**NIQ**
**Demographics**
*Food & Beverage*

February 2, 2026

*"For African American consumers, outcomes—not optics—are what decide the basket. This community faces more persistent food insecurity, so the right outcomes—meal security, trust, and nutritional confidence—are what bridge the gaps, not slogans or shelf talk. Where they choose to shop is increasingly shaped by whether a channel reliably delivers those outcomes, from premium-value missions to everyday stretch. And as health awareness, scanning behaviors, and guideline literacy deepen, the brands and retailers that consistently deliver better outcomes will win. My prediction: by 2030, outcome-driven value will be the single strongest predictor of loyalty in this consumer group."*

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

## Did you know…

- African Americans that wear personal health devices are **2.4x more likely** to be consuming smaller portion sizes / controlling portions
- African Americans who use social media at least once a week are **1.7x more likely** to discover new food or beverages that they are interested in purchasing?[5]
- African Americans who use third party scanning apps (e.g., Yuka) to evaluate a product are **1.2x more likely** to trust what the app says over the product's label?[1]

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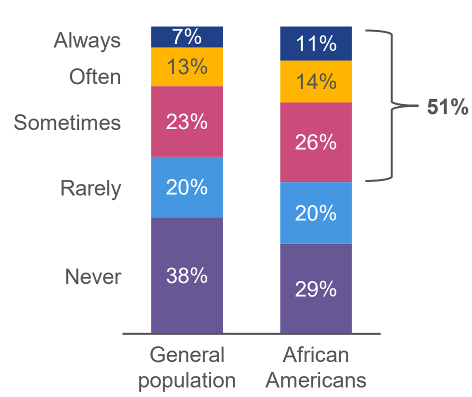
# The outcome economy of African American baskets

## African American households

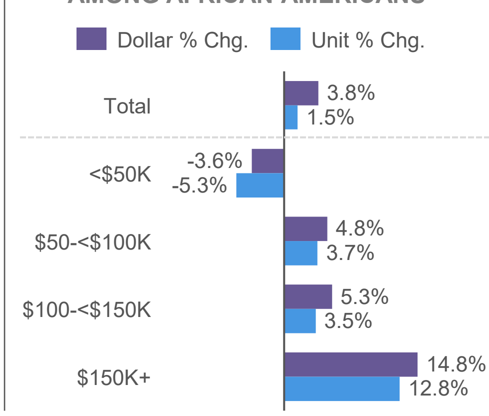
### Price pressure and pantry risks

Food insecurity is a real concern among African American households. SNAP reliance runs 1.5x higher and fewer than half can satisfy basic needs past seven days without benefits[4]. This makes "bridge food" innovation and reliable protein access essential. The spend signal is shifting from "cheapest today" to "reliable, resilient, protein-forward nutrition that lasts". This puts a focus on offers, packs, and formats that bridge food security gaps.

**FREQUENCY OF BEING CONCERNED ABOUT RUNNING OUT OF FOOD[4]**



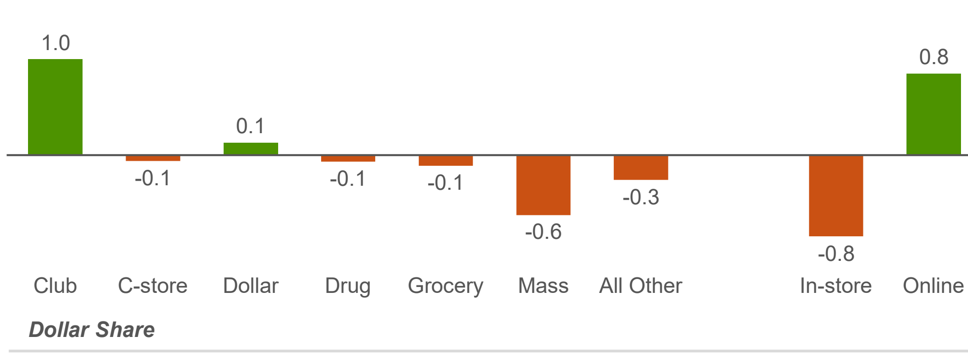

**FOOD & BEVERAGE SALES TREND AMONG AFRICAN AMERICANS[2]**




### Channel value rewritten

Club and Dollar channels are gaining share among Black households, with upper-income segments driving +20.6% (Club)[2] and +22.2% (Dollar)[2] spend growth—proof that "value" increasingly means quality, one-stop efficiency, and superior customer service, not bargain bins. eCommerce is capturing share from brick & mortar stores, pointing to a future where "value control" is digital, planned, and deeply mission-driven.

