NIQ

Growth Playbook

Hollywood, FL • June 2 - 5, 2025

The quest for *next*

C360

This book belongs to:

Find your next growth opportunity

Welcome to C360

On behalf of all of us at NielsenIQ, it's my pleasure to welcome you to C360, our flagship annual conference and a cornerstone moment for the CPG industry and omnichannel retail community of innovators, leaders, and changemakers. This year's theme — "Quest for Next" — couldn't be more timely. In an environment shaped by ever-shifting consumer behaviors, technology acceleration, and global market complexity, the ability to see clearly and act confidently is more critical than ever.

C360 is more than a conference — it's a collaborative space where data meets decision-making, insight sparks innovation, and our collective expertise drives transformation. Over the next few days, you'll hear from some of the brightest minds in the industry, dive into forward-thinking content, and experience firsthand how NielsenIQ is evolving to meet the moment — and help you lead it. To support that mission, we've created the Growth Playbook—your guide to capturing the most valuable ideas, frameworks, and discussions throughout the event.

Whether this is your first time at C360 or you've been with us for years, I encourage you to fully engage: ask bold questions, share your perspective, and make new connections. The power of this event comes not just from the content, but from the incredible community in the room — including you. Thank you for being here. We're honored to have your voice and your vision as part of the C360 experience.

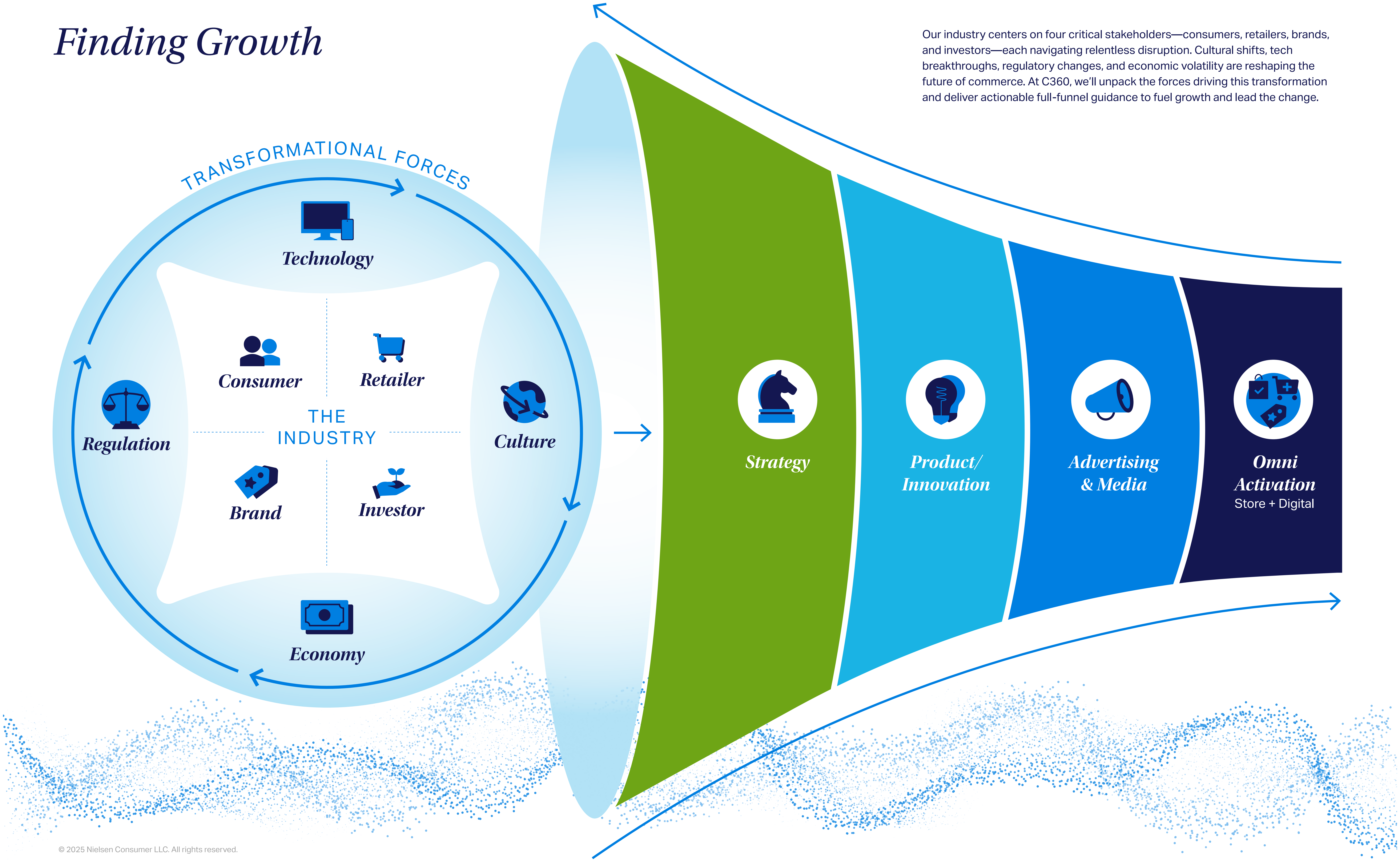
Let's shape the future together in the industry's 'Quest for Next.'

