

Balancing Wide-Ranging Consumer Behaviors and Shopping Habits

Jennie Bell
Managing Director, Snacking & Beverages

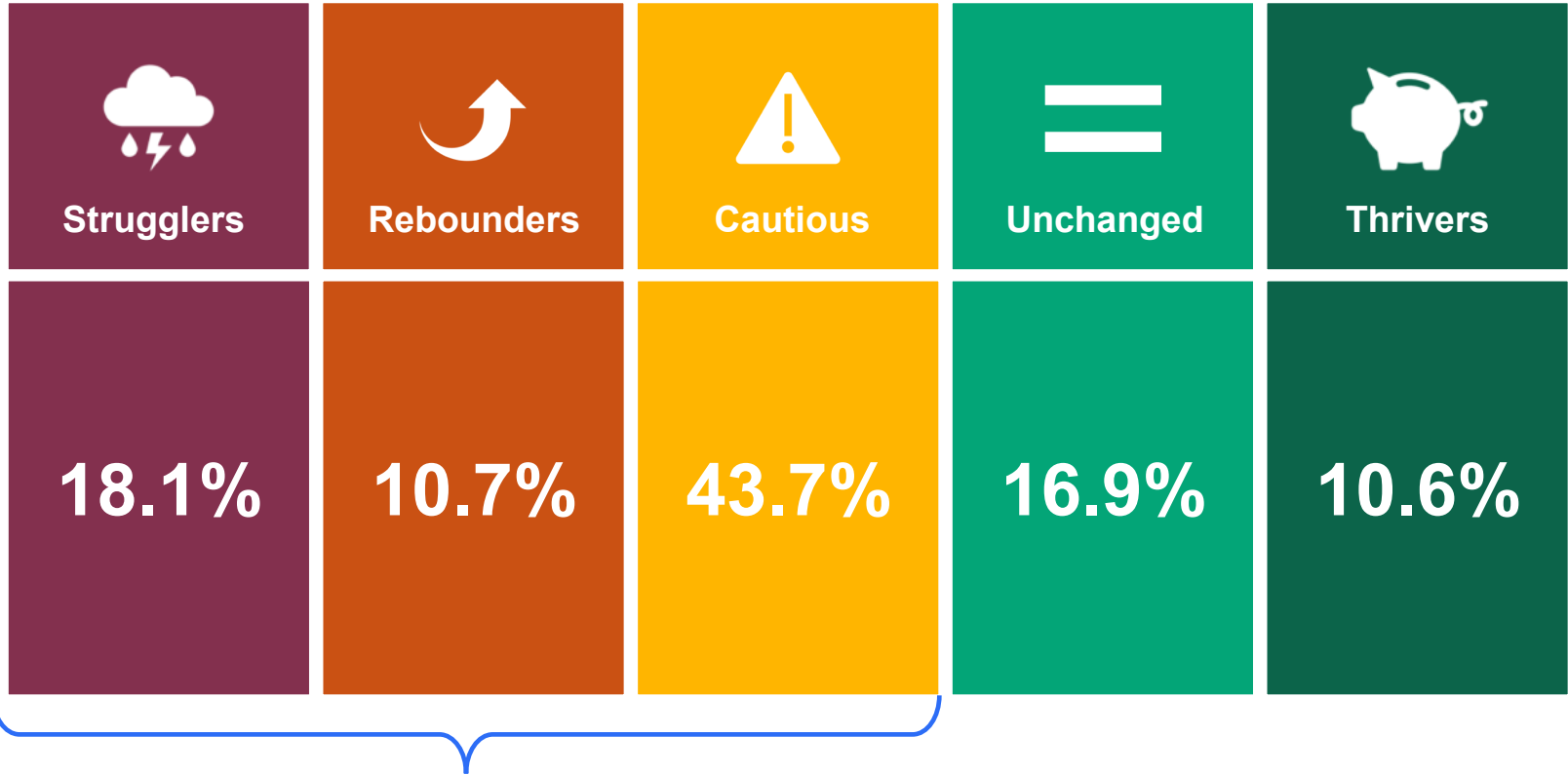


We're at a pivotal moment





Consumers are more challenged than ever.....



72.5% of consumer are vulnerable.
They're cautious, calculating and craving value.

...and they are
more
conscious
than ever....

*It's price vs. all
the other drivers*

87%

of consumers
changing how
they shop to
save money

69%

of consumers
willing to pay
more to eat
healthy

72%

of consumers
say "makes my
life easier"
defines the
value of a
product

49%

shop at stores
they don't
normally shop
at to check out
a sale

Postponed a
purchase until
the product was
on sale/special
offer

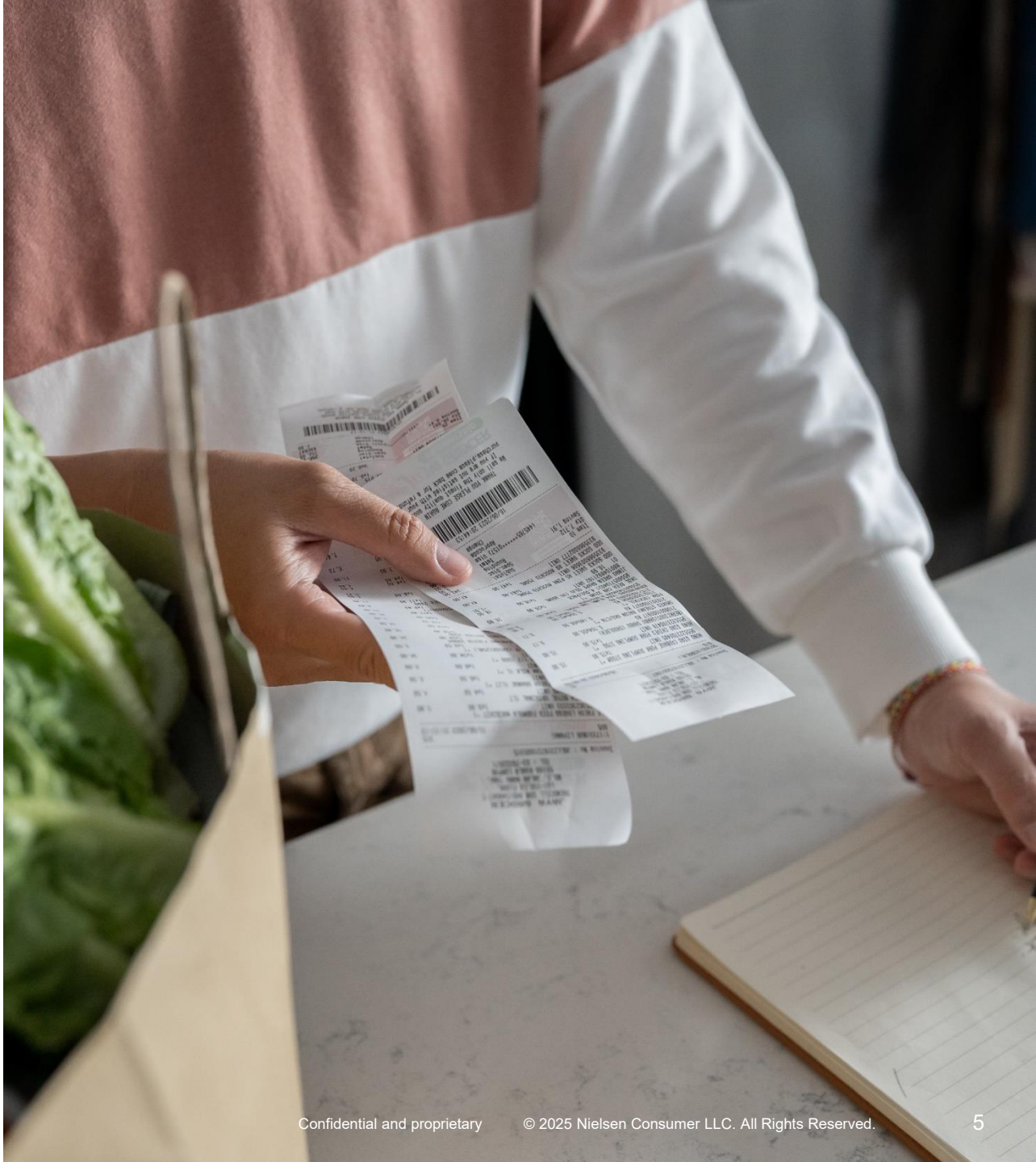
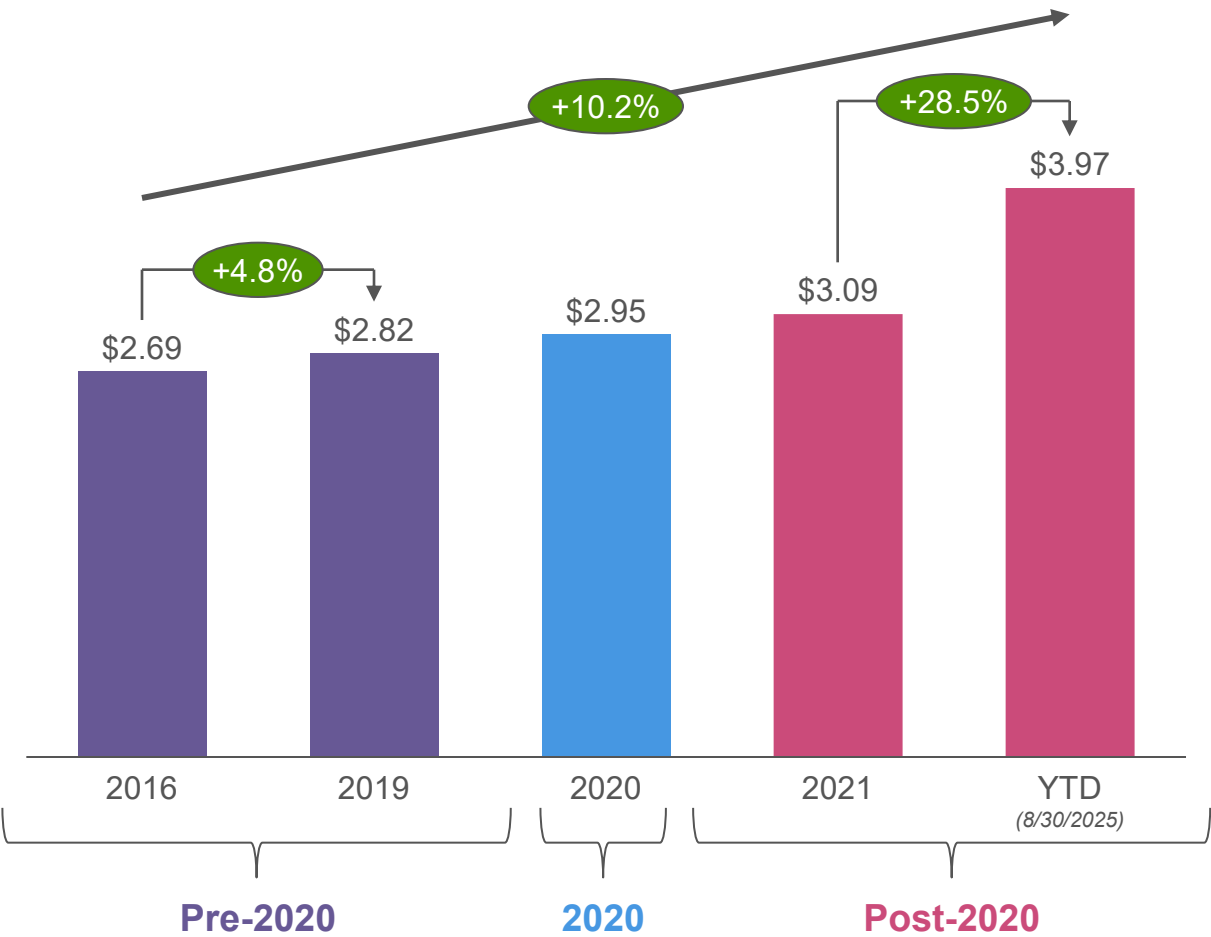
Bought in
bulk to get
a discount

