

Finding the growth:

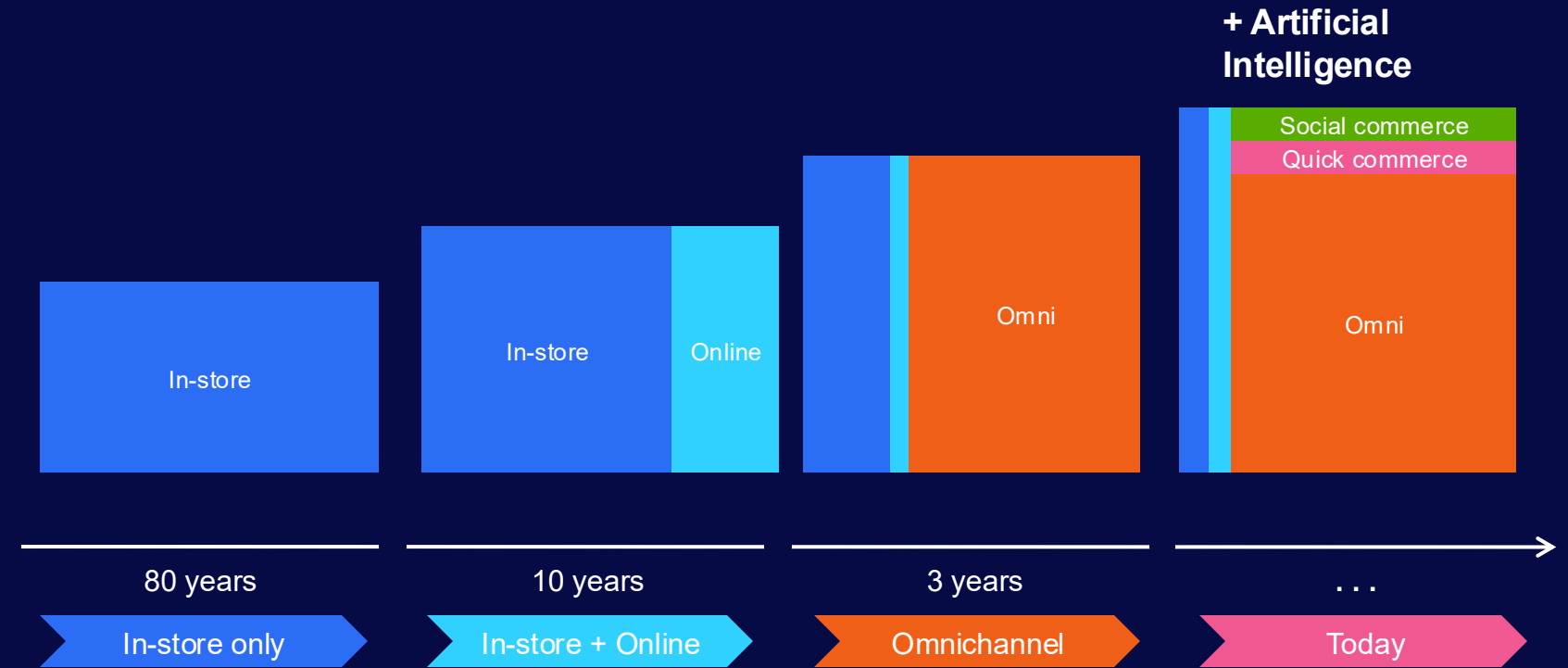
A Full View Measurement approach to uncovering opportunities in Digital Commerce, Amazon and Costco

The quest for *next*



The retail landscape today is drastically different than before

The pace of change is accelerating rapidly

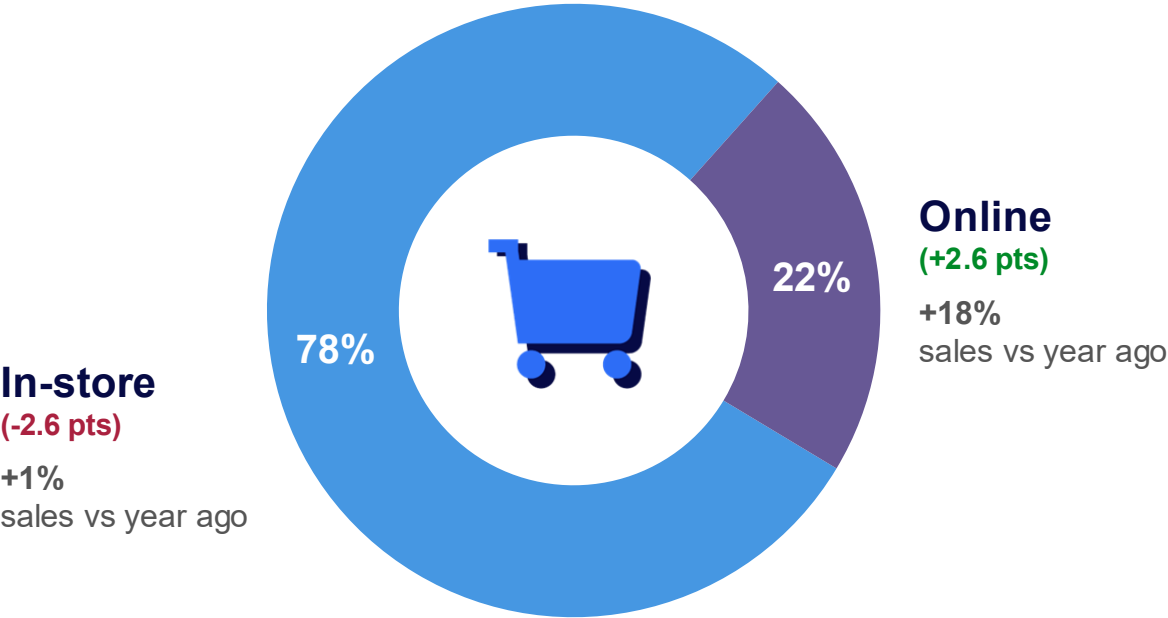


Source: NIQ

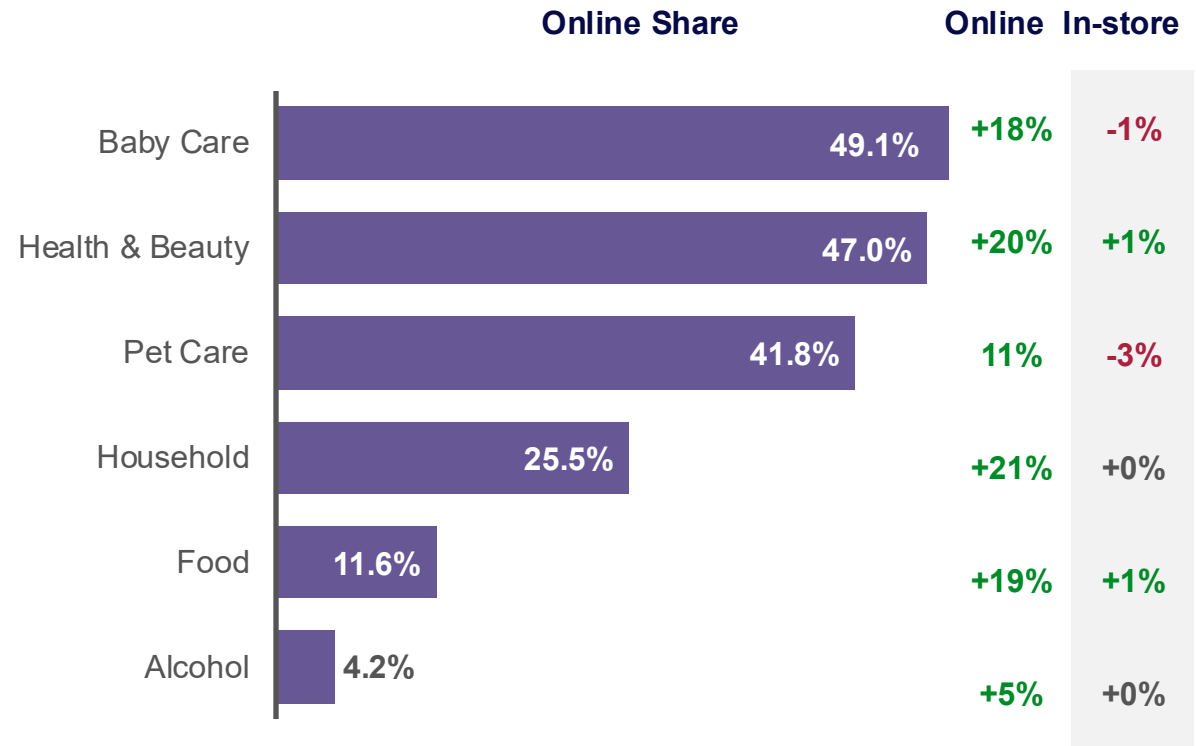
In-store sales are still the majority, but there are major variances category to category

