Launch Fast, Learn Faster

Are you reading the early signals- before your product launch falls behind?

Part 1 – Consumer Acceptance

NIQ Consumer Panel Services, May 2026

A focus on the United Kingdom

2.053 new launches - 42% Branded products

UK launch reality checks

Part I: Consumer acceptance

Food dominates launches, but with distinction for Branded vs. PL products.

Branded products focus more on indulgence and personal care categories, while PLs launch mainly in categories for everyday meals and/or cooking

Scale is the exception, not the norm.

In a highly crowded UK market, only 1 in 4 launches manages to reach 1% of households, Categories with fewer launches, like Health & Beauty, Home Care, Paper Products, are far more polarized: fewer products, but a much higher chance of breaking through.

High innovation volume does not equal high innovation effectiveness.

Crowded routine categories like Food, or Confectionery and Snacks build trial faster, but struggle to bring them back. Meanwhile, categories with smaller activation in terms of launches (like Paper Products), or ones that target smaller part of the population (like Pet Food or Alcoholic Beverages) recruit more slowly but are better at getting these early trialists to repeat.

Stay tuned for our second series publication!
How do early trialists tend to evaluate a new product and what drives them to come back?

Although Food categories make the core of new launches, there is a different prioritization for Branded vs. Private Label products

Branded products focus more on indulgence and personal care categories, while PLs launch mainly in categories for everyday meals and/or cooking

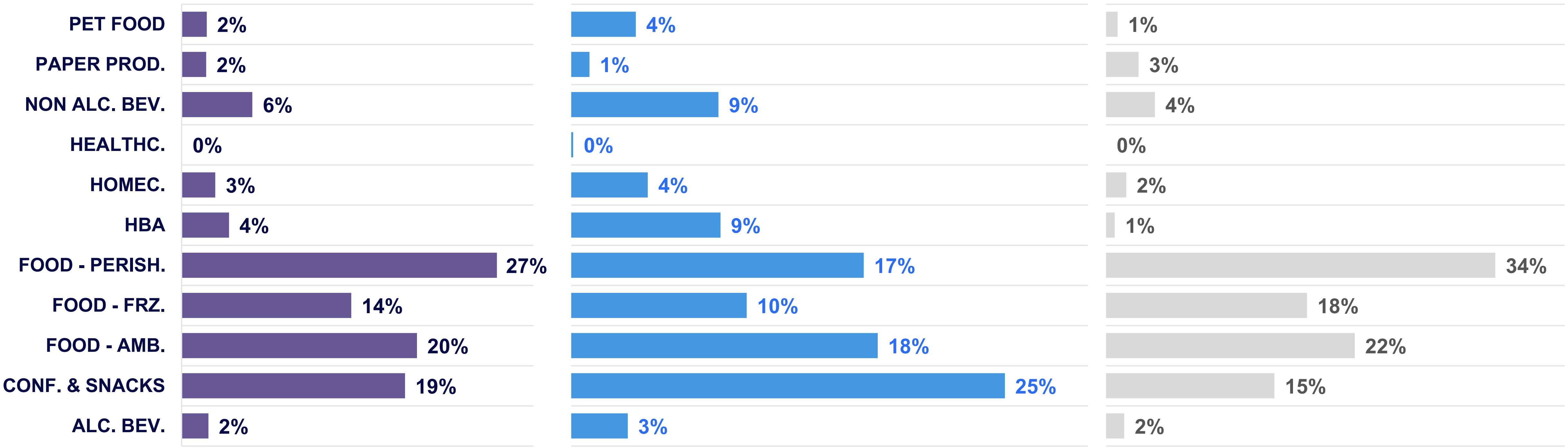
42% of total launches were Branded products

58% of total launches were Private Labels

How many new products were launched per supergroup?

Branded products: % of new launches per supergroup

PL products: % of new launches per supergroup



Source: NIQ Consumer Panel and Retail Measurement data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

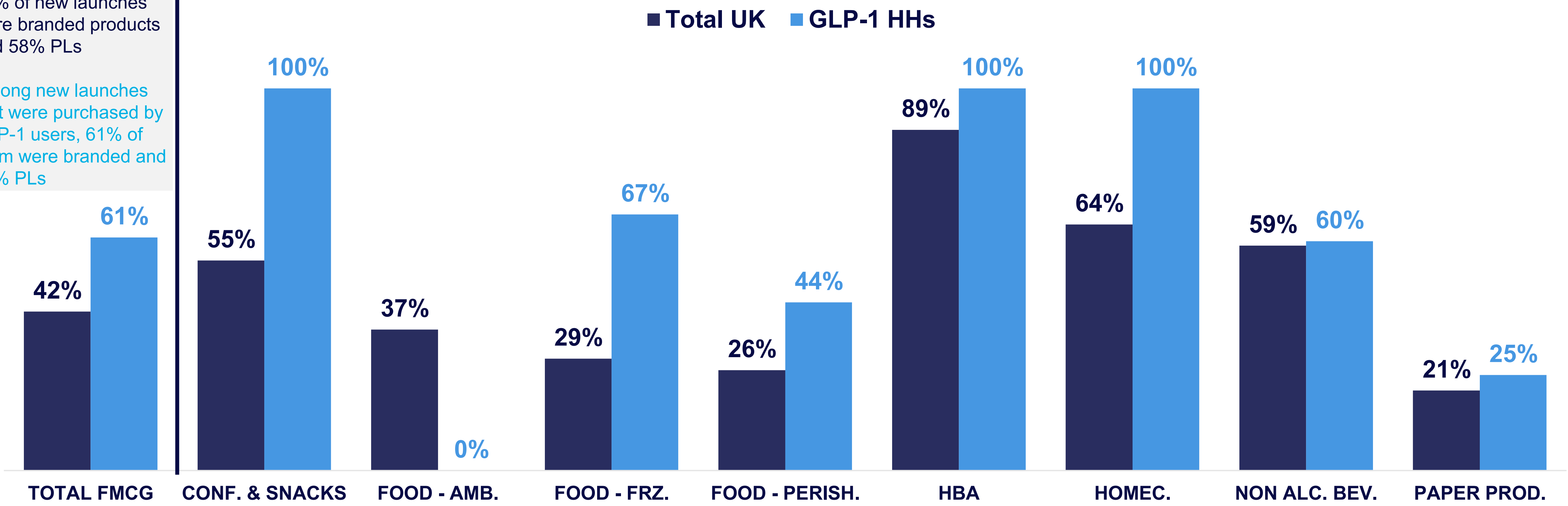
GLP-1 users show preference to branded products (*IF* they try something new)

Limited consumption hinders less probability to try something new, but also a lack of innovations that are relevant to this group.

What was the % of Branded new launches (# of innovations) purchased by…

42% of new launches were branded products and 58% PLs

Among new launches that were purchased by GLP-1 users, 61% of them were branded and 39% PLs



# of new products total / # of new products that were purchased by GLP-1 users' households at least once:

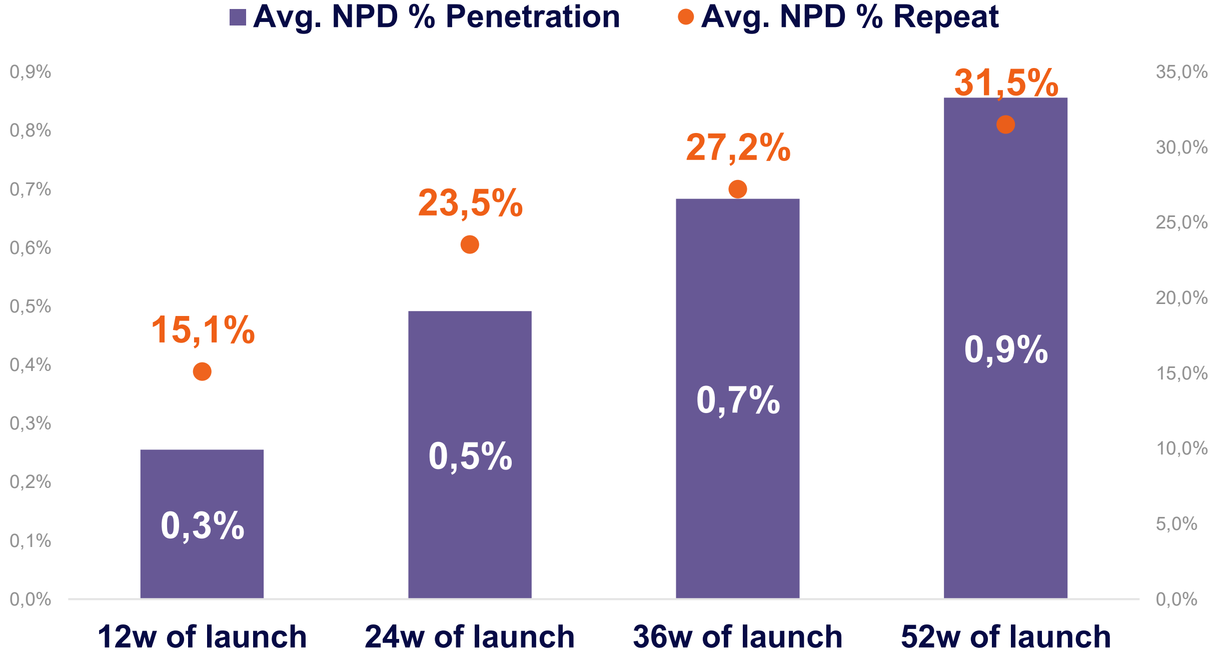
2.053 / 41	391 / 10	412 / 4	297 / 6	552 / 9	83 / 2	59/ 1	124 / 5	43 / 4

Source: NIQ Consumer Panel and Retail Measurement data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025
GLP-1 households HHs that have declared that there is at least one member that is currently using a GLP-1 drug

An average new launch barely reaches 1pt of penetration in its first year

... with less than a third of its trialists repeating at least once

How many trialists and repeaters does an average new launch* reach?



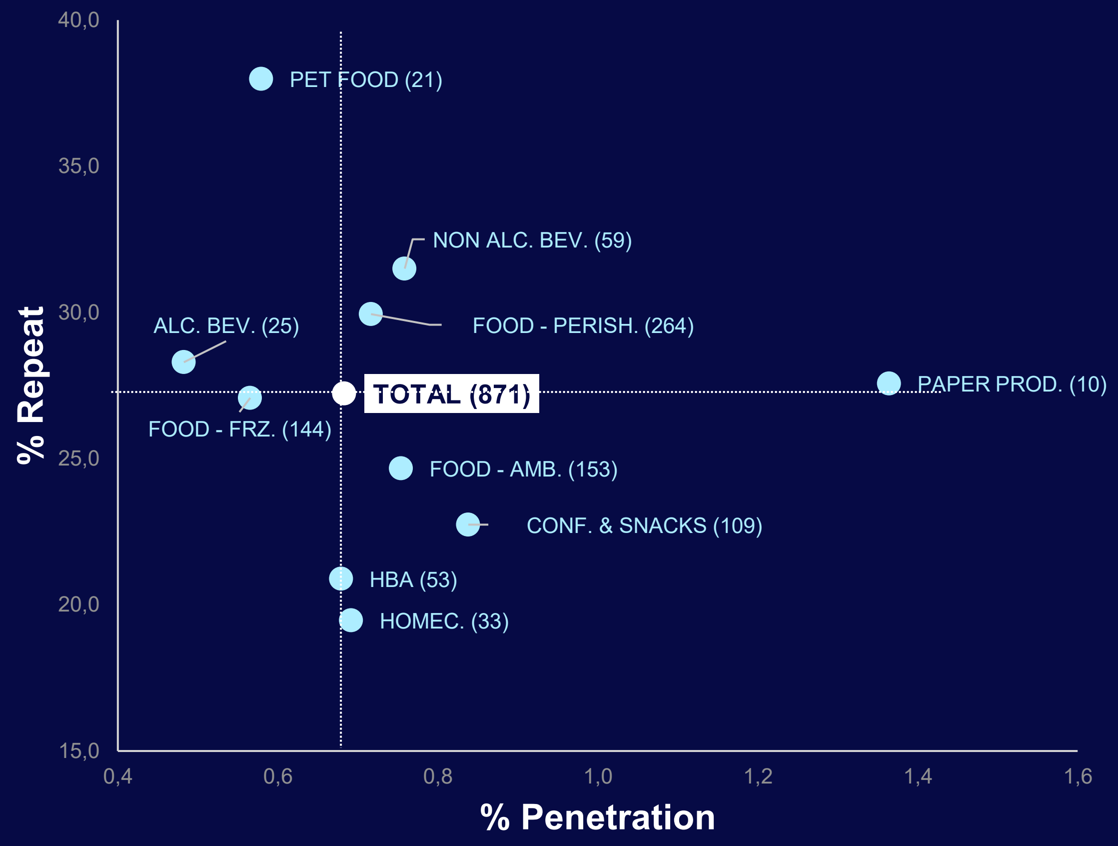
# of new products:

2.052	1.336	871	191

But different categories have different dynamics

Conf & Snacks and Amb. Food enter more HHs but fail to retain them, as opposed to Pet Food, Non Alc-Bev or Paper

View per supergroup – 36w of launch



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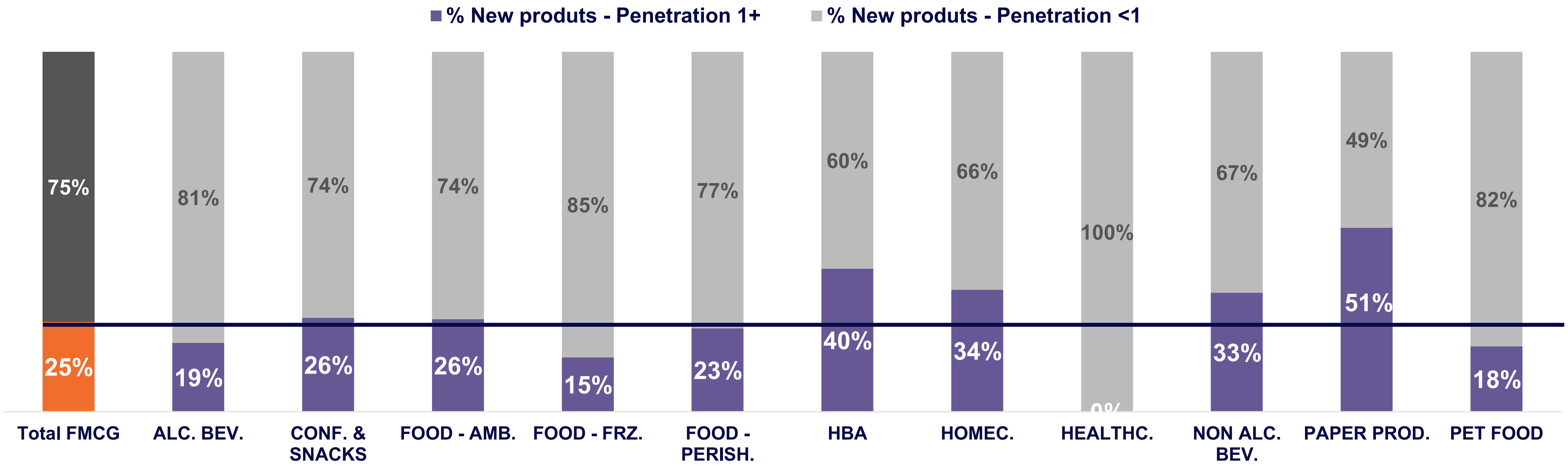
*Average new launch referring to median for each category (i.e. half of new launches exceed 27,2% repeat after 36w as of launch)

Only one out of four new launches managed to reach 1% of UK households during 2025

Categories with lower number of innovations seem quite polarized: HBA and Homecare have a higher % of products that reach 1pt of penetration.

How many new products reached at least 1pt of penetration?



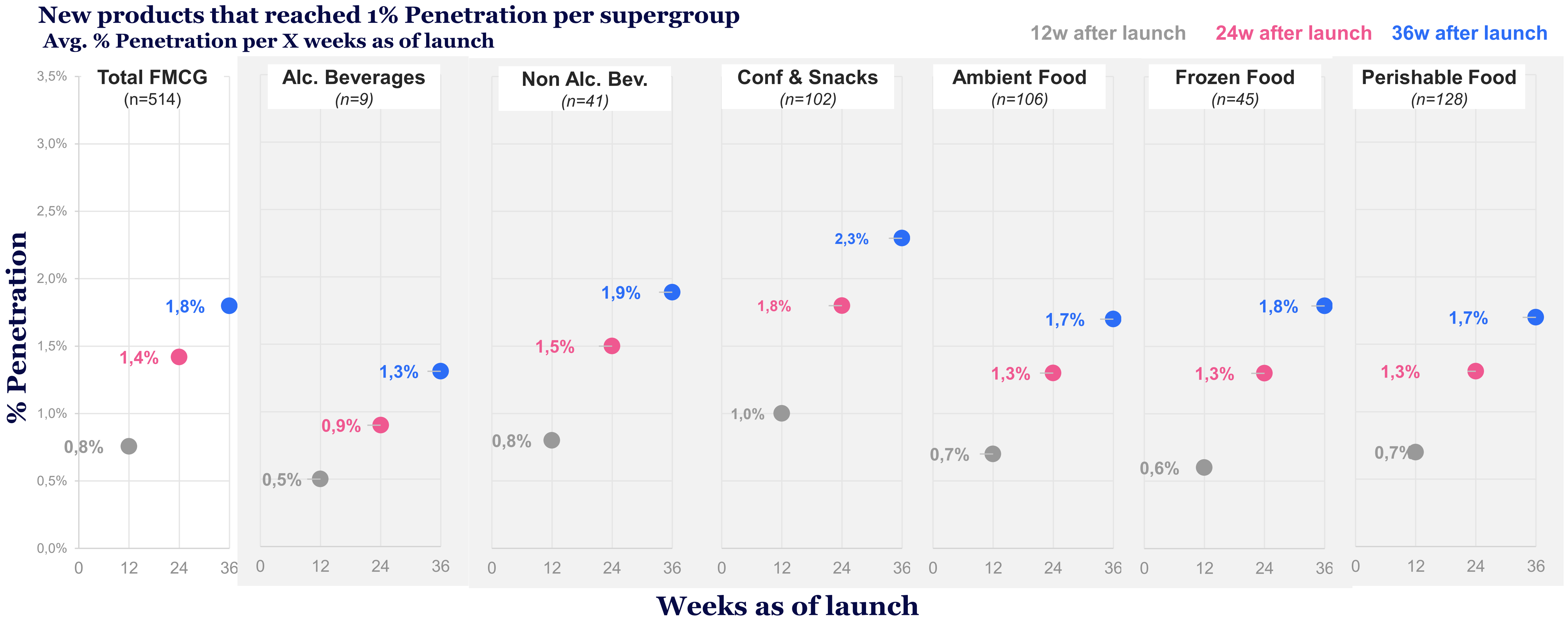
# of new products:

2053	47	391	412	297	552	83	59	1	124	43	44

Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

Food & Beverages: penetration build-up as of launch

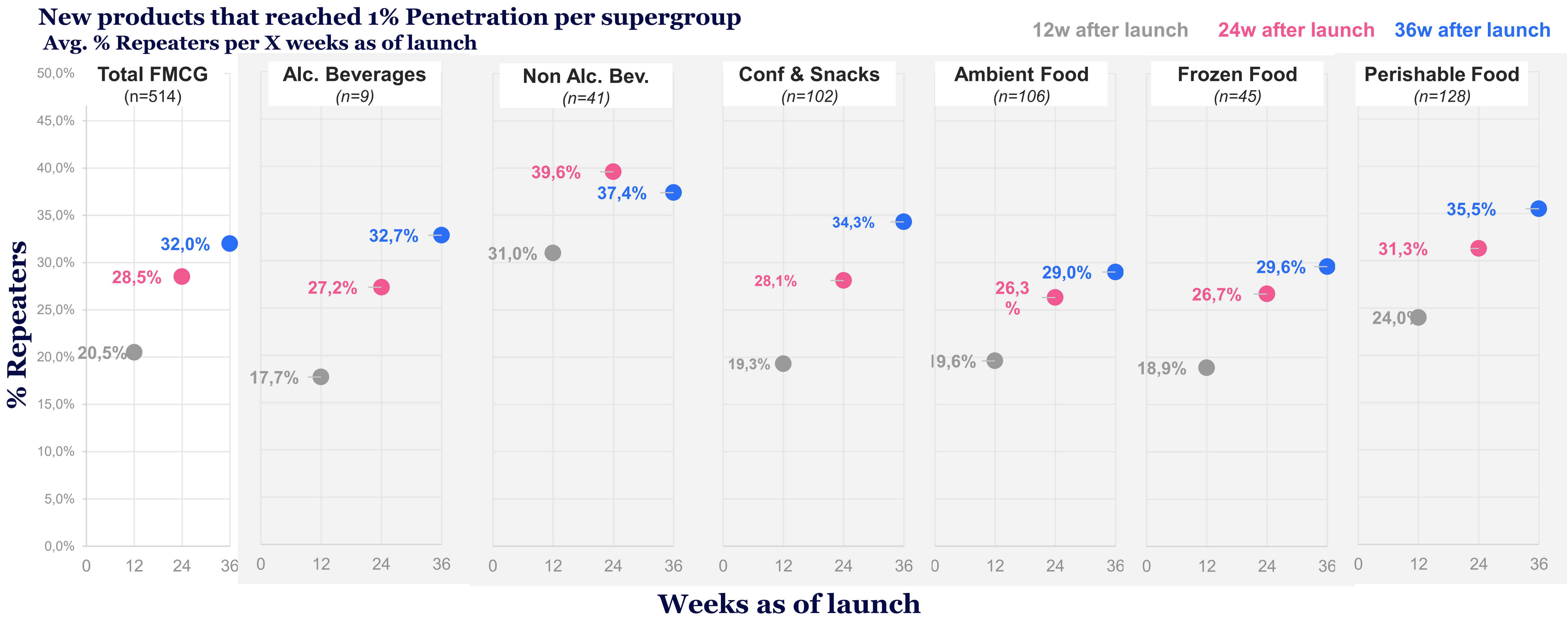
Majority of new products that reach 1% of households, do it after about half a year as of launch. But there are exceptions; for a Conf Snack product trial should be built faster (first 3 months of launch), while Alc. Beverages take about 9 months.



Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

Food & Beverages: repeat rate build-up as of launch

Both Conf & Snacks and Alc. Beverages though settle for a lower repurchase rate; it is after 9 months that they manage to bring back one third of their trialists. Non Alc. Beverages stand out, generating the highest levels of repurchase, but not maintaining it after 6 months.

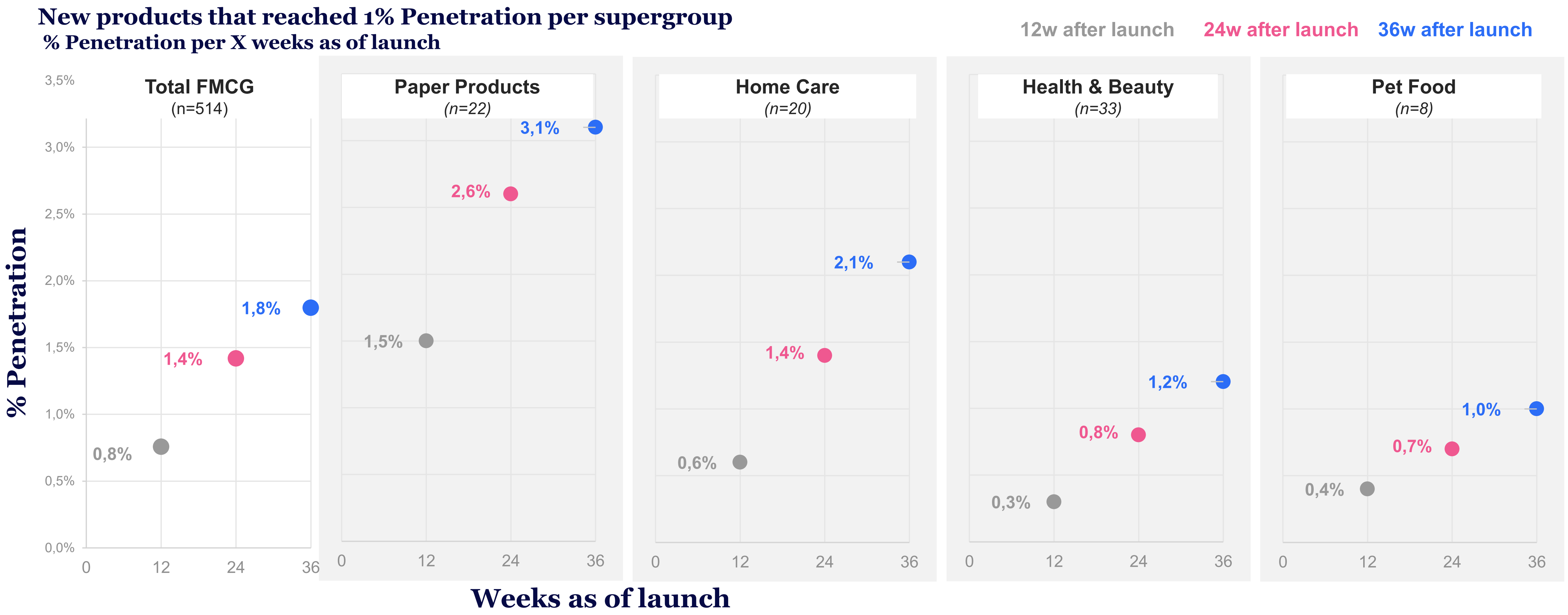


Source: NIQ Consumer Panel data for calendar year 2025

New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

Non Food: penetration build-up as of launch

Paper products are the fastest to build trial, while Home Care is following. Health & Beauty and Pet Food need more time to recruit buyers



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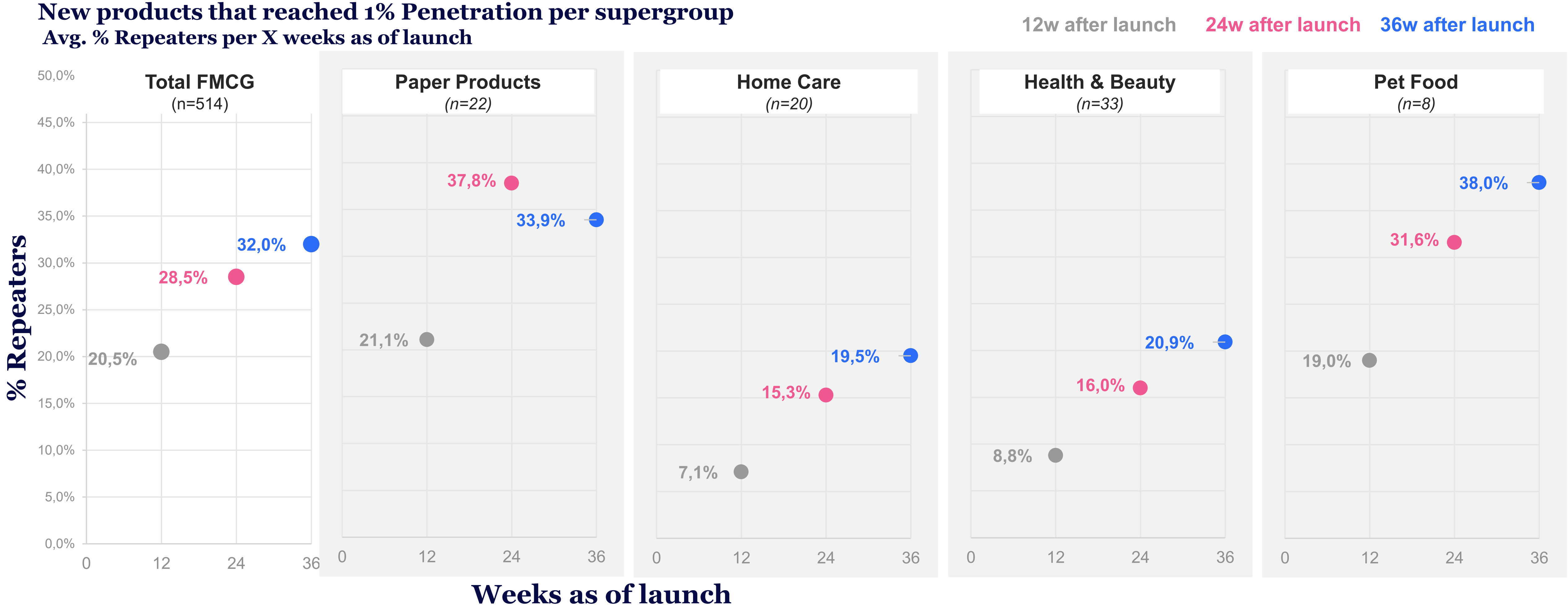
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

Non Food: repeat rate build-up as of launch

Despite the slow trial build-up, Pet Food launches manage to drive highest repeat rate and retain it: almost 4/10 trialists repurchased. Home Care and HBA although not reaching high repeat, grow their retention gradually, given the long purchase cycle but also the higher involvement of the consumer in terms of the benefits they offer

New products that reached 1% Penetration per supergroup
Avg. % Repeaters per X weeks as of launch



Source: NIQ Consumer Panel data for calendar year 2025
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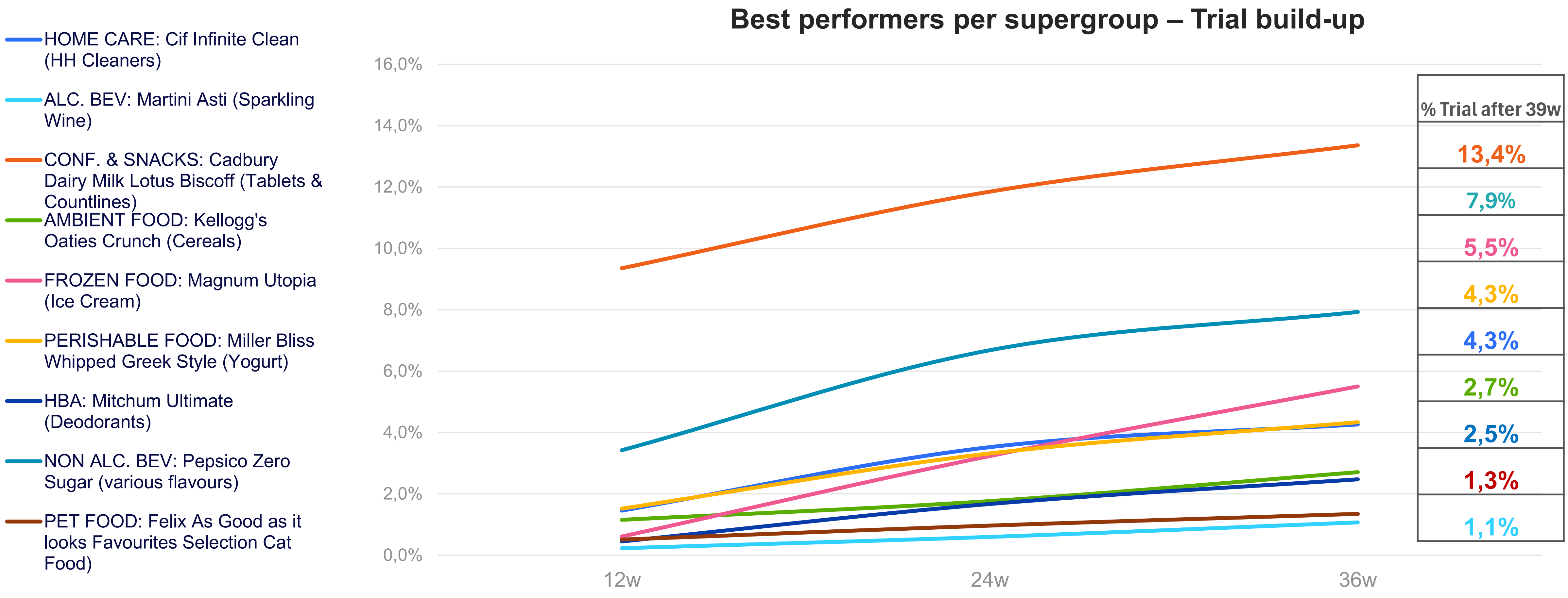
Top brand innovations* based on 39w as of launch – Trial build up

Cadbury Dairy Milk Lotus Biscof, combining two strong brand names and indulgence gets more than two times the penetration of other categories' top launches. Pepsi Zero Sugar follows, with the launch of various flavours, also depicting a strong, international brand name.

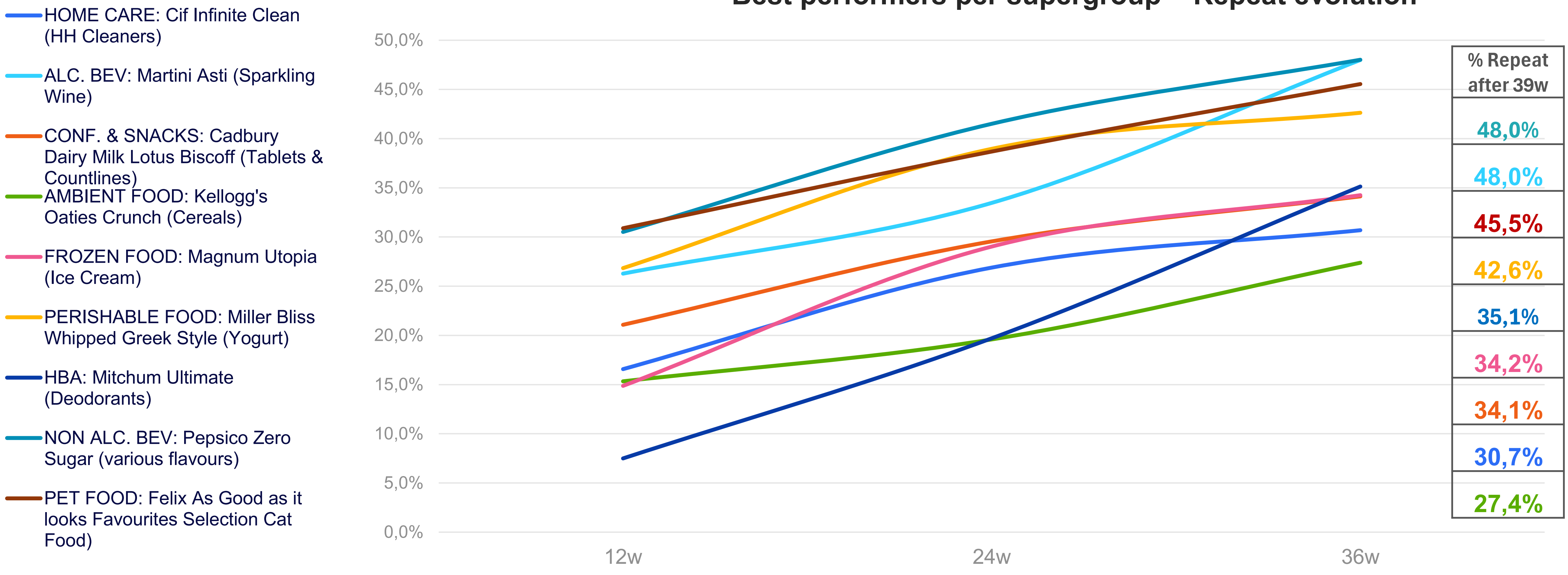


Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025
*Best performers are defined based on trial & repeat after 36w of launch against total avg. branded new launches

Top brand innovations* based on 39w as of launch – Repeat rate

Pepsi Zero Sugar, along with Martini Asti excel in retaining their trialists. For Martini Asti, this is despite the smaller trial dictated by the specific categories' nature, as is also the case with and Felix "As good as it looks favourites selection"

Best performers per supergroup – Repeat evolution



% Repeat after 39w
48,0%
48,0%
45,5%
42,6%
35,1%
34,2%
34,1%
30,7%
27,4%

Source: NIQ Consumer Panel data for calendar year 2025
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A focus on France

738 new launches - 69% Branded products

France launch reality checks

Part I: Consumer acceptance

Food dominates launches, but breadth limits effectiveness.

Both Branded and PL launches concentrate on everyday Food and Confectionery & Snacks. However, the breadth of new launches in Ambient Food and Conf & Snacks makes it harder to build both trial and repeat, despite high activity.

Reaching 1% of penetration for a new launch is achievable, but not common.

The average new launch reaches ~1% household penetration in its first year, yet only ~30% of launches manage to cross that threshold. Perishable Food stands out, with 37% of launches reaching 1% penetration despite high innovation pressure, showing stronger ability to break through.

Repeat separates categories more than trial.

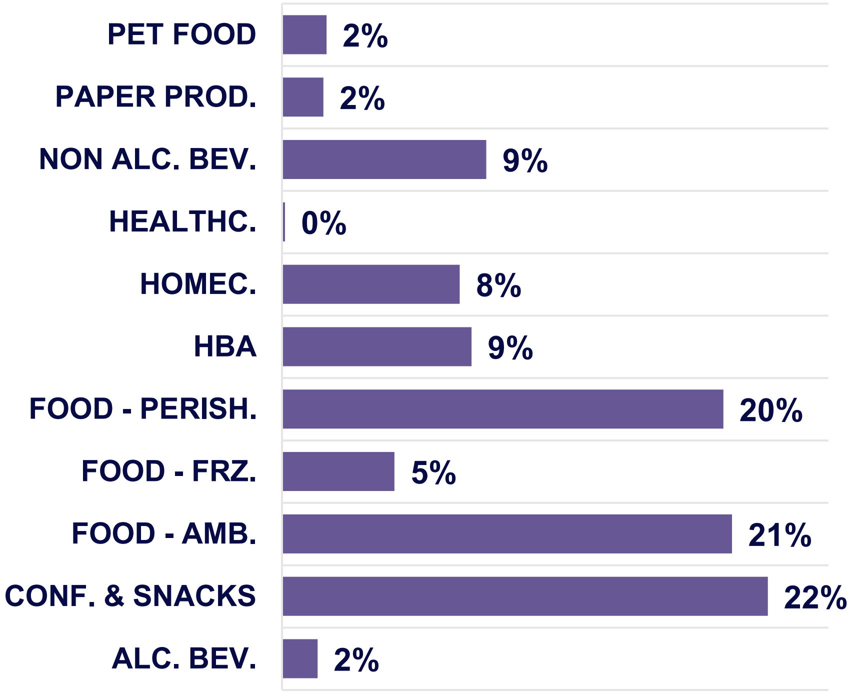
While necessity categories are more effective at driving early trial, Pet Food and Perishable Food deliver the highest repeat, alongside Alcoholic and Non-Alcoholic Beverages, which bring back more trialists over time. In contrast, Confectionery & Snacks struggle to convert trial into loyalty, reflecting higher experimentation and lower repeat behaviour.

Stay tuned for our second series publication!
How do early trialists tend to evaluate a new product and what drives them to come back?

In France, both Branded and PL launches focus equally highly on everyday Food categories, but also Confectionery & Snacks

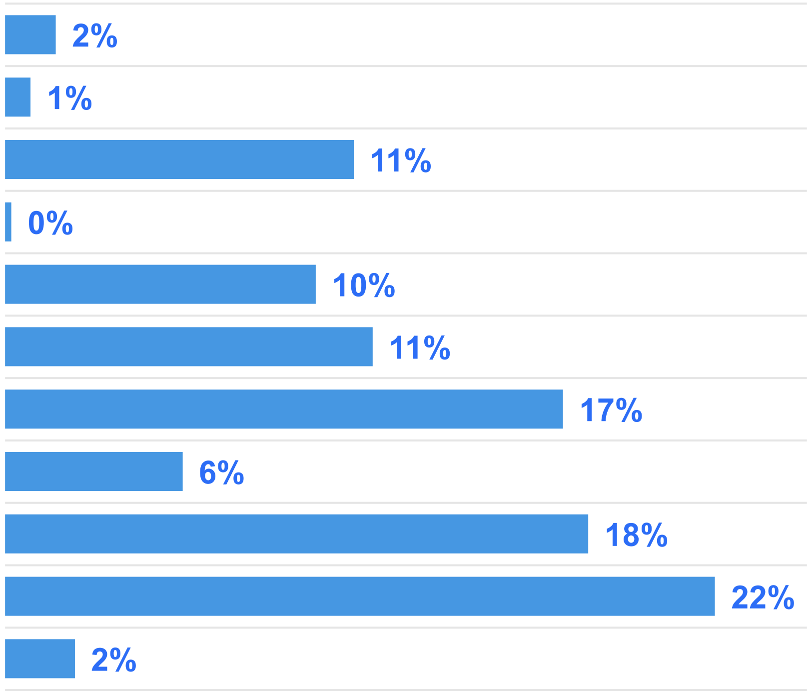
Branded products though are relatively more active though in Non Alc. Beverages, partly leveraging new trends around functional benefits, but also in Health & Beauty.

How many new products were launched per supergroup?