Purchased
products with
2+ highly
valuable
health claims

Source: NIQ Consumer Life Global 2024, 2024 Global Consumer Outlook Report

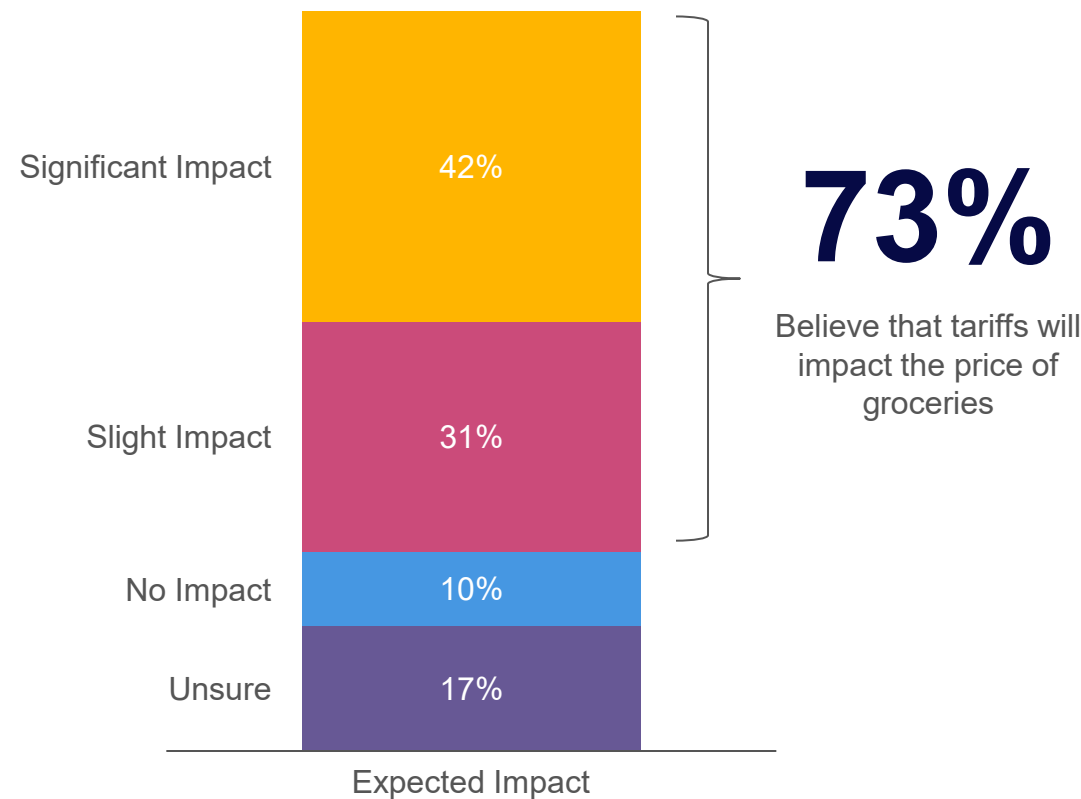
Prices have taken off since 2020...

Food & Beverage
Base Unit Price



...tariffs are having an impact...

Expected Impact Of Tariffs
On Grocery Prices

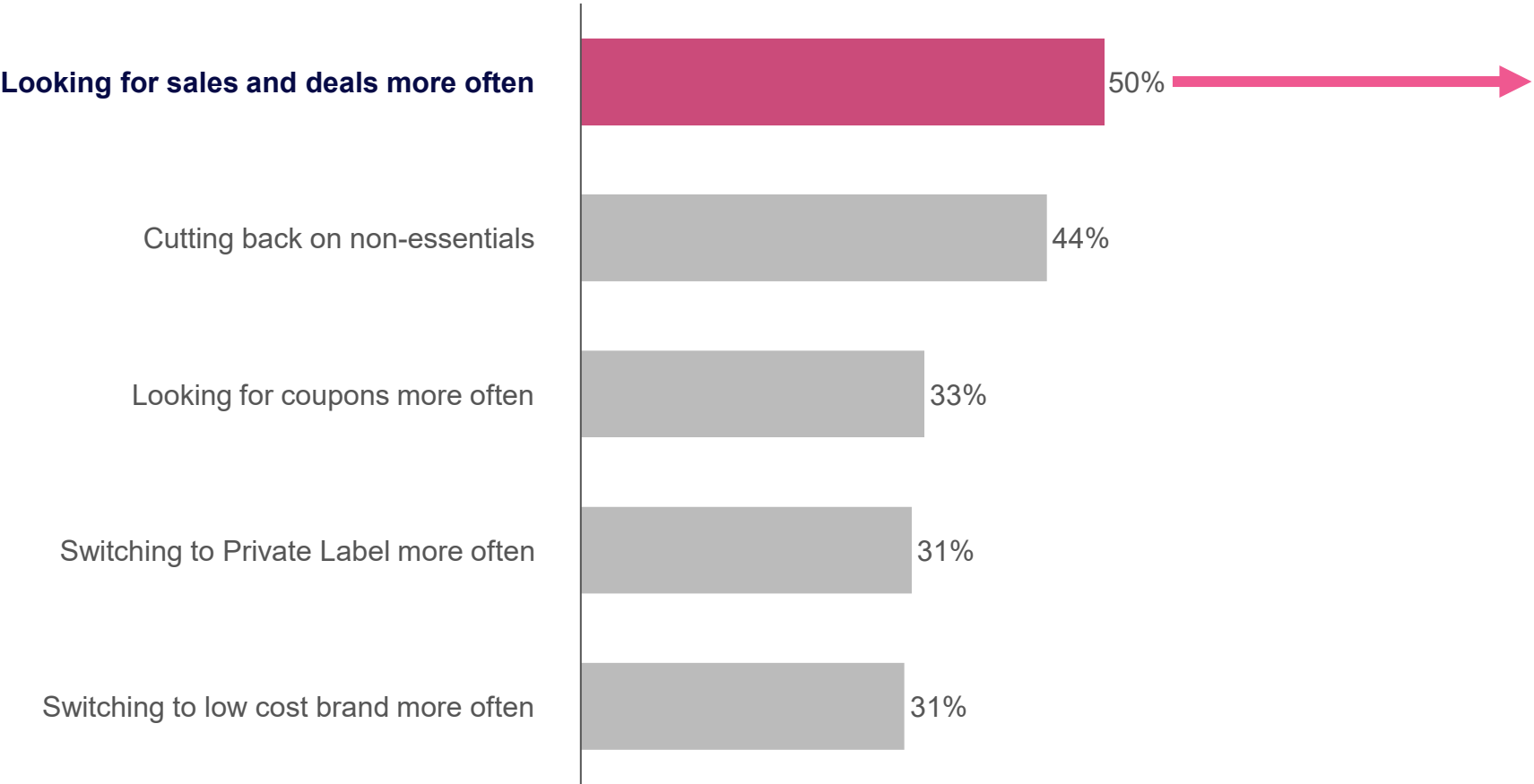


Source: NIQ, BASES Quick Question Omnibus Survey, February 2025 n=1,003
Note: Survey was conducted when tariffs were announced on Canadian and Mexican imports only.



Consumers are wanting to shop differently...