2024 Omni Share of CPG Total \$ Sales

Total CPG Dollar Sales: +4.2% vs 2023



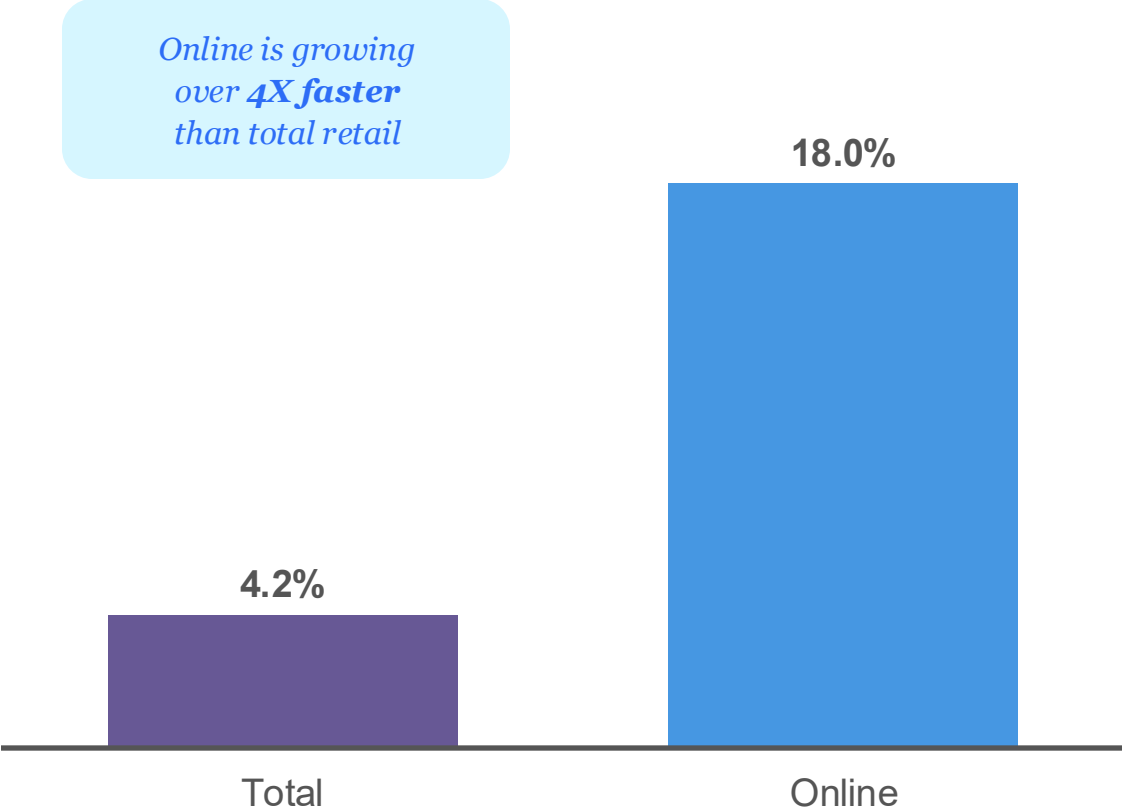
2024 Online \$ Share and \$ Growth



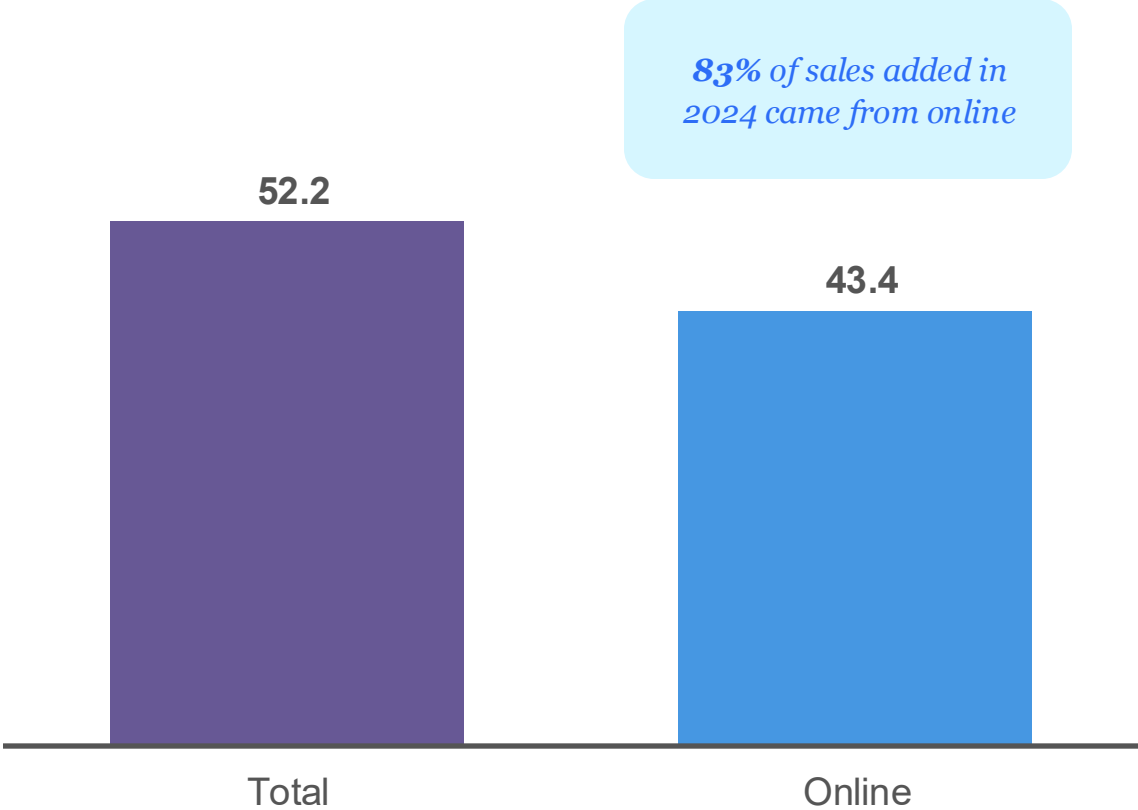
Source: NIQ Omnisales+, CPG only

And nearly all growth is coming from online

2024 Sales Growth



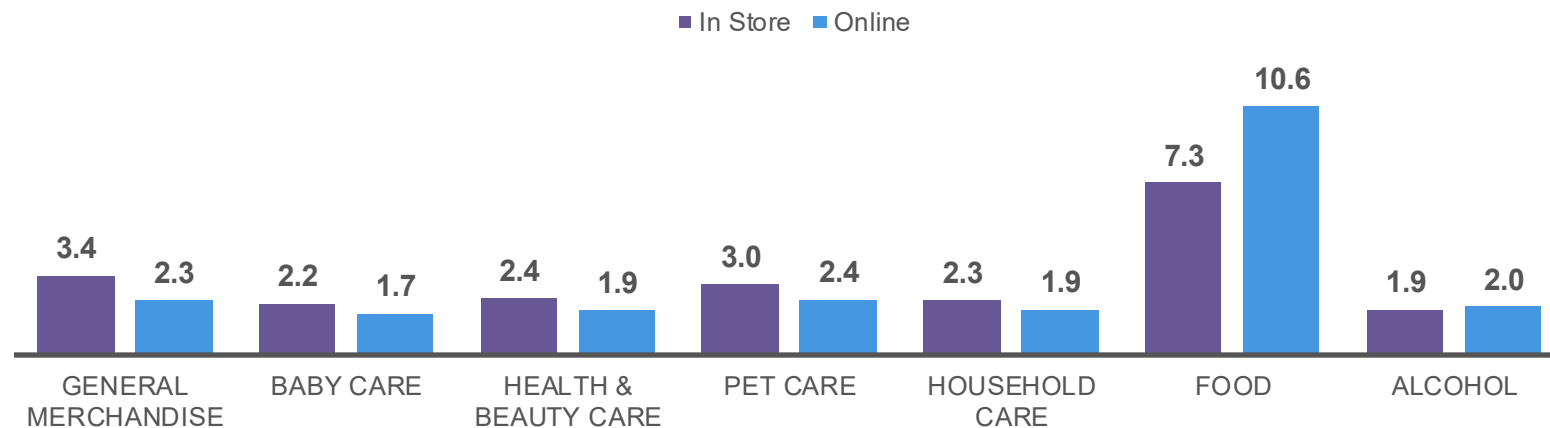
2024 Sales Added (bil USD)