Warm regards,

Liz Buchanan
North America President
NielsenIQ

Finding Growth

Our industry centers on four critical stakeholders—consumers, retailers, brands, and investors—each navigating relentless disruption. Cultural shifts, tech breakthroughs, regulatory changes, and economic volatility are reshaping the future of commerce. At C360, we'll unpack the forces driving this transformation and deliver actionable full-funnel guidance to fuel growth and lead the change.



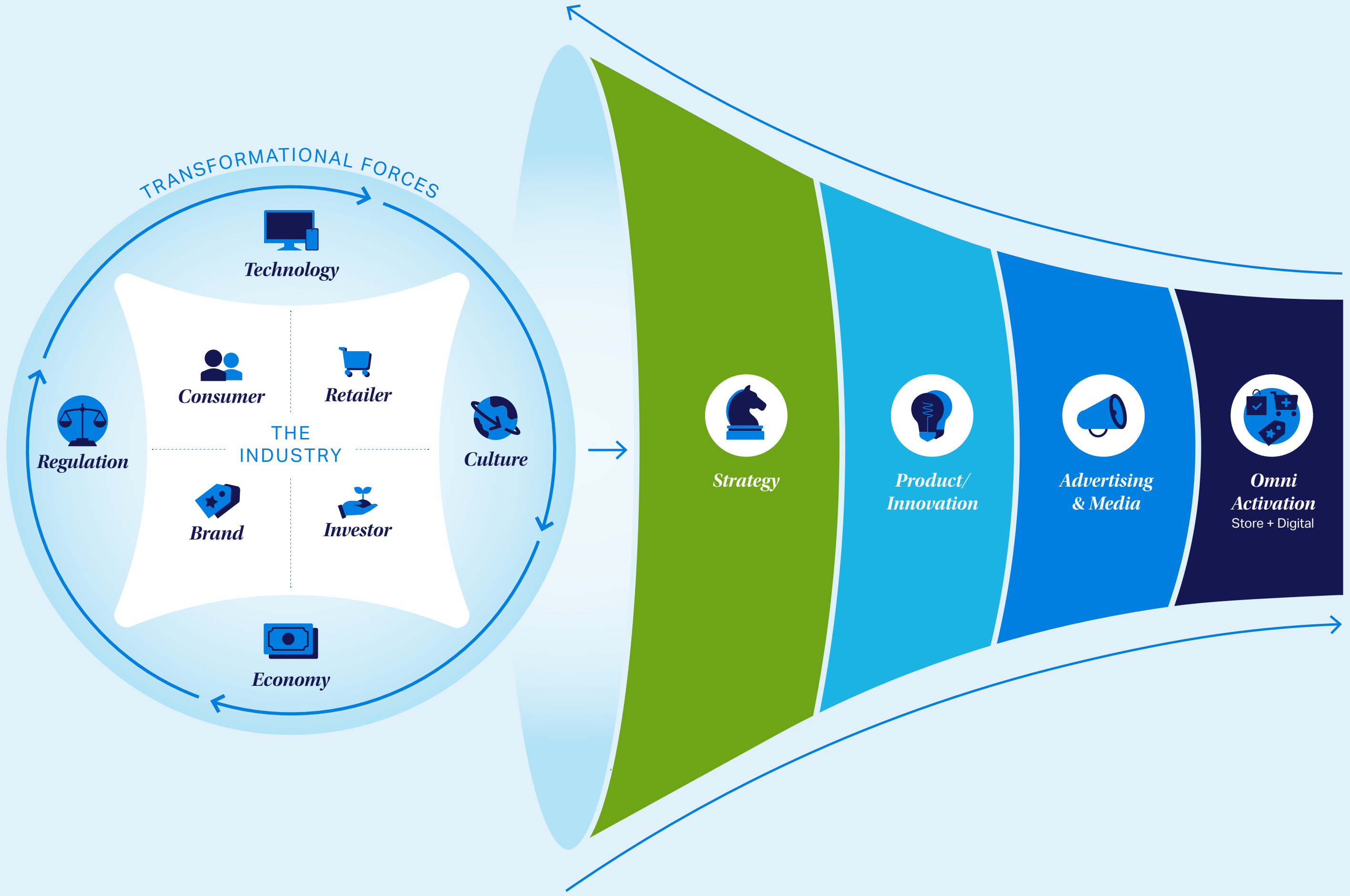
Insights and reflections on...