Top Cost-Saving Strategies



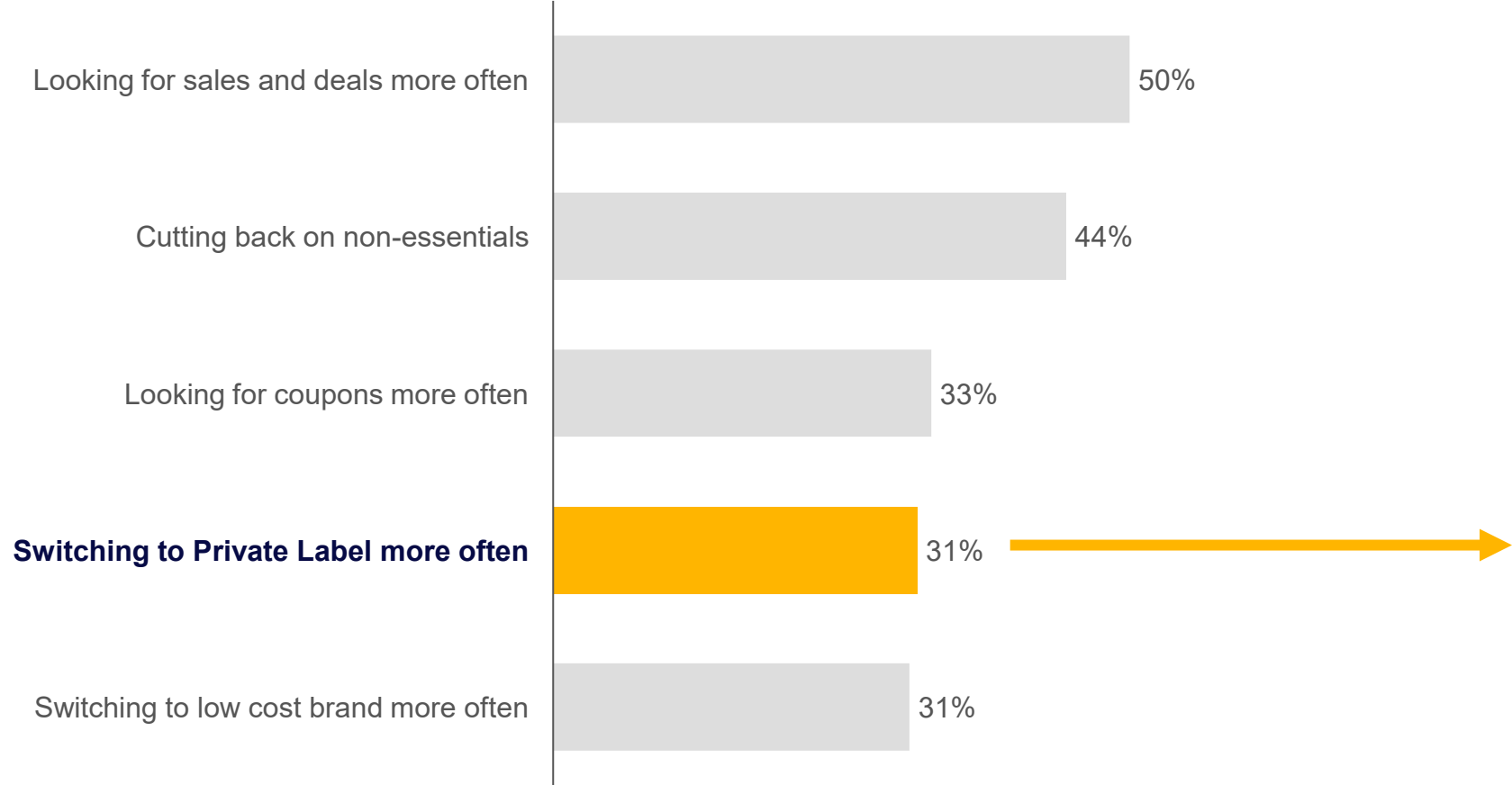
26%
of CPG Sales are
on Promotion

+2pts
vs YA

Source: NIQ, BASES Quick Question Omnibus Survey, June 2025, n=1,005
: NIQ RMS | US Socialization TSR (Synd) | \$ and \$ % Chg YA | Latest 52 weeks w/e 08/09/25

... and Private Label is a beneficiary

Top Cost-Saving Strategies



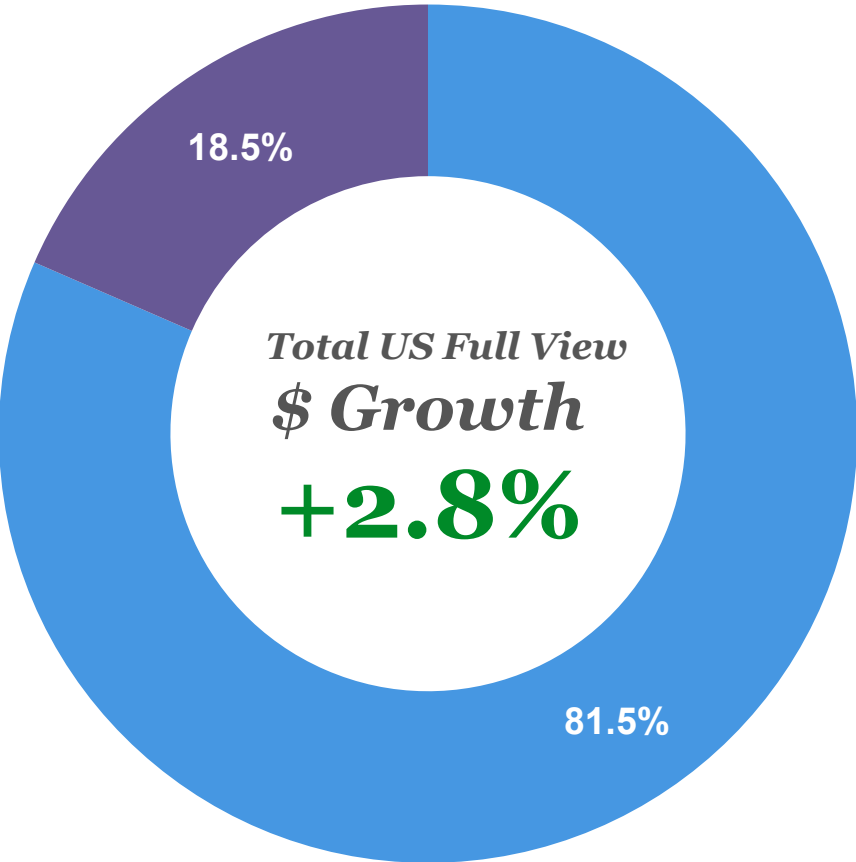
18.5%
Private Label Share of
CPG

+4.4pts
vs YA

Source: NIQ, BASES Quick Question Omnibus Survey, June 2025, n=1,005
: NIQ RMS | US Socialization TSR (Synd) | \$ and \$ % Chg YA | Latest 52 weeks w/e 08/09/25

Private Brand growth continues to outpace National Brand

Total Market Growth driven by Private Brand



Total US – Private Brand

\$'s +5.1%

Units +1.3%

Price +3.8%

Total US – National Brand

\$'s +2.3%

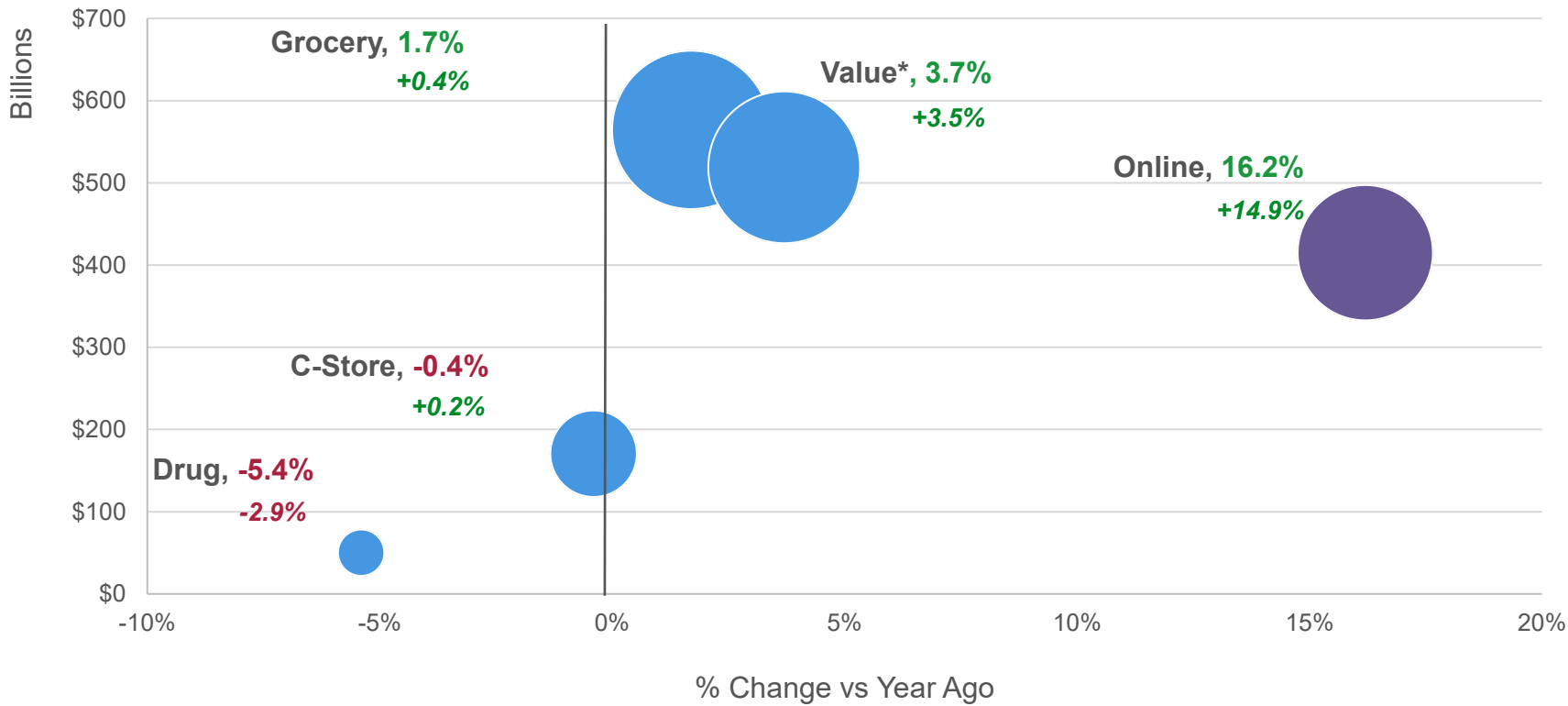
Units -0.1%

Price +2.5%

Source: NielsenIQ Total US Full View™ (Total US xAOC + Convenience + Amazon1P + Costco), Calendar Years & 31 Weeks Year-to-Date W/E 08/02/25

Channel dynamics are ever changing.

All departments – dollar sales & trend



Bold = \$ % Chg vs YA
Bold + Italics = Hurdle (YA - \$ % Chg vs YA)
Size of bubble denotes dollar share of Total US Omni

Source: NIQ, Retail Measurement Services, Total U.S. xAOC (UPC-coded + random-weight/Non-UPC) plus Convenience (UPC-coded) | \$ and \$ % Chg YA 52 weeks ended 6/28/2025; *mass-merchandisers, dollar stores, warehouse clubs, and military