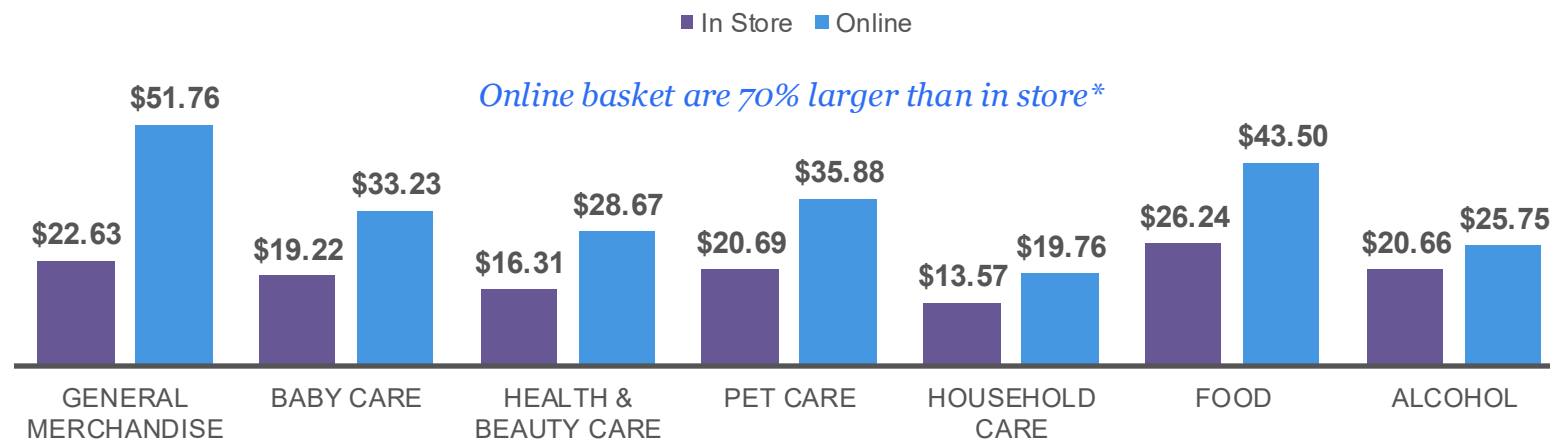
Source NIQ Omnisaes+, CPG only

Online also represents an opportunity to grow basket size

2024 Units Per Occasion By Department

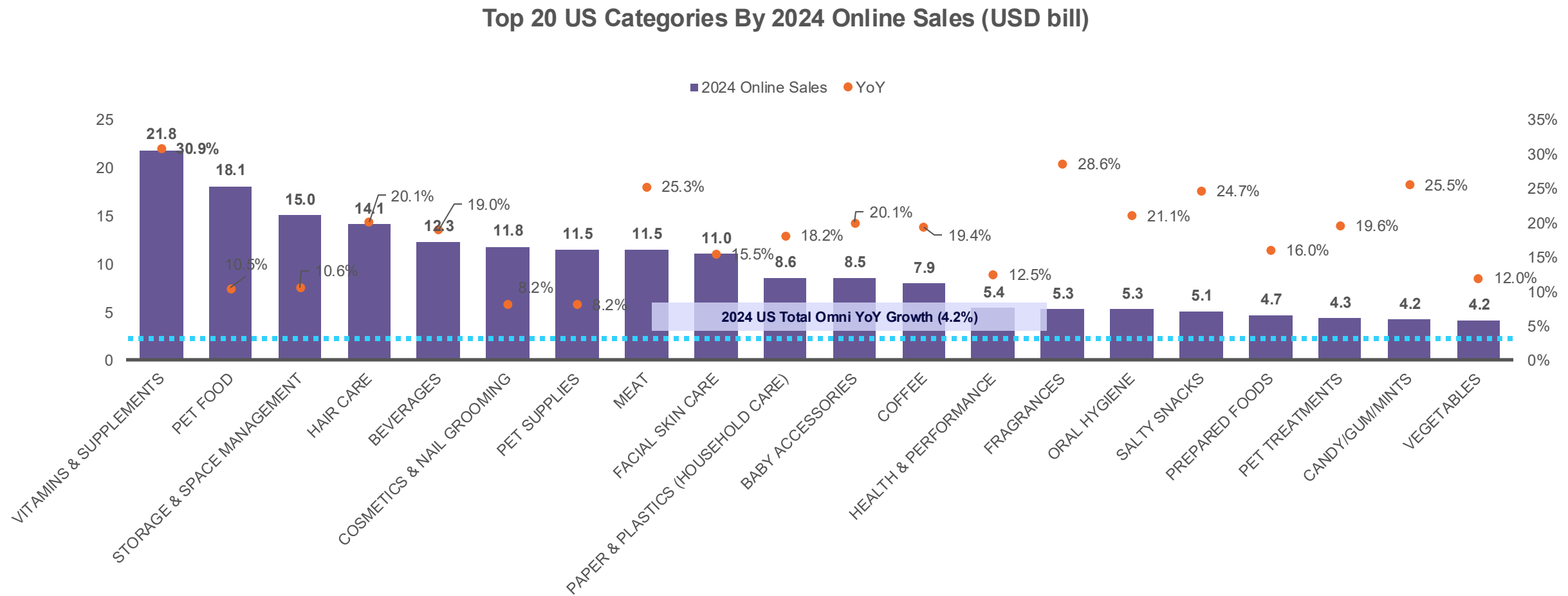


2024 Value Per Occasion By Department



Source: NIQ Omnishopper, *Average of basket size difference across all departments, equally weighted

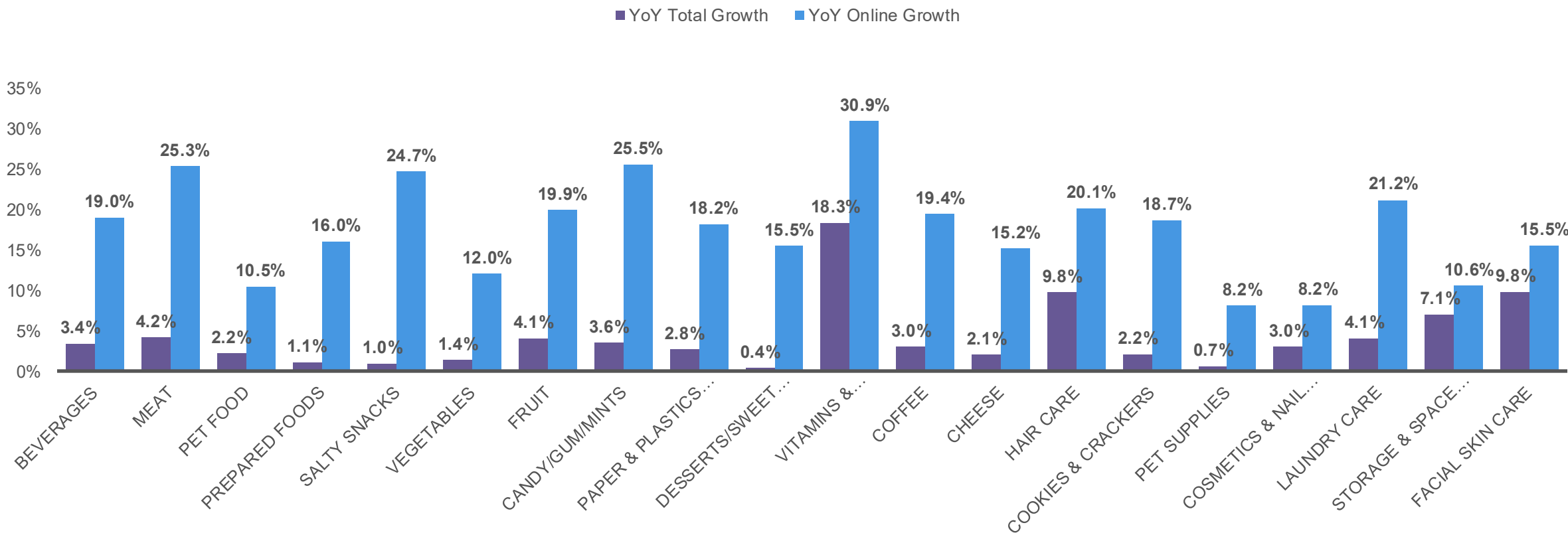
Top online categories today span departments and are growing well above total retail averages



Source: NIQ Omnisales+, CPG only

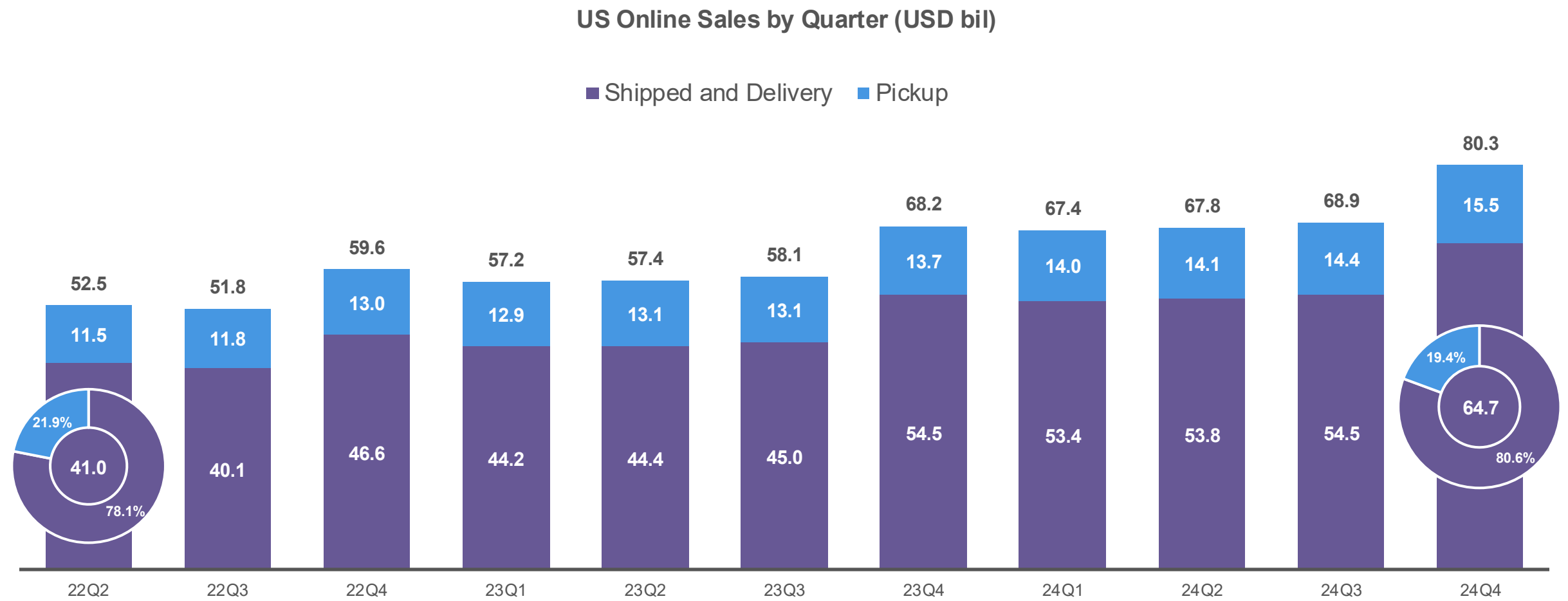
The largest categories today are seeing much of their growth come from online sales as well

