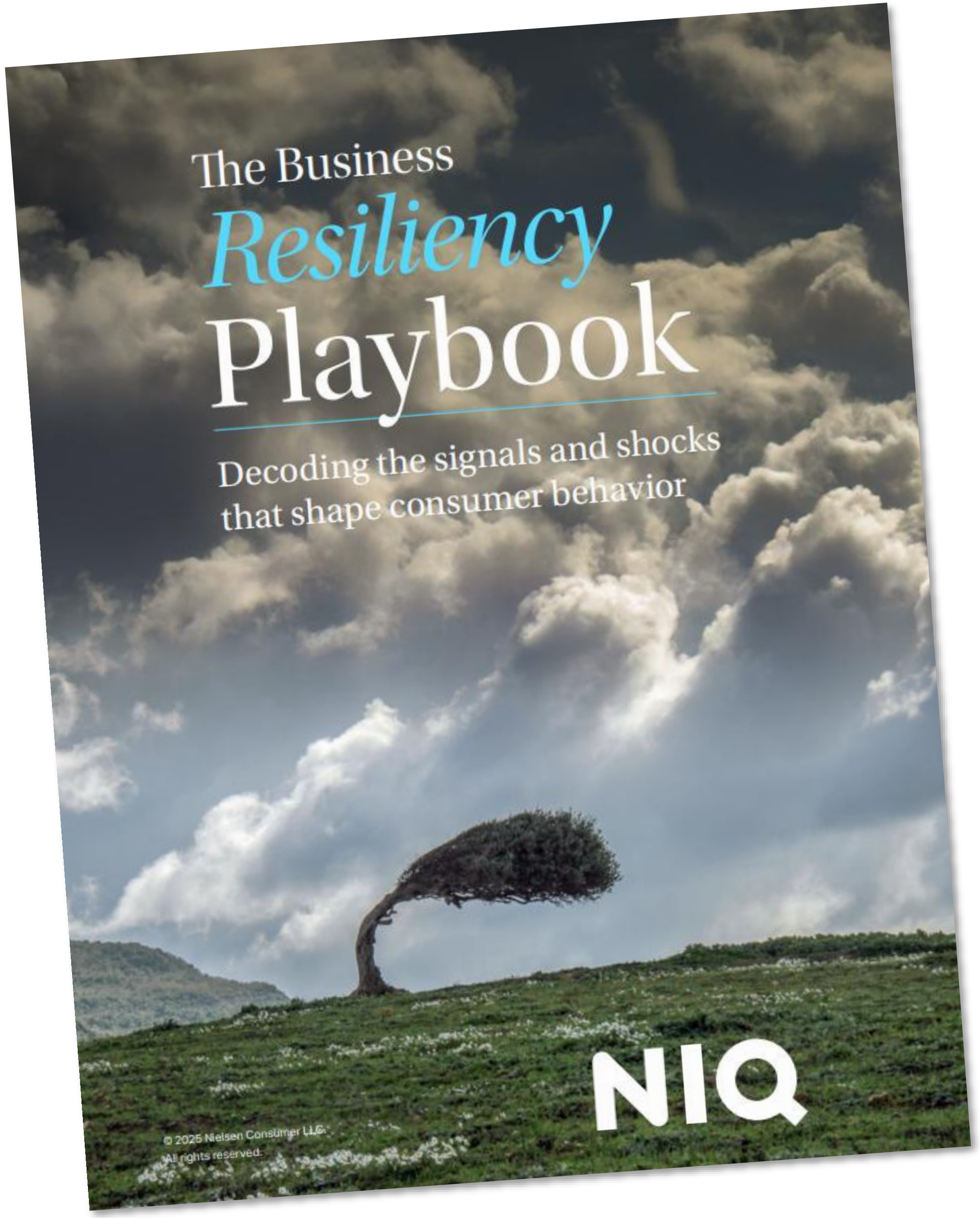
NIQ Next
Growth & Transformation Consulting

Building Your Business Resiliency Playbook

Case Study: How NIQ Next Helped a Global Food Manufacturer Quantify & Plan for the Impact of Today's Economic Uncertainty