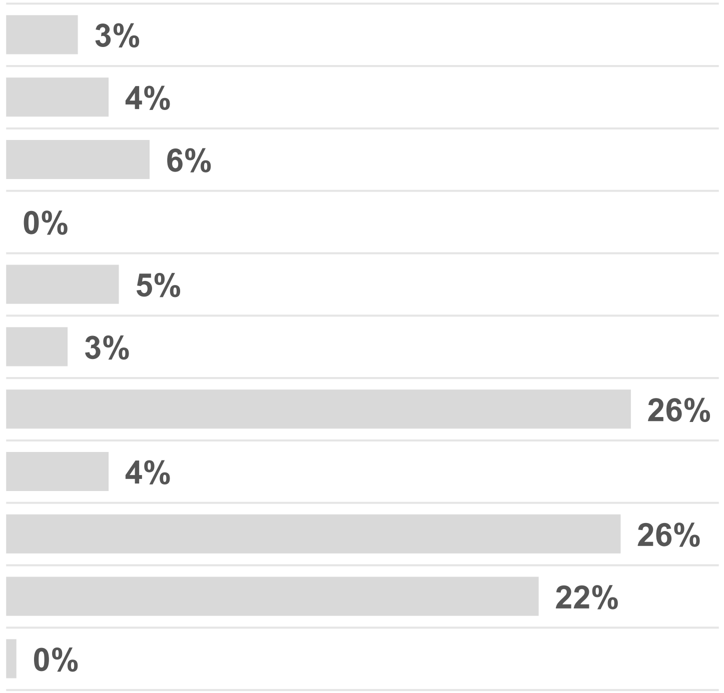
69% of total launches were Branded products

Branded products: % of new launches per supergroup



31% of total launches were Private Labels

PL products: % of new launches per supergroup



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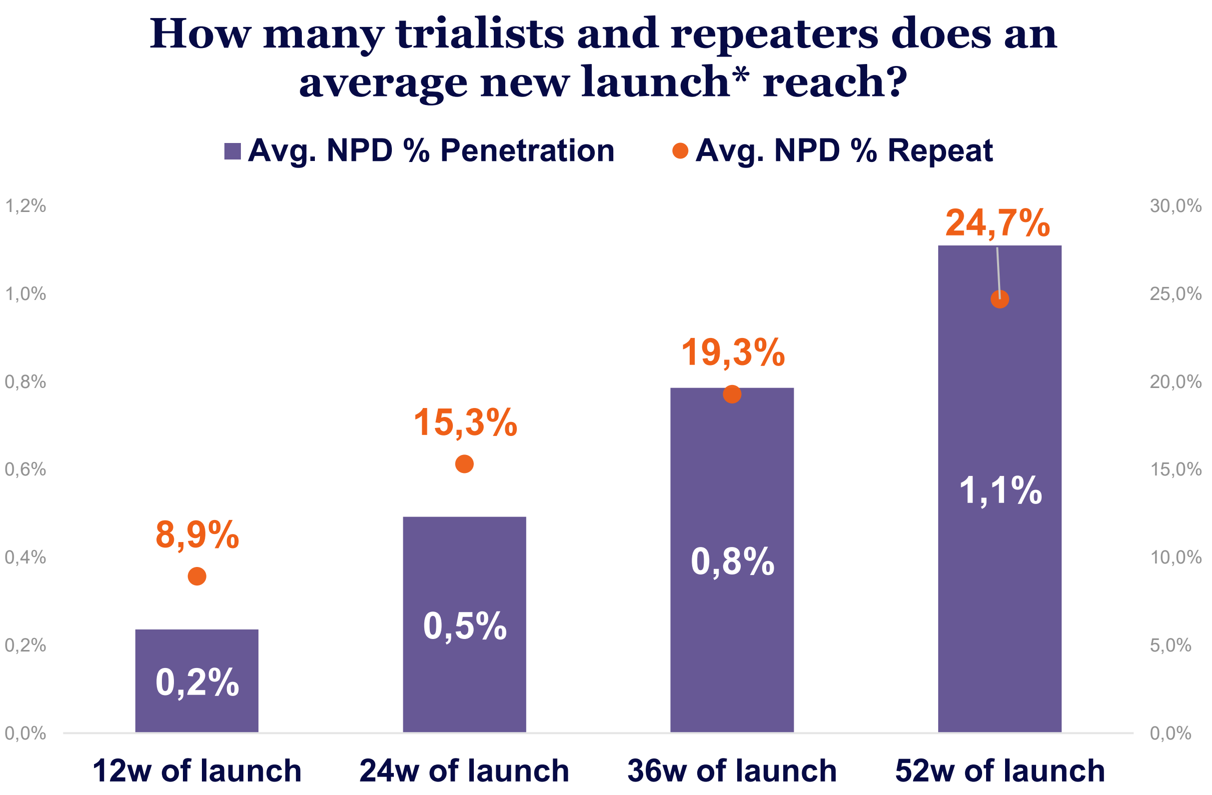
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

An average new launch reaches about 1pt of penetration in its first year

... with less than a fourth of its trialists repeating at least once

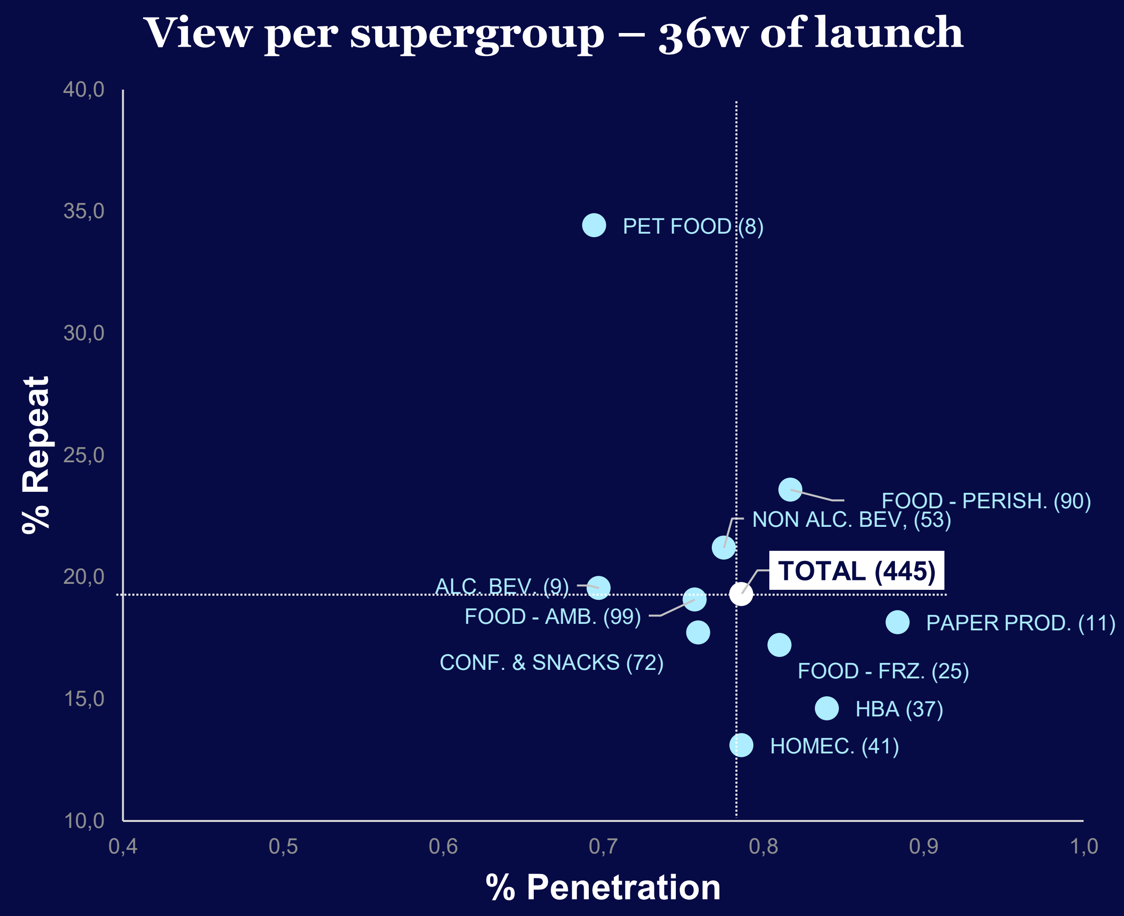


# of new products:

737	587	445	46

Amb. Food and Conf & Snacks breadth of NPD make it harder to build trial / repeat

Necessities do better in getting early trial, while highest repeat is obvious for Pet Food and Perishable Food



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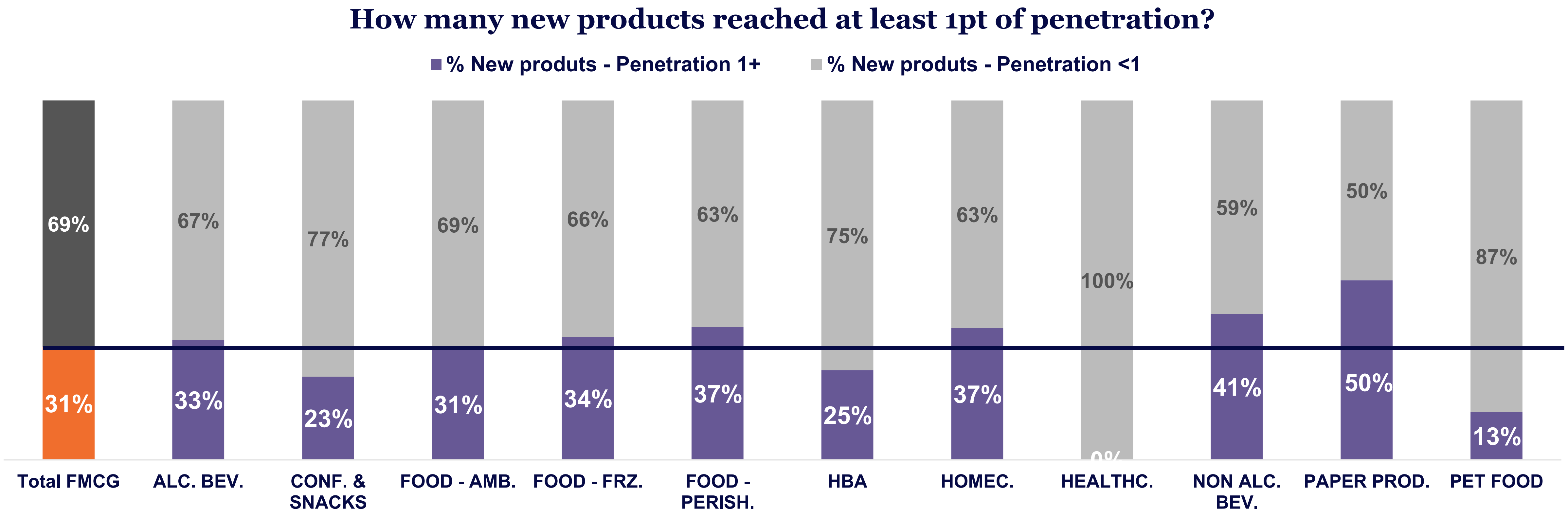
About 30% of new launches managed to reach 1% of FR households during 2025

Perishable Food stands out, as despite the high number of new launches, 37% of them reached 1% penetration



# of new products:

738	12	163	152	38	149	64	60	1	69	14	15

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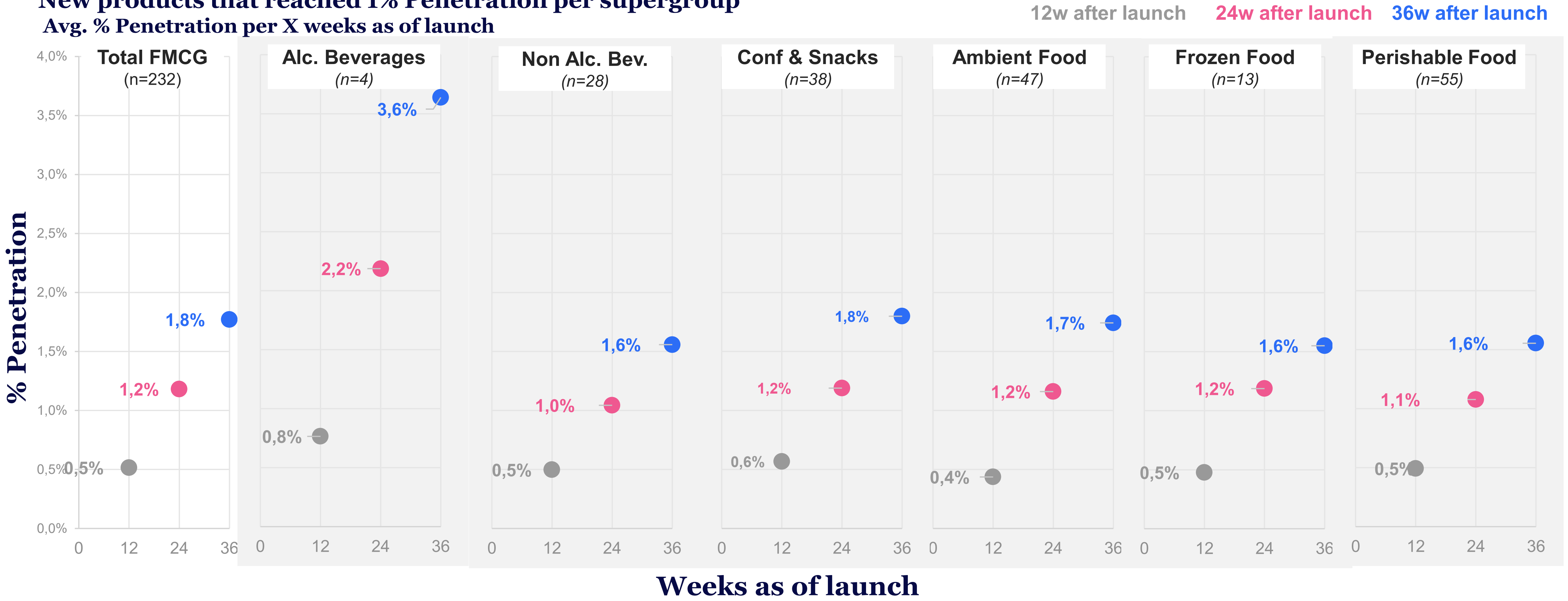
Food & Beverages: penetration build-up as of launch

Majority of new products that reached 1% of households, did it after about half a year as of launch. But there are some stand outs on how they build up, especially in Beverages: despite the lower number of Alc. Beverages that reached 1% of households, they did showcase a much faster and higher trial build

New products that reached 1% Penetration per supergroup

Avg. % Penetration per X weeks as of launch



Source: NIQ Consumer Panel data for calendar year 2025

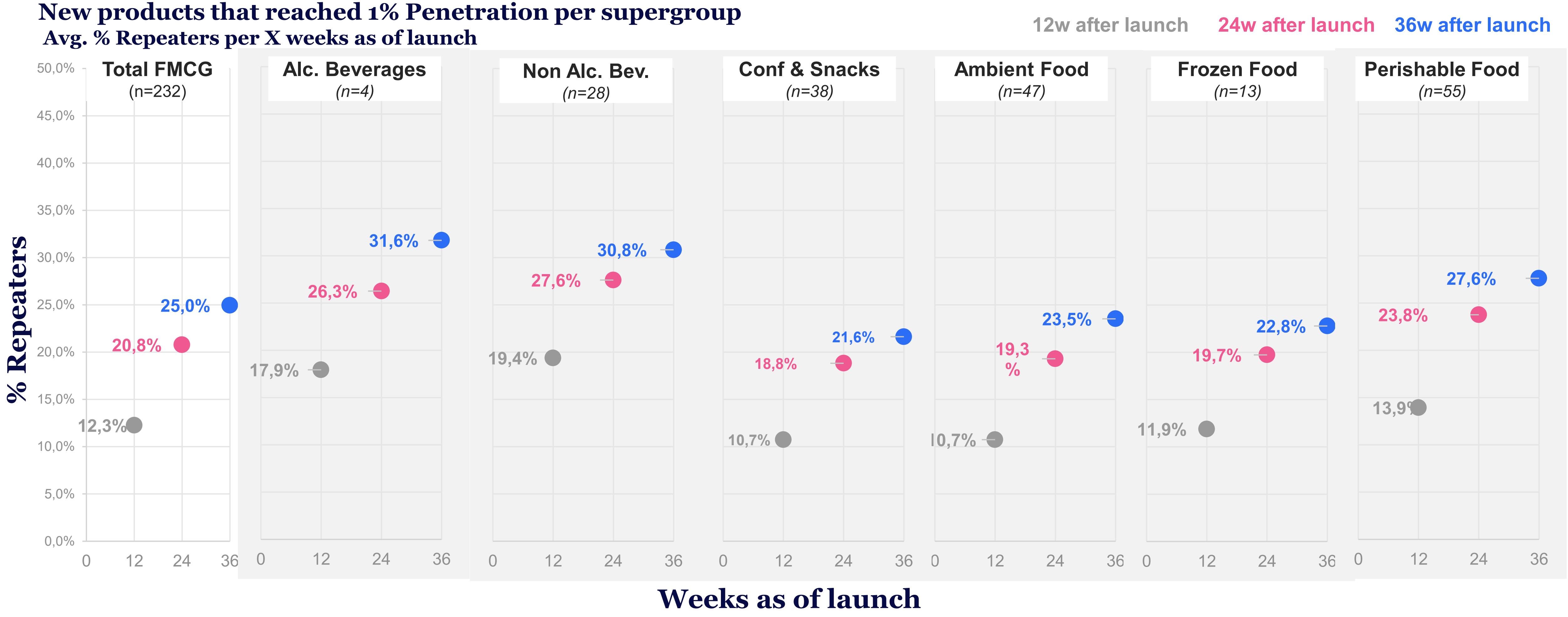
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

Food & Beverages: repeat rate build-up as of launch

Both Alc. & Non Alc. Beverages though do manage to get more of their trialists back compared to rest categories. Confectionery & Snacks struggle more to get households to repeat, potentially due to the wide variety of launches and the pleasure nature of the category, that make it more prone to exploration rather than loyalty.

New products that reached 1% Penetration per supergroup

Avg. % Repeaters per X weeks as of launch



Source: NIQ Consumer Panel data for calendar year 2025
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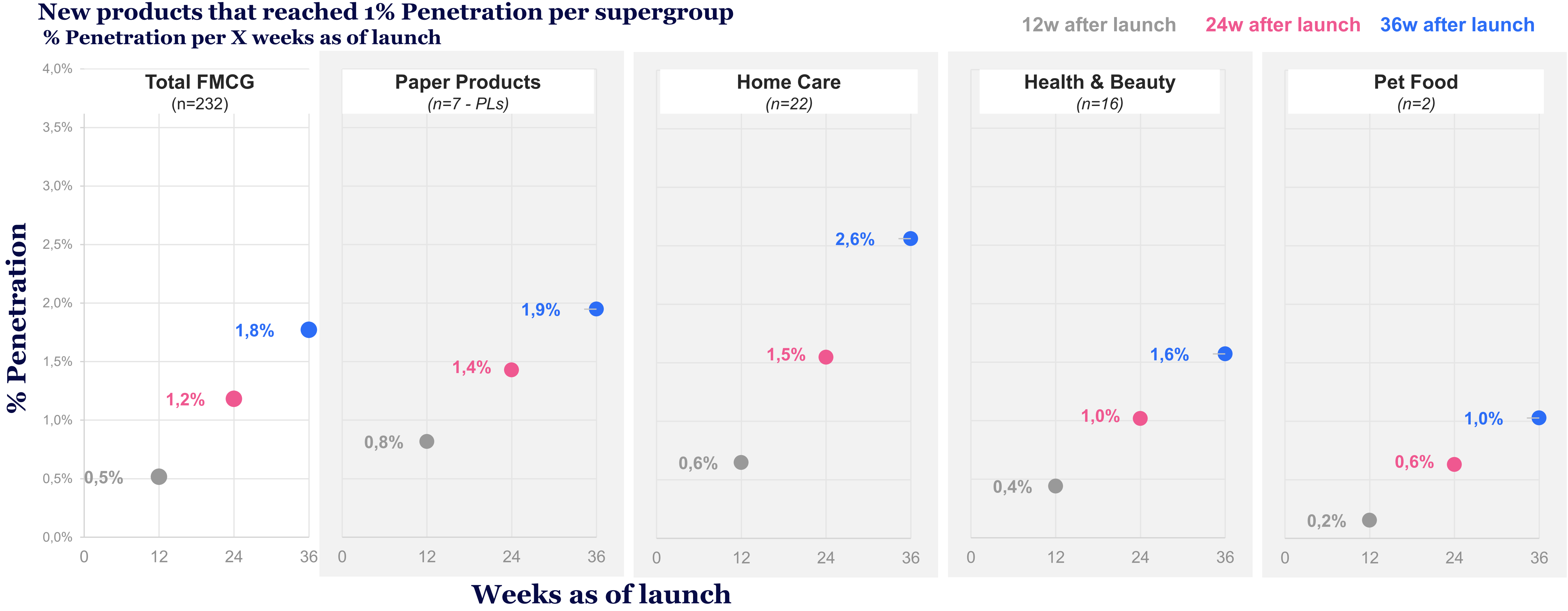
Non Food: penetration build-up as of launch

Paper products are the fastest to build trial in the first 3 months, though all products that reached 1% of households are PLs. Home Care launches that reached 1pt of penetration evolved more rapidly in the following months. Health & Beauty and Pet Food need more time to recruit buyers