Transformational Forces

Technology	*Culture*
Regulation	*Economy*

The Industry

Consumer	*Retailer*
Brand	*Investor*



Ideas to improve my...

Strategy	*Product/Innovation*	*Advertising & Media*	*Omni Activation*

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Breakout Sessions

Healthy Nation, Healthy Future: Food Policy Developments and Industry Examples

Key Facts

Wellness is accelerating due to consumer demand, regulatory changes, chronic illness concerns, and tech-driven behavioral changes.

Challenges for the food industry include ultra-processed foods, additive bans, GLP-1s, nutrient density, SNAP changes, and dwindling trust and loyalty.

Key Insights

45% of global consumers strongly agree that clear, transparent labeling is essential for health-conscious choices, especially in North America.

Vegetables, dairy, and salads are growing faster than indulgent categories like sweets and snacks.

Personalized tools and behavioral shifts are tailoring nutrition, driving engagement, and improving health outcomes.

What's Next?

Tech, policy, and consumer health priorities will continue to shift, requiring deeper data and new frameworks for sustainable formulation and product portfolio changes.

Increased partnerships between retailers, tech platforms, and health data providers to deliver **personalized, health-focused food solutions, especially as "food as medicine" gains traction.**

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Breakout Sessions

From Data to Strategy: GLP-1 Shopper Insights and Manufacturer Responses Through Real-World Data

Key Facts

Explore the impact of GLP-1 medications on Consumer, Channel, Category, and Characteristics using real-world healthcare and consumer purchase data.

Question the impact and risk for your categories/brands, identify opportunities through data analysis, and adjust strategies for evolving consumer needs.

Key Insights

GLP-1 consumers' purchasing behavior is evolving, affecting categories beyond food and beverage. Behavior changes from post-90 days on drug to post-180 days.

Demographics and health metrics of GLP-1 consumers have shifted with increased accessibility. Non-diabetic consumers now outnumber diabetic ones, and they tend to be younger and predominantly female.

Collaboration between NIQ and MSA has identified the significant role of diet and nutrition facts and ingredients in category sales among GLP-1 consumers.

What's Next?

NIQ GLP-1 Thought Leadership on C-stores, emerging brands, snacking, and more!

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Breakout Sessions

Beauty Unleashed: The Evolution of Social Selling in the TikTok Era

Key Facts

- **Beauty & personal care sales:** +2.9% YTD, down from +6.4% 52-week average.
- **44% of beauty & personal care sales are online.**
- **Amazon:** #1 beauty retailer, growing double digits in dollars & units.
- **TikTok Shop:** $1B in health & beauty sales over the past year.

Key Insights

Amazon grows by focusing on **competitive pricing, assortment, and product replenishment needs.**

68% of beauty sales on TikTok Shop are impulse buys, making it a leading product discovery retailer.

What's Next?

Amazon & TikTok Shop will challenge mass & beauty specialty retailers to evolve for modern customers.

New social selling retailers to watch: YouTube, Pinterest, Snapchat, Flip, and more.

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Breakout Sessions

Raising the Bar: Strategies for Thriving in a Moderating BevAl World

Key Facts

- **BevAl categories are seeing** declines in value and volume sales.
- Consumers prioritize **high quality drinks at the right price.**
- 36% of on-premise consumers are **drinking less to save money.**

Key Insights

Moderation is driven by health, wellness, and economic concerns.