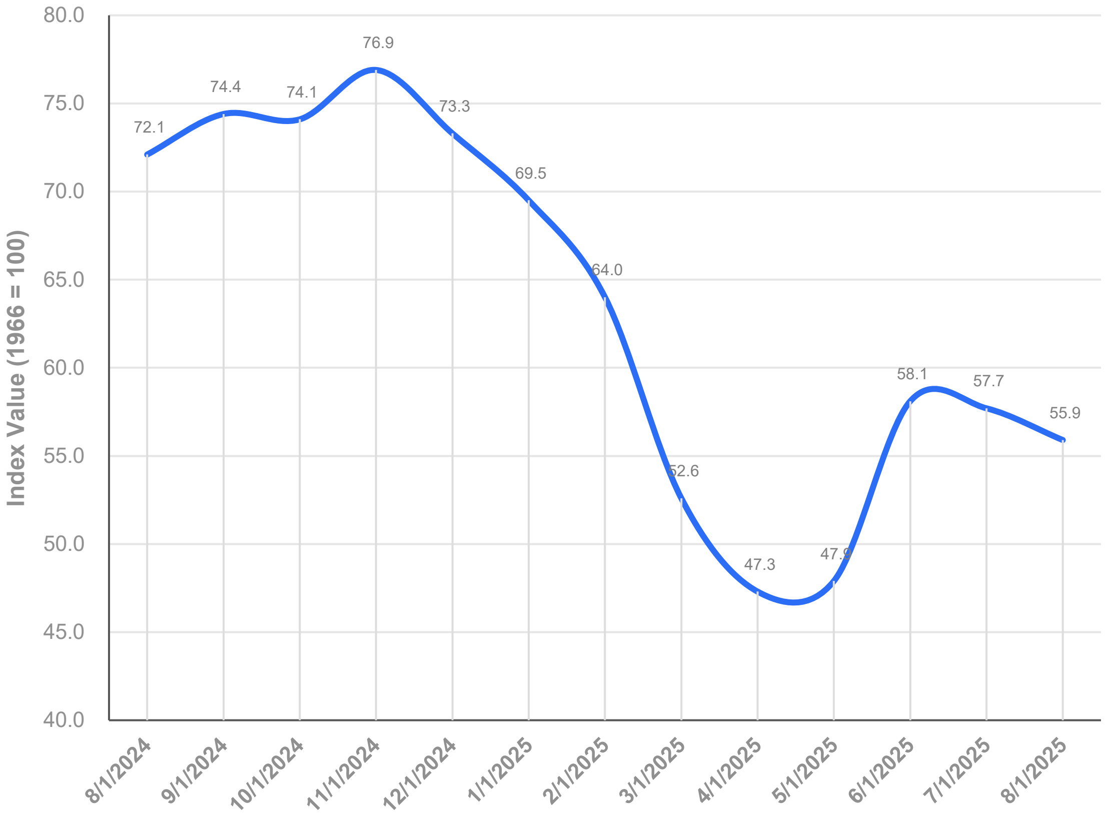
The Business Resiliency Playbook (August 2025)

- Written by NIQ + Yale Economists
- Analysis of 50 years of historical US data
- Reviewed consumer behavior across past economic shocks
  - Mild recessions
  - Deep recessions
  - Stagflation
  - Geopolitical crisis

Identifies patterns in consumer behavior during uncertain times to help CPG manufacturers and retails inform their short-term and long-term plans

Consumer expectations of the US economy have shown the steepest three-year decline seen since the 1990 recession

So What? Uncertainty is the “new normal” and business leaders who proactively plan will win



UNIVERSITY OF MICHIGAN

“Consumer expectations have fallen a precipitous 32% since January, the steepest three-month percentage decline seen since the 1990 recession…

…the expectations index plummeted with drop-offs in personal finances as well as business conditions…

…expectations worsened for vast swaths of the population across age, education, income, and political affiliation…

…consumers perceived risks to multiple aspects of the economy, in large part due to ongoing uncertainty around trade policy and the potential for a resurgence of inflation looming ahead…”[1]

[1]Source: University of Michigan “Surveys of Consumers” (August 2025)

NIQ Next can help you quantify the impact of economic uncertainty to inform your strategic planning process and mitigate near-term risks

Case Study: Global Food Manufacturer

Given considerable uncertainty in today's economy, a global food manufacturer sought an objective way to navigate various factors that they do not directly control (e.g., rising inflation, tariffs, evolving consumer trends, etc.).

