NIQ Perspectives

Food & Beverage

February 20, 2026

“Two soft weeks don’t define a year — especially at the start of one. Early-January demand reflects intentional behavior: consumers pulling back to reset, save more, and make healthier choices, not stepping away from the market. When you look at the full view, demand doesn’t disappear — it pauses, then re-engages quickly when conditions change. The real advantage right now isn’t reacting faster, it’s interpreting better. Leaders who understand the consumer context will see opportunity where others see false alarms.”

Chris Costagli

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

Did you know…

- Those using GLP-1 weight loss medications were **1.8x more likely** to have participated in “dry January,” consuming no alcohol during the first month of 2026.[3]
- Consuming more fiber in 2026 is a goal for many, but Asians are **1.3x more likely** and Hispanics are **1.4x more likely** to be focused on adding more fiber to their diets this year.[3]
- Shoppers will still pay for what matters; 37% are willing to pay a premium for sustainably produced products — including SNAP consumers, who are **2.1x more likely** to say they would pay more for sustainability.[3]

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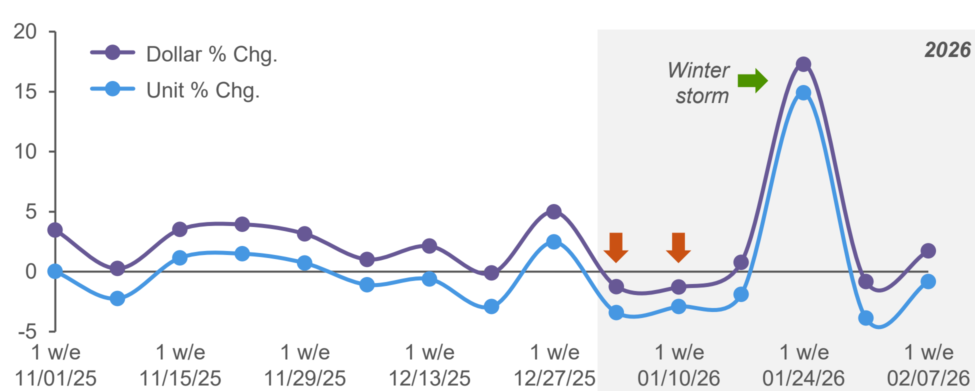
Why two weeks don’t define 2026

Implications for the Food & Beverage Industry

Soft weeks don’t signal collapse

Two weak weeks don’t define a year. Early January softness reflects restraint, not retreat. Consumers entered 2026 with intention—to spend less, eat better, and regain control—introducing short-term volatility that can obscure underlying demand. Forecasting models and inventory strategies must adapt to behavioral volatility, not just historical norms. Demand can shift on a dime: a major winter storm in January drove F&B sales up 18%.

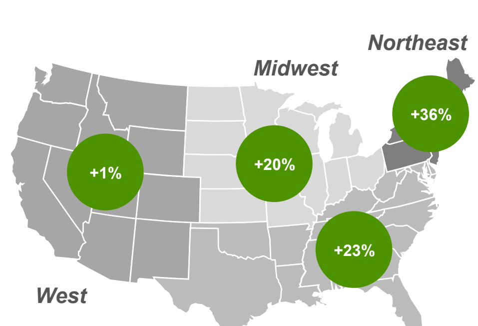
FOOD & BEVERAGE WEEKLY DOLLAR & UNIT PERFORMANCE TREND[1]



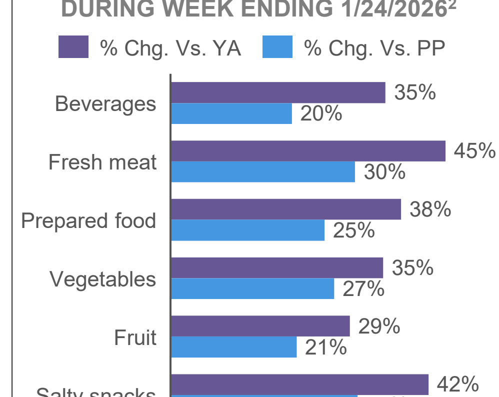
Weather events can cause dramatic shifts in demand

The late-January winter storm released demand. In a single week, sales surged, with dramatic regional spikes as shoppers stocked up on what they couldn’t live without once flexibility disappeared. During major weather events, preparedness is the dividing line between empty shelves and frustrated shoppers versus in-stock leadership and share capture — and that outcome is decided before the event, not during it.