**DOLLAR SHARE CHANGE ACROSS CHANNELS AMONG AFRICAN AMERICAN HOUSEHOLDS, TOTAL STORE[3]**




Industry Analysis Sources: [1]NIQ, BASES Quick Question Omnibus Survey, n=2,006, January 2026; [2]NIQ, Expanded Omnishopper Panel On Demand, Powered By Label Insights, Total US, Total Outlets, Total Food & Beverage, 52 Weeks Ending 12/27/2025; [3]NIQ, Expanded Omnishopper Panel, Total US, Total Outlets, Total Product, 52 Weeks Ending 11/29/2025; [4]NIQ, BASES Quick Question Omnibus Survey, n=1,021, November 2025; [5]NIQ, BASES Quick Question Omnibus Survey n=1,002, December 2025; [6]NIQ, BASES Quick Question Omnibus Survey, n=1.020, August 2025

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## The takeaway…

- Value is shifting from price to stability; the industry treats value as a shelf-price game, but African American consumers are redefining it around predictability, longevity, and resilience
- Algorithms—not marketing—are deciding trust; brands still assume messaging drives persuasion, but African Americans are outsourcing trust as product truth—not positioning—takes over
- Channel choice is decoupling from income; segmenting shoppers by income is an antiquated strategy as African American shoppers choose channels based on mission fit, not household earnings

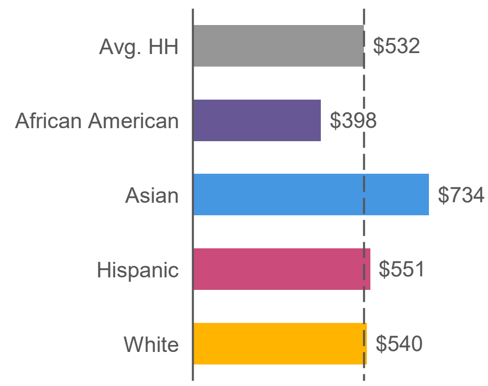
## Your next move…

- Build "resilience value" into the shopping experience; shift towards "stability promotions" that use predictable cycles, consistent options, and reliable availability to anchor those who value dependability over discounting
- Merchandize for missions; design for outcomes whether premium-value or stretch-engine rather that income-based assumptions
- Engineer guidance into the product experience; shoppers are hungry for clarity, translation, and advice—trusted advisors win loyalty

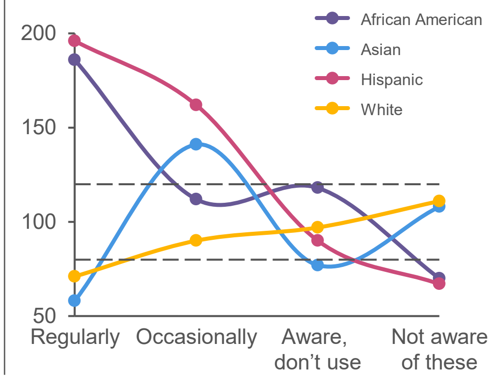
### The rise of algorithmic pantries

African American shoppers spend 25% less on BetterFor™ products, but that may start to change rapidly[2]. These consumers are more ingredient-attentive, using third-party scanning apps at higher rates to validate quality. They're 1.2x more likely to put back low-scoring or artificial-additive products[1], and 1.4x more likely to wear health wearables that reinforce habitual tracking[5]. Expect to see algorithms guiding their purchase decision more often.