Top 20 Categories US by Total Omni Sales – YoY Growth Comparison



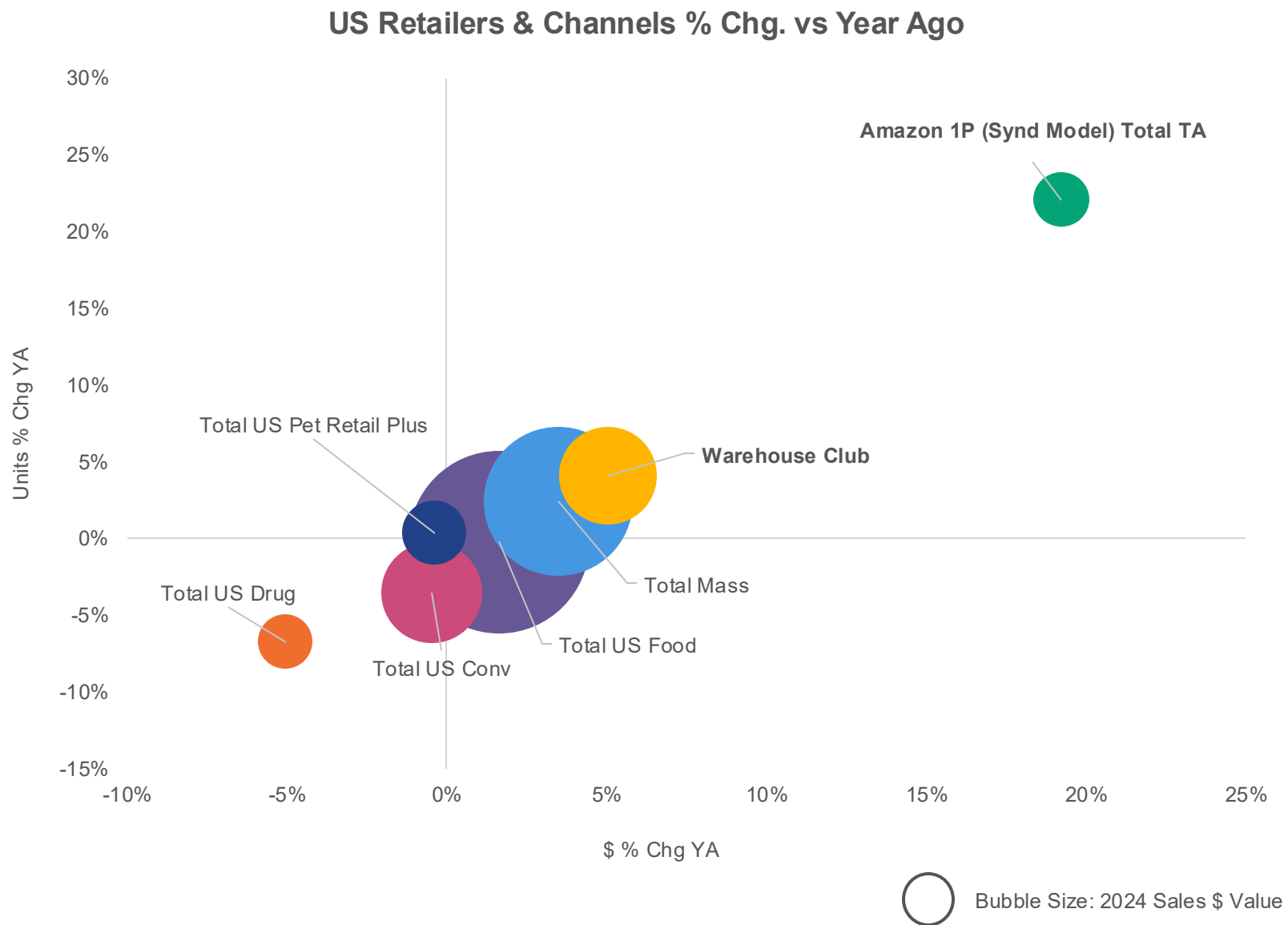
Source: NIQ Omnisales+, CPG only

Shipped and delivery the primary fulfillment modality, gaining slight share on pickup



Source: NIQ Omnisaless+

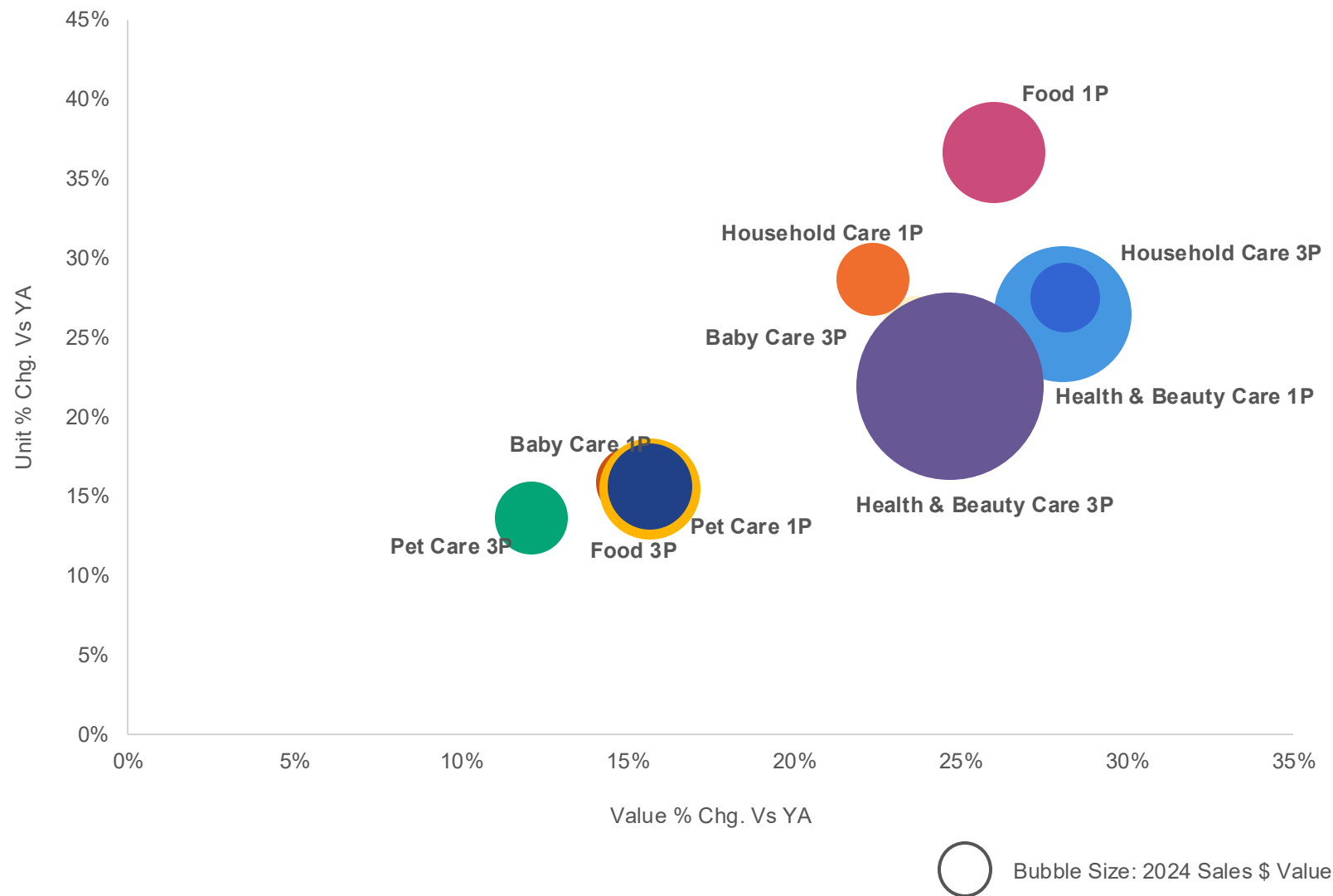
There are
leading retail
formats in this
landscape



Source: NIQ Omnisales+

For Amazon,
it is critical to
understand
first-party
versus third-
party dynamics
for each
category