F&B DOLLAR SALES % CHANGE DURING 1-WEEK ENDING 1/24/2026[2]



F&B GROWTH IN THE NORTHEAST DURING WEEK ENDING 1/24/2026[2]



Industry Analysis Sources: [1]NIQ, Retail Measurement Services, Total Food & Beverage Incl. Non-UPC, Total US Full View; [2]NIQ, Retail Measurement Services, Total Food & Beverage Incl. Non-UPC, US Regions, 1-Week Ending 1/24/2026; [3]NIQ, BASES Quick Question Omnibus Survey, n=2,029, February 2026

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The takeaway…

- Early-year demand reflects intentional consumer discipline, understanding this and planning for this will increasingly define success.
- When conditions change, demand re-enters fast – making readiness, not planning cycles, the growth engine.
- Friction is the silent killer of progress. Cravings, cost, and stress are predictable derailers; the brands and retailers that design friction out will own repeat behavior.

Your next move…

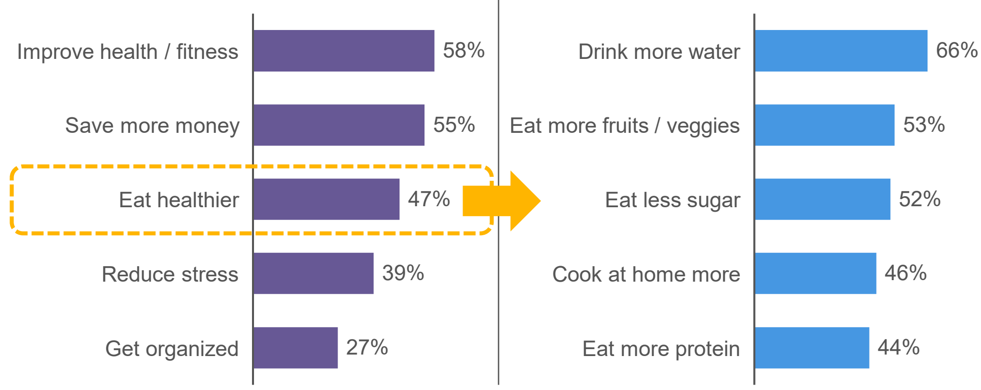
- Institutionalize context before action with guardrails against over-correction that prevent narrow timeframes – especially in early January – from driving structural decisions.
- Design assortment and inventory systems for discipline plus demand release, not steady-state shopping.
- Intentionally design products that support staying on track, not just starting strong so that health progress is achievable, not aspirational.

Wellness-value tension is reshaping food choices

Consumers expect wellness and value to coexist. Resolution data points to a motivated yet constrained consumer: nearly half are trying to eat healthier, 16% are reducing alcohol, and ingredient scrutiny is intensifying—while cost, cravings, and complexity remain friction points. Success now depends on a narrow execution window, where products must clearly justify their benefit, price, and simplicity to stay in regular rotation.

