY FACTS
Walmart	National leader ~21% grocery share	5,200+ U.S. stores. Largest grocer by revenue (\$568B U.S. sales 2024). Dominates value positioning. Neighborhood Market format expanding. Strong omnichannel (pickup/delivery). Walmart+ membership.
Kroger	Top-tier ~9% share	2,700+ stores across 35 states under multiple banners (Kroger, Fred Meyer, Ralphs, Harris Teeter). \$147B revenue. Attempted Albertsons merger blocked 2024. Strong loyalty program and retail media network.
Costco	Top-tier ~8.5% share	Membership-based warehouse club. 600+ U.S. locations. Bulk/value proposition. Kirkland private label. Fastest-growing grocery retailer by market share over 5 years.
Albertsons	National ~5% share	2,300 stores under Safeway, Albertsons, Jewel-Osco, Vons, Shaw's, Acme banners. \$80B revenue. Post-merger-collapse, operating independently.
Publix	Regional leader ~4% share	Employee-owned. Southeast U.S. dominance (Florida, Georgia, Carolinas). Highest customer satisfaction scores among traditional grocers. Premium positioning.
H-E-B	Regional leader	455 stores, Texas and Mexico. \$49.6B revenue. Privately held. Cult brand loyalty in Texas. Central Market premium banner.
Aldi	Fast-growing discounter	~2,600 stores (targeting 3,200 by 2028). Fastest-growing chain by new openings and square footage. Private-labeled model. Acquired Winn-Dixie/Southeastern Grocers stores.
Target	National	\$106.6B revenue. Strong in urban/suburban grocery integration. Younger demographic skew. Good For You and premium brand curation.

Amazon / Whole Foods	National	Amazon is the #2 U.S. retailer overall (\$273B). Whole Foods (~530 stores) anchors premium/organic. Amazon Fresh expanding. E-grocery leadership.
Dollar General / Dollar Tree	National value	Dollar General operates 20,000+ stores, many in rural and food-desert areas. Critical value channel for single-serve beverages. Limited refrigeration but expanding cooler programs.