New products that reached 1% Penetration per supergroup

% Penetration per X weeks as of launch



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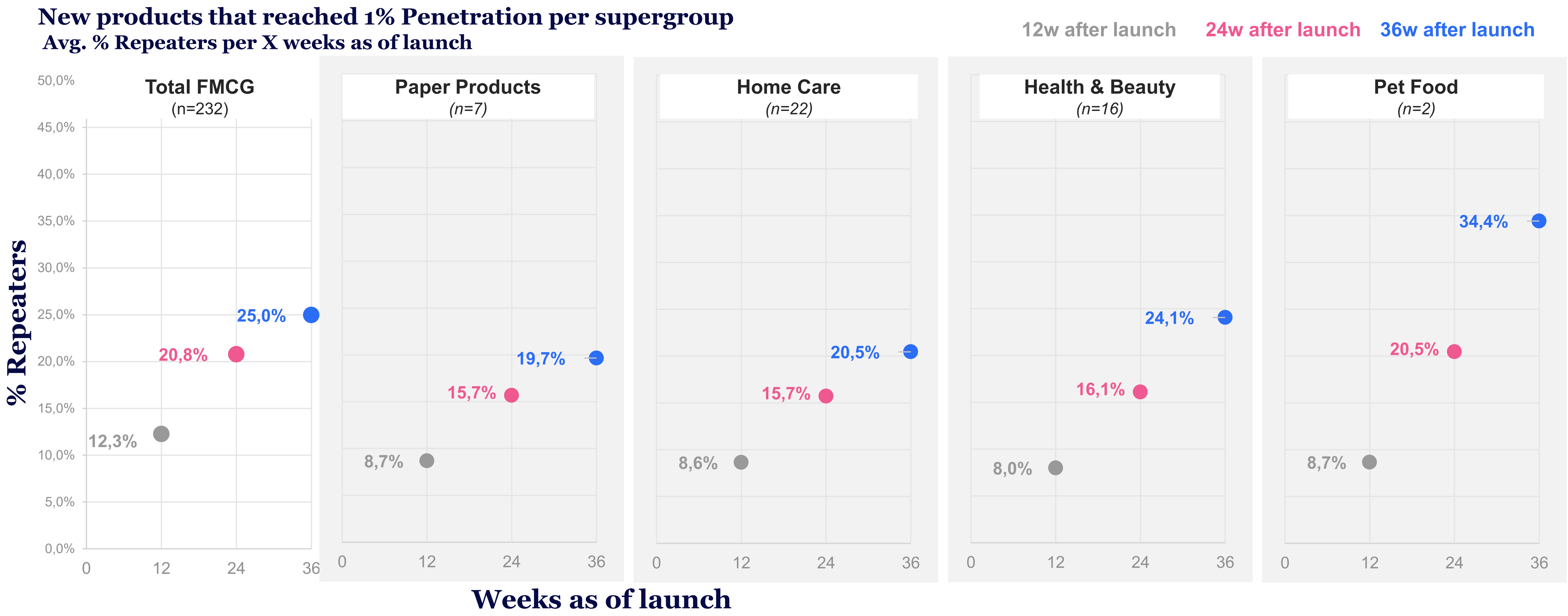
Non Food: repeat rate build-up as of launch

Despite the quick trial build-up, Paper products and Home Care struggle more to get repeaters in the first 9 months, given longer purchase cycles and potentially stockpiling. On the other hand, Pet Food manages to constantly get more and more repeaters



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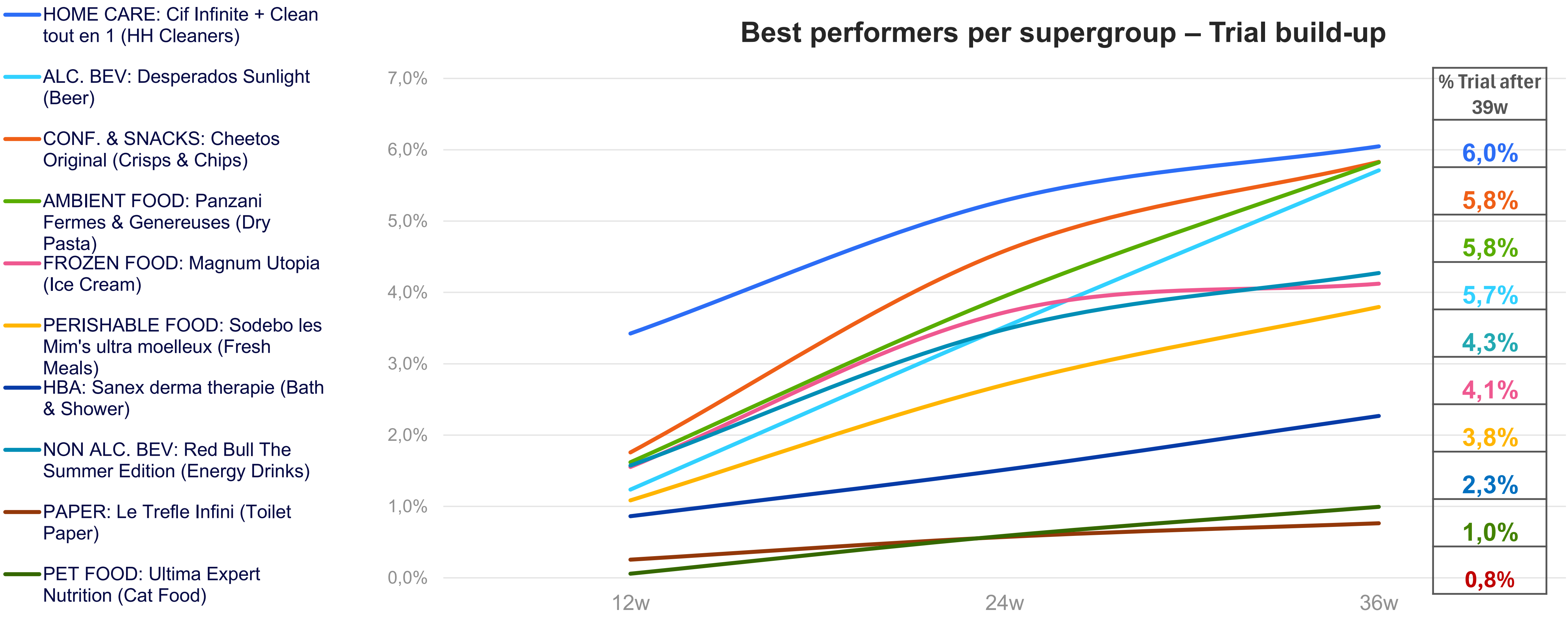
Top brand innovations* based on 39w as of launch – Trial build up

Cif Infinite+ and Desperados Sunlinght top the ranking, both representing categories with low number of innovations



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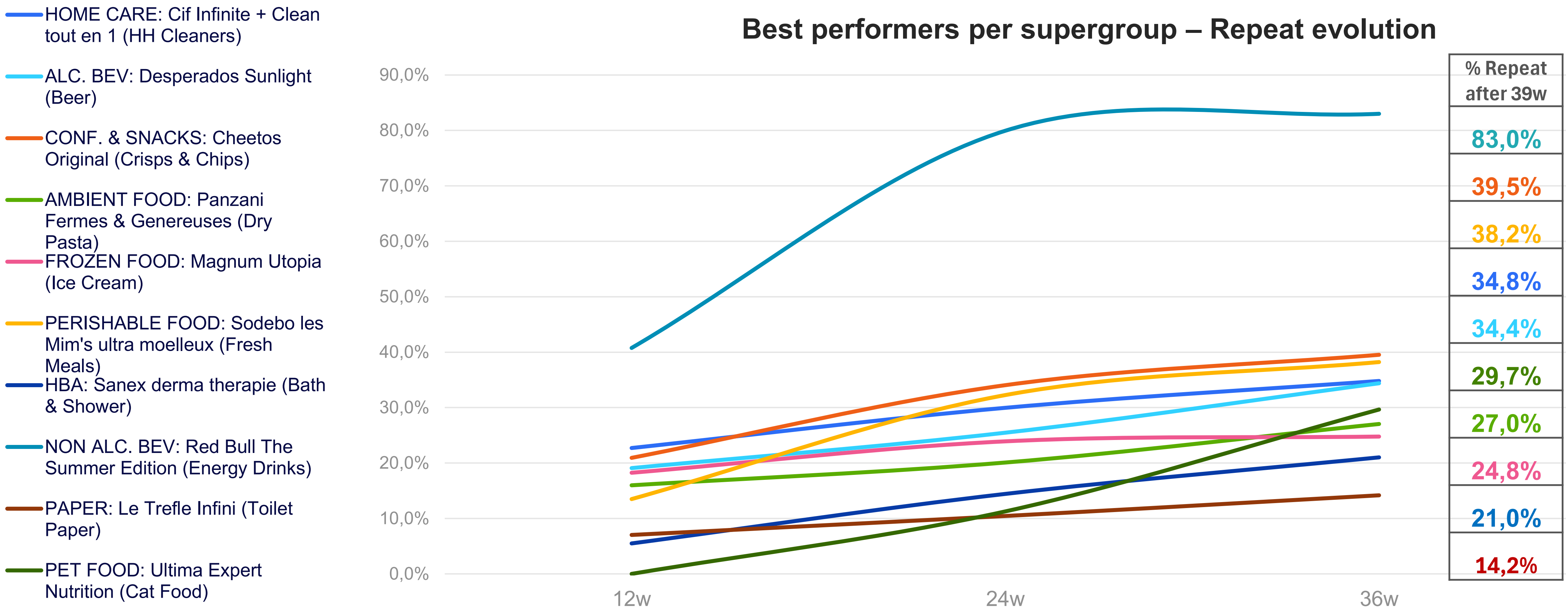
Top brand innovations* based on 39w as of launch – Repeat rate

Red Bull Summer Edition urges higher repeat, given the “limited time offer” nature of the launch.



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A focus on Germany

406 new launches - 61% Branded products

Germany launch reality checks

Part I: Consumer acceptance

Food dominates launches, but priorities differ by brand type.

Branded launches skewing toward Confectionery & Snacks and Personal Care, while Private Labels focus on routine Food. Both Branded and PL are equally active in Non-Alcoholic Beverages, making it a key battleground.

Germany shows stronger reach potential than other markets.

The average new launch reaches almost 1.5% of households in its first year, and more than half of launches cross the 1% penetration threshold. Home Care and Non-Alcoholic Beverages stand out with the highest share of launches achieving scale.

Trial and repeat outliers are concentrated in a small number of categories.

Among products that reached 1% of penetration, Non-Alcoholic Beverages, Perishable Food are the ones building both trial and repeat at a faster pace. Homecare best penetrated launches also manage to enter households fast, but repeat builds more slowly, given the lower purchase frequency nature of the category.

Stay tuned for our second series publication!
How do early trialists tend to evaluate a new product and what drives them to come back?

Although Food categories make the core of new launches, there is a different prioritization for Branded vs. Private Label products

Branded products focus more on confectionery & snacks and personal care categories, while PLs launch mainly in routine Food categories; still, they are both equally active in non alcoholic beverages

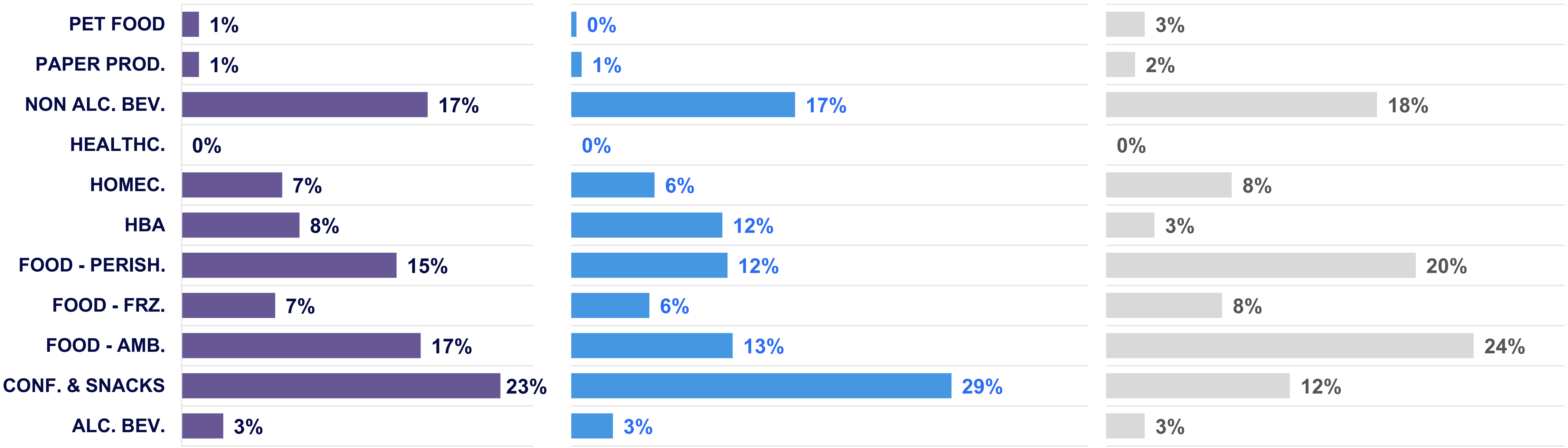
61% of total launches were Branded products

39% of total launches were Private Labels

How many new products were launched per supergroup?

Branded products: % of new launches per supergroup

PL products: % of new launches per supergroup



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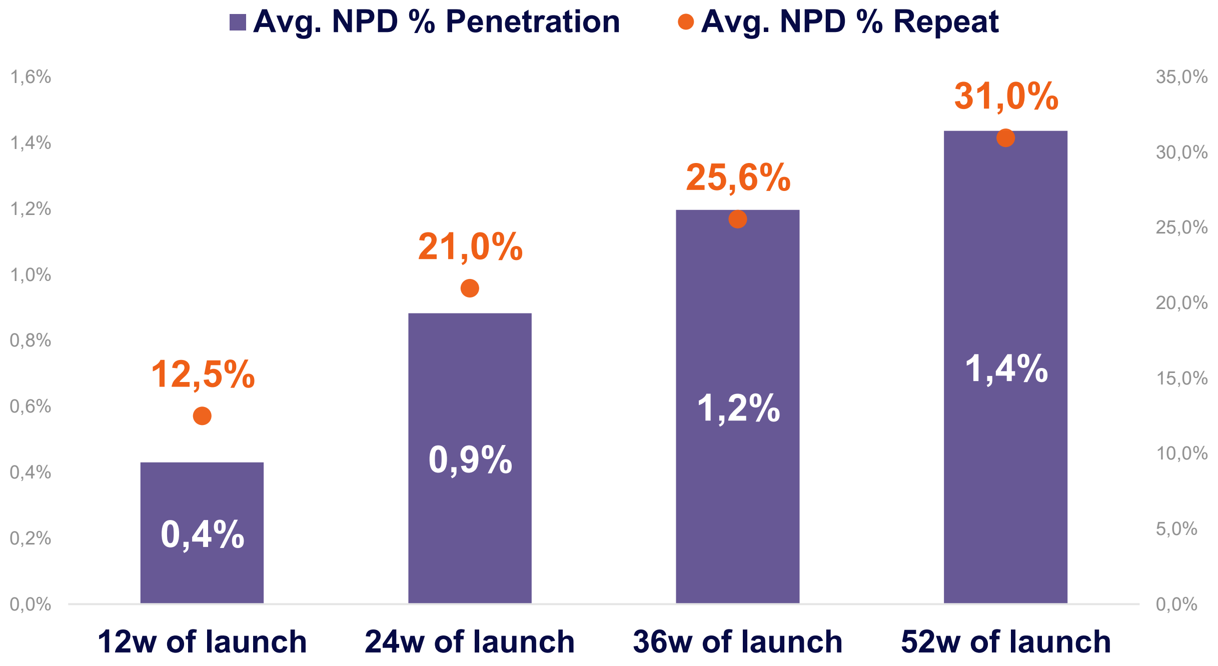
An average new launch reaches almost 1.5% of German households in its first year

... with less than a third of its trialists repeating at least once

How many trialists and repeaters does an average new launch* reach?



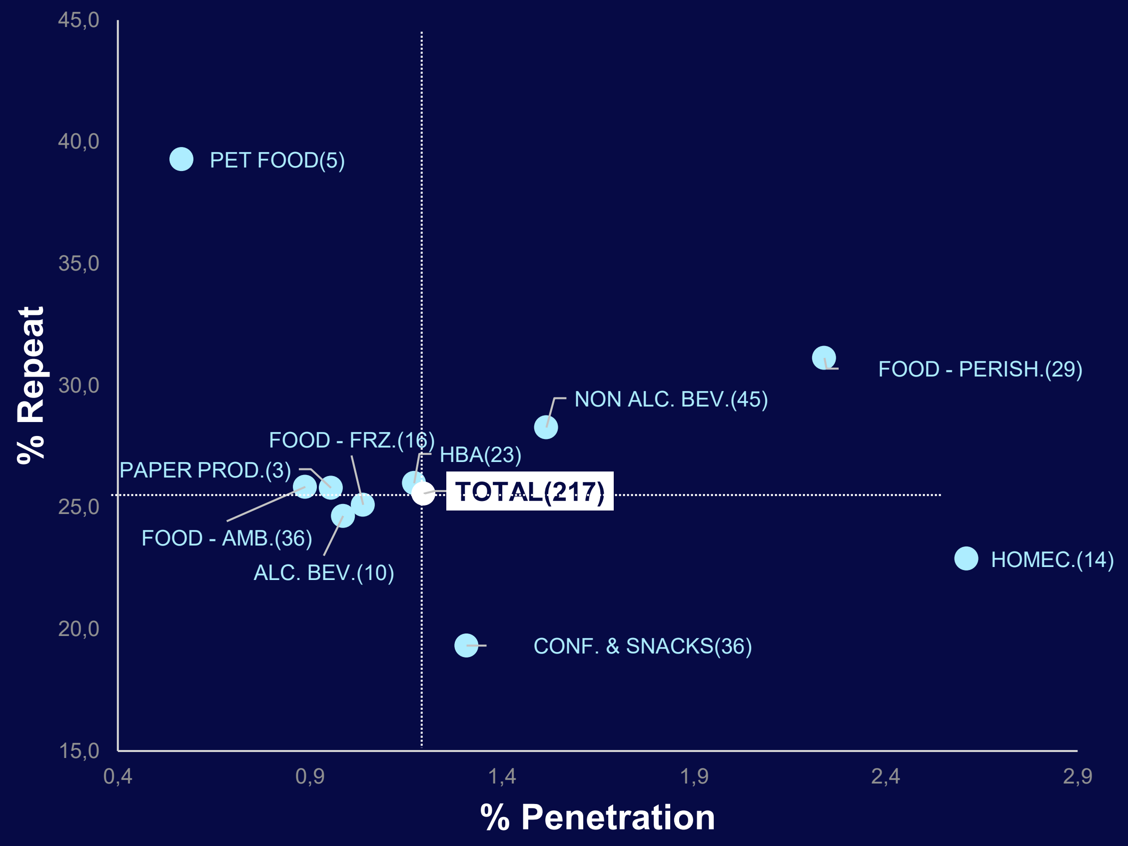
# of new products:

406	312	217	32

But only 4 category groups actually drive high trial in early launch stage

Non Alc. Bev and Perishable Food manage to drive both higher trial and repeat, given their high purchase frequency

View per supergroup – 36w of launch



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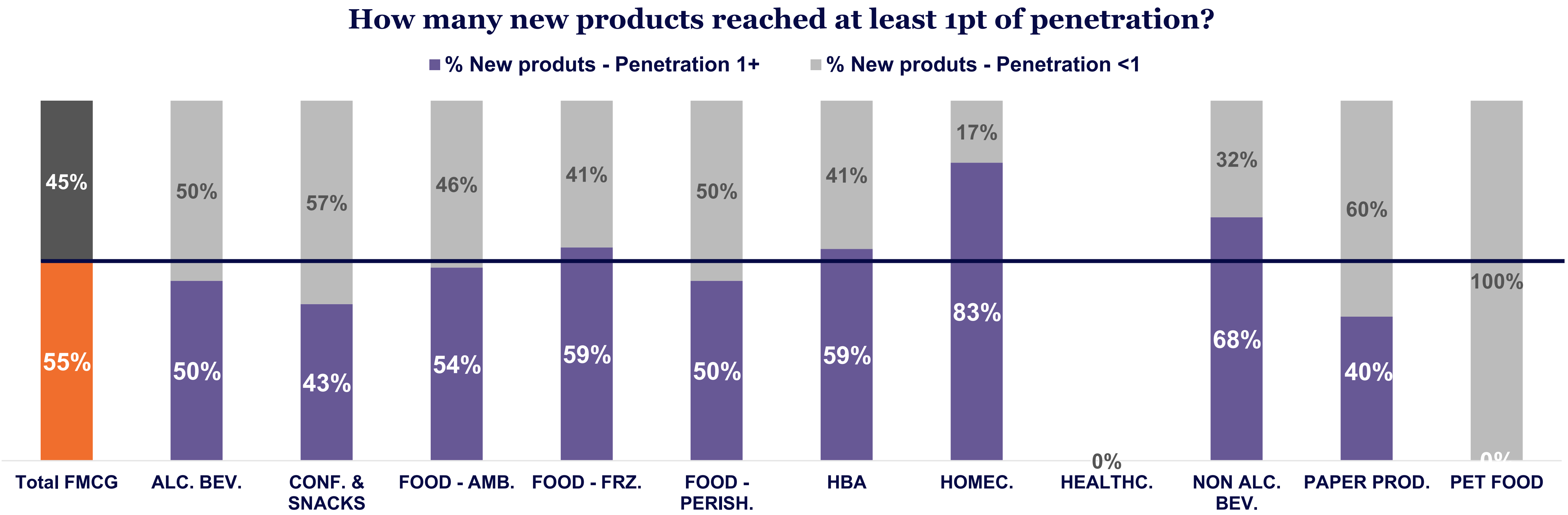
*Average new launch referring to median for each category (i.e. half of new launches exceed 25,6% repeat after 36w as of launch)

More than half of new launches managed to reach 1% of German households in 2025

Homecare and Non Alc. Beverages stand out, with a higher % of successful launches.