MOST COMMONLY MADE 2026 NEW YEAR RESOLUTIONS[3]

MOST COMMONLY MADE RESOLUTIONS RELATED TO EATING HEALTHY[3]

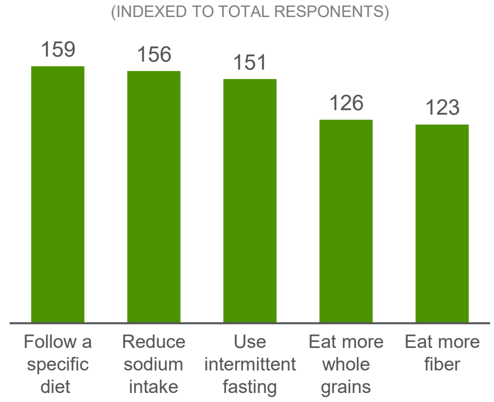


Healthy eating intent isn't the challenge for SNAP households, it's feasibility

SNAP households entered 2026 more motivated than average, setting resolutions around eating healthier, cutting back on alcohol, increasing fiber and whole grains, and reducing sodium. SNAP shoppers struggle with access to healthier options and affordability remains a barrier. Assortment and pricing increasingly functions as health infrastructure — and retailers who design with SNAP realities in mind will unlock broader, more resilient demand.

MOST LIKELY RESOLUTIONS AMONG SNAP HOUSEHOLDS FOR 2026[3]

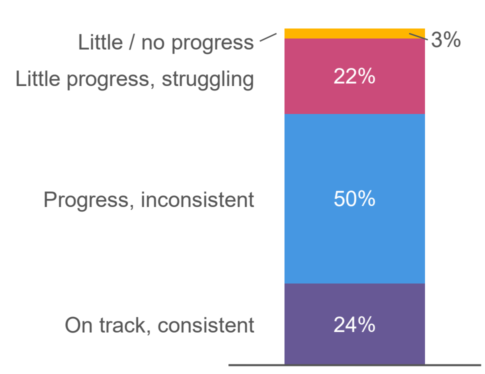
(INDEXED TO TOTAL RESPONENTS)



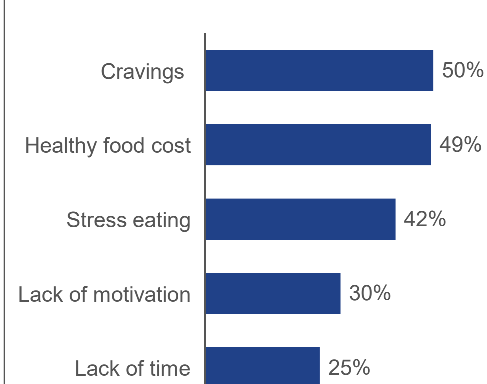
Resolution progress is fragile

The desire to eat healthier is real in 2026 — the ability to sustain it is not. While most consumers believe they're making progress, nearly all face obstacles that erode consistency, from rising costs to everyday stress. This isn't a motivation gap; it's a design flaw in how food is priced, presented, and purchased. Brands and retailers that reduce friction will convert intent into repeat behavior and loyalty.

PROGRESS ON EATING HEALTHY RESOLUTIONS 1-MONTH INTO 2026[3]



CHALLENGES FACED WITH EATING HEALTHY RESOLUTIONS[3]



Questions?

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The biggest competitive advantage in FMCG isn't reaction — it's interpretation. As data becomes richer and our ability to read demand improves, the edge will come from understanding context, not chasing headlines. A few soft weeks can create noise, but without consumer context they lead to the wrong conclusions. Short-term softness should not be mistaken for structural weakness, especially early in the year when shoppers are acting with intention — pulling back selectively and re-engaging quickly as conditions change. Those who read the data in context will see opportunity where others see risk. The future belongs to companies that respond to consumers as they are, not to headlines as they appear.

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Industry Analysis Sources: [1]NIQ, Retail Measurement Services, Total Food & Beverage Incl. Non-UPC, Total US Full View; [2]NIQ, Retail Measurement Services, Total Food & Beverage Incl. Non-UPC, US Regions, 1-Week Ending 1/24/2026; [3]NIQ, BASES Quick Question Omnibus Survey, n=2,029, February 2026

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