NIQ Omnisales +, Total US Omni and Total US Online, 52 weeks ended 7/26/25

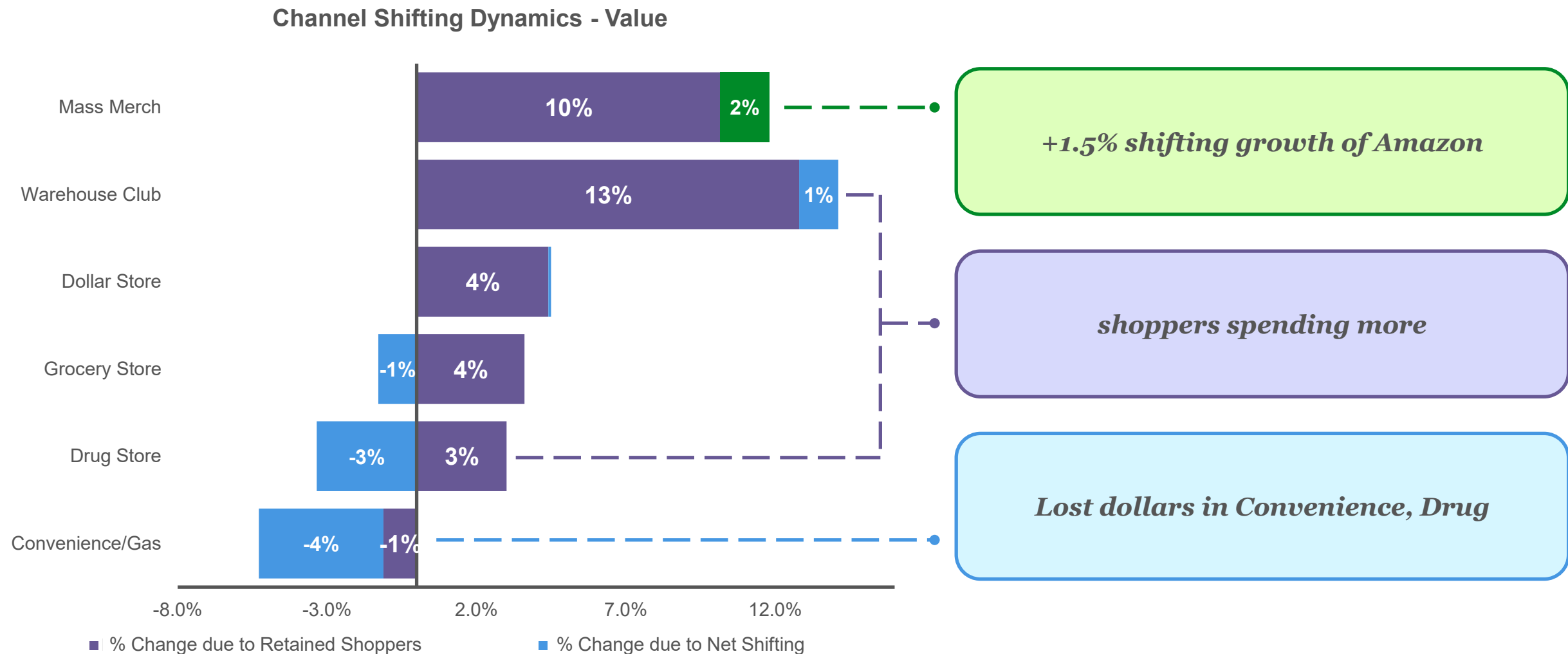
\$1,612 billion

Total US Omni

+4.5%

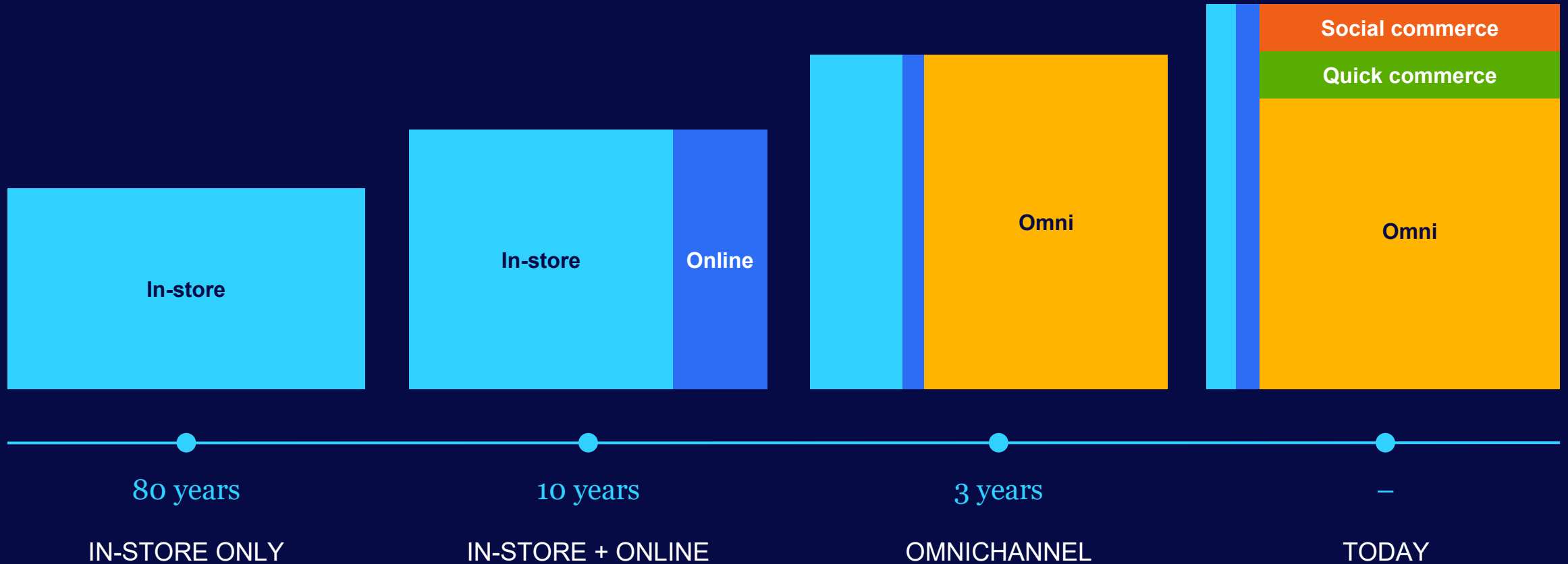


Share of Wallet Is Shifting: Retailers Compete for a Slice of the Pie



Source: NIQ Expanded Omnishopper | US Exp Osh - NDH Synd Full View - 444 5 yr | Shopper Shifting Template, Spend per Trip, Items per Trip | Latest 52 weeks w/e 07/12/25

The pace of change *is accelerating rapidly*

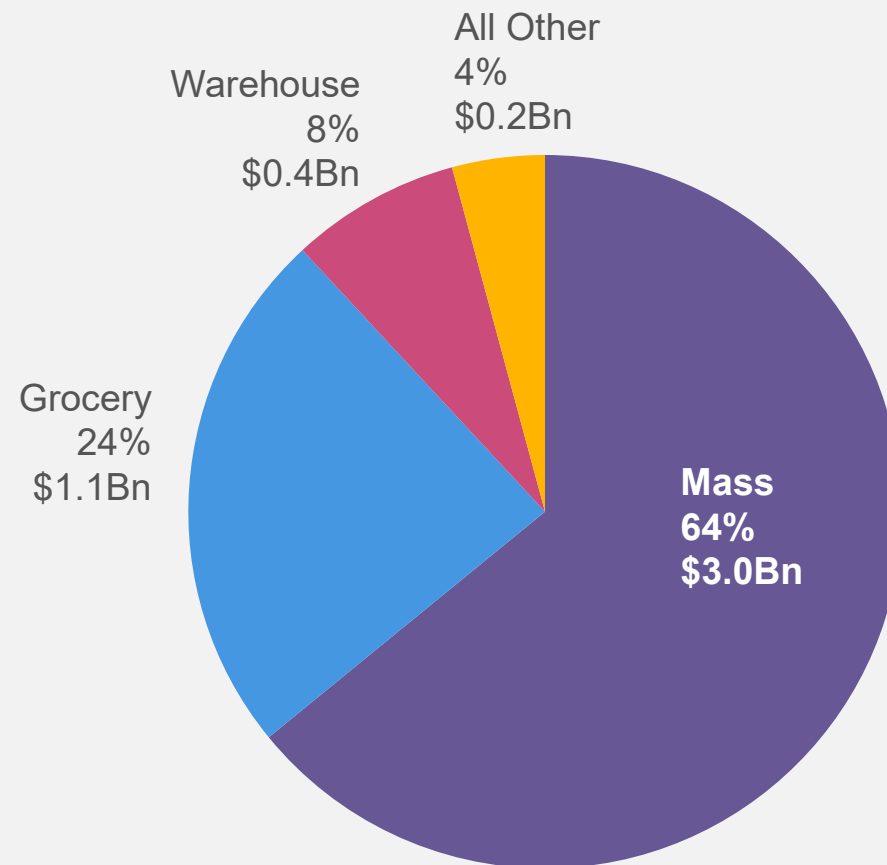


1.2Bn units shifted away from B&M...

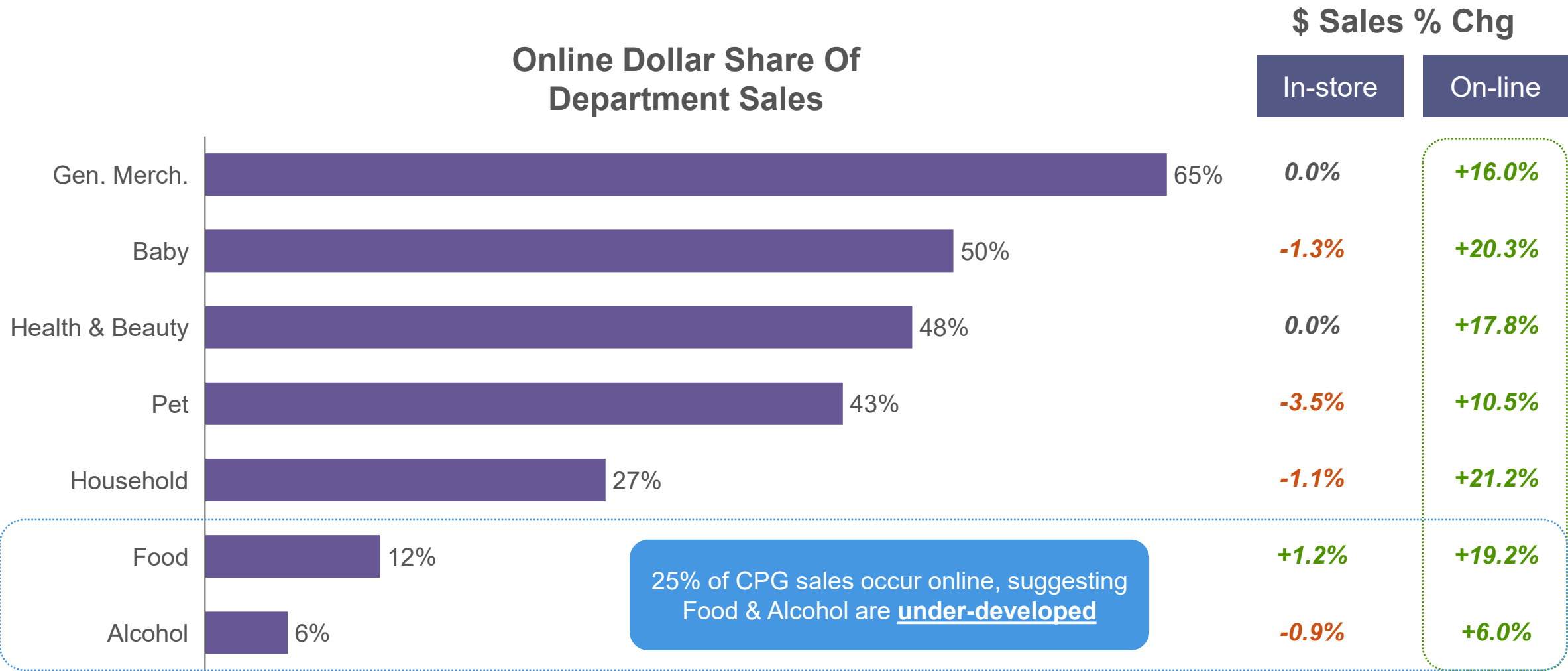
Brick & mortar stores
*lost \$4.7
billion*
in food & beverage sales
to eCommerce