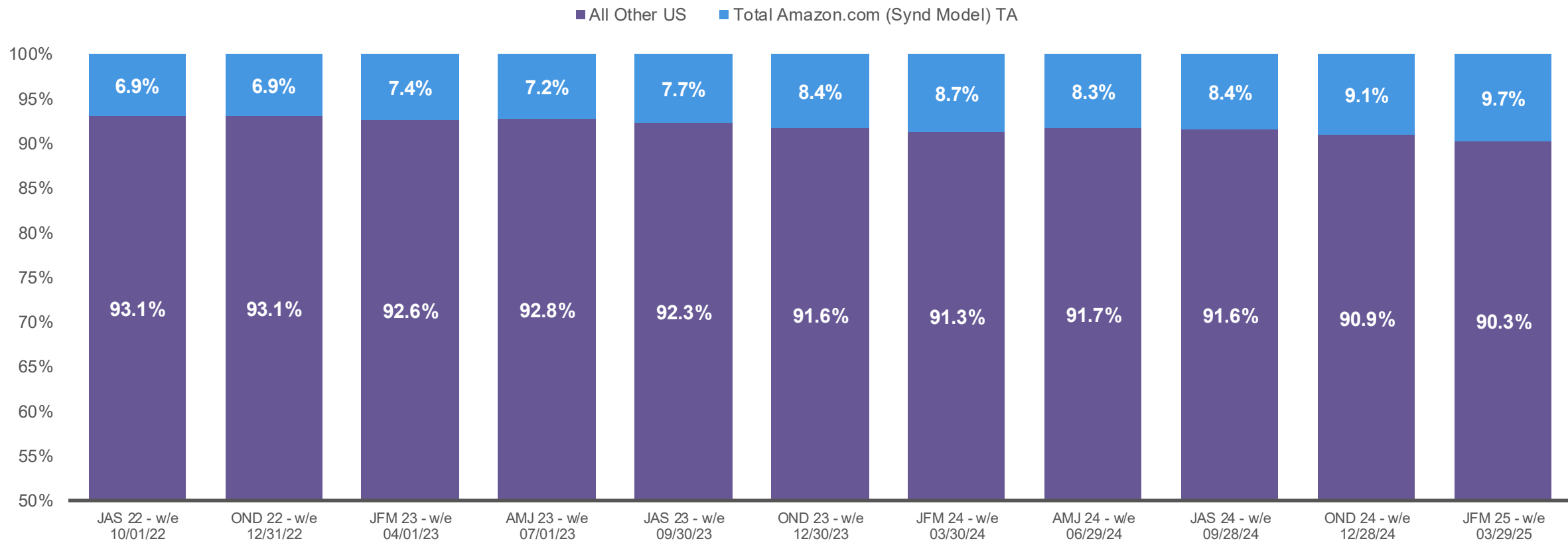
Amazon Department % Chg. Vs Year Ago



Source: NIQ Full View Measurement - Amazon

Amazon's share of US retail has grown 2.8% since 2022

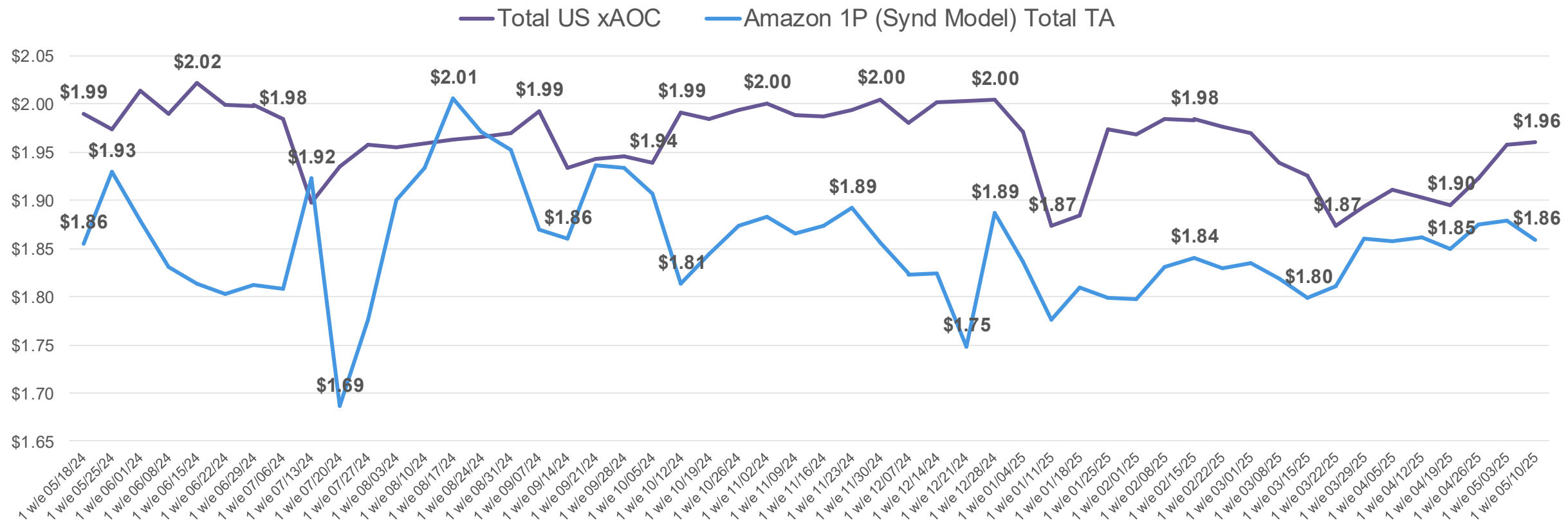
Quarterly Share of Total Sales US, Amazon vs. All Other



Source: NIQ Omnisailes+

Amazon commonly undercuts broader market on price

Top Nutritional Bar, Weekly Avg. EQ Price, Amazon vs Total US xAOC



Source: NielsenIQ Retail Measurement | US Total Store

Amazon has created an endless sandbox for innovative products

Unlimited Options

1-48 of 390 results for "Probiotic soda"

Explore Related Products

- olipop
- poppi prebiotic soda
- probiotic water
- kombucha

Extensive Search & Filters

Nutritional Supplement Diet Type

- ☐ Gluten Free
- ☐ Halal
- ☐ Keto
- ☐ Kosher
- ☐ Plant Based
- ☐ Vegan
- ☐ Vegetarian

Specialty Food Type

- ☐ High-Fructose Corn Syrup-Free
- ☐ Non-GMO
- ☐ Organic

Calories Per Serving

- ☐ 0 Calories
- ☐ Up to 40 Calories
- ☐ 40 to 100 Calories
- ☐ 100 to 200 Calories
- ☐ 200 to 300 Calories

Videos and Media

Why GOOD IDEA

1 Natural, Mild, & Refreshing
Light & crisp, with all natural flavors.

2 Naturally Energizes
Converts carbs into energy faster, sustaining your energy all day long.

0 Zero Calories

0s Zero Sugars or Sweeteners

BS 100% Natural

⚡ Supports Balanced Blood Sugar

💧 Real Energy No Caffeine

Reviews, Ads, Product Recs

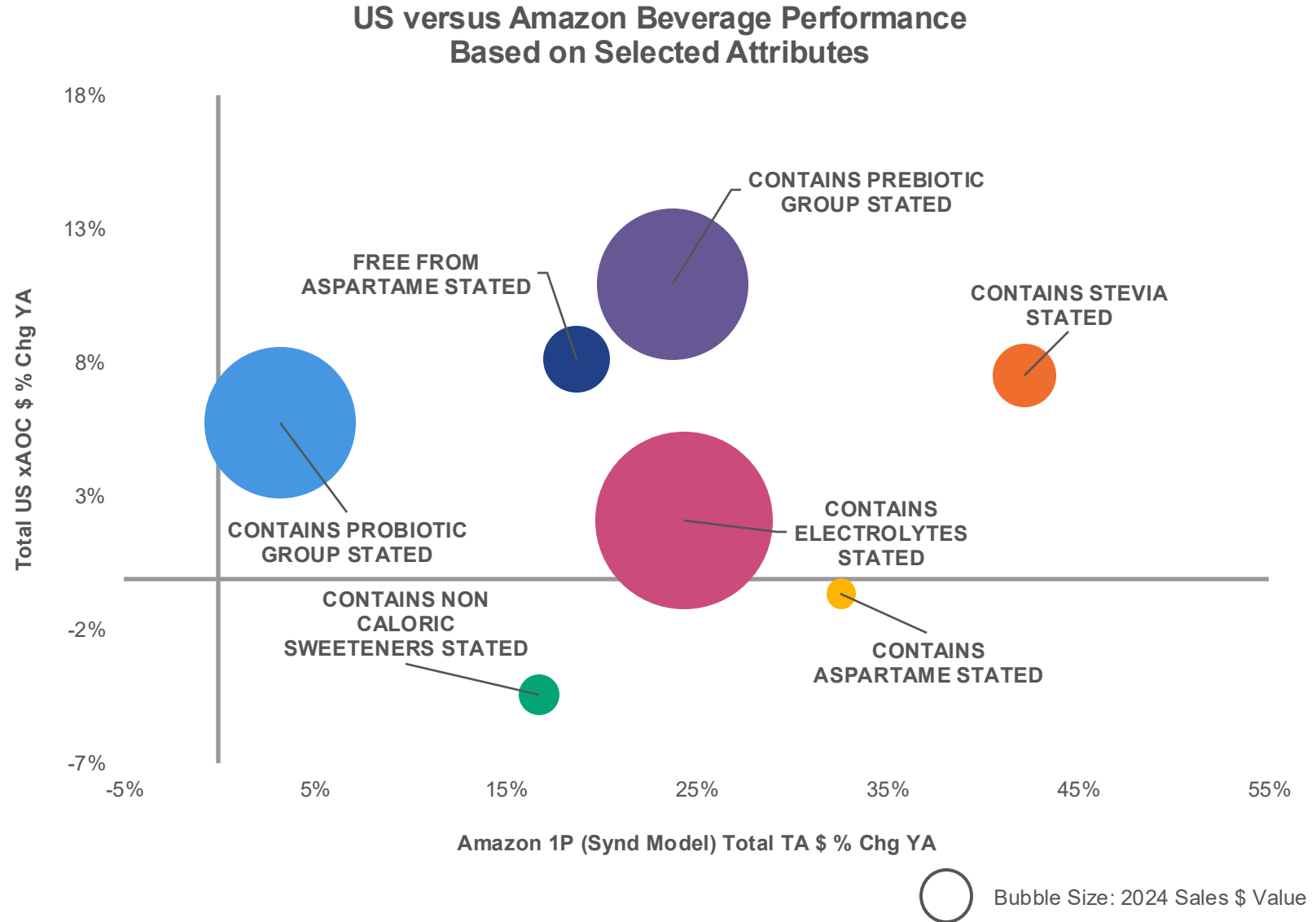
Customer reviews

Customers who viewed this item also viewed

Sponsored

Customers who viewed this item also viewed

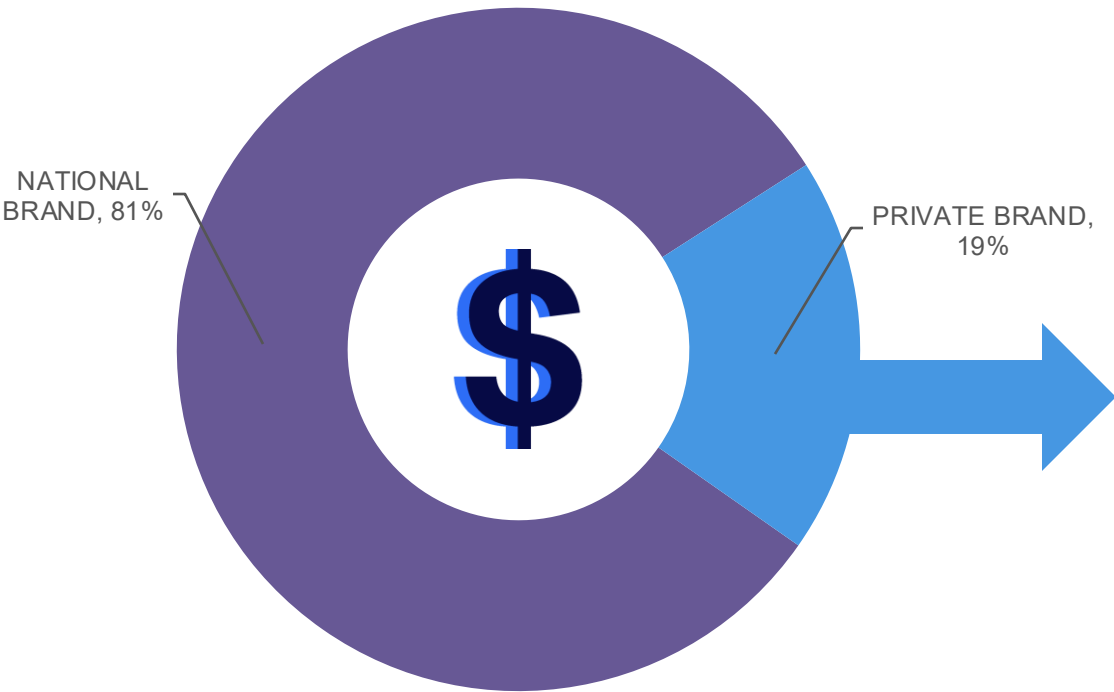
This has made Amazon a destination for consumers seeking specific product attributes