NIQ Next developed an analytic approach that forecasts each risk/opportunity over a three-year time horizon and provides the manufacturer actionable recommendations to confidently make decisions to optimize business performance.

Key Business Questions Addressed:

- What factors represent the greatest risk/opportunity to the business in the next three years?
- How significant are the risks/opportunities (quantified)? How probable are they to come to fruition?
- What specific actions should the manufacturer take to confidently optimize our business given the backdrop of economic uncertainty?

NIQ Next delivers a consultative approach to bring clarity during uncertain times

NIQ Next helps you see ‘what’s next’ and prepare for various scenarios that might unfold given the fluidity of the current geopolitical environment. Using a collaborative approach with your team, NIQ Next leads you and your team through the process:

STEP ONE **Identify**	STEP TWO **Prioritize**	STEP THREE **Quantify**	STEP FOUR **Activate**
NIQ Next works with you to identify the most relevant factors that may impact your sales	In a workshop setting, NIQ Next facilitates decisions with your leaders to pinpoint which factors have the highest probability of having a material impact on your business results	Using a combination of advanced analytic techniques and informed assessments from NIQ forecasting experts, NIQ Next provides volumetric estimates for the highest probability factors	Use estimates and recommendations from the project, NIQ Next works with you to create growth and/or mitigation plans to optimize business performance

STEP ONE
Identify

In collaboration with you, NIQ Next identifies and prioritizes the factors that are most likely to impact your business

Economic

Factors influenced by US fiscal policy and resulting category-specific pricing actions

Examples:*
- *Inflation Rate*
- *Household Debt*
- *Client & Competitive Pricing*

Legislative

Factors influenced by non-fiscal US policy decisions in Washington

Examples:*
- *Tariffs*
- *Government Regulations*
- *Disposable Income (Tax Code)*

Retail & Shopper

Factors that impact the consumer experience when making purchase decisions

Examples:*
- *Distribution*
- *Pricing & Promotions*
- *Channel Dynamics*

Demographic

Factors influenced by the changing US consumer profile

Examples:*
- *Ethnic Trends (e.g., Growth of Hispanic Consumers)*
- *Generational Trends (e.g., Boomers)*

Consumer

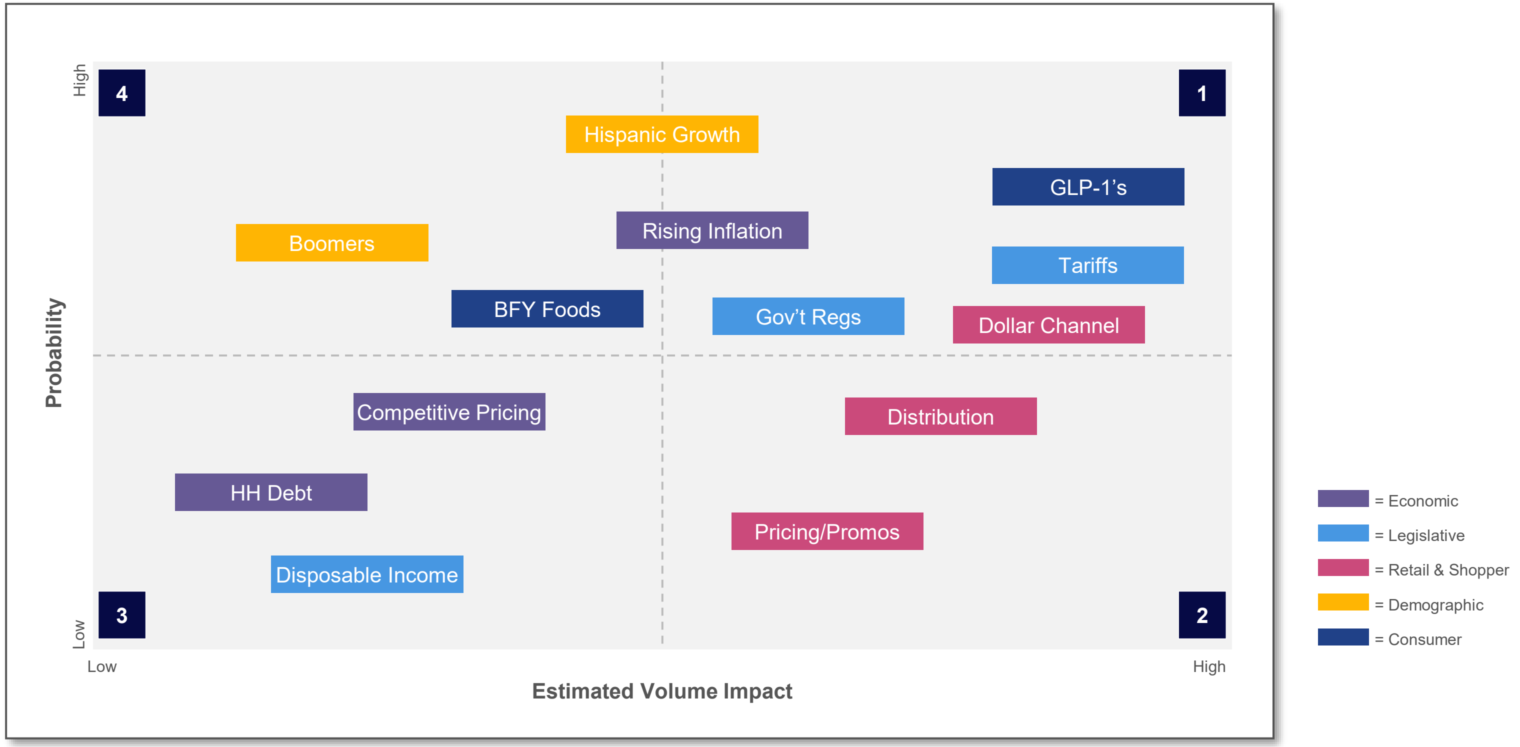
Factors aligned to evolving end-user needs and wants in the US