...and online Mass retailers won 64% of them

Online Food & Beverage
Dollar Shifting Gains



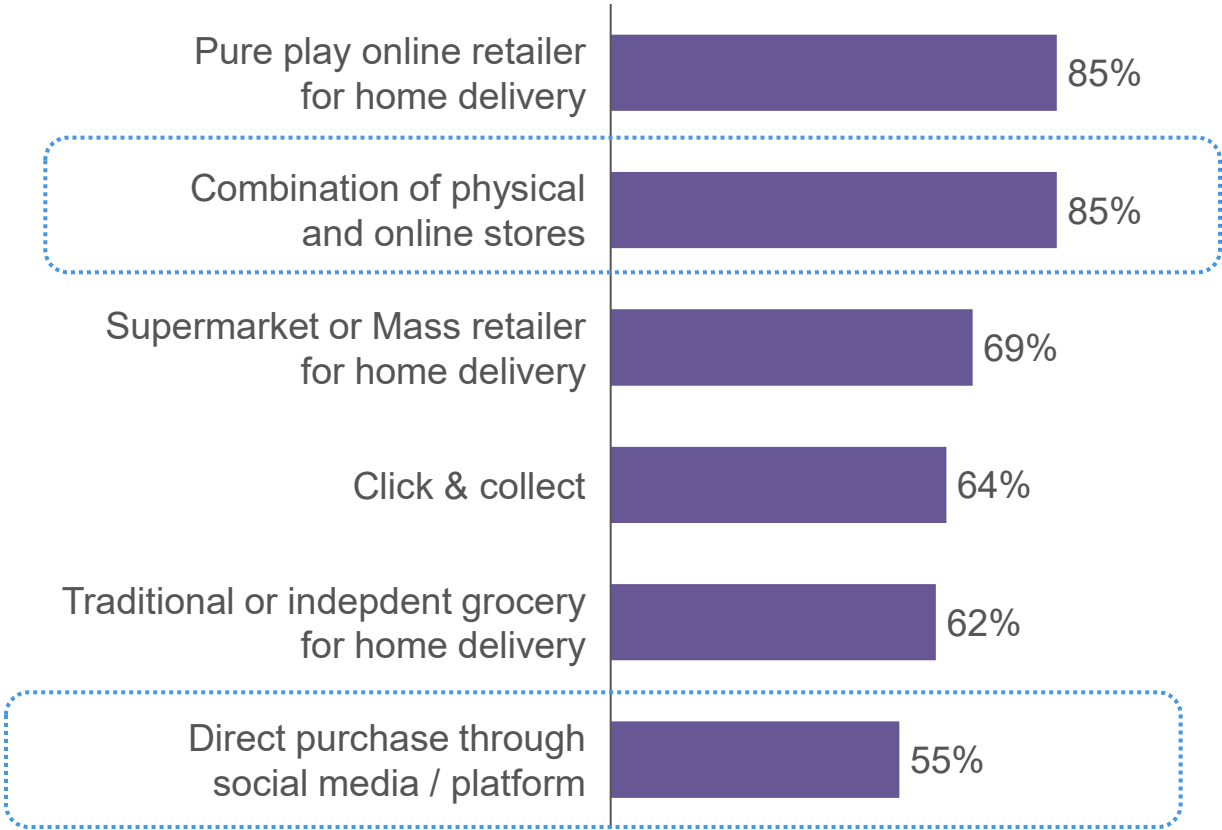
Departments online are growing double-digit



Source: NIQ, Omnisaless+, Total US Omni, 52 Weeks Ending 3/29/2025

On-line benefits can no longer be ignored

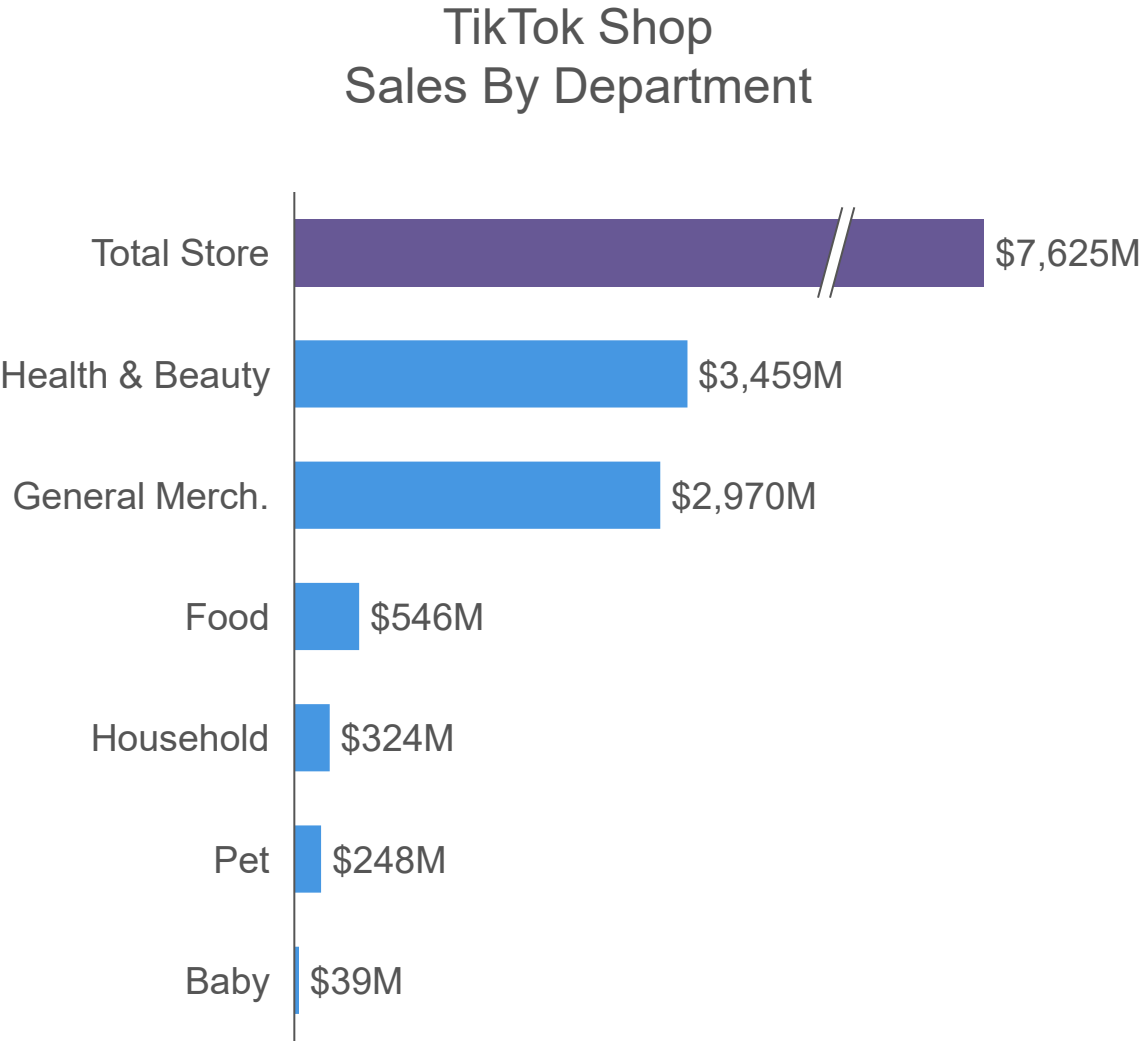
Where Shopping For Grocery & Household Items Normally Happens



Source: NIQ 2024 Consumer Outlook, U.S.
TikTok Shop sales, NielsenIQ Omnisales 52wks ending 9/30/2024



Nearly \$6 billion sold through TikTok Shop



Source: NIQ, Omnisaies+, Total US Omni, Total Store, 52 Weeks Ending 7/26/2025

Snacks are among the top selling categories

Top Food Super Categories
Selling On TikTok Shop



Health & Performance
\$117M +51%



Beverages
\$100M +206%



Candy, Gum, & Mints
\$99M +132%

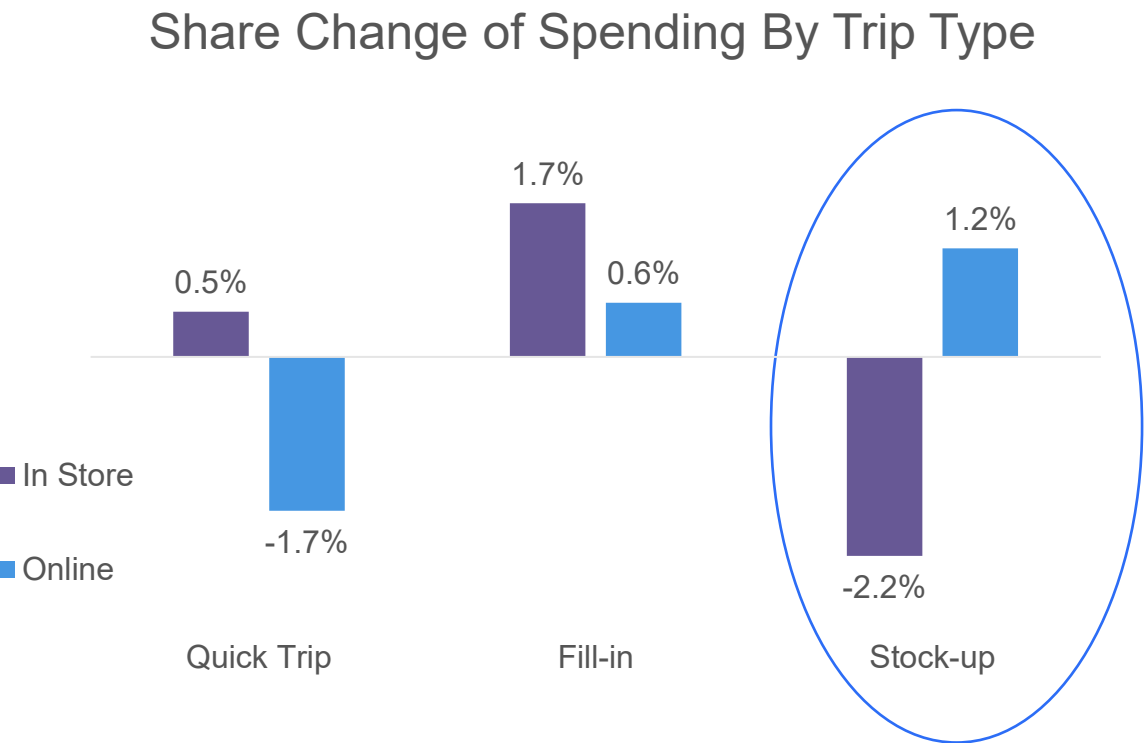


Nutrition & Cereal Bars
\$42M +795%



Salty Snacks
\$30M +104%

In-store remains key for quick trips and fill-ins, but online is taking over stock-up spending



Source: NIQ Expanded Omnishopper | US Exp Osh - NDH Synd Full View - 444 5 yr | Share of Spending by Trip Type, Value per Occasion and Units per Occasion| Latest 52 weeks w/e 07/12/25



“Regulatory” changes moving quickly with states and consumers reacting

THE WALL STREET JOURNAL.