Premiumization is growing despite economic pressures.

High-income shoppers are shifting premium alcohol purchases.

What's Next?

Recruit new LDA audiences through authentic engagement and create differentiated new consumption occasions.

Tackle uneven wealth distribution through localized strategies.

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Breakout Sessions

Tech & Durables: Driving Category Performance Through Innovation

Key Facts

Despite inflation, **consumers prioritize affordability and value.**

Most consumers view innovation as "an easier way of doing something" or "providing a solution to a problem."

Key Insights

Innovation must have a relevant use case to justify the price, like smartphones with higher storage or smart thermostats that reduce utility costs.

Consumer decision-making on affordability includes value for money spent.

What's Next?

Brands should identify consumer motivations, from affordability and value to convenience, performance, health, and sustainability.

Retailers will see immense change as physical and digital merge. AI must help provide offers, answer queries, ease product selection and checkout, and bolster product fulfillment.

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Breakout Sessions

Finding Harmony on the Shelf: 2025 Global Outlook on Private Label & Branded Products

Key Facts

Private label's global share stabilized to 23%, with W. Europe having the highest share at +40% in 2024.

Africa, Middle East, LATAM seeing the fastest private label value growth.

Consumers trust global brands while seeking value with private label.

Key Insights

Private label stigma is fading: 68% of global consumers say private labels are good alternatives to name brands.

Private label demand is healthy and growing: 60% of global consumers say they would buy more private label products.

What's Next?

Consumers will continue to seek value and variety driving private label growth and SKU expansion.

Retailers will continue to challenge brands for shelf and margins and brands will build on the "trust factor" and challenge private label.

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Breakout Sessions

Fueling Flavor: The Now and Future of Convenience Stores

Key Facts

Convenience Channel $ Sales: -0.6% latest 52 weeks, but **Food Service Forward Chains:** +3.4%.

43% of BevAl $ sales in the US come from Convenience.

Rise in functional products, cleaner energy drinks, high protein food/bev, and GLP-1 friendly items.

Key Insights

Convenience stores with Food Service forward offerings are outperforming the market, showing demand for convenience in meals and immediate consumption.

Innovation in BevAl is transforming the beer cooler beyond just beer.

Adapting to changing consumer needs is crucial for success.

What's Next?

Track key trends impacting the convenience space and align strategies to increase customer traffic and sales.

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Breakout Sessions

The Evolution of Retail Media: Decoding What Works—and What Doesn't

Key Facts

Retail media is projected to reach $27B in 2026, evolving into a sophisticated ecosystem dominated by Retail Media Networks (RMNs).

Seamless omnichannel tactics are the norm, but **finding robust measurement datasets is a key challenge for CPGs.**

Key Insights

Robust share of voice tracking can empower budget decisions.

Simple automation processes can stop diminishing ROI due to OOS or adverse competitor activities.

Optimize content for SEO algorithms to rank at the top of the page organically.

What's Next?

Align the business on ROI metrics, create unified budget frameworks and breakdown team silos and allow for agile execution.

Integrate RMNs into joint business planning (JBP).

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Breakout Sessions

Revealing Shopper Insights: Discovering Growth and Debunking Loyalty Myths

Key Facts

FMCG retailers struggle to build shopper loyalty and grow share of wallet.

Even the largest FMCG retailers capture less than one-fifth of their shoppers' spend, with over 80% leaking to competitors.

Key Insights

Growth can be driven by acquiring new shoppers and increasing share of wallet among existing customers.

Disaggregated data enables you to better track innovation and analyze shifts in consumer demand.

Shopper behavior varies significantly between in-store and online environments, requiring tailored strategies for each channel.

What's Next?

Empower sales and category teams with insights to drive incremental growth for manufacturers and retailers.

Continue leveraging full-view data to deepen your understanding of consumer behavior and refine innovation strategies.

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Breakout Sessions

How to Make AI Useful for Everyone

Key Facts

Did you know that 50% of everyday consumers claim to have used AI?

Early adopters and students lead the AI adoption curve.

Half of Consumers and 3 in 4 Content Creators mention using AI in some capacity to complete a task online.

Key Insights

"Finding the products I need when shopping" is the most important task that everyday consumers do online and among their top priorities.