Examples:*
- *Food: High Protein, High Fiber, GLP-1's*
- *All CPG: Sustainability, Convenience*

** Not an exhaustive list (NIQ Next works with you to identify factors most relevant to your business)*

STEP TWO
Prioritize

Using advanced analytics techniques and expert opinion, NIQ Next qualitatively identifies the highest probability, highest impact factors for further analysis



1 **Prioritize:** Quantify impact and develop plans to mitigate risk or amplify opportunity associated with each factor

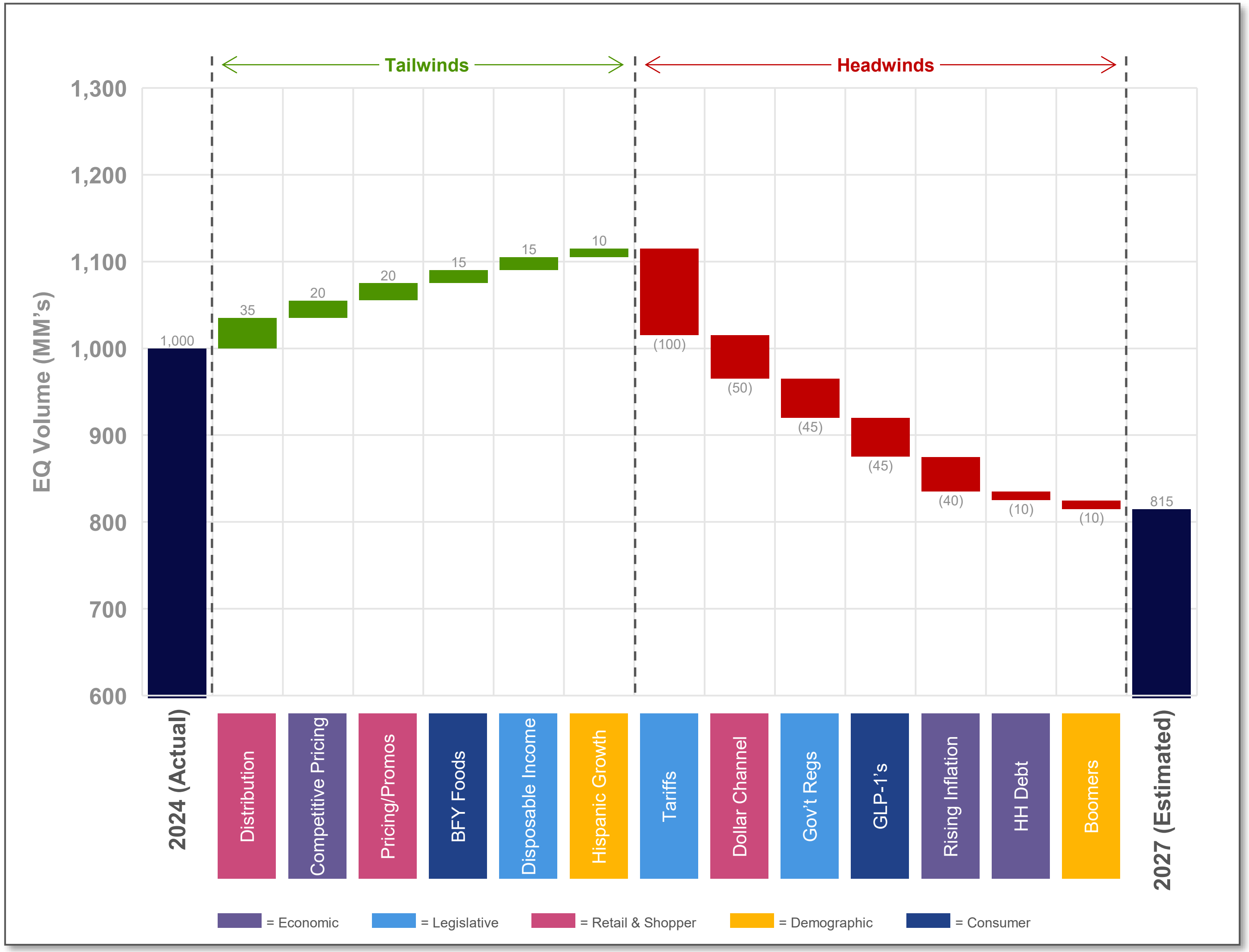
2 **Reassess:** Develop plans to turn volumetric headwinds into tailwinds to positively influence business results for each factor