# of new products:

406	12	92	69	27	62	34	29	0	71	5	5

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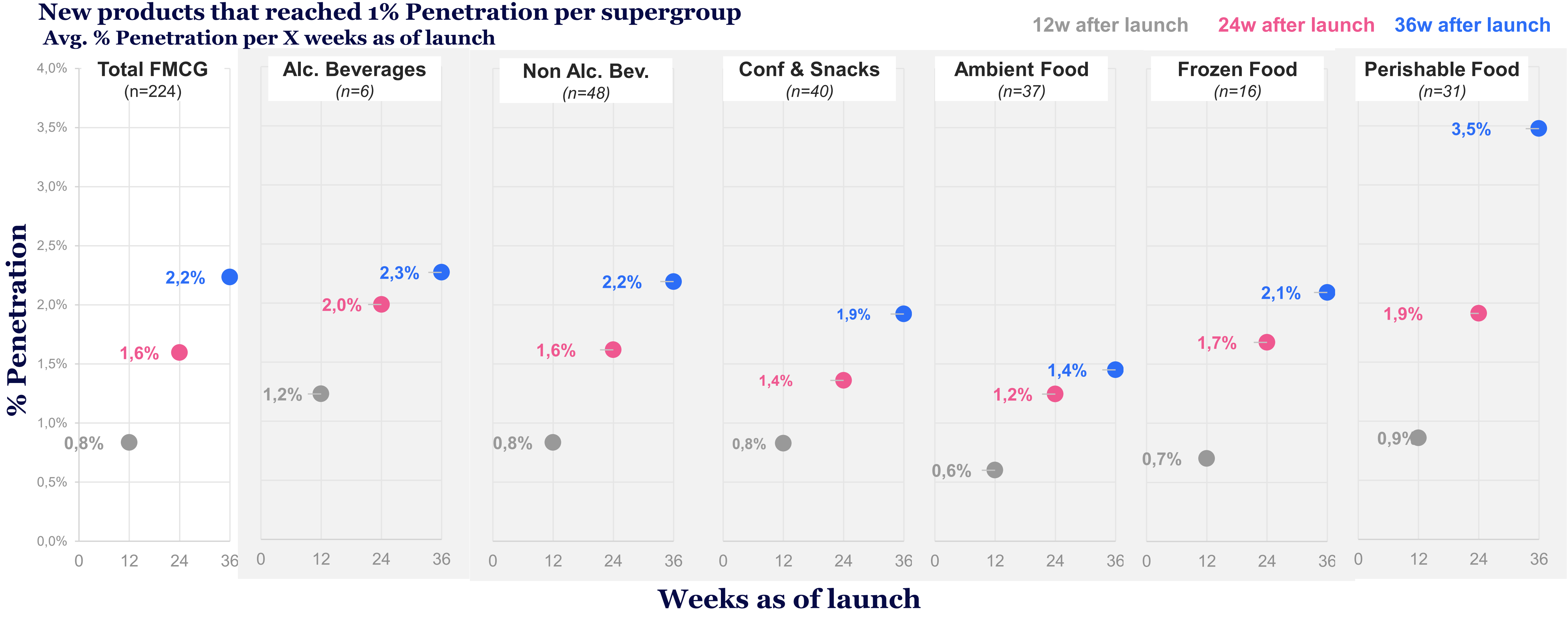
Food & Beverages: penetration build-up as of launch

Majority of new products that reach 1% of households, do it after about half a year as of launch. Non Alc Beverages and (notably) Perishable Food show higher acceleration of trial

New products that reached 1% Penetration per supergroup

Avg. % Penetration per X weeks as of launch



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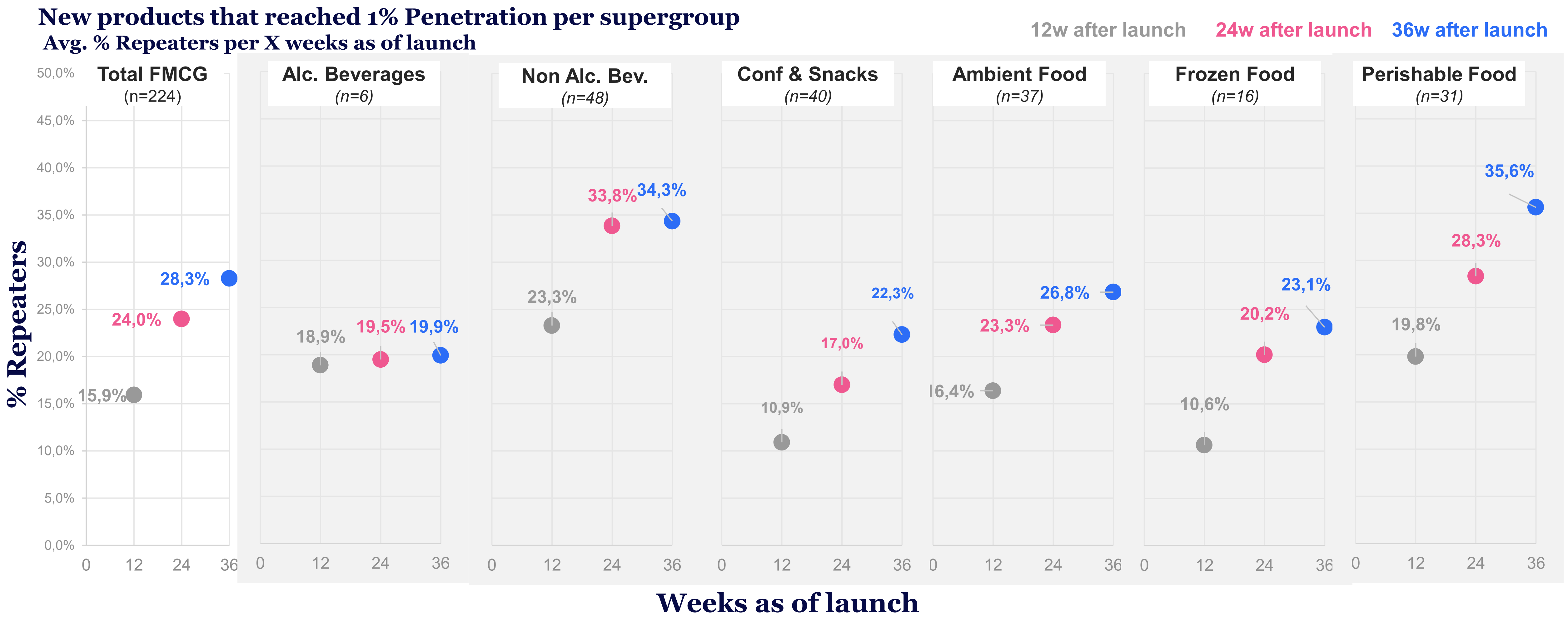
Food & Beverages: repeat rate build-up as of launch

Perishable Food also captures higher rates of repurchase compared to FMCG average. Non Alc. Beverages, that perform at par with FMCG in terms of trial, also capture high levels of repeat, but reaching their saturation point after 6 months.



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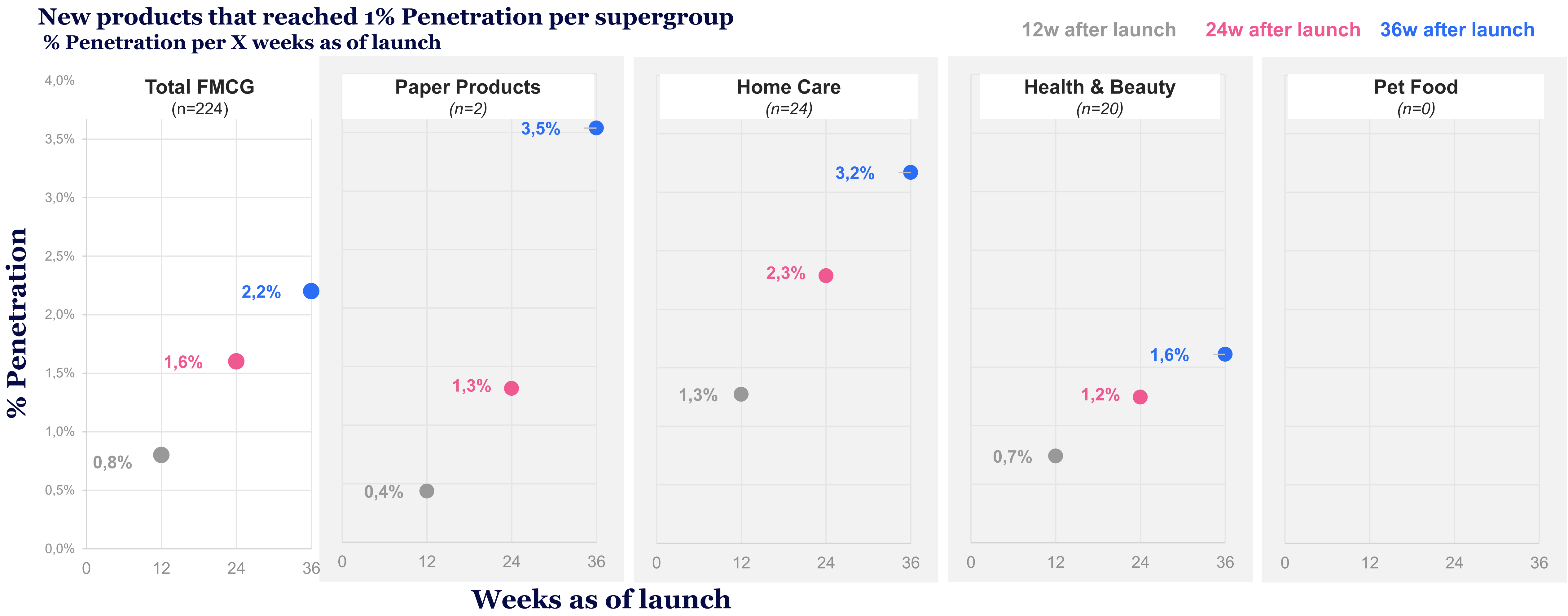
Non Food: penetration build-up as of launch

Home Care products that reached 1% of households did this within the first 3 months of launch and continued to grow even beyond 3%



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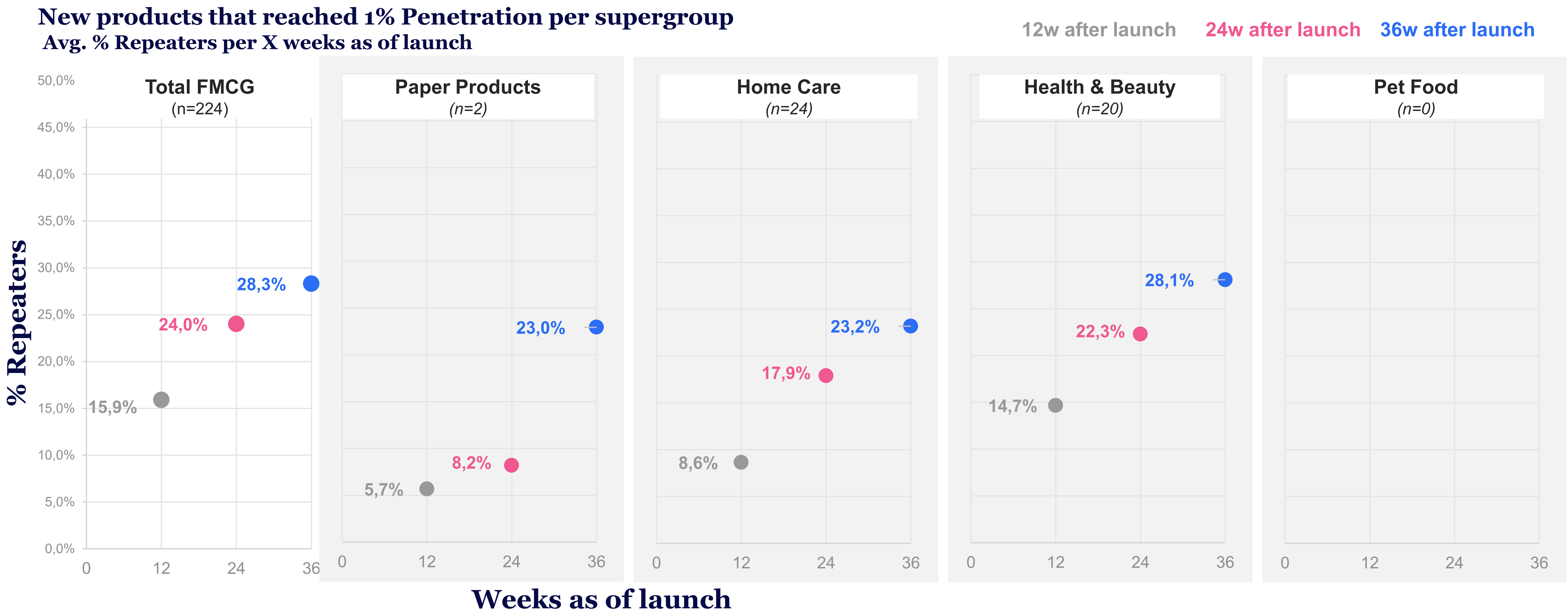
Non Food: repeat rate build-up as of launch

However, repeat rate for this category builds up at a slower pace



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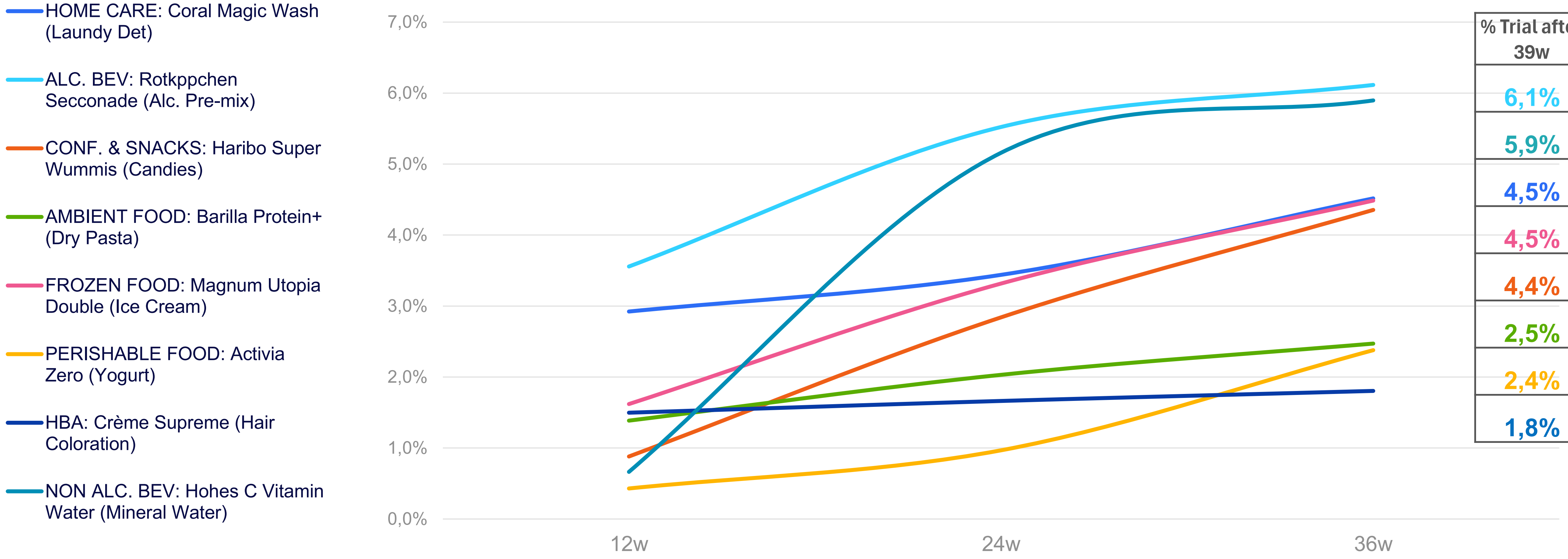
Top brand innovations* based on 39w as of launch – Trial build up

Beverages top the rank among best performers, with launches both in the Alcoholic and Non-Alcholic sectors that are addressing healthier lifestyle (low-alcohol and functional benefits)

Best performers per supergroup – Trial build-up



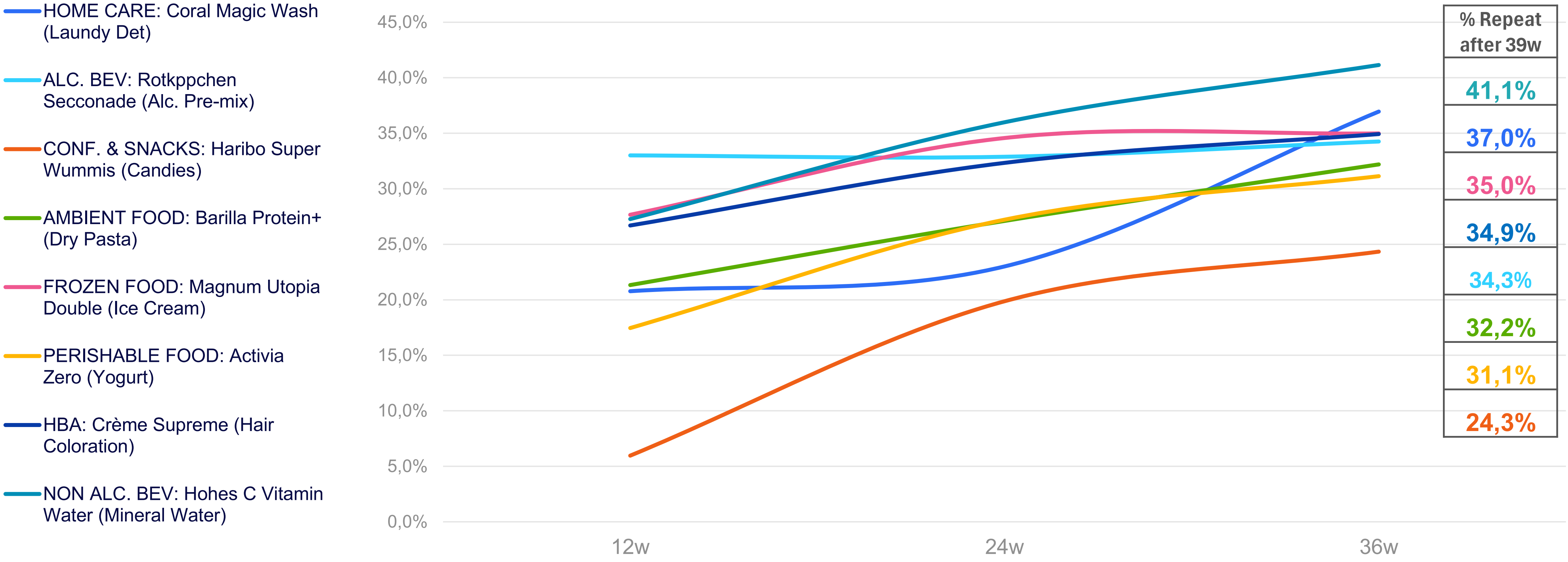
% Trial after 39w
6,1%
5,9%
4,5%
4,5%
4,4%
2,5%
2,4%
1,8%

Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025
*Best performers are defined based on trial & repeat after 36w of launch against total avg. branded new launches

Top brand innovations* based on 39w as of launch – Repeat rate

Hohes C Vitamin Water stands out among success stories, as it manages to also retain the greatest part of its trialists. .

Best performers per supergroup – Repeat evolution



% Repeat after 39w
41,1%
37,0%
35,0%
34,9%
34,3%
32,2%
31,1%
24,3%

Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025
*Best performers are defined based on trial & repeat after 36w of launch against total avg. branded new launches

A focus on Italy

280 new launches - 72% Branded products

Italy launch reality checks

Part I: Consumer acceptance

Food dominates launches but focus swifts by brand type.

Food categories remain the core of innovation in Italy, although Branded Products show also a focus on Health & Beauty.

Reaching scale is achievable, but uneven across categories

The average new launch reaches slightly above 1% household penetration in its first year, with ~30% of trialists repeating at least once. Nearly half of new launches reach 1% penetration, with Home Care standing out as the category with the highest share of launches surpassing this threshold.

A small number of categories drive both trial and repeat.

Among products that reached 1% of penetration, Ambient Food, Perishable Food and Home Care are the ones building trial and a faster pace. However, for Ambient Food and Home Care, repeat is more challenging, giving also longer products' life cycle. Non-Alcoholic beverages, show a steady penetration evolution, paired with high rates of repeat

Stay tuned for our second series publication!
How do early trialists tend to evaluate a new product and what drives them to come back?