**BetterFor™ FOOD & BEVERAGE DOLLARS PER BUYER[2]**



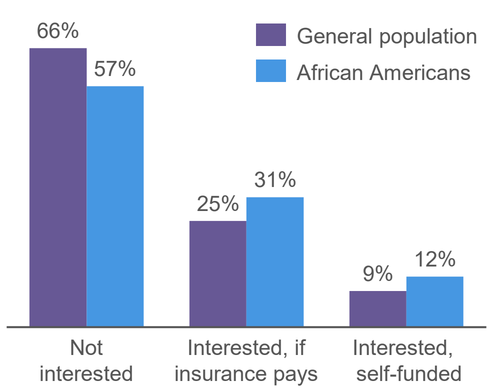

**FREQUENCY OF 3rd PARTY SCANNER USAGE[1]**
INDEX TO TOTAL RESPONDENTS




### GLP-1 interest paired with a protein reality

African American consumers are more interested in new oral GLP-1s, and 1.4x more likely to self-fund them—signaling a future where appetite-modifying tools will more broadly reshape category demand[1]. They're already 1.4x more likely to use protein supplements and 1.6x more likely to eat high-protein snacks multiple times per day[6]. As access barriers to GLP-1s are removed, expect products with characteristics that matter to take off.

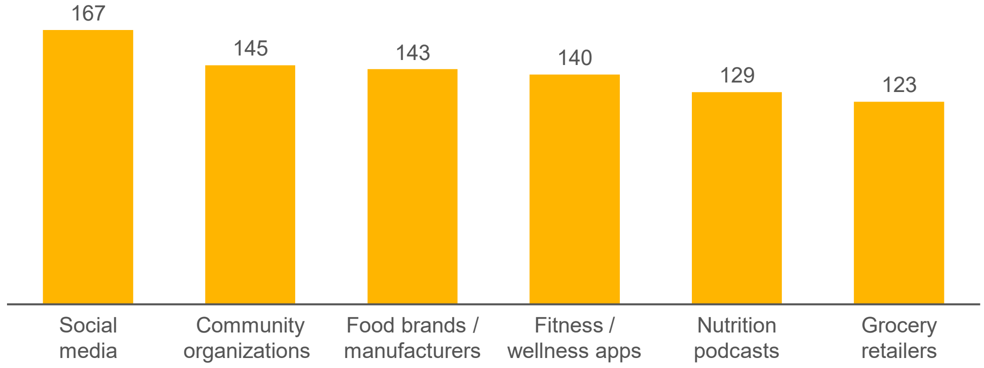
**INTEREST IN NEW ORAL GLP-1 WEIGHT LOSS MEDICATION[1]**




### New Dietary Guidelines in the United States will shift consumption behaviors

Nearly 48% of African American consumers plan to change their eating habits as new U.S. Dietary Guidelines roll out—and they are 1.8x more likely to make significant changes[1]. They expect retailers and manufacturers to help interpret and apply these new guidelines, which gives retailers and manufacturers an opportunity to transform Dietary Guideline education into a competitive advantage that builds and strengthens loyalty.

**WHERE AFRICAN AMERICANS ARE MOST LIKELY TO SEARCH FOR INFORMATION ABOUT THE NEW DIETARY GUIDELINES IN THE US[1]**
INDEX TO TOTAL RESPONDENTS




## Questions?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*The next five years will redefine the African American food economy as households navigate rising prices, shrinking SNAP coverage, and mounting volatility. "Benefit-per-dollar" will overtake "price-per-ounce" as the defining value metric, accelerated by growing BetterFor™ interest and tougher algorithmic scrutiny. As low-cost personal health wearables expand, barriers will fall—and purchase decisions will shift decisively away from empty calories and unhealthy formulations. Channel roles will continue to separate into premium-value missions and stretch-engine missions, but shopper behavior will hinge less on income and more on the real value each channel delivers.*

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Industry Analysis Sources: [1]NIQ, BASES Quick Question Omnibus Survey, n=2,006, January 2026; [2]NIQ, Expanded Omnishopper Panel On Demand, Powered By Label Insights, Total US, Total Outlets, Total Food & Beverage, 52 Weeks Ending 12/27/2025; [3]NIQ, Expanded Omnishopper Panel, Total US, Total Outlets, Total Product, 52 Weeks Ending 11/29/2025; [4]NIQ, BASES Quick Question Omnibus Survey, n=1,021, November 2025; [5]NIQ, BASES Quick Question Omnibus Survey n=1,002, December 2025; [6]NIQ, BASES Quick Question Omnibus Survey, n=1.020, August 2025


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