3 **Eliminate:** Remove factors from consideration set given low probability/low estimated impact

4 **Reassess:** Develop plans to turn volumetric headwinds into tailwinds to positively influence business results for each factor

STEP THREE
Quantify

NIQ Next quantifies the factors, summarizing them into a Driver Analysis and bridging the impact year-over-year

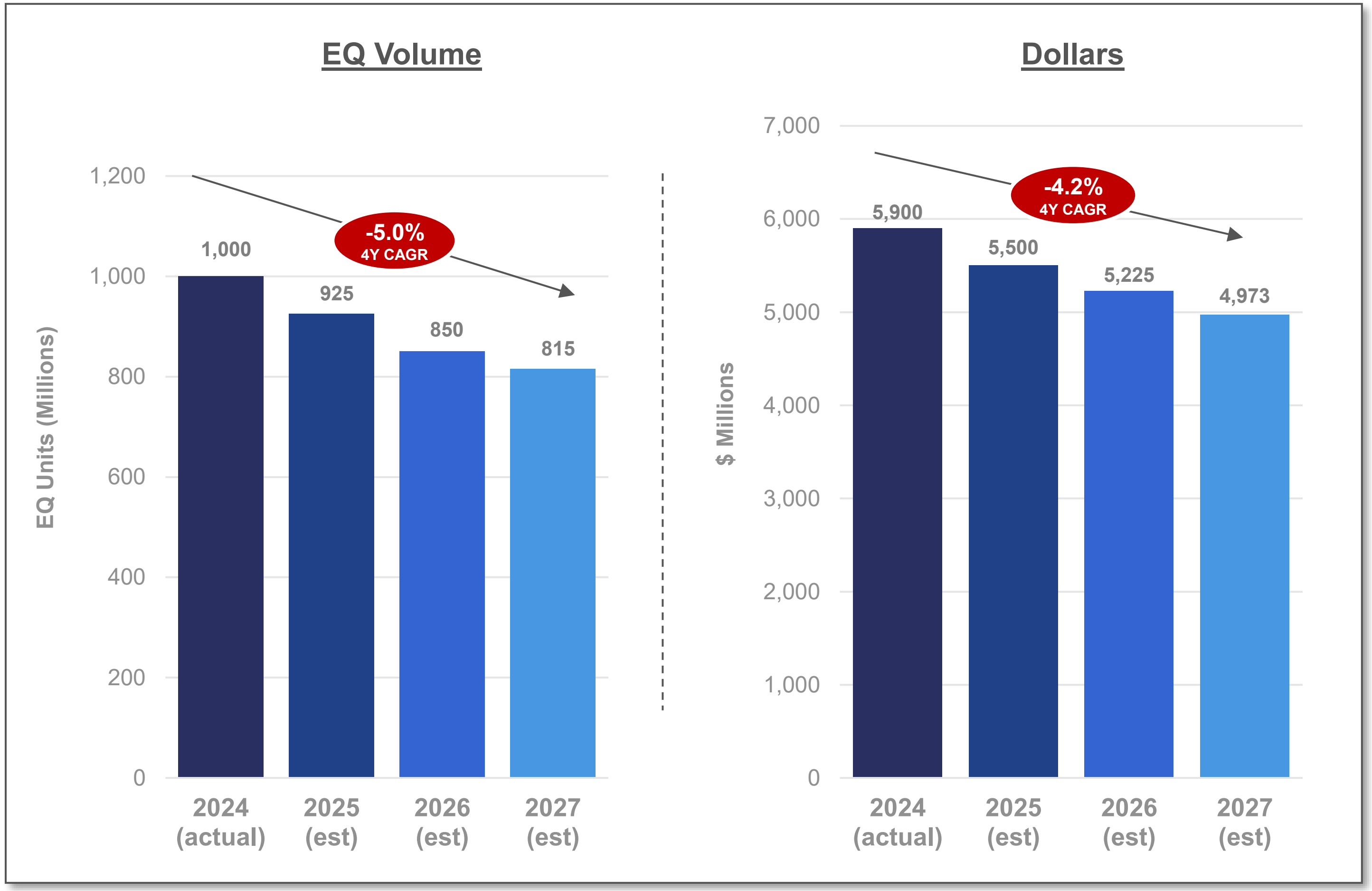


NIQ Next Driver Analysis

- Using advanced analytics techniques supplemented by NIQ expert opinion, NIQ Next identifies each factor as a headwind (negative volumetric impact) or tailwind (positive volumetric impact)
- Quantification by factor can be done for one or more years (maximum three-year time horizon)
- NIQ Next's volumetric analysis becomes a key component of business implications and recommendations

STEP THREE
Quantify

NIQ Next also provides volumetric (and dollar) estimates over a longer horizon, up to three years, to inform your long-term strategic plans



Inform Your Strategic Plan!

- NIQ Next delivers estimates in both volume (EQ units) and dollars, a useful input into strategic plans
- In the short-term, insights uncovered by NIQ Next help drive close-in actions to mitigate risk and optimize opportunities

STEP FOUR

Activate

NIQ Next analyzes all data available and provides you actionable recommendations to mitigate risk and identify growth opportunities

1

What?

NIQ Next provides a clear articulation of the risk or opportunity, including insights informed by NIQ data (and other info sources)

2

So What?