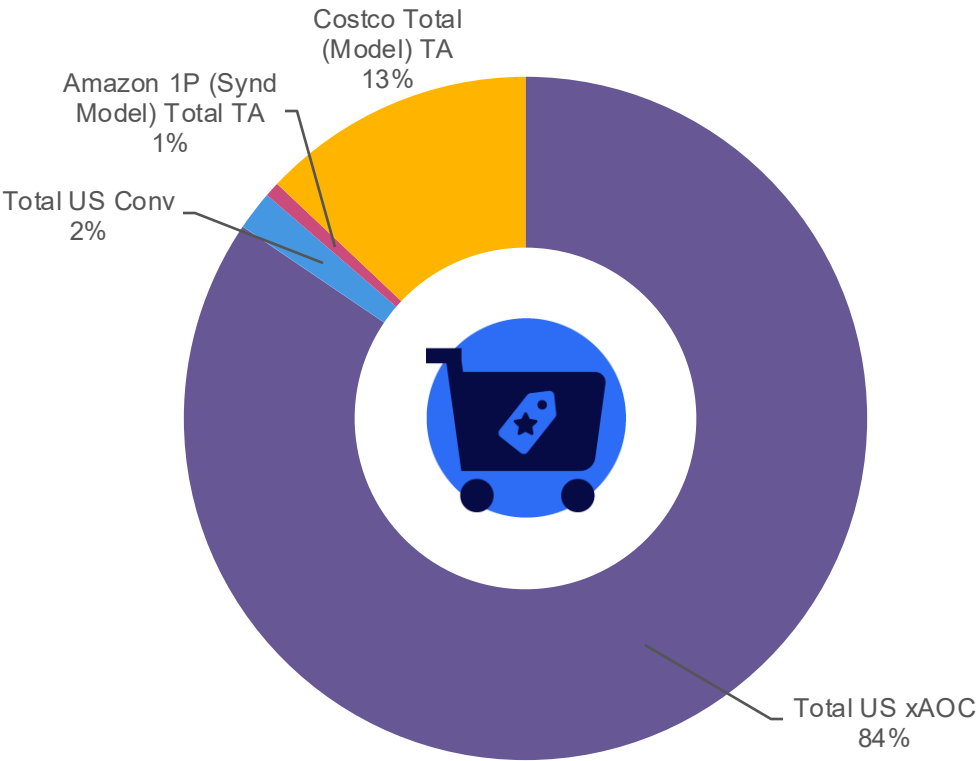
Source: NielsenIQ Retail Measurement | US Socialization TSR (Synd)

Another area consumers are seeking today is value, private label products are benefiting from this demand

US Total Full View Market \$ Sales, Latest 52 Weeks

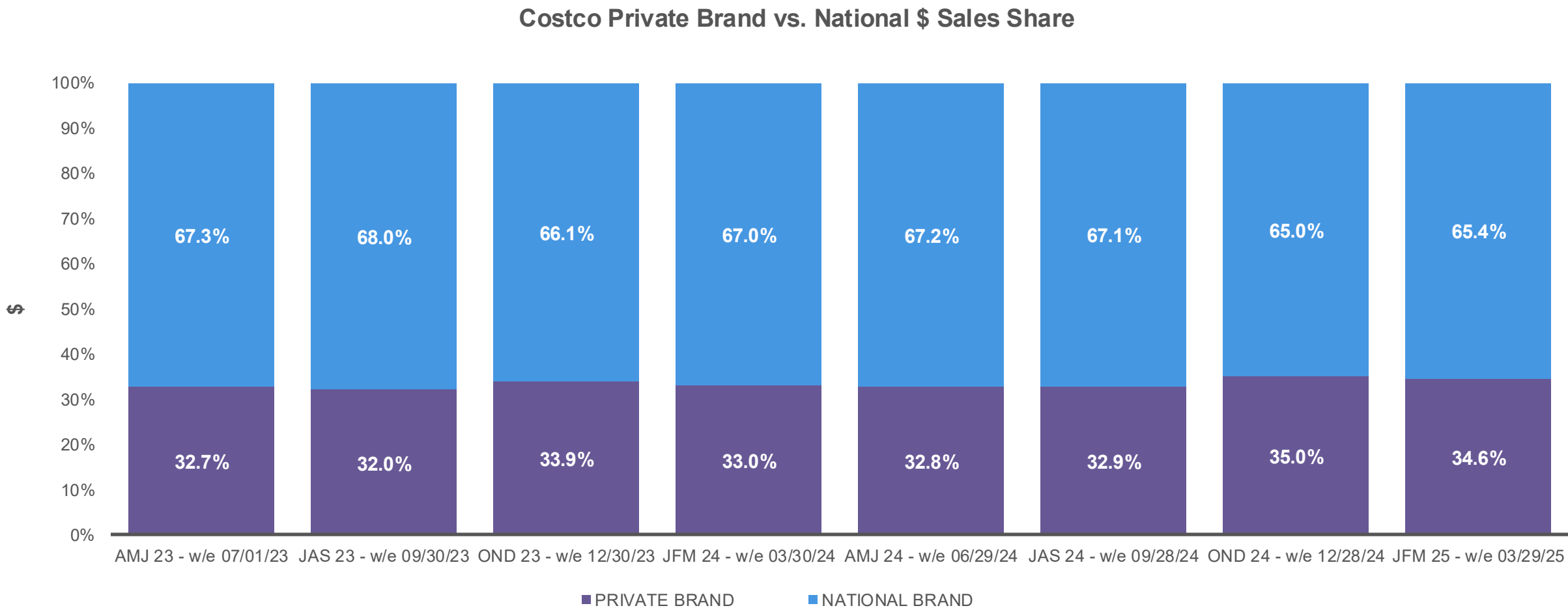


Private Brand Share by Channel or Retailer, Latest 52 Weeks



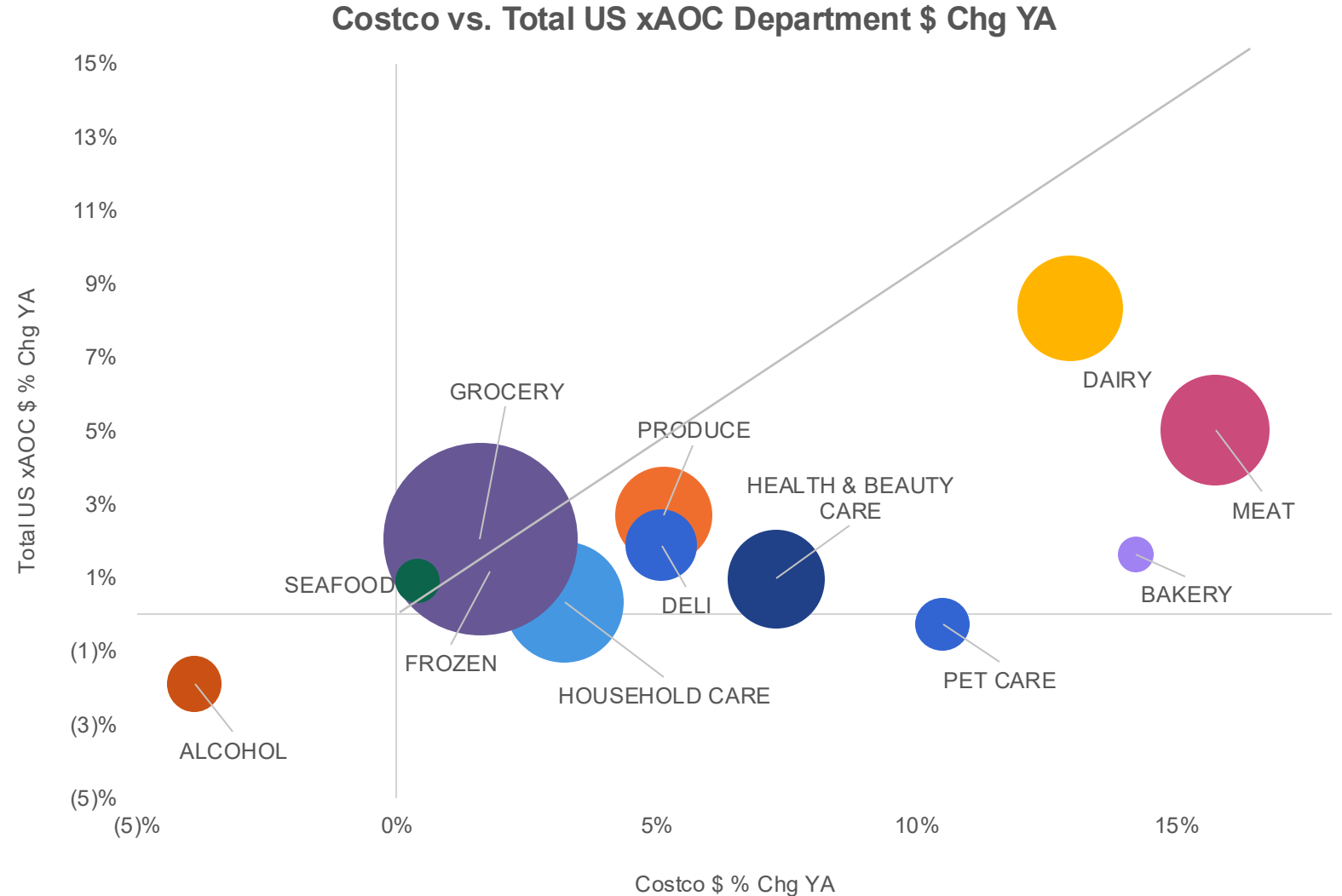
Source: NIQ Full View Measurement – Costco