World Business U.S. **Politics** Economy Tech Markets & Finance Opinion Arts Lifestyle

RFK Jr. Unveils Plan to Phase Out Artificial Food Dyes

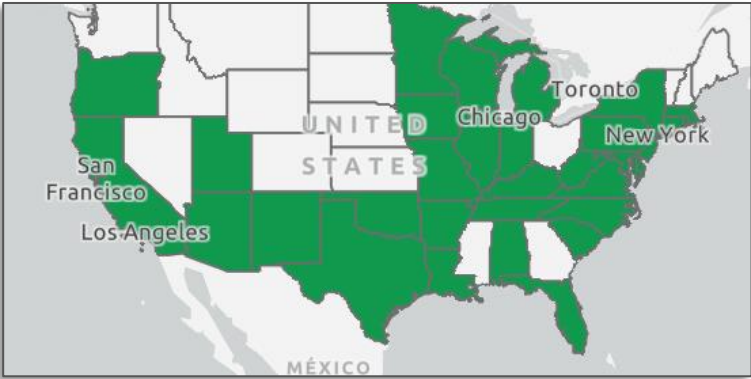
Trump administration aims to eliminate petroleum-based dyes in food by the end of 2026; food companies have vouched for dyes' safety

By [Jesse Newman](#) [Follow](#)

Updated April 22, 2025 7:26 pm ET

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Active state-level ingredient bills¹



Seed Oils Ingredients ³		
# of Food & Beverage items		
	xAOC + C-Stores	C-Stores
Soybean oil	46.4K	15K
Canola oil	33.7K	10.9K
Sunflower oil	26.6K	9.2K
Peanut oil	4.6K	1.4K
Safflower oil	4.0K	1.5K
Flaxseed oil	193	66

Food Additives Potential Bans Impact ²		
# of Food & Beverage items		
	xAOC + C-Stores	C-Stores
Brominated Vegetable Oil	~300	~140
Propyl Paraben	~260	~100
Potassium Bromate	~610	~160
Titanium Dioxide	7.5K	2.3K
High Fructose Corn Syrup	22.4K	8.6K

2025 Food bill tracker
Updated 4/28/25

Bills adopted in 2025

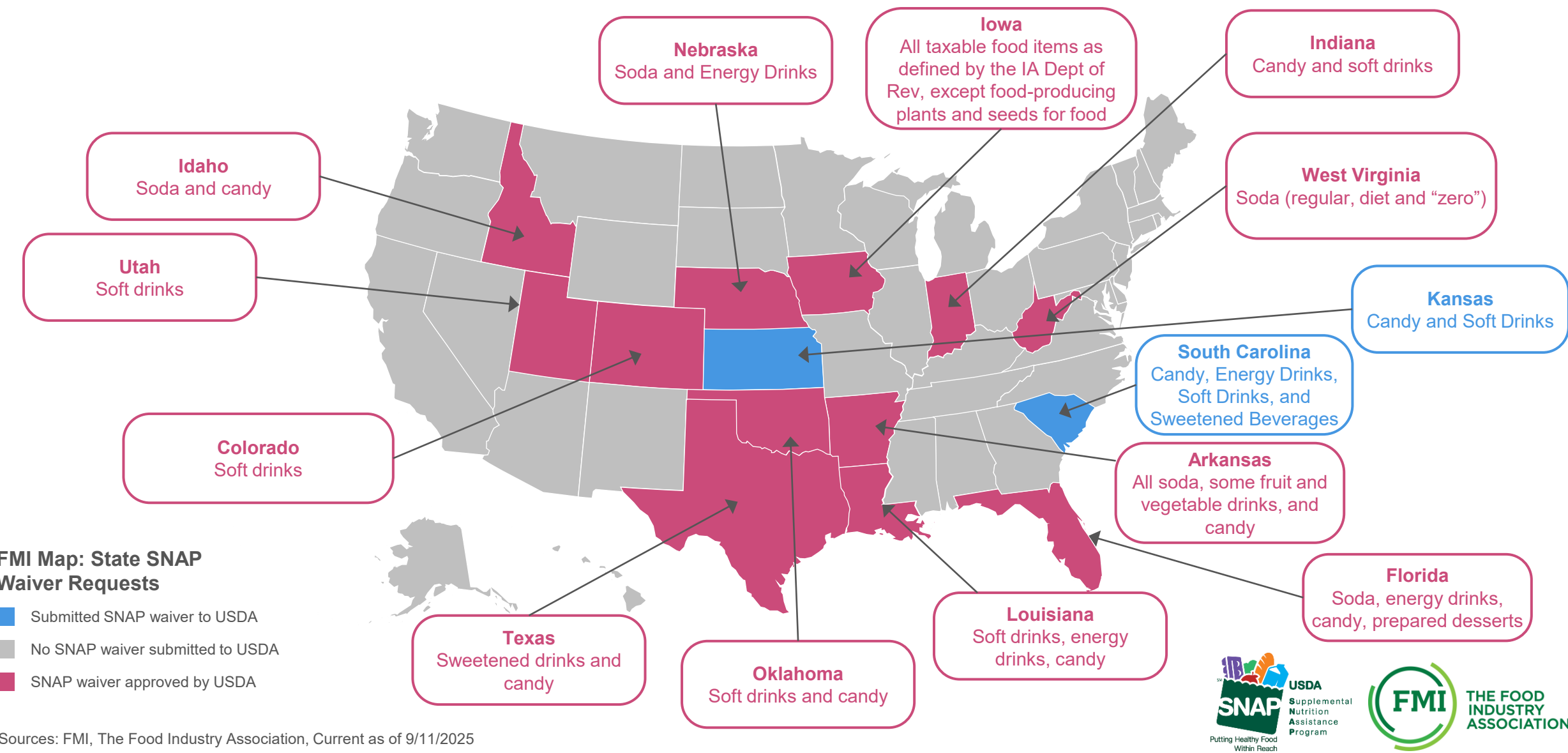
8

Active Bills

65

Sources: ¹Track U.S. Food Chemical Bans with EWG's Interactive Map; ² NIQ Retail Measurement Services, NIQ Product Insight, powered by Label Insight; Total US xAOC + Conv vs Total US Convenience; Total Food & Beverage; Number of UPCs selling impacted; 52 weeks ending March 22, 2025; ³ NIQ Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total Us xAOC + Conv vs Total US Conv

State-level SNAP legislation creates challenges across categories



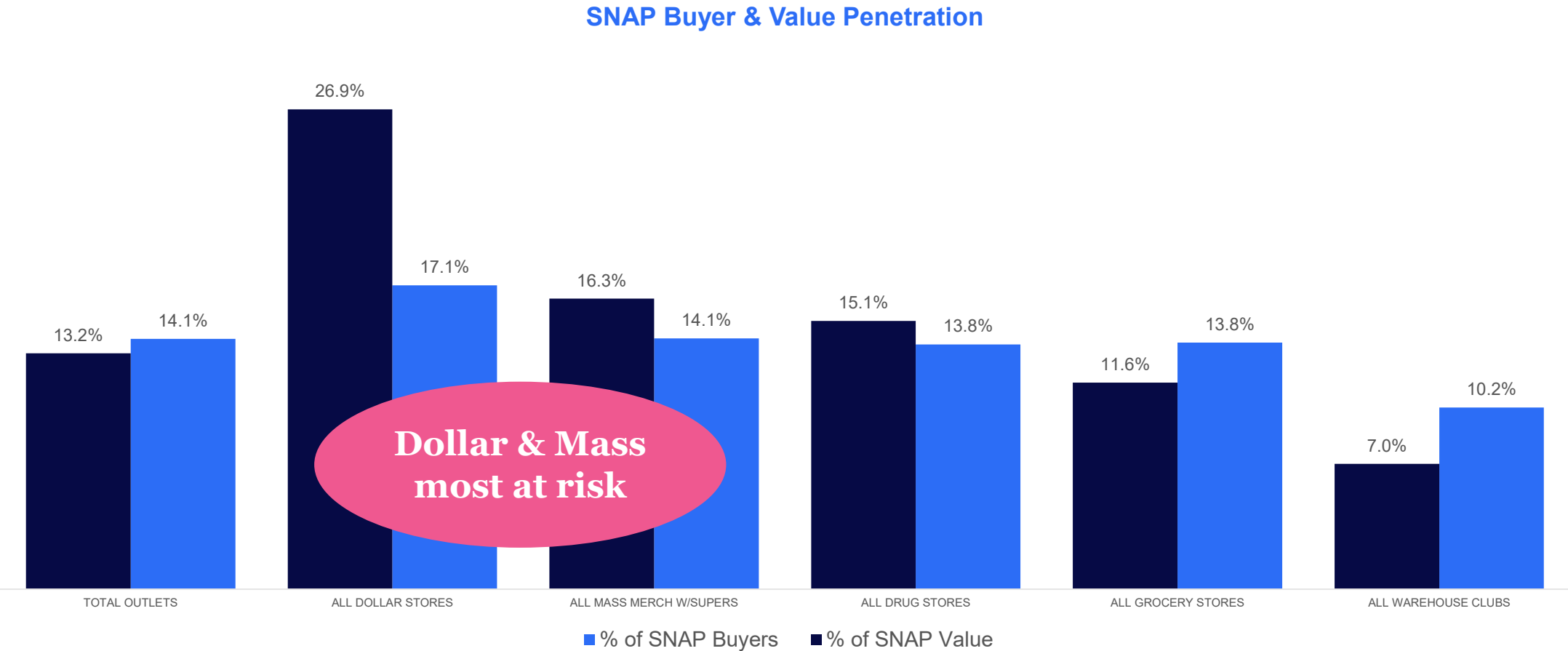
Sources: FMI, The Food Industry Association, Current as of 9/11/2025