NIQ Next unpacks business implication(s), including volumetric assessment and competitive context needed to drive success

3

Now What?

NIQ Next synthesizes each risk or opportunity into actionable recommendations, focused on business optimization

4

Why?

NIQ Next takes the subjectivity out of decision making by supporting every recommendation with a rationale based in facts/data

NIQ Next

Growth & Transformation Consulting

What is NIQ Next?

NIQ Next is the strategic consulting arm of NIQ, using the power of NIQ data to help clients grow & transform

NIQ Next unlocks the power of NIQ data by analyzing disparate information sources to find growth and transformation opportunities to accelerate your success

NIQ Next Areas of Expertise

Growth & Expansion	Determine the markets and categories in which to play and how to win
Brand Growth	Develop strategies to build distinct brands and transform brand experiences
Innovation Acceleration	Accelerate product and business model innovation strategies & processes
Marketing Transformation	Build modern marketing capabilities to activate for biggest ROI and impact
Efficiency	Identify strategies to deliver efficiencies and cost reduction

Want to learn more about how NIQ Next can help you grow & transform your business? Contact Ron Bielski (Ron.Bielski@nielseniq.com) to arrange a consultation

Thank You!

Contact NIQ Next to learn more about how we can help identify and activate strategies to drive growth in your business

Ron Bielski
SVP, NIQ Next FMCG Global Lead
Ron.Bielski@nielseniq.com

NIQ Next
Growth & Transformation Consulting