Private Brand is gaining share at Costco



Source: NIQ Full View Measurement – Costco

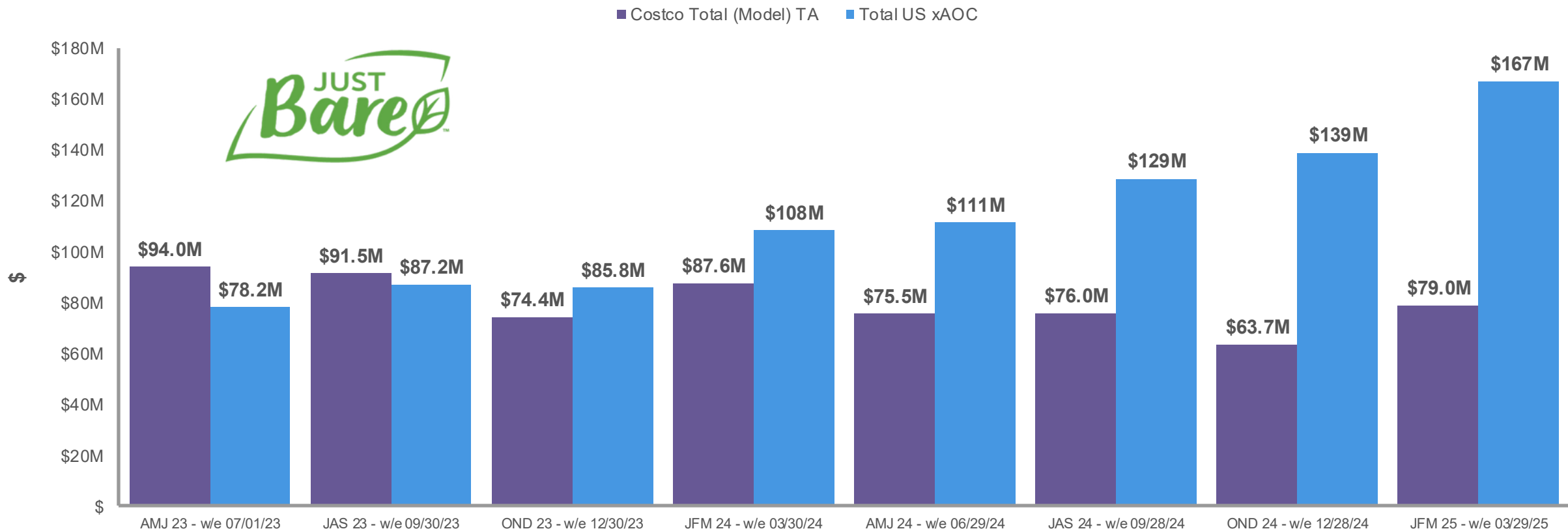
The Costco story doesn't end with private label, numerous categories outpacing US averages at the club



Source: NIQ Full View Measurement – Costco

Notable Costco products often find success outside the club

Quarterly Just Bare Gold’N Plump Poultry Costco vs Total US \$ Sales



Source: NIQ Full View Measurement – Costco

Your next steps

Here are the **top four actions CPG leaders** can enhance data workflows:



1. Understand variances within the category for club or Amazon versus total market



2. Uncover trending attributes to avoid being left behind on key category trends



3. Promote eCommerce and omnichannel internally through education and timely data reads



4. Drive digital shelf excellence to capture fair share of growth, invest in the data and tools to measure this

Fueled by..



Get the Full View™ with the NIQ Digital Commerce Suite

NIQ Digital Commerce Suite

NIQ Omnisaales

- **See** performance across categories, channels and global markets
- **Measure** all online channels: stores, apps, social
- **Measure** competitors online and in-store
- **Optimize** distribution, availability and search

WHAT THEY BUY

NIQ Digital Purchases

- **Access** more granularity on in-store and online behavior for better marketing
- **See** what and where consumers buy
- **Know** online consumers' interests
- **Track** online consumer trends

WHY THEY BUY

NIQ Digital Shelf

- **Optimize** distribution, marketing and product availability
- **See** search trends
- **Boost** item ranking & page performance
- **Tailor** content to searches
- **Manage** the digital shelf at store-level

HOW THEY BUY



Integration

Most integrated across existing data/systems



Data quality

Most complete, most accurate, and most granular in the market



Localization

Location-based capabilities supported by AI search optimization

True omnichannel solution, built on the *Retail Measurement Services* data you trust

With **Omnisales+** achieve total market coverage

Combining all data sources, and projecting for blind spots at KAD-level

ePOS

E-commerce POS

Online sales direct from cooperating retailers

POS

Point-of-sale

Sales from cooperating retailers

Web scraped

Amazon 1P & 3P

Actuals from continuous public web-scraping

ePanel

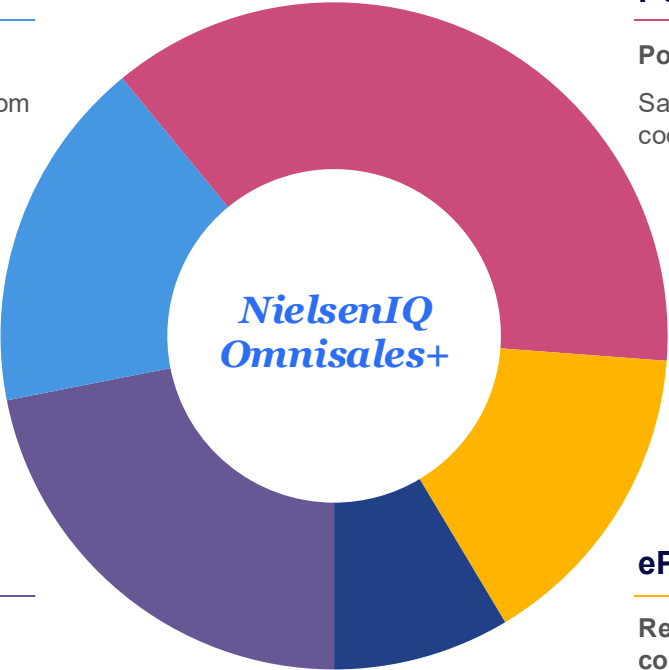
Rest of market coverage

Consumer email receipt panel to cover remaining blind spots

Credential Panels

Rest of market coverage

Direct access to order history; for retailers with e-receipt obfuscation



Recent Enhancements:

- Introduction of Units, in addition to Dollars
- Availability of subcategory and segment granularity across 500+ categories
- Reduced latency from D+30 to D+23
- Replaced Chewy, Whole Foods and Kroger e-receipt estimates with EPOS
- Expanded the panel size by 50% to 2.9M individuals
- Introduced **Credential Panel Methodology**, providing direct access to online order history



Walmart – *Active Today*



Instacart – *Planning for H2 2025 or H1 2026*

Full View Measurement: Expansion that doesn't compromise on granularity or completeness

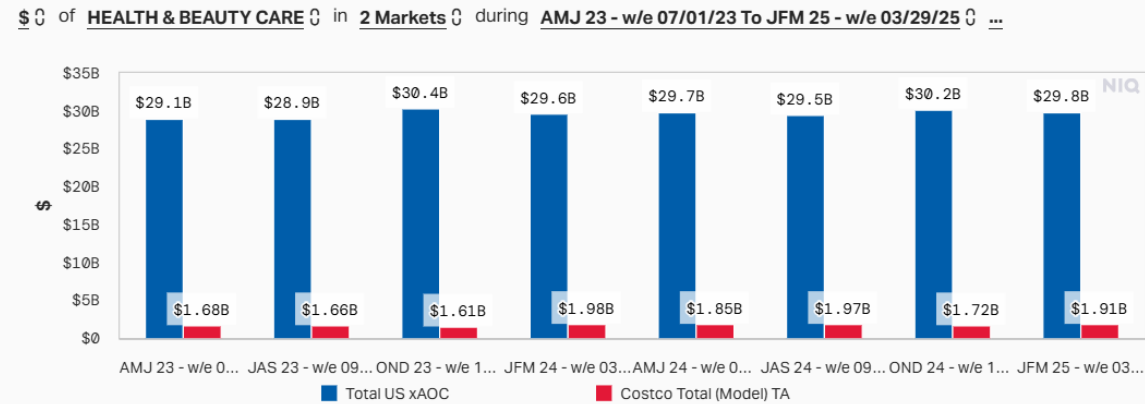


	Release 1: Amazon Inclusion	Release 2: Costco Inclusion
Source	Deep Learning Modeled Estimates	Receipt Panel (> 5MM receipts monthly), Transaction-Projected
Products	All current NIQ-coded categories, 95% \$ coverage	All current NIQ-coded categories, 95% \$ coverage
Periods	Weekly	Weekly
History	January '22 forward	December '22 forward
Frequency	Weekly	Weekly
Platform	Discover, D+9	Discover, D+9
Product Attribution	Full Characteristics and Custom Chars for 95%+ of Amazon volume*	Full Characteristics and Custom Chars
Private Label	Full visibility and inclusion at item-level	Full visibility and inclusion at item-level

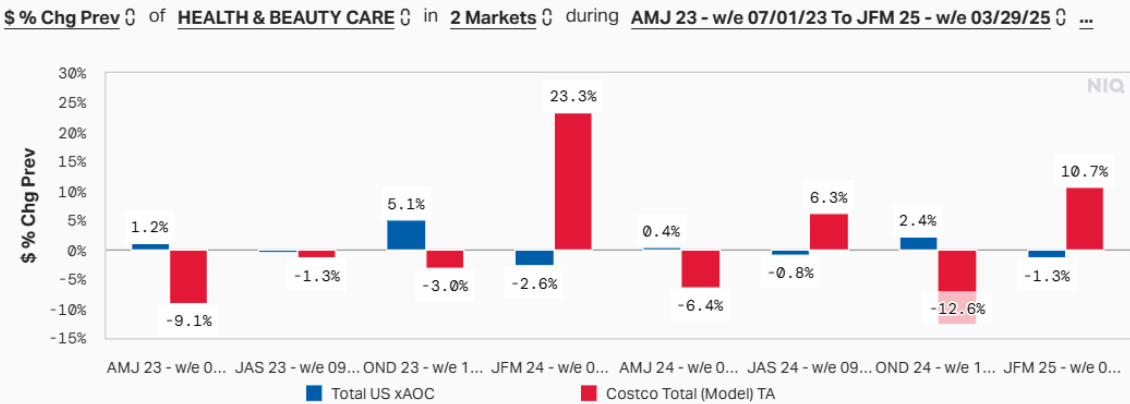
Live in Discover or Byzzer: Evaluate Costco Performance, Private Label Contributions