The most important task to **Generation Z Consumers was book, music, movie, and TV show recommendations** based on preferences.

What's Next?

Brands and retailers should **lean into AI that simplifies the shopping process.**

Highlight AI tools that resonate with power users (students, consumers and early adopters) in marketing communications to help boost usage with AI tools for completing tasks.

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Breakout Sessions

Evolution of CPG through Investments and M&A

Key Facts

Strategic deal value in Consumer Products dropped by 19% in 2024, while deal count increased by 27%, driven by smaller brand, scope, and capability deals.

Portfolio reshaping will continue to drive M&A, with many CPG companies evaluating and divesting low-growth and non-core businesses (60% of executives are preparing an asset for sale in the next 3 years).

Key Insights

Established CPGs must focus on driving value creation post-acquisition through scale synergies or topline growth.

Unpacking and clarifying unique parenting advantages is critical to unlocking value.

What's Next?

Tech disruption, post-globalization, and shifting profit pools will lead companies to continue pursuing M&A.

Emerging brands aiming for acquisition will address unmet consumer needs, sustain velocity growth while expanding distribution, and keep assortment simple, strong, and streamlined.

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Breakout Sessions

Investing in What's Next: Private Equity's Quest for the Next Market Leader

Key Facts

Consumer spending on CPG products in the US grew by +3.9% in 2024 and is projected to exceed $1.7 trillion.*

Over 115,000 brands were sold in the US market in 2024.

**Source NielsenIQ Omnisales*

Key Insights

Identify the qualities investors value most in CPG brands before investing.

Understand how investors contribute to the growth and success of a CPG company post-investment.

Share strategies to foster and sustain strong, productive partnerships between investors and portfolio companies.

What's Next?

Leverage consumer insights, market trends, and competitive benchmarking data to understand your category and target audience.

Develop strategies to position your brand as a strategic partner rather than merely a funding recipient.

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Breakout Sessions

Break Through the (Creative) Noise
Voya's New Approach to Sharpen Marketing Creative

Key Facts

Hear how Voya Financial partnered with NIQ to develop an **innovative, and cost-saving approach to sharpen marketing creative.**

Learn how to make marketing creative resonate with consumers and **drive engagement and ROI.**

Key Insights

Provide your stakeholders with the tools to easily implement this approach.

Understand how consumer insights can inform your marketing strategy.

Don't just trust your gut. Learn how insights can deliver ROI and drive growth in the marketing org.

What's Next?

Manage against overload from Gen AI and agency partners to **be more deliberate and planned in your approach to creative.**

Integrate consumer insights into creative planning for both aggregate and targeted campaigns.

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Breakout Sessions

From MMM Insights to Actions: Optimize Brand Sales by Unlocking the Best Amazon Media Mix

Key Facts

The Cetaphil brand wanted to understand drivers of sales across online and brick and mortar stores.

Amazon sales remain stable for most of the year, with the exception of 3 key periods: Prime Day, Prime Big Deal Days and Black Friday.

Key Insights

Sponsored and DSP vehicles serve different purposes and should be used strategically to build incremental sales.

Shifting spending to sponsored vehicles resulted in 4x lift.

Amazon media generated almost 14% incremental sales for Cetaphil.

What's Next?

Media Mix Modeling is critical. Incremental volume is your #1 KPI with retail partners that drive category growth.

Don't abandon DSP for sponsored ads. These should be used across your promotion plans to optimize results.

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Breakout Sessions

Beautiful Results: How Milani Grew its Footprint with its Top Retailers

Key Facts

Eye, lip, and face cosmetics were declining at a key retailer, driven by large brands with big budgets.

Despite year-over-year growth, **Milani's footprint remained unchanged.**

Key Insights

Assortment projects should start with a brand vision and an evaluation of your portfolio to identify growth drivers, "me too" items, and cannibalistic SKUs.

Expect a non-linear progression with various stakeholders involved throughout the journey.

Involve retail partners early and often for mutual investment in the strategic direction of the assortment and category.

What's Next?

Evaluate your brand's offerings and look for opportunities to rationalize and determine a strategic direction for your category that makes sense to the retailer.

Develop a compelling story that aligns with what the retailer wants and demonstrate how your brand attracts valuable shoppers with bigger basket values.

