

December 18, 2025

“Growth this holiday season and into 2026 will favor brands that optimize trip frequency and mission completion, not broad reach. Claims-led, time-bound bundles will convert late-season intent into repeatable behavior that manufacturers and retailers can leverage to bolster loyalty. Use benefit claims to guide baskets and protect margin. The overlooked edge is designing promotions around benefit outcomes rather than price depth.”



Chris Costagli
Vice President,
Thought Leadership
F&B Insights Lead,
NielsenIQ

The takeaway...

- Trip share beats basket size—frequency is the new growth
- Claims replace price as the shopper’s value compass
- Private label becomes the fast lane to BFY dominance

Your next move...

- Engineer mission-led bundles for peak trip windows
- Re-map aisles and apps around functional benefits
- Bridge holiday intent into Q1 resolution habits

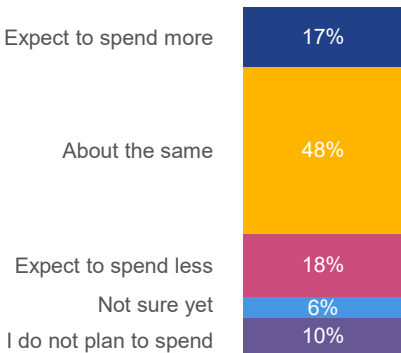
Christmas 2025: The Shift From Impulse to Intentionality

Implications for FMCG Brands

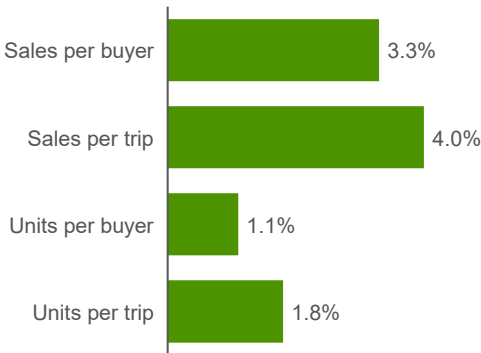
Trips will beat buyers in a polarized holiday—growth shifts to frequency, not reach

With sales per trip rising faster than sales per buyer last year, and wallets splitting between “spend more” and “spend less” this year, the holiday playbook is about to flip. The winners will engineer more occasions—mission-led bundles, time-bound triggers, and convenience levers—to capture trip share across both cautious and indulgent segments.

CONSUMER SPENDING ON F&B DURING CHRISTMAS 25’ VS YA¹



PURCHASE TRENDS OF F&B INDUSTRY DURING CHRISTMAS 24’ VS YA³



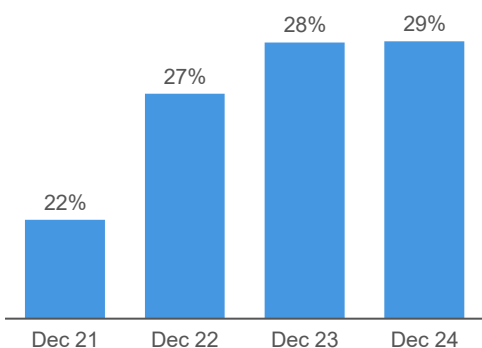
Precision value design will beat blanket discounts

With consumers actively hunting for promotions and brands flooding the market with offers, success depends on more than discounts. Brands that combine creativity with precision—delivering promotions that feel exclusive and relevant—will not only win the holiday battle but also build lasting loyalty beyond the season.

LEADING STRATEGIES TO REDUCE SPENDING DURING CHRISTMAS 25’¹



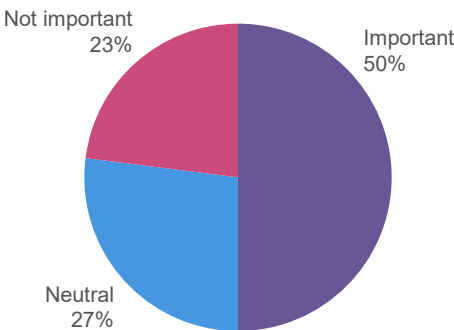
% ANY PROMO TRENDS DURING CHRISTMAS²



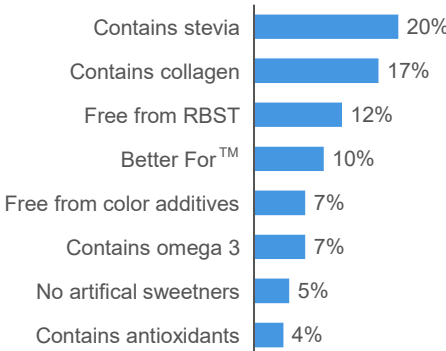
Holiday spend is shifting to intentionality

Half of celebrators say healthier options are important, and the fastest-growing claims around Christmas indicate a shift from pure indulgence to intentionality. This requires a strategic reset—brands that organize assortment and promotions around functional benefits will own the holiday and lock in loyalty for Q1 resolutions.

IMPORTANCE OF HEALTHIER F&B OPTIONS DURING CHRISTMAS 25’¹ (AMONG THOSE PLANNING TO CELEBRATE)



F&B GROWING CLAIMS DURING CHRISTMAS 24’ VS YA²



Industry Analysis Sources: ¹NIQ, BASES Quick Question Omnibus Survey, December 2025, n=1,002; ²NIQ, Retail Measurement Services, Total Full View, December 2024 5 Weeks Ending 12/28/2024; ³NIQ, Expanded Omni Shopper Panel On Demand, Total US, Total Outlets, December 2024 5 Weeks Ending 12/28/2024
Author: Chris Costagli, Vice President, Thought Leadership, Food & Beverage Insights Lead; Maria Camila Garnica, Industry Analyst