Health and Beauty Care Trends

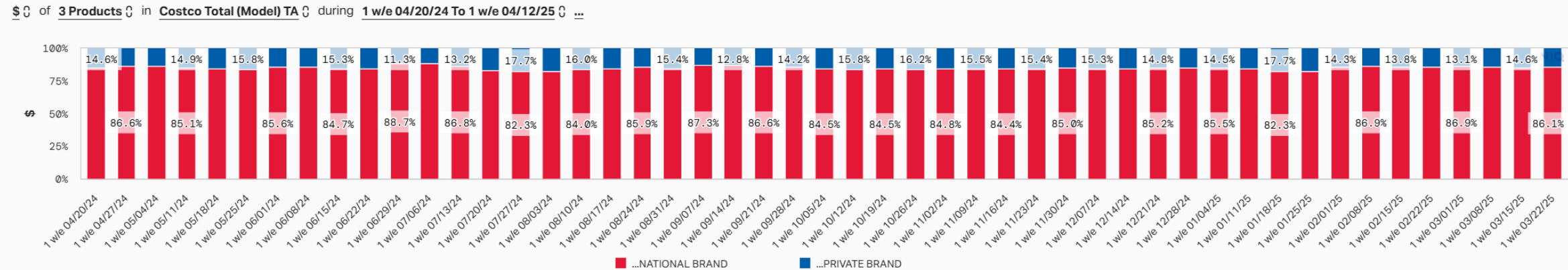
Sales Trend



Growth Trend



HBC - Branded vs PL



Live in Discover: Compare Competitor Performance and Pricing at Costco & Amazon

EQ Sales + Pricing

Category Comparison



4 Facts of 18.2K BRAND LOW, 53 CATEGORY, 8427 MANUFACTURER, HAIR CARE in 2 Markets during Latest 52 Wks - w/e 04/19/25 ...

			EQ	EQ	EQ % Chg YA	EQ % Chg YA	Avg EQ Price	Avg EQ Price
BRAND LOW	CATEGORY	MANUFACTURER	↓ Costco Total (Model) TA	Total US xAOC	Costco Total (Model) TA	Total US xAOC	Costco Total (Model) TA	Total US xAOC
PANTENE PRO-V (PROCTE...	SHAMPOO	PROCTER & GAMBLE CO...	256,696,235	338,566,737	13.1%	2.8%	\$ 0.29	\$ 0.38
HEAD & SHOULDERS (PR...	2 IN 1	PROCTER & GAMBLE CO...	221,750,740	607,940,488	7.2%	(0.5)%	\$ 0.30	\$ 0.45
PANTENE PRO-V (PROCTE...	CONDITIONER	PROCTER & GAMBLE CO...	115,836,411	268,905,264	(27.7)%	0.8%	\$ 0.30	\$ 0.46
PRIVATE LABEL	SHAMPOO	PRIVATE LABEL	100,783,661	211,352,766	(6.6)%	(3.9)%	\$ 0.30	\$ 0.38
NEXXUS UNBREAKABLE C...	SHAMPOO AND CONDITI...	UNILEVER GROUP	89,994,508	483,584			\$ 0.34	\$ 0.38
PRIVATE LABEL	CONDITIONER	PRIVATE LABEL	74,517,293	84,865,832	(11.3)%	9.4%	\$ 0.30	\$ 0.29
SHEA MOISTURE (SUNDIA...	SHAMPOO	UNILEVER GROUP	65,211,721	71,433,472	(1.9)%	(6.2)%	\$ 0.37	\$ 0.79
SHEA MOISTURE (SUNDIA...	CONDITIONER	UNILEVER GROUP	60,586,223	68,591,885	8.3%	(9.4)%	\$ 0.35	\$ 0.80
PANTENE (PROCTER & GA...	CONDITIONER	PROCTER & GAMBLE CO...	40,866,755	92,755	15.2%	(81.2)%	\$ 0.27	\$ 0.23
SUPER NATURE (PROCTE...	SHAMPOO	PROCTER & GAMBLE CO...	29,401,632		(43.0)%		\$ 0.39	
SUPER NATURE (PROCTE...	CONDITIONER	PROCTER & GAMBLE CO...	21,777,525		(38.5)%		\$ 0.38	
KRISTIN ESS (MAESA LLC)	SHAMPOO AND CONDITI...	MAESA LLC	21,014,626	338	74.0%		\$ 0.39	\$ 0.58
PRIVATE LABEL	HAIR GROWTH PRODUCT	PRIVATE LABEL	6,694,867	9,845,724	5.6%	15.0%	\$ 3.72	\$ 6.30
CAROL'S DAUGHTER (L'OR...	HAIR CARE COMBINATION...	L'OREAL SA	6,321,326	3	11,806.5%	(100.0)%	\$ 0.45	\$ 9.50
NEXXUS THERAPPE & HU...	SHAMPOO AND CONDITI...	UNILEVER GROUP	5,133,847		27.3%		\$ 0.32	

Live in Discover: Item level price comparisons for Costco & Amazon, including Private Label

Item Level									
Sales Detail									
4 Facts of 1.88M Products in 2 Markets during Latest 52 Wks - w/e 04/19/25 ...									
				EQ	EQ	EQ % Chg YA	EQ % Chg YA	Avg EQ Price	
SUPER CATEGORY	ITEM	CATEGORY	TOTAL SIZE	↓ ▾ Costco Total (Model) TA	▾ Total US xAOC	Costco Total (Model) TA	Total US xAOC	Costco Total (Model) TA	
HAIR CARE	PANTEN HR SHMP ASRTD ...	SHAMPOO	38.2 FLUID OUNCE	172,177,943	26,803	45.7%	598.8%	\$	0.30
HBL	AVN HND BDY SKN PRDC ...	BODY	24 FLUID OUNCE	153,248,436	2,761	127.6%		\$	0.33
HAIR CARE	PANTEN HR CNDT ASRTD ...	CONDITIONER	38.2 FLUID OUNCE	115,836,411	4,332	(27.7)%	(49.6)%	\$	0.30
HAIR CARE	NXS UNB CR HR SHMP ST...	SHAMPOO AND CONDITI...	64 FLUID OUNCE	89,994,508	483,584			\$	0.34
HAIR CARE	CTL BR HR CNDT ASRTD L...	CONDITIONER	33.8 FLUID OUNCE	74,483,325	2,827	(11.4)%		\$	0.30
HAIR CARE	SH MST HR SHMP ASRTD ...	SHAMPOO	34 FLUID OUNCE	49,728,340	405,008	515,280.5%		\$	0.39
HAIR CARE	SH MST HR CNDT ASRTD ...	CONDITIONER	34 FLUID OUNCE	41,636,679	407,830			\$	0.31
HAIR CARE	SH MST HR CNDT SFTN C...	CONDITIONER	34 FLUID OUNCE	18,935,382	406,096	(66.1)%		\$	0.27
HAIR CARE	SH MST HR SHMP CLR SF ...	SHAMPOO	34 FLUID OUNCE	15,385,665	412,624	(76.8)%		\$	0.30
HBL	NTRS BDY BTR NON GRSY...	BODY	6 FLUID OUNCE	7,521,507	84	37.0%	(100.0)%	\$	1.50
HAIR CARE	CTL BR 5 PCT MNXD TPCL...	HAIR GROWTH PRODUCT	2.11 OUNCE	6,333,607	7,406	13.2%	(72.0)%	\$	3.80
HAIR CARE	HEAD HR SHMP CNDT IN ...	2 IN 1	40 FLUID OUNCE	4,407,266	16,196	(97.8)%	175.4%	\$	0.21
HAIR CARE	SCNC HR ELST 30 CT	HAIR ACCESSORIES	30 COUNT	2,478,749	56,867,488	(30.3)%	1.4%	\$	2.50
HAIR CARE	CTL BR HR SHMP ASRTD ...	SHAMPOO	33.8 FLUID OUNCE	1,651,426	5,654	(25.0)%		\$	0.33
FACIAL SKIN CARE	OLY SKN SRM BTL ALPH H...	FACIAL MOISTURIZER	1 FLUID OUNCE	609,786	264,728			\$	19.20

How market leaders win with NIQ's Digital Commerce Suite

L'ORÉAL

“

*The tool's coverage is fantastic! It gives us a **great way to read the omnichannel**, which is becoming increasingly important. So ultimately it helps us **build our go to market strategy**. It allows us to put the right offer into the right retail touchpoints and **better manage our campaigns**.”*

Emilia Simonin,

Global Market and Business
Intelligence Director



LACOSTE

“

*We are breaking down conventional wisdom with Foxintelligence (now **Digital Purchases**). It didn't replace another solution, it's a new solution on the market. **Before we were blind, now we have glasses.**”*

Aurélie Bastian,

Performance Manager, Europe



WILLIAM GRANT & SONS
INDEPENDENT FAMILY DISTILLERS SINCE 1867

“

***NIQ Digital Shelf is a great tool that helps us make decisions at multiple levels—not only e-commerce.** It's a great source of information even for our offline business management.”*

Alexandre Morelon,

E-Commerce & E-Retail
Media Manager

But let's hear it from Kellanova

Introducing Mike McCune



NielsenIQ

Thank you!



The quest for *next*
Find your next growth opportunity