Despite dominance of Food launches, Branded products also have a high focus on Health & Beauty new launches

Routine Food categories (Perishable and Ambient) are the core of PL launches

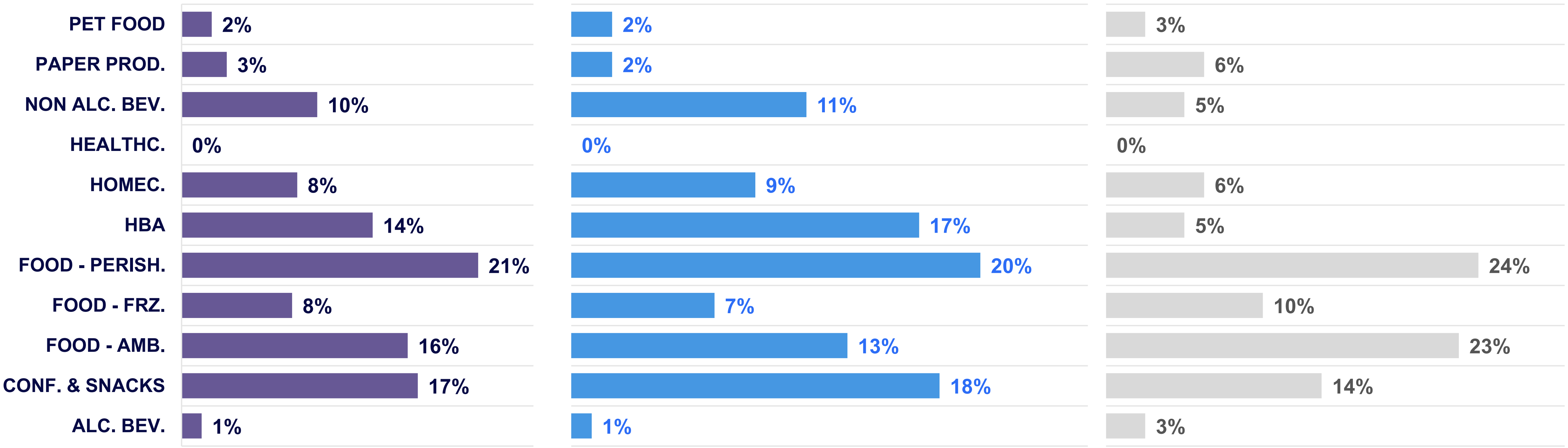
72% of total launches were Branded products

28% of total launches were Private Labels

How many new products were launched per supergroup?

Branded products: % of new launches per supergroup

PL products: % of new launches per supergroup

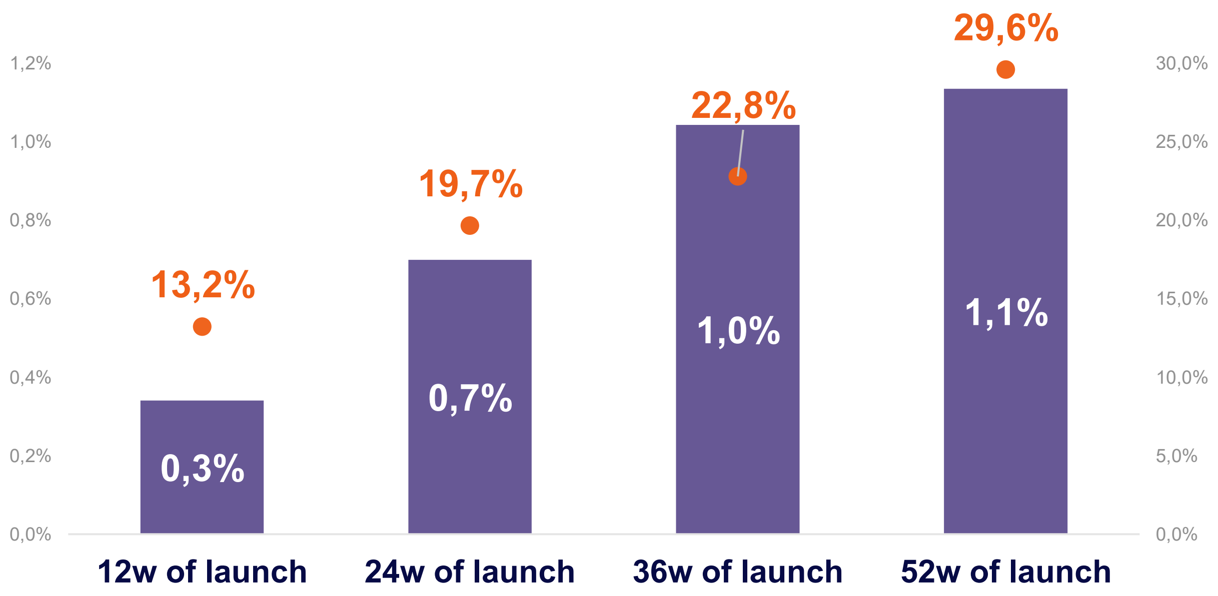


Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

An average new launch reaches a bit more than 1% of Italian households in first year

... with ~30% of its trialists repeating at least once

How many trialists and repeaters does an average new launch* reach?



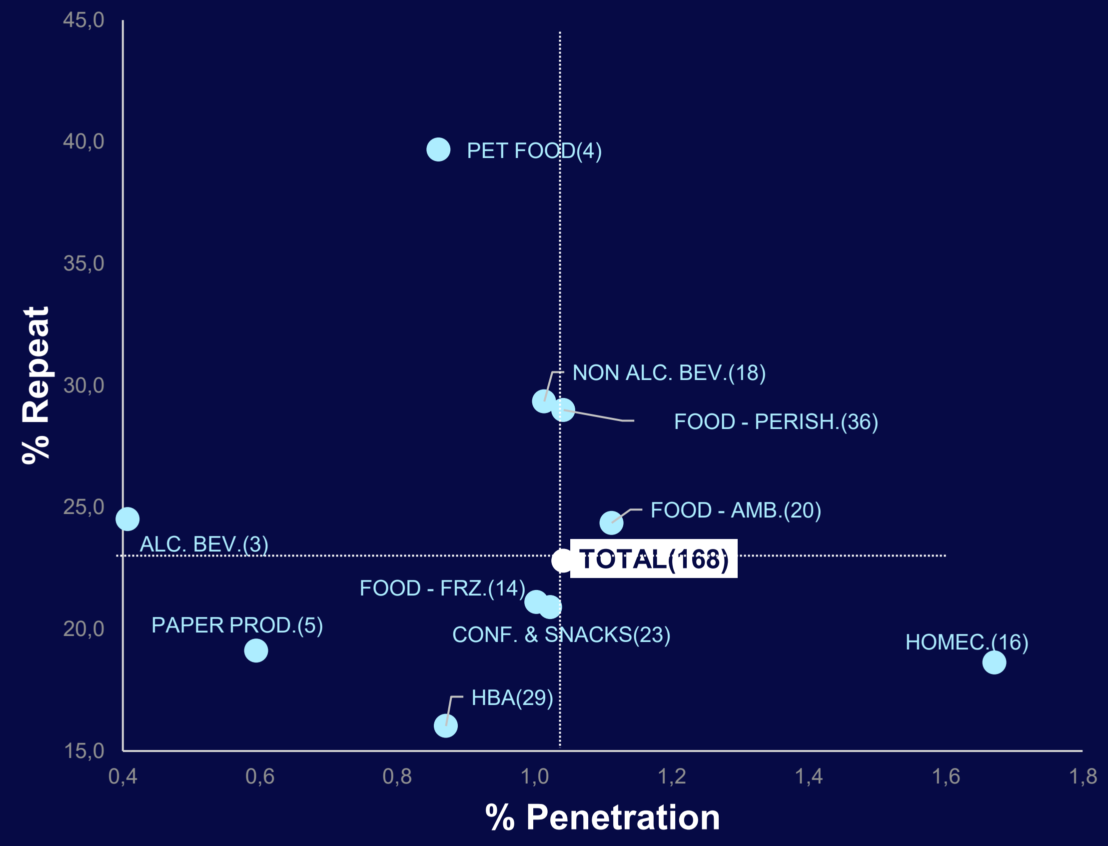
# of new products:

280	223	168	21

But only 2 category groups actually drive high trial in early launch stage

Non Alc. Bev and Perishable Food manage to drive average trial but higher repeat, given their high purchase frequency

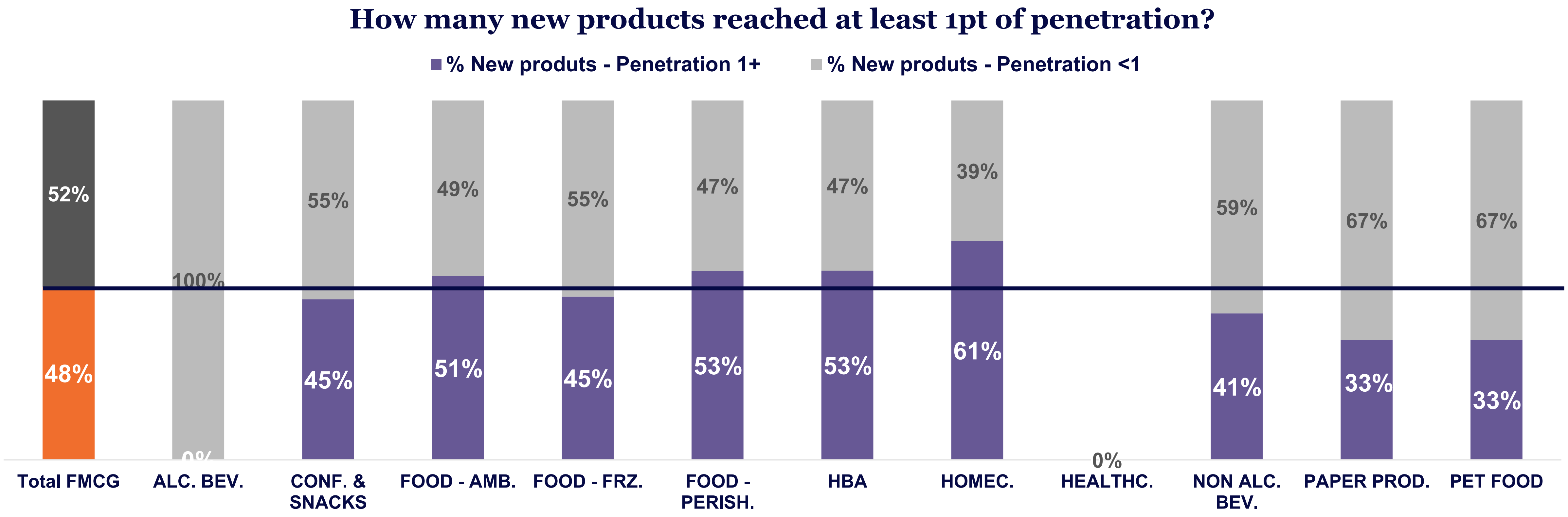
View per supergroup – 36w of launch



Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025
*Average new launch referring to median for each category (i.e. half of new launches exceed 22,8% repeat after 36w as of launch)

48% of new launches managed to reach 1% of Italian households in 2025

Homecare launches stand out, with a higher % of them reaching more than 1pt of penetration



# of new products:

280	4	47	45	22	59	38	23	0	27	9	6

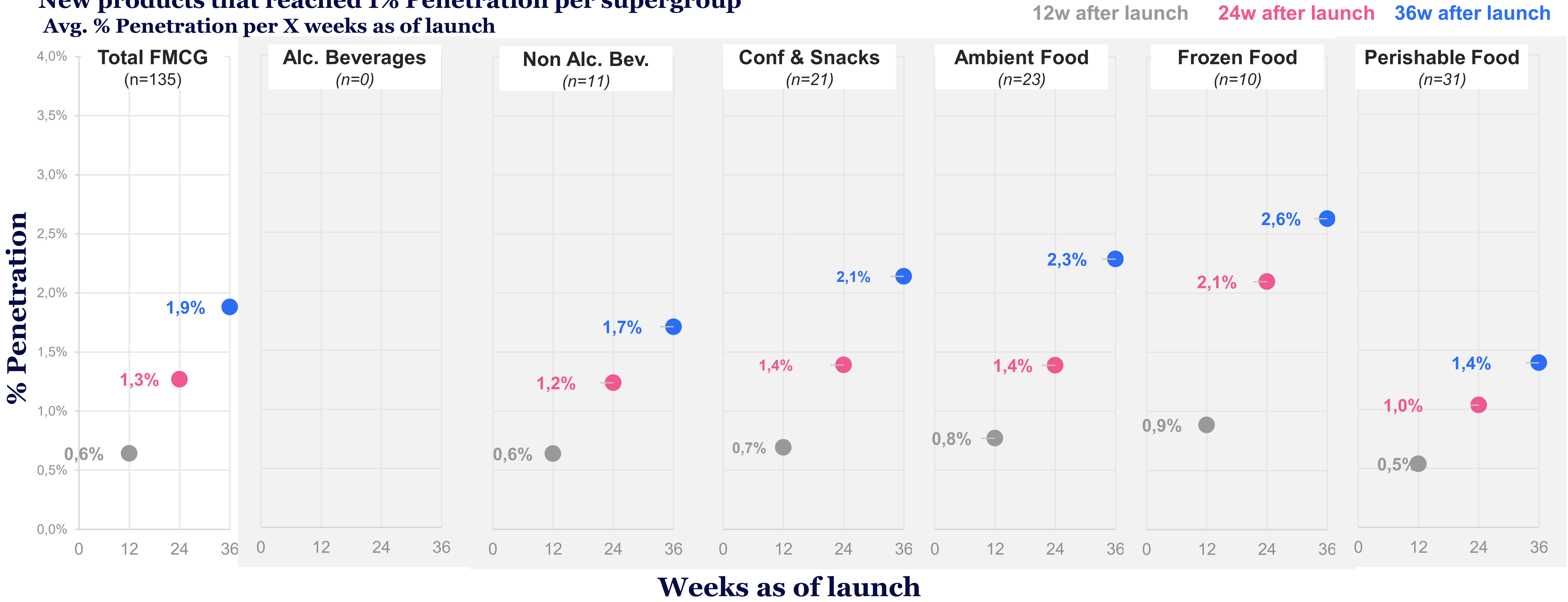
Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

Food & Beverages: penetration build-up as of launch

Majority of new products that reach 1% of households, do it after about half a year as of launch. Ambient and Perishable Food show higher acceleration of trial

New products that reached 1% Penetration per supergroup

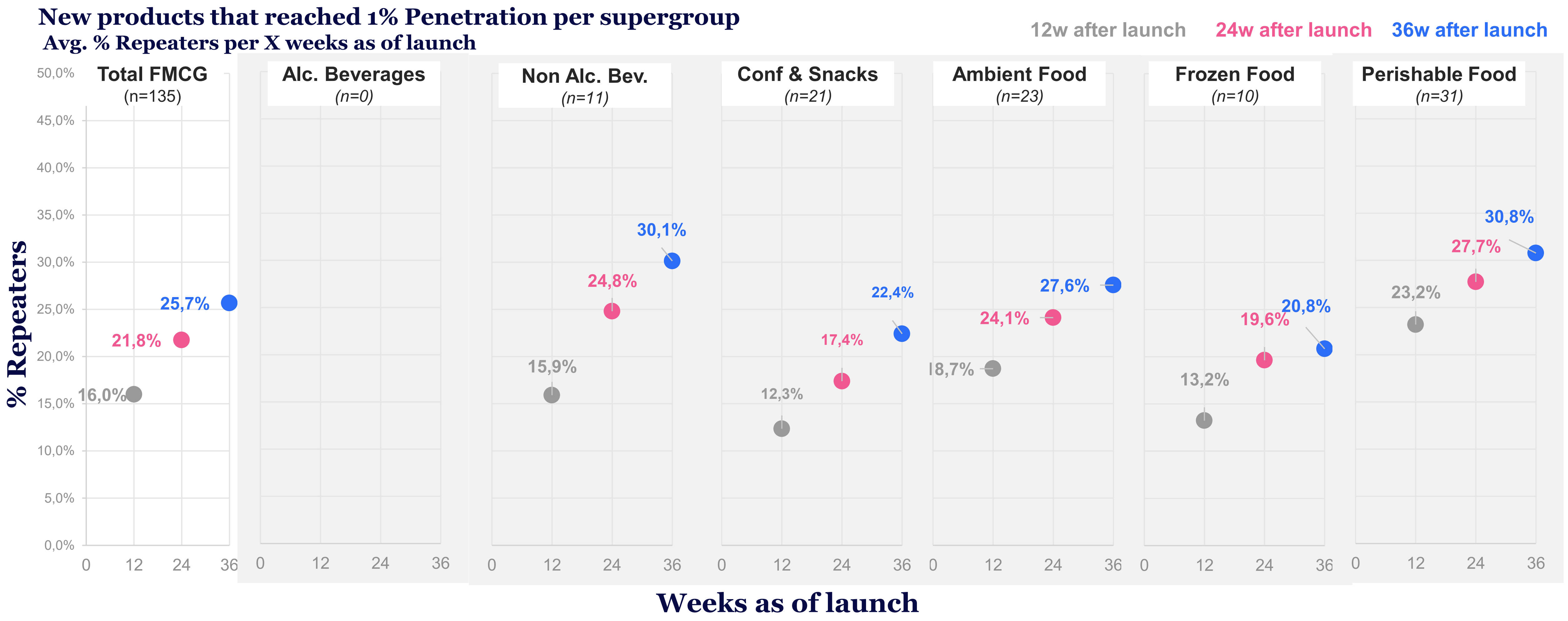
Avg. % Penetration per X weeks as of launch



Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

Food & Beverages: repeat rate build-up as of launch

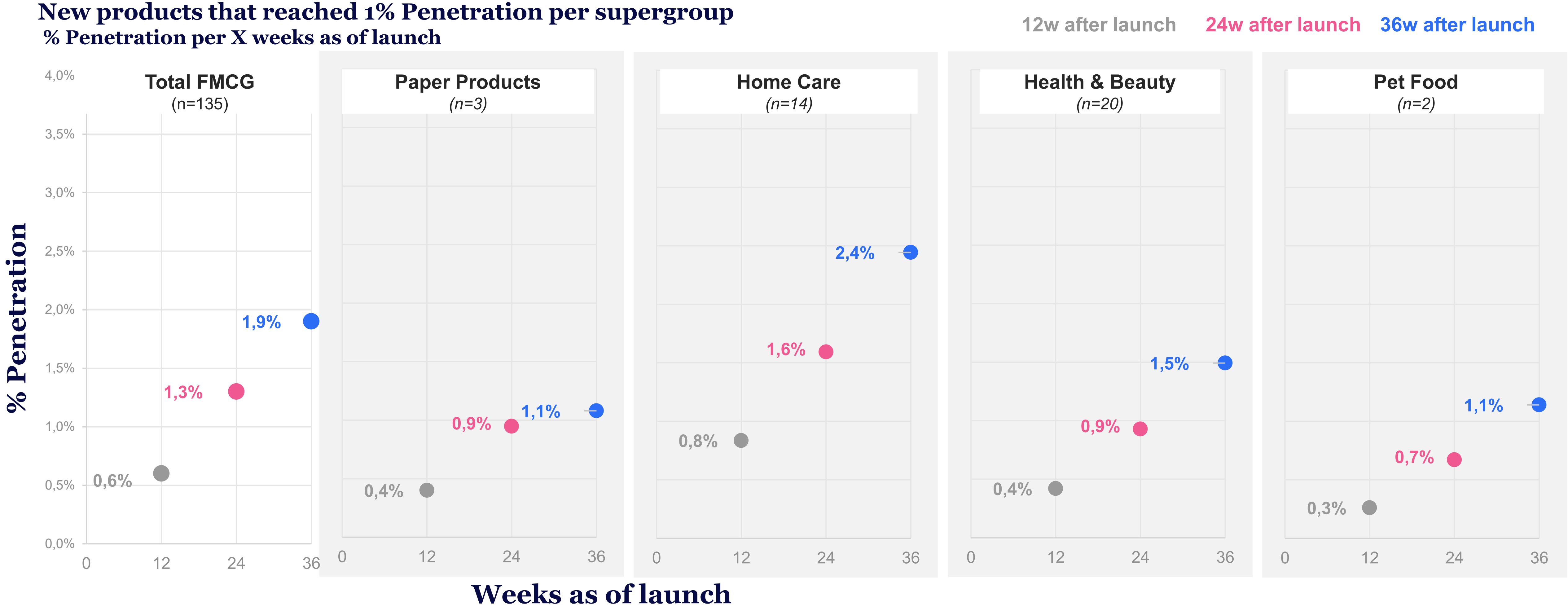
Perishable Food also captures higher rates of repurchase compared to FMCG average. Non Alc. Beverages, that perform slightly lower than FMCG average in terms of trial, also capture high levels of repeat.



Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

Non Food: penetration build-up as of launch

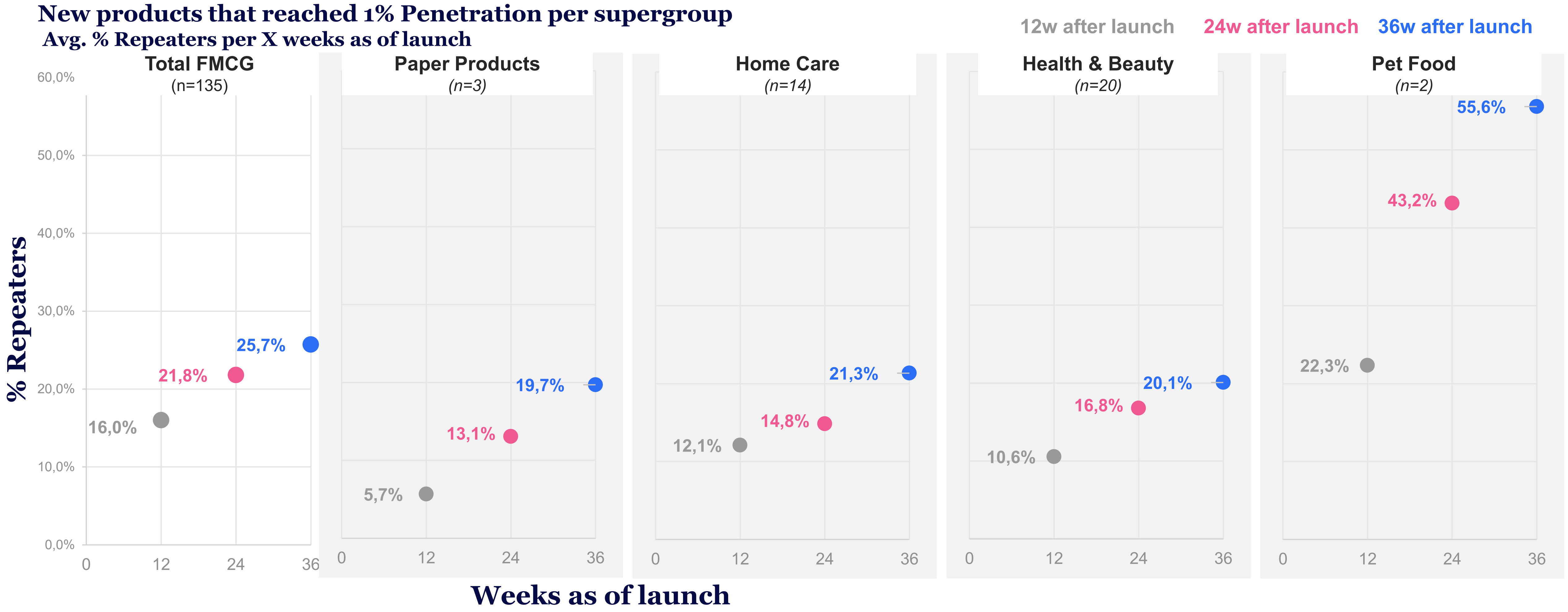
Home Care products stand out for building higher trial, without losing momentum



Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

Non Food: repeat rate build-up as of launch

However, repeat rate for this category builds up at a slower pace

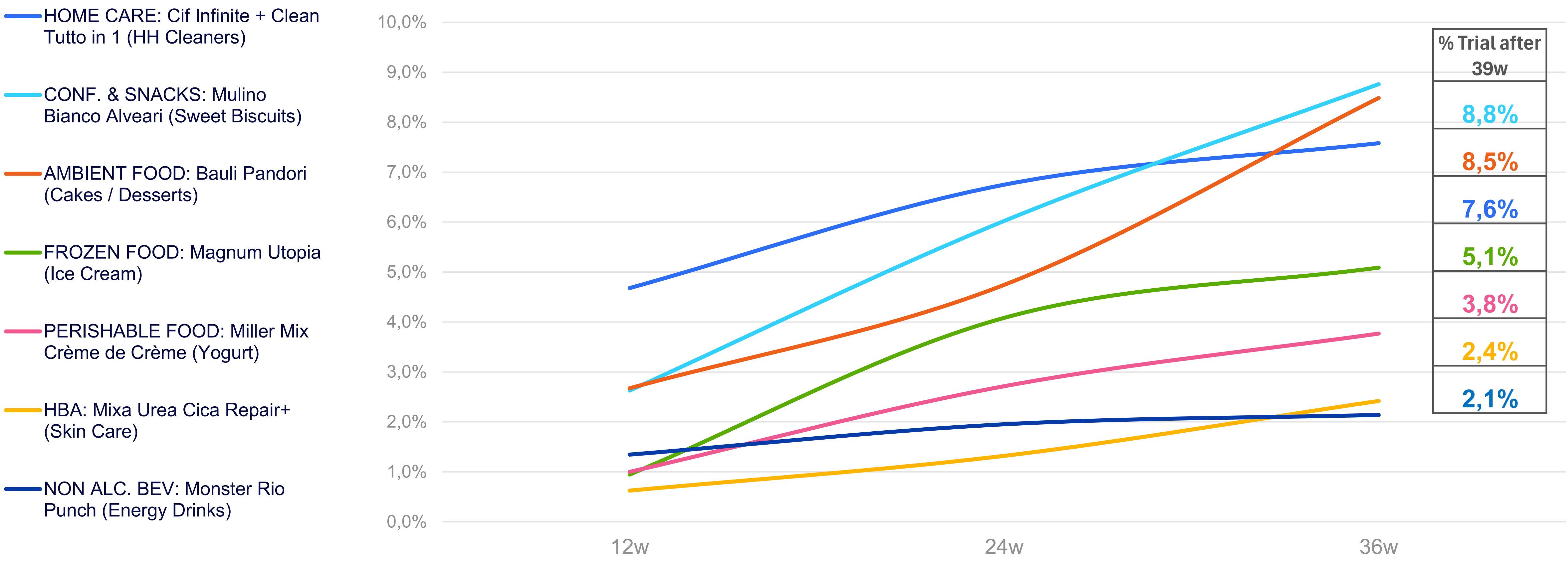


Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

Top brand innovations* based on 39w as of launch – Trial build up

Mulino Biaco Alveari and Bauli Pandor top the rank in terms of new products reaching highest trial after 36w, both demonstrating locality and indulgence. Cif Infinite+ ranks 3rd, performing better than other Food & Beverages launches

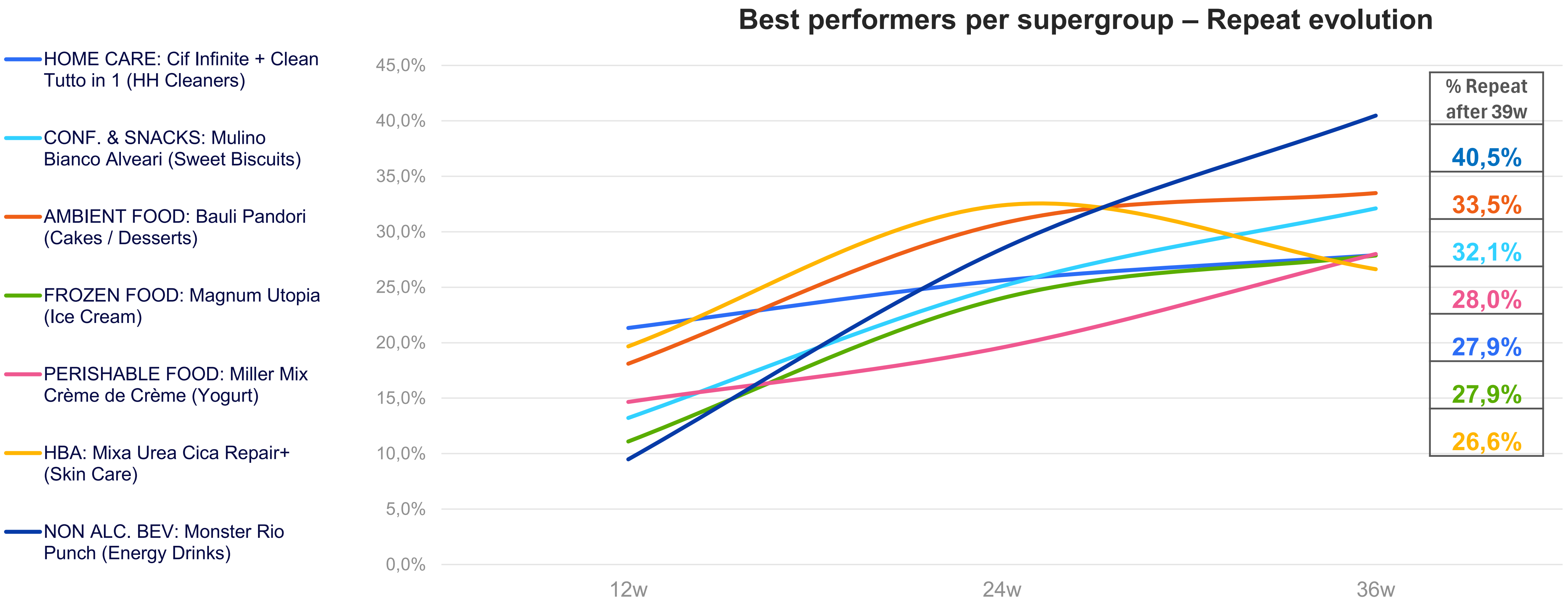
Best performers per supergroup – Trial build-up



Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025
*Best performers are defined based on trial & repeat after 36w of launch against total avg. branded new launches

Top brand innovations* based on 39w as of launch – Repeat rate

Mulino Biaco Alveari and Bauli Pandor are also among the top 3 innovations in terms of getting trialists to repeat, though Monster Rio Punch tops the rank; despite its slower penetration built-up compared to rest top innovations, highest repeat indicates also higher level of satisfaction



Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025
*Best performers are defined based on trial & repeat after 36w of launch against total avg. branded new launches

A focus on Spain

150 new launches - 49% Branded products

Spain launch reality checks

Part I: Consumer acceptance

Balanced activation, with clear category winners.

Branded and PL launches are broadly active across categories, with Branded skewing slightly toward Home Care and Confectionery & Snacks, and PL more active in Health & Beauty.
Home Care and Conf & Snacks, both brand-led, stand out for delivering higher early trial.

Spain shows the strongest ability to scale

The average new launch reaches ~1.5% household penetration in its first year, with almost 35% of trialists repeating. Two-thirds of new launches reach 1% penetration, with Confectionery & Snacks clearly outperforming (19 out of 24 launches reaching ≥1%).

Fast trial and strong repeat reinforce each other.

Confectionery & Snacks is the only category over-performing on both trial and repeat, while Beverages peak in penetration within the first 6 months and rely more on loyalty. In Non-Food, Home Care builds penetration extremely fast—reaching 1% within 3 months and ~4% within 9 months—while also retaining more than 37% of trialists.

Stay tuned for our second series publication!
How do early trialists tend to evaluate a new product and what drives them to come back?

Branded and PL launches are activating almost similarly across categories, with few exceptions

Branded products are more active in Homecare and Conf & Snacks, while PLs in Health and Beauty

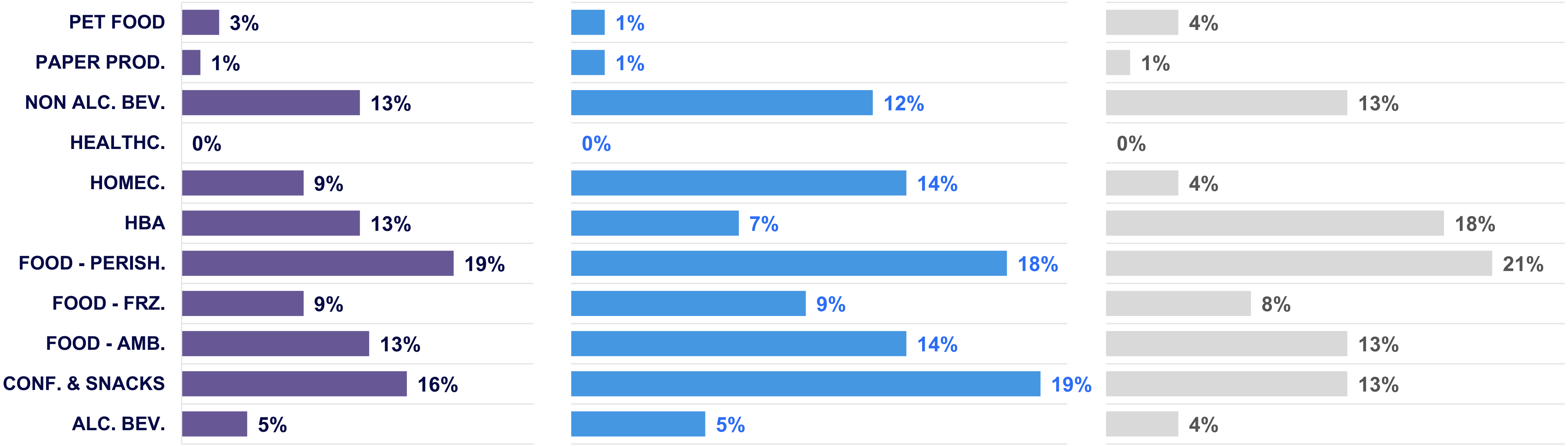
49% of total launches were Branded products

51% of total launches were Private Labels

How many new products were launched per supergroup?

Branded products: % of new launches per supergroup

PL products: % of new launches per supergroup



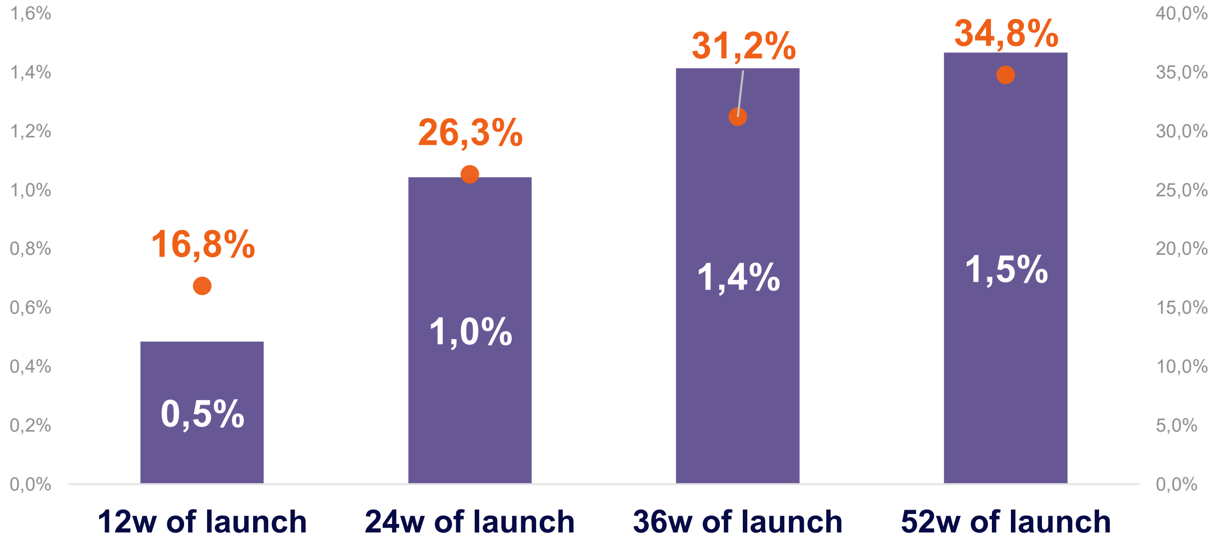
Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

An average new launch reaches 1.5% of Spanish households in its first year

... with almost 35% of its trialists repeating at least once

How many trialists and repeaters does an average new launch* reach?

■ Avg. NPD % Penetration ● Avg. NPD % Repeat



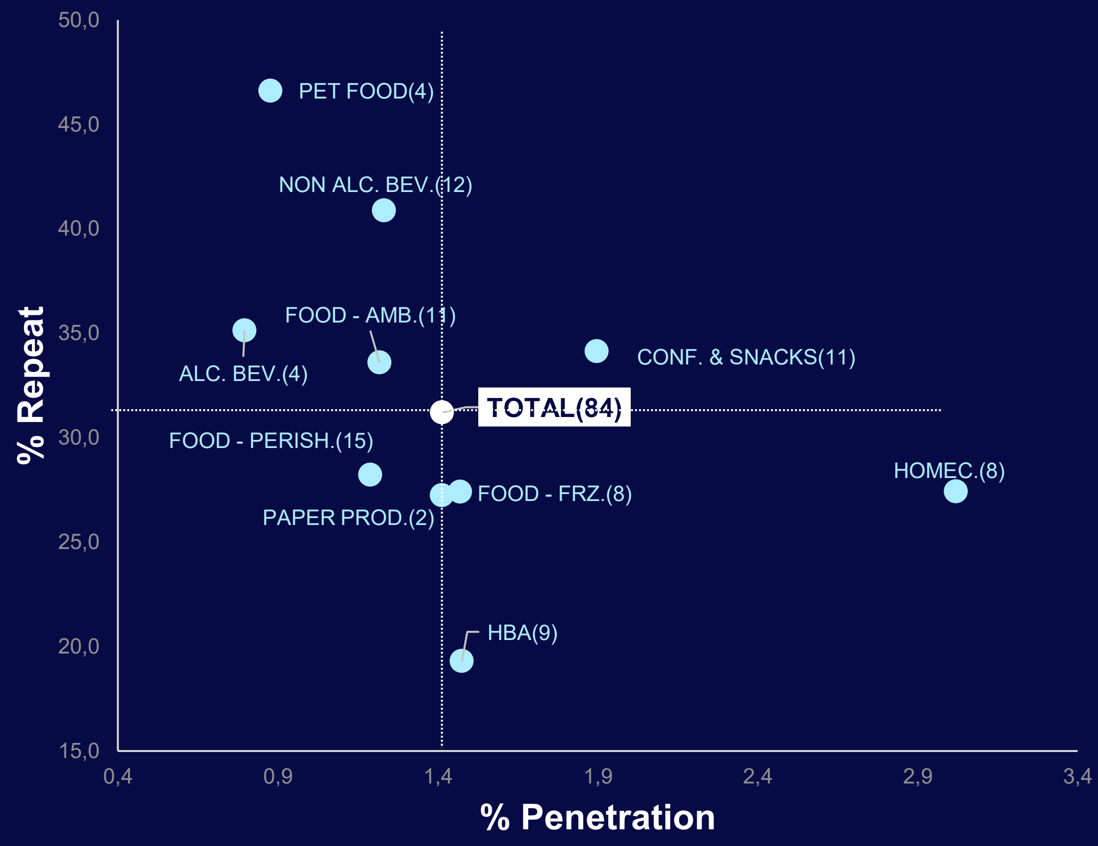
# of new products:

150	112	84	10

Homecare and Conf & Snacks, both dominated by brands reach higher trial

Conf & Snacks is the only category over-performing both in trial and in repeat rate

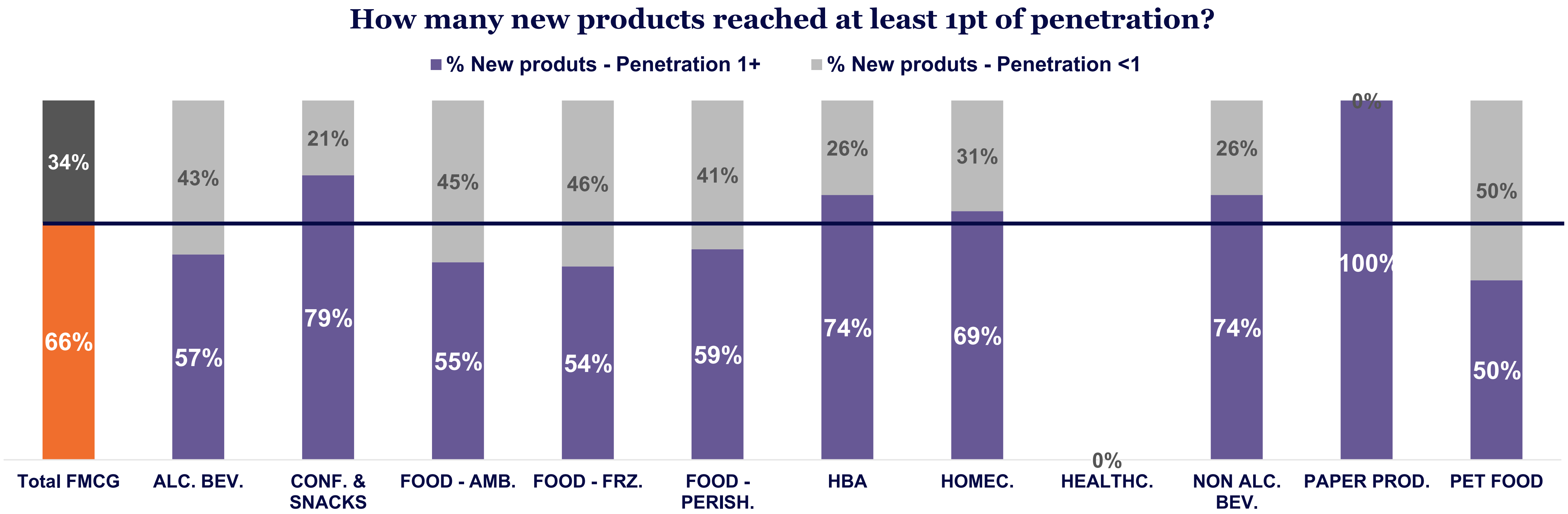
View per supergroup – 36w of launch



Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025
*Average new launch referring to median for each category (i.e. half of new launches exceed 31.2% repeat after 36w as of launch)