Support SNAP households by turning habit shifts into your competitive edge



Source: NIQ, BASES Quick Question Omnibus Survey, February 2025 n=1,003

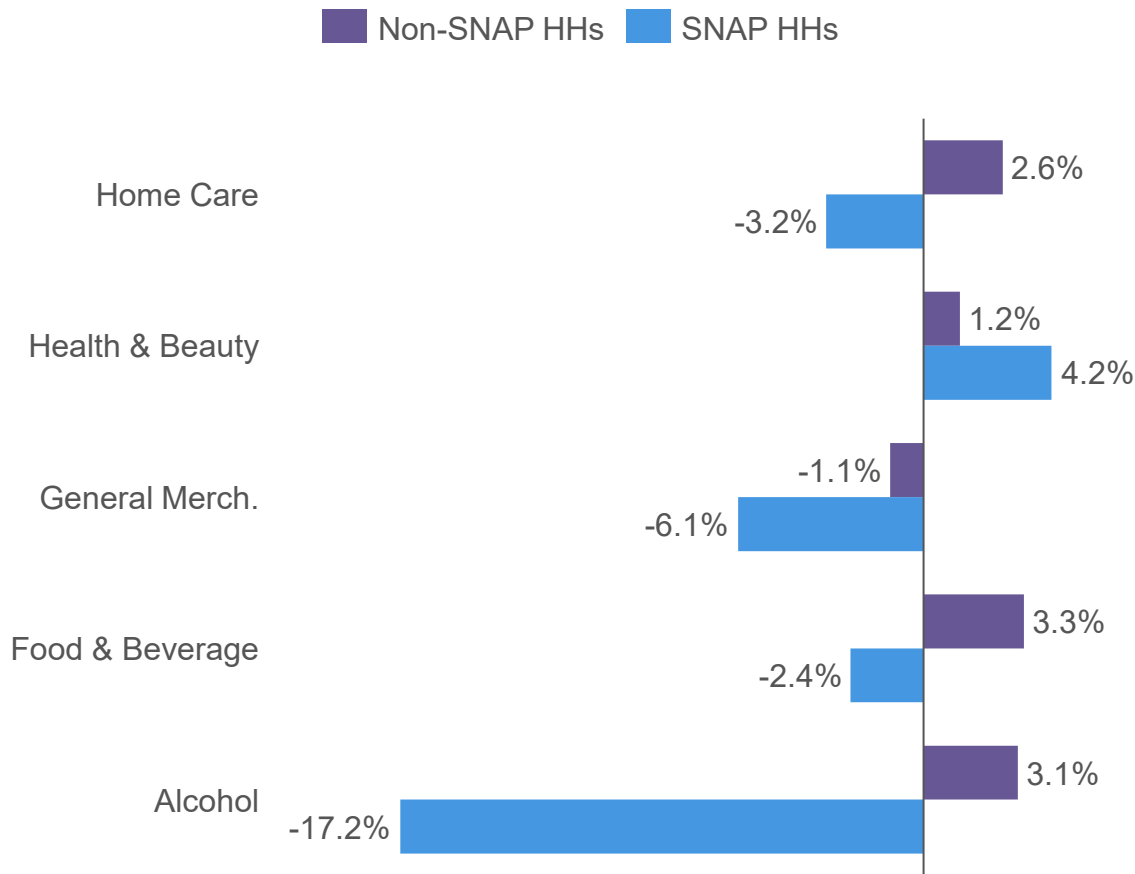
Planned \$186B in SNAP reduction from 2025-2034 will impact 14.1% of buyers



Source 1NiesenIQ Homescan Panel, All Outlets, SNAP Survey, Total US, Total Store Excluding Tobacco, Latest 52 Wks W/E 07/26/25,
Source: NIQ Homescan Panel SNAP Survey, Total Outlets 3/5/2023-7/22/2023
Note: Analysis focused on a comparison of pre/post the COVID-19 crisis SNAP benefit allotment

Causing a ripple effect across the industry

Unit Sales & Change During Previous SNAP Benefit Reduction

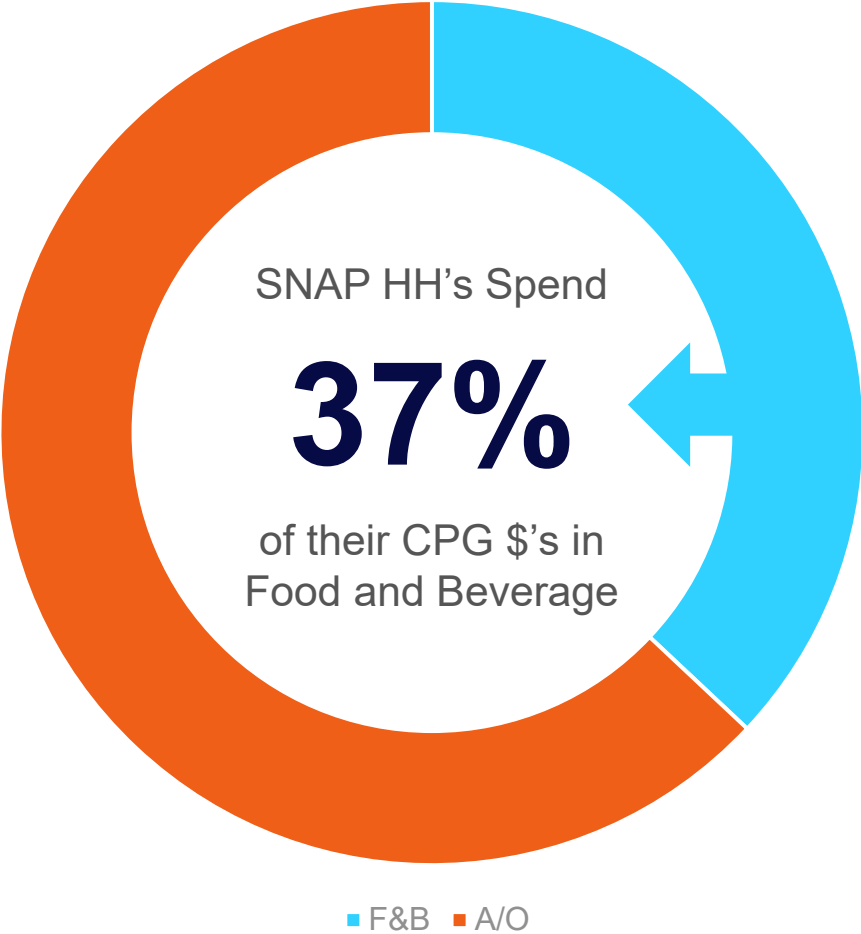


Source: NIQ Homescan Panel SNAP Survey, Total Outlets 3/5/2023-7/22/2023

Note: Analysis focused on a comparison of pre/post the COVID-19 crisis SNAP benefit allotment



Food and Beverage Captures the Largest Share of SNAP Spend



Top 10 Food & Bev Categories by Snap HH \$ Shr

Category	Food & Bev \$ Share
1 Beverages	28%
2 Salty Snacks	11%
3 Candy, Gum, Mints	8%
4 Prepared Foods	5%
5 Cookies and Crackers	4%
6 Cereal and Granola	4%
7 Packaged Coffee	3%
8 Sweet Snacks	2%
9 Bread	2%
10 Sauce, Gravy, Marinade	2%

MAHA regulatory movement is putting ingredients under the microscope

25% of snackers say they are looking for snacks

free of artificial ingredients

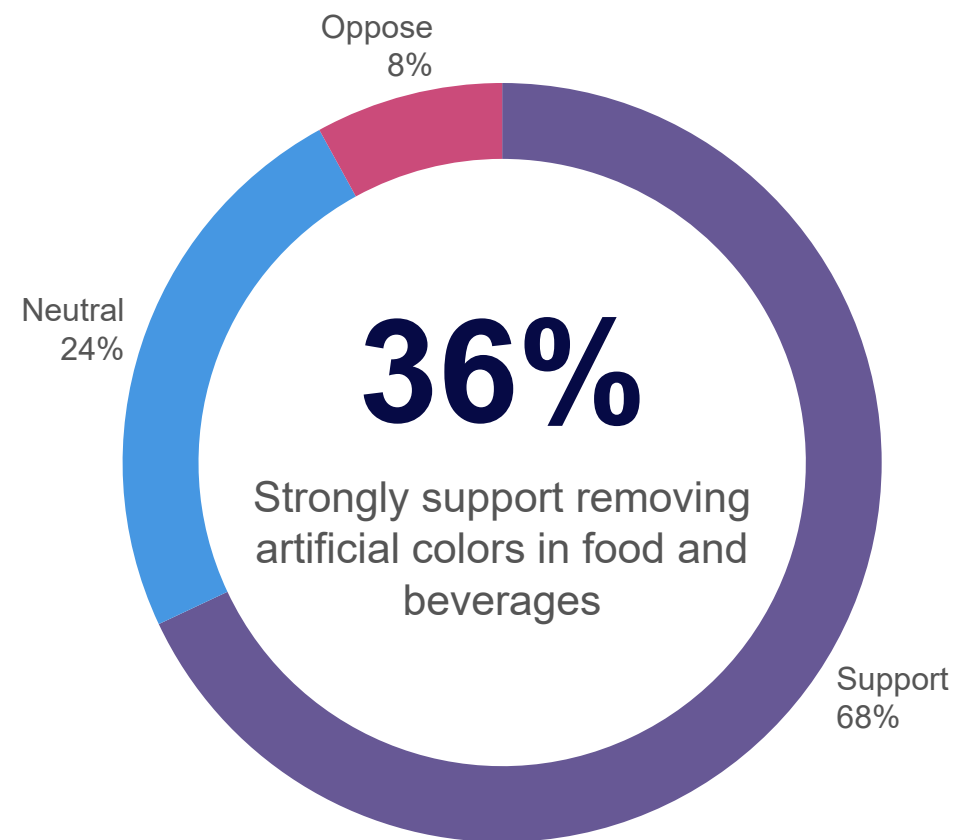
like colors, preservatives, and other additives