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Breakout Sessions

Enhancing Your Competitive Edge and Market Position with Strategic Price Optimization

Key Facts

56% of consumers expect a negative impact on the US economy over the next 3 years.

Private Label & Promotions continue to deliver dollar share growth, +2.2 & +4.3 pts outpacing National brands & non-promo, respectively.

Switching to a lower-priced option was the #1 consumer saving strategy.

Key Insights

Economic shock events are becoming more frequent, requiring pricing strategy to be more insulated to change.

A mix of price action levers is required to address the current economic and consumer headwinds.

AI optimization & advanced analytics present a unique opportunity to accelerate strategy to action.

What's Next?

Ensure clearly defined & communicated pricing strategy aligned to your organization's level of pricing sophistication.

Take advantage of price optimization & advanced analytics to accelerate KPI goal attainment & talent multiply your teams.

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Breakout Sessions

Accelerating Business Growth on Amazon

Key Facts

22% of Total CPG sales are online, with +18% growth YOY.

83% of sales added in 2024 came from online.

Amazon units grew +12% in '24 on a $300B base, making it a top retailer to focus on for CPG growth.

Key Insights

Integrating Amazon 1P and 3P category data is complex and takes time – some manufacturers spend 800 hours a year on it!

With NIQ, manufacturers can spend less time integrating and more time acting on visible data, down to a UPC level.

What's Next?

Analyze product trends on Amazon to see what's driving the growth – unique pack sizes, products with unique ingredients, or claims.

Compare those trends across retailers; your strategy on Amazon is not the same as it should be on Walmart, TikTok and beyond.

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Breakout Sessions

Telling a Win-Win Story for your Portfolio, Category and Retail Partners

Key Facts

61% of consumers expect a negative impact on the US economy through year-end with short windows for retailers to make a sale in-store.

Almost 40% of retailers plan to reduce SKUs in the next 12 months.

Consumers are spending 36% more in the past three years due to inflation.

Key Insights

Good brand partners understand the consumer, category, and retailer.

Save time and add value with opportunities that optimize retail & brand sales.

Fully understand consumer sentiment to develop partnering distribution strategies.

What's Next?

Gain expertise in the consumer and category trends and segment attributions that are differentiated.

Highlight your contributions to the retailer's performance and define how you both will continue to win.

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Breakout Sessions

The Value of In-Market Testing for New Products

Key Facts

Companies that grow innovation sales are 2x as likely to grow overall sales, yet only 7% grew innovation sales last year.

95% of new products tested in-market with NIQ that meet key KPIs— sales, trial, and repeat—and are then launched nationally **go on to succeed.**

Key Insights

In-market testing provides fact-based shopper insights: REAL people spending REAL dollars in REAL stores.

Integrate multiple data assets (POS data, loyalty card data, shopper survey data) for a full understanding of test results.

In-market testing provides an internal rehearsal of the national launch.

What's Next?

Learn from what has worked and what hasn't. Identify 3-4 historical new product benchmarks from which to learn.

Set realistic goals backed by actionable plans based on these benchmarks.

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Find the latest thought leadership from NIQ below

Global Thought Leadership Signature Reports

Time for Tariffs

Navigating uncertainty and disruption amid shifting trade priorities

Finding Harmony on the Shelf

How private labels and big brands can collaborate for growth

Global State of Health & Wellness

Evolving consumer priorities affecting a fast-growth category

Consumer Tech Industry Trends 2025

What's in demand—and where—across digital tech categories

Beyond Vitality

Improving innovation sales by focusing on core principles of agility

The Ultimate Guide to Omnichannel

Crafting omnichannel strategies rooted in best-in-class data

CMO Outlook

How CMOs should be thinking about AI and data-driven decision-making

US Regional Insights

NIQ Perspectives, Q1 US

Economic slowdown for the US economy—reactions from our analysts across Beauty, BevAl, and Grocery on Q1 performance and what considerations to think about into Q2

NA Tariff Sentiment Study

Insights from our ongoing Tariff Sentiment Study, focused on Canadian and US consumers

US Private Label Executive Summary

Short summary on how US consumers feel about private label and branded products; how do FMCG manufacturers and retailers move forward to coexist on the shelf and into baskets long-term

Want more NIQ Perspectives?

Scan here to browse trending and timely topics →

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The quest for *next*

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