Two thirds of new launches managed to reach 1% of Spanish households in 2025

Confectionery and Snacks stand out: 19 out of 24 new products reaching at least 1pt of penetration



# of new products:

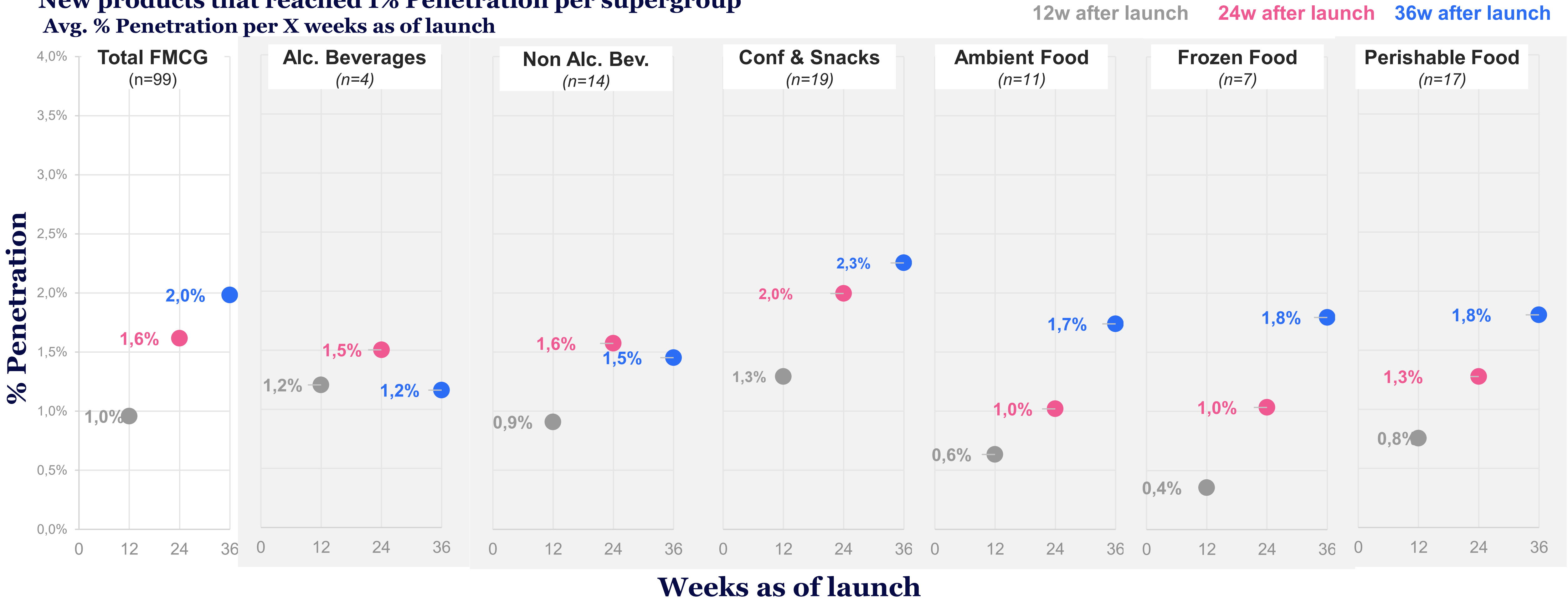
150	7	24	20	13	29	19	13	0	19	2	4

Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

Food & Beverages: penetration build-up as of launch

Beverages reach their penetration peak in their first 6 months of launch. While Conf & Snacks reach higher trial quicker, Food products grow at a higher pace in their second semester of launch.

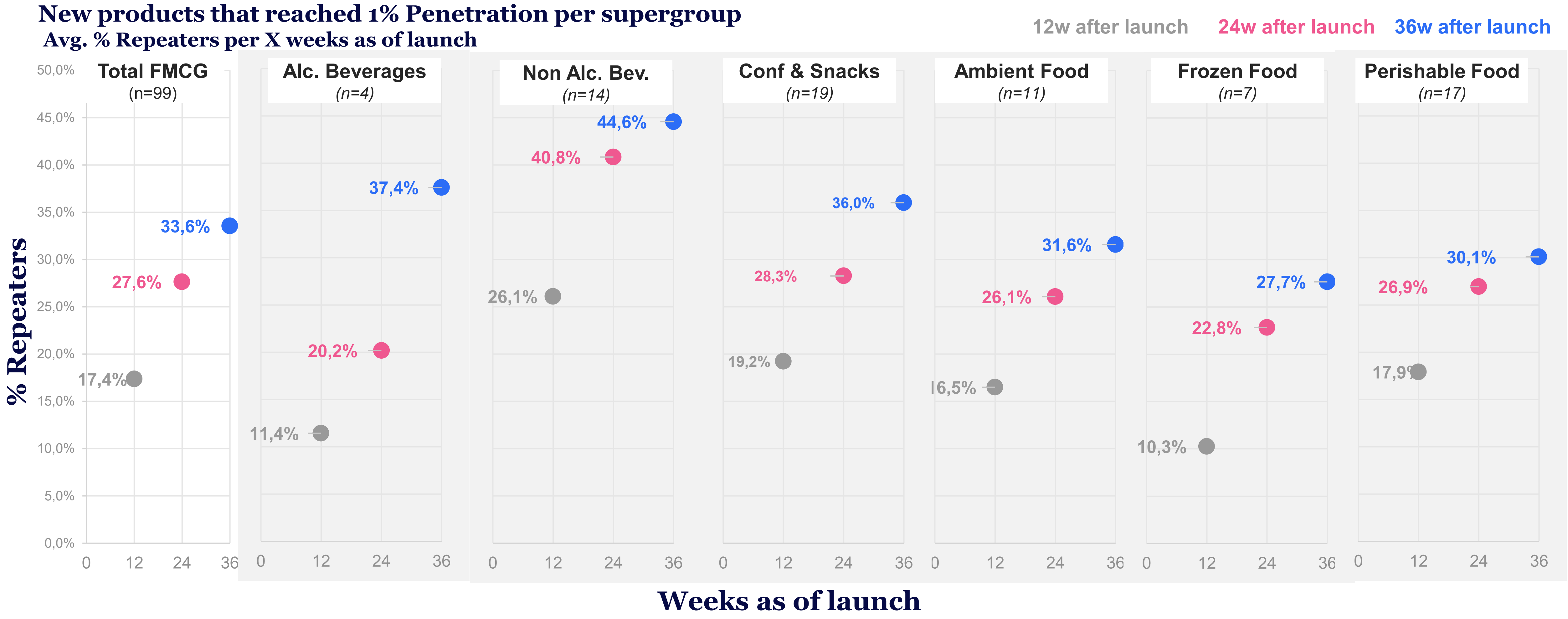
New products that reached 1% Penetration per supergroup
Avg. % Penetration per X weeks as of launch



Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

Food & Beverages: repeat rate build-up as of launch

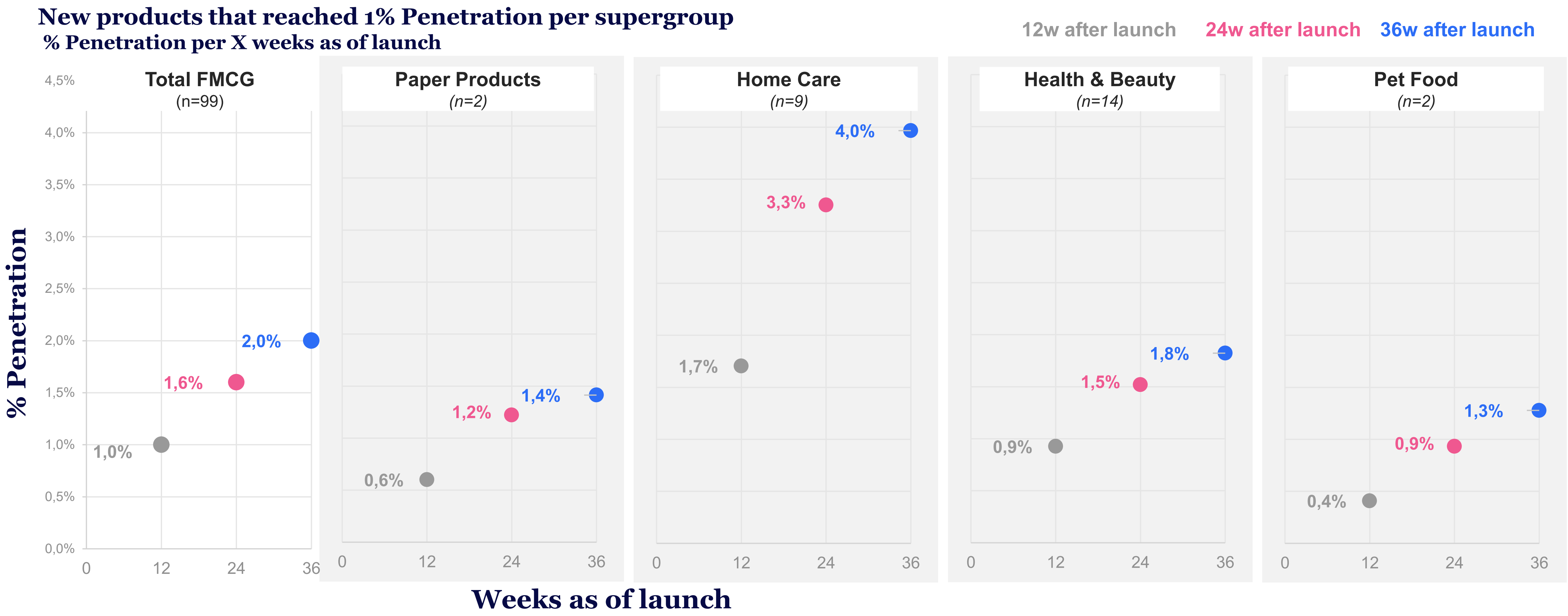
Beverages' categories, although build might struggle more to build trial quickly, they do better in retaining their trialists and getting them back to purchase. The same is true for Confectionery & Snacks which build quick trial and repeat rate.



Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

Non Food: penetration build-up as of launch

Home Care products that reached 1% of households did this within the first 3 months of launch and continued to grow, reaching 4% in their first 9 months.

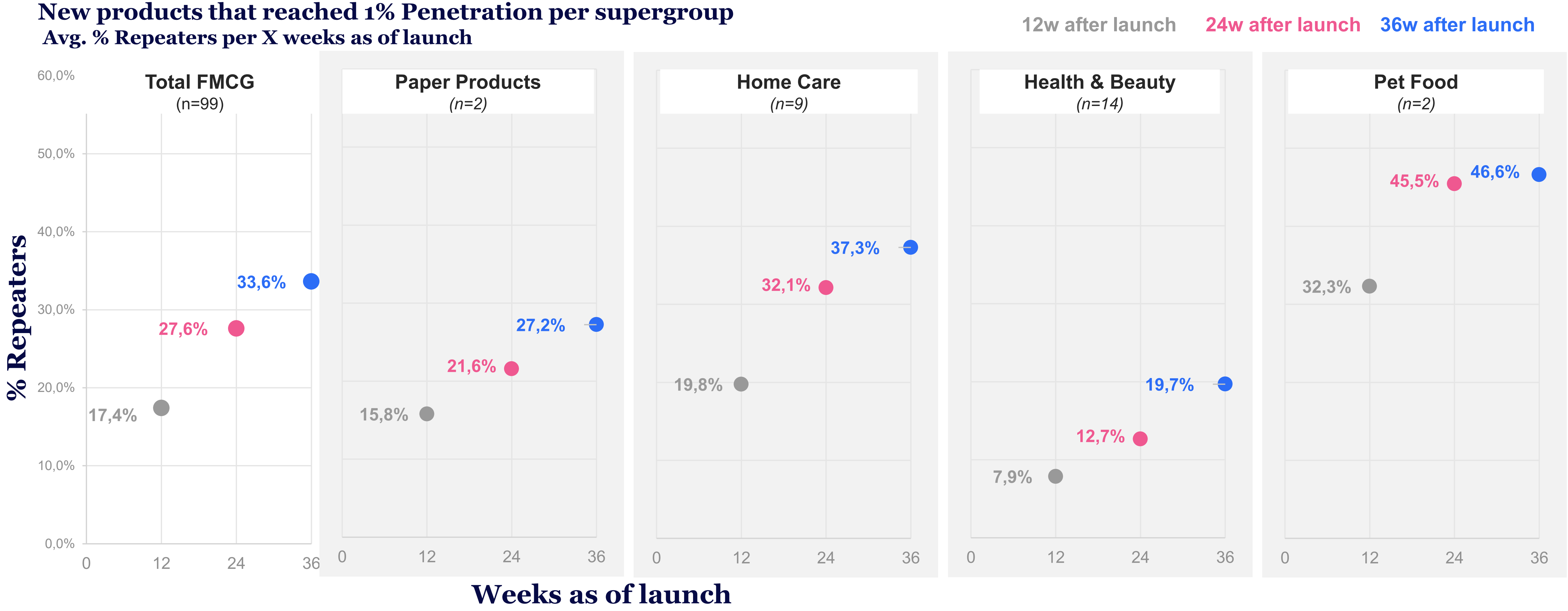


Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

Non Food: repeat rate build-up as of launch

While building consumer base they also managed to retained it, with more than 37% of trialists coming back

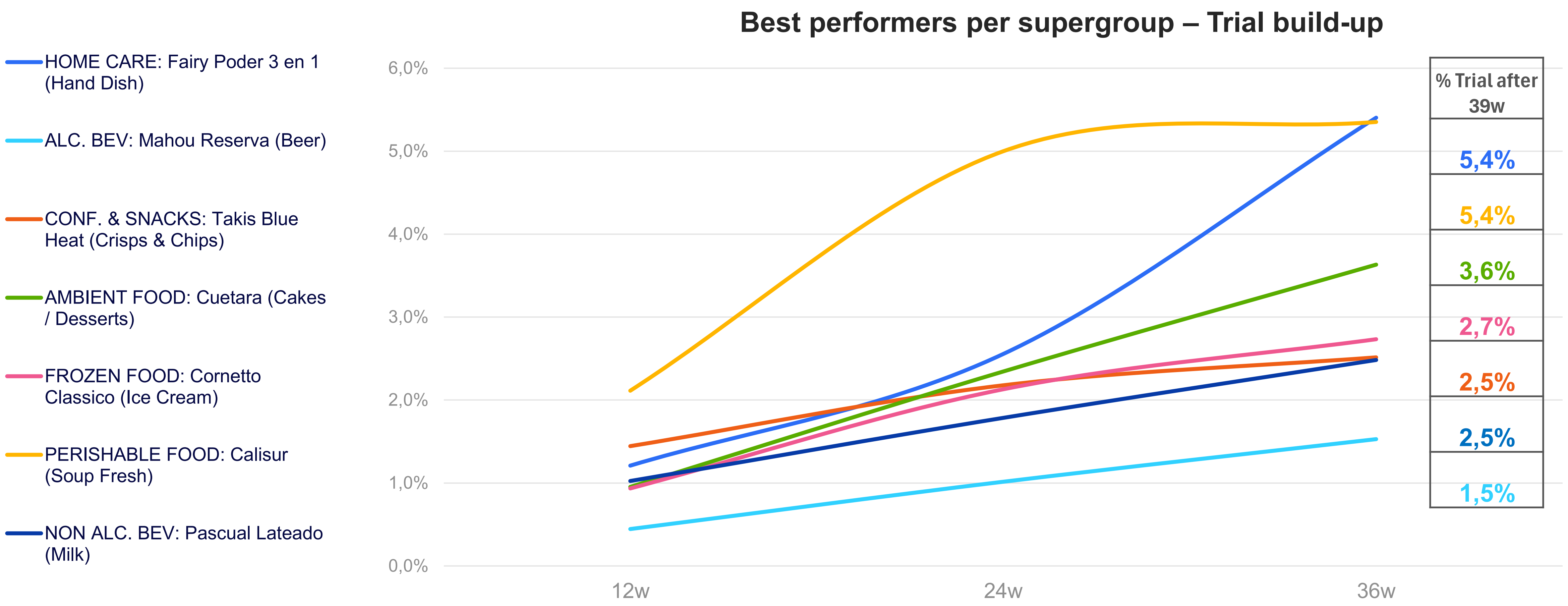
New products that reached 1% Penetration per supergroup
Avg. % Repeaters per X weeks as of launch



Source: NIQ Consumer Panel data for calendar year 2025
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

Top brand innovations* based on 39w as of launch – Trial build up

Fairy 3 in 1 proposition, creating a new segment in a routine category stands out, reaching the highest trial among successful launches. Calisur fresh soup is following closely



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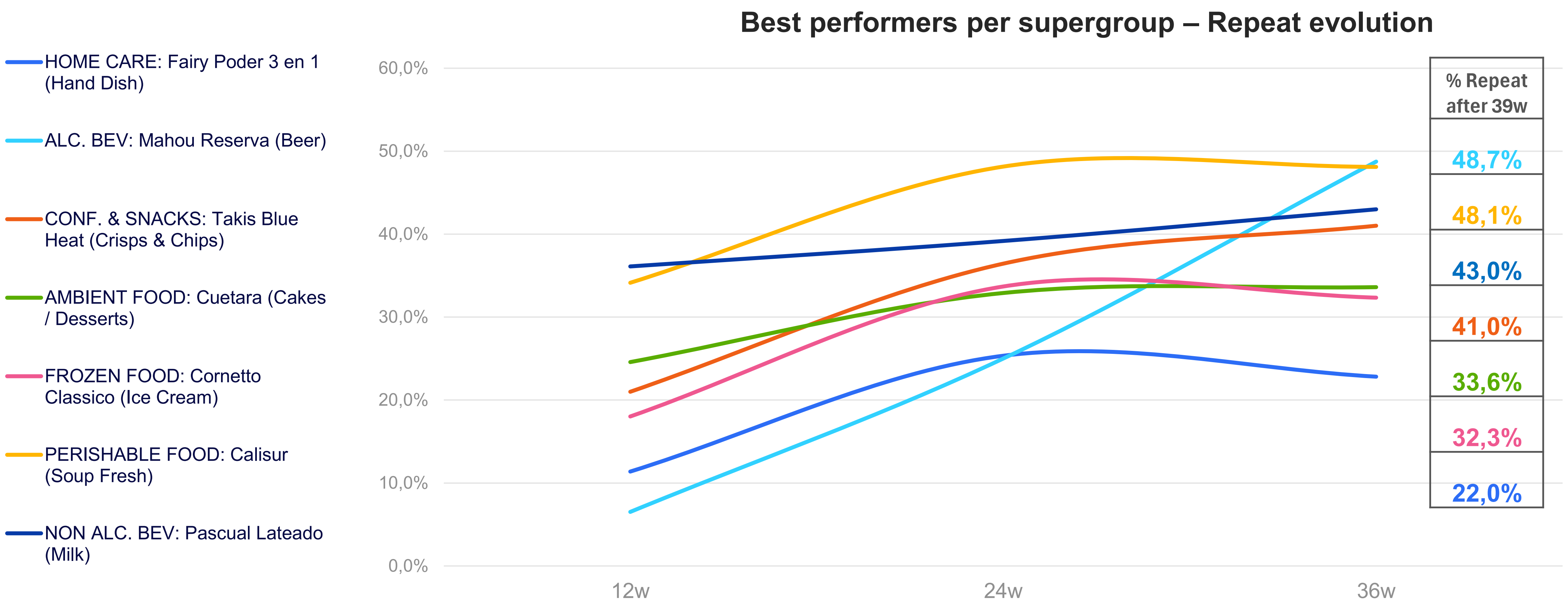
*Best performers are defined based on trial & repeat after 36w of launch against total avg. branded new launches

Top brand innovations* based on 39w as of launch – Repeat rate

Fairy 3 in 1 repeat rate is lower than rest successful innovations, given the nature of the category. Calisur remains at the top, following closely Mahou Reserva Beer, which excels in converting its trialists into repeaters



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*Best performers are defined based on trial & repeat after 36w of launch against total avg. branded new launches

Two immediate data needs for brand CMIs about to support NPD launches.

Early signals on your new product performance, fast and complete that lead to action to maximize your innovation impact

Benchmarks:

What does GOOD look like? What should I target to become an NPD best seller and convince retailers to list my NPD everywhere?

NIQ

Thank you!

Contact your NIQ partner to help you assess your early innovation performance.

NielsenIQ