Source: NIQ, BASES Quick Question Omnibus Survey, February 2025, n=1,003



Shoppers support removing artificial colors

Support For Removing Artificial Colors From Food & Beverages

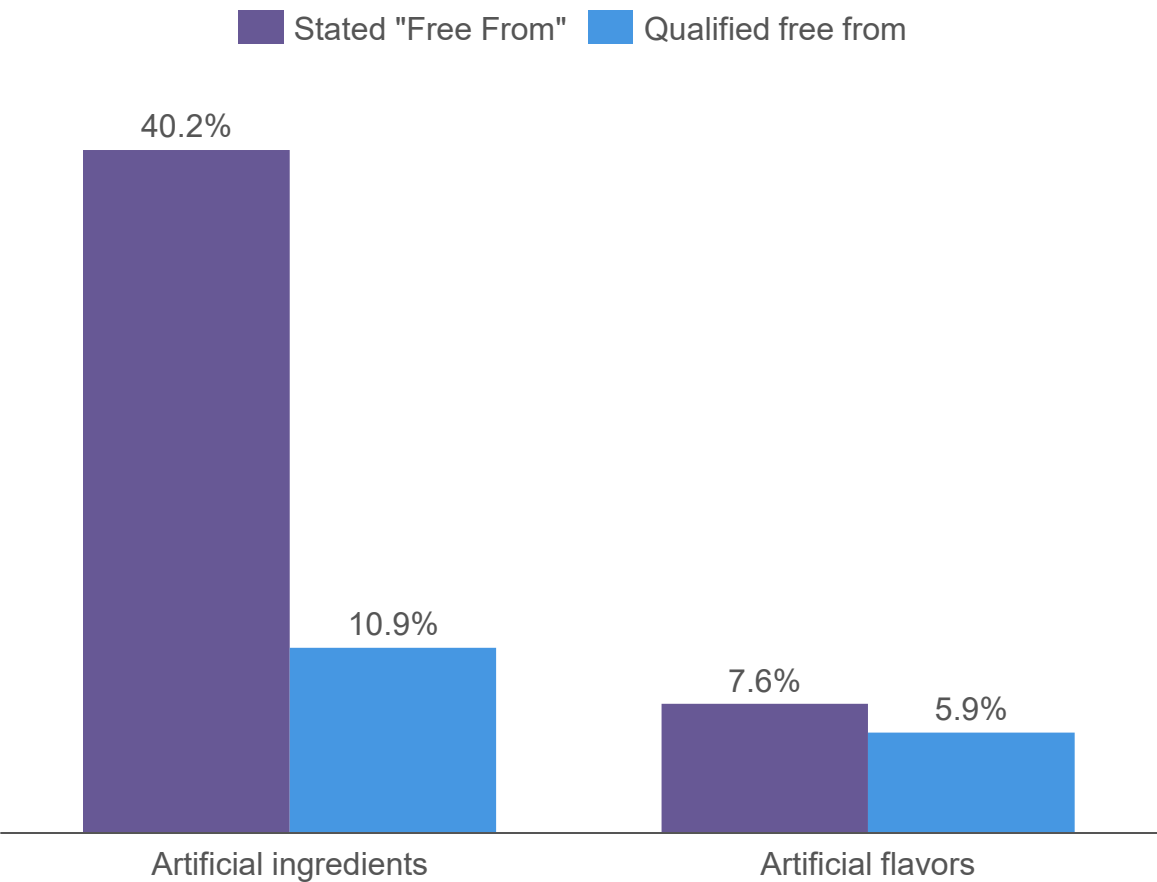


Source: NIQ, BASES Quick Question Omnibus Survey, May 2025, n=1,000



“Free From” claims are winning

Candy, Gum, & Mints Free From Artificial Dollar Sales Performance

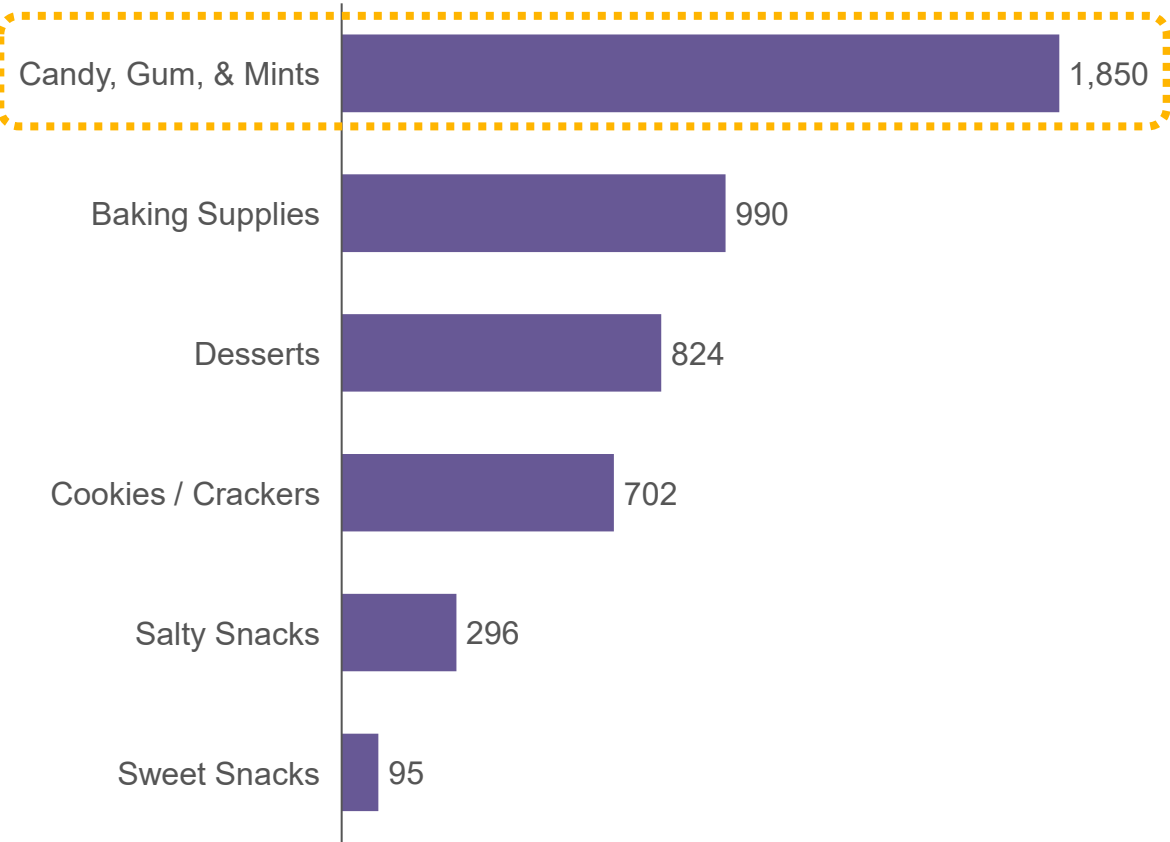


Source: NIQ, RMS, Powered By Label Insights, Total US Full View + Conv., 52 Weeks 8/16/2025



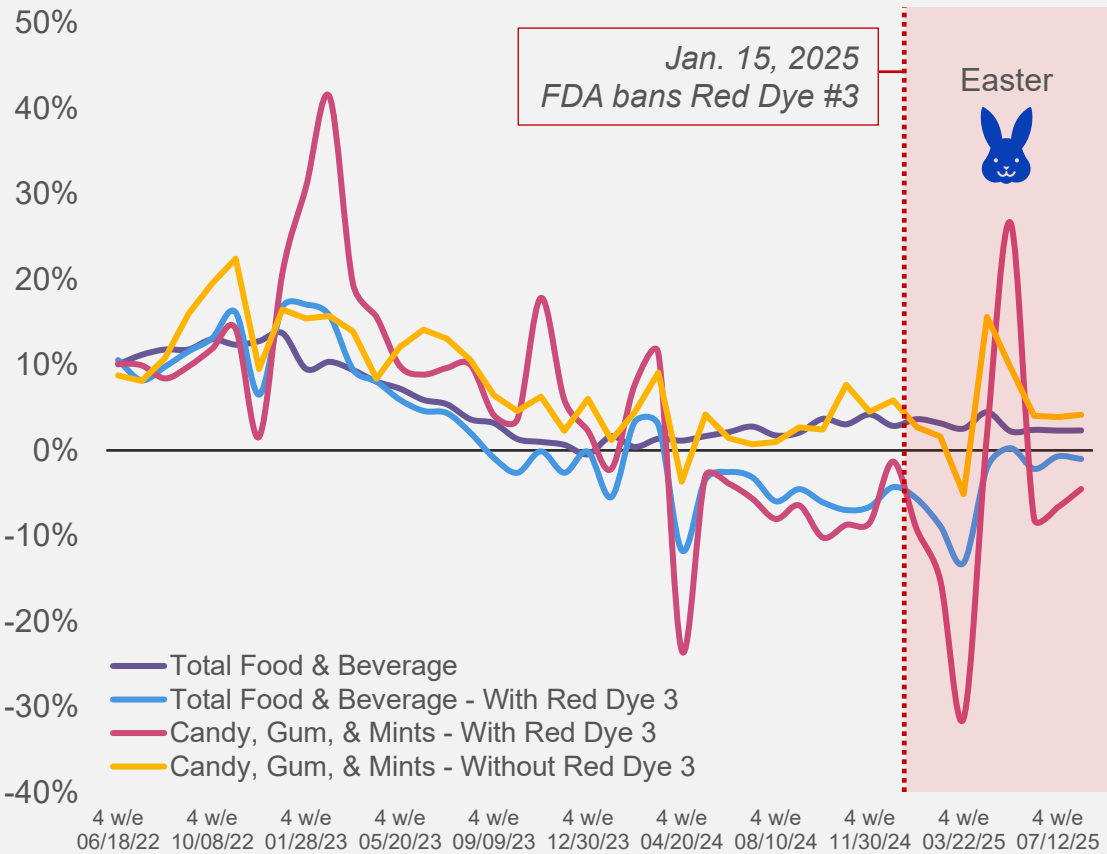
Ingredient scrutiny is weighing on shoppers

Number Of Items Selling
Containing Red Dye 3



Left Source: NIQ, RMS, Powered By Label Insights, Total US Full View + Conv., 52 Weeks 8/16/2025
Right Source: NIQ, RMS, Powered By Label Insights, Total US xAOC + Conv., 52 Weeks 8/16/2025

Dollar Sales % Change
Vs. Year Ago



Charting the Course Forward

Consumer Behavior Is Shifting Rapidly

Shoppers are cautious, value-driven, facing economic pressures and regulatory changes adapting how and where they buy. Retailers and manufacturers must adapt quickly to stay relevant.

Omnichannel Strategies Are Essential for Growth

Ecommerce and digital channels are absorbing losses from brick-and-mortar, and winning retailers are those who connect channels seamlessly and meet consumers wherever they shop.

Anticipate Emerging Trends Before They Disrupt

Success depends on proactively spotting and acting on shifts in health & wellness, private label growth, and digital commerce. Early movers will capture growth and avoid being left behind as the market evolves.

Thank you!



Jennie Bell

Managing Director,
Snacking and Beverages
Jennie.bell@nielseniq.com

NielsenIQ