NielsenIQ

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

Innovation poses big challenges for brands

95% of new products that **fail to meet a consumer need or desire** fail in the market

30% fail due to inadequate marketing support

25% of new product launches shrink their parent brand portfolio

New products that rock in the long run achieve 3 goals

1. They are tried by many

They drive consumer acceptance (Trial% since the launch) and retailers' acceptance, via expanded listings and in-store support

2. Repeatedly

They delight their trialists so much, that they return to purchase them again and again (Repeat % since launch)

3. And expand their category

Not only do they grow their parent brand's share, but they also bring new buyers into the category or result in existing buyers increasing their category consumption

Launch fast, Learn faster

Part I: Consumer acceptance

- Across Europe, the innovation engine is running faster than ever. New products are launched every day, competition for physical and digital space is intensifying, and both brands and private labels are moving fast to capture increasingly fragmented consumer needs.
- In 2025 alone, **more than 3,500 new brands and sub-brands were launched** across the United Kingdom, Germany, France, Italy and Spain - yet, only **one third of them were able to reach 1% of households** in their respective country.
- In a context where assortment is under pressure and activation windows are tightening, retailers must make harder decisions, faster, while manufacturers face a **shrinking opportunity to prove that a new product truly resonates with consumers** and deserves to stay.
- The **first months of a launch reveal** whether a product is building the momentum, credibility, and category value it needs to grow, or whether it will quietly fade into the background.

Powered by our integrated and robust **NIQ Consumer Panel data***, this analysis focuses on early trial and repeat performance of new launches, across 5 European markets, enabling you:

1. Set **realistic success targets**.
2. Assess **early-launch performance** with confidence.
3. Strengthen your **listing discussions** with retailers.

Source: NIQ Consumer Panel data for calendar year 2025 (United Kingdom, Germany, France, Italy and Spain)
New launches consider any new brands or sub-brands introduced per country and per category* throughout January 2025 – September 2025 and remained active until December 2025.
*Brands, sub-brands and categories, as per NIQ syndicated definitions and coding

West Europe: Five Key take outs

#1 Meaningful success is rare for innovation

Only ~1 in 3 new FMCG launches reached just 1% of households in 2025 across EU5

- More than 3,500 new brands and sub-brands launched across UK, FR, DE, IT and ES.
- Yet two-thirds failed to even reach 1% penetration in their own country.
- The first months already decide which products “earn the right to stay”.

#2 High innovation pressure does NOT equal high consumer acceptance

Categories with the most launches often struggle the most with repeat.

- Crowded categories (e.g. Food, Confectionery & Snacks) recruit trial faster.
- But they are less successful at converting trial into repeat.
- Conversely, less crowded categories (e.g. Paper, Pet, some Non-Food) recruit more slowly but retain shoppers better.

#3 Standing out on BOTH trial and repeat is the exception — not the norm

Fewer than 1 in 5 new launches outperform their category benchmark on both trial and repeat.

- Among branded launches, ~17% over-index on both dimensions.
- For Private Label, the share is even lower.
- Many launches win trial but fail on repeat — or quietly disappear without either.

#4 “Success” does not look the same across Europe

A 1% penetration target can signal success in some countries — but not in others.

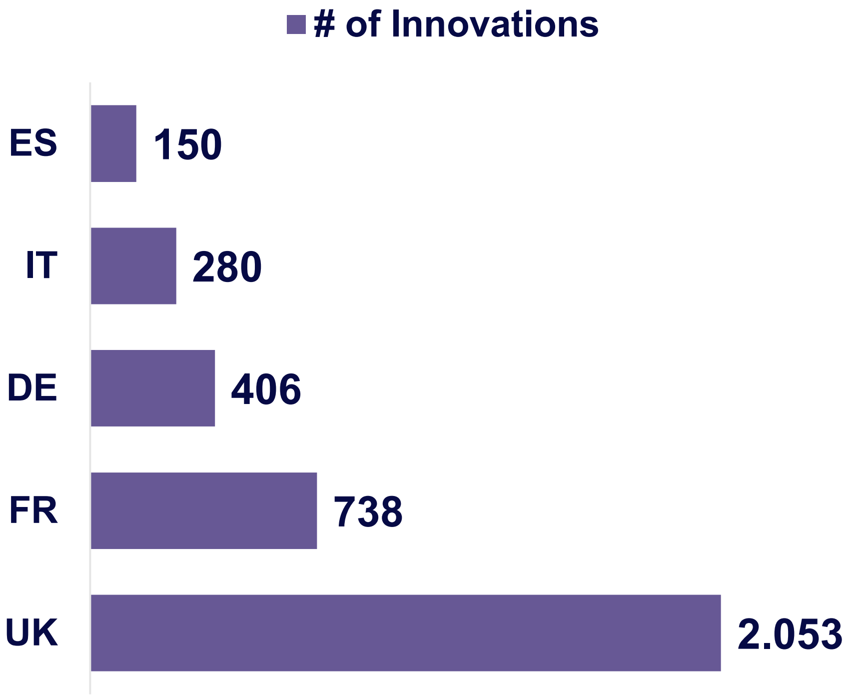
- Early penetration and repeat benchmarks vary hugely by country.
- Average repeat ranges from ~20% to over 30% of trialists, depending on market.
- This makes “one-size-fits-all” launch KPIs misleading at best, dangerous at worst.

Source: NIQ Consumer Panel data for calendar year 2025 (United Kingdom, Germany, France, Italy and Spain)
New launches consider any new brands or sub-brands introduced per country and per category* throughout January 2025 – September 2025 and remained active until December 2025.
*Brands, sub-brands and categories, as per NIQ syndicated definitions and coding

European countries differ in innovation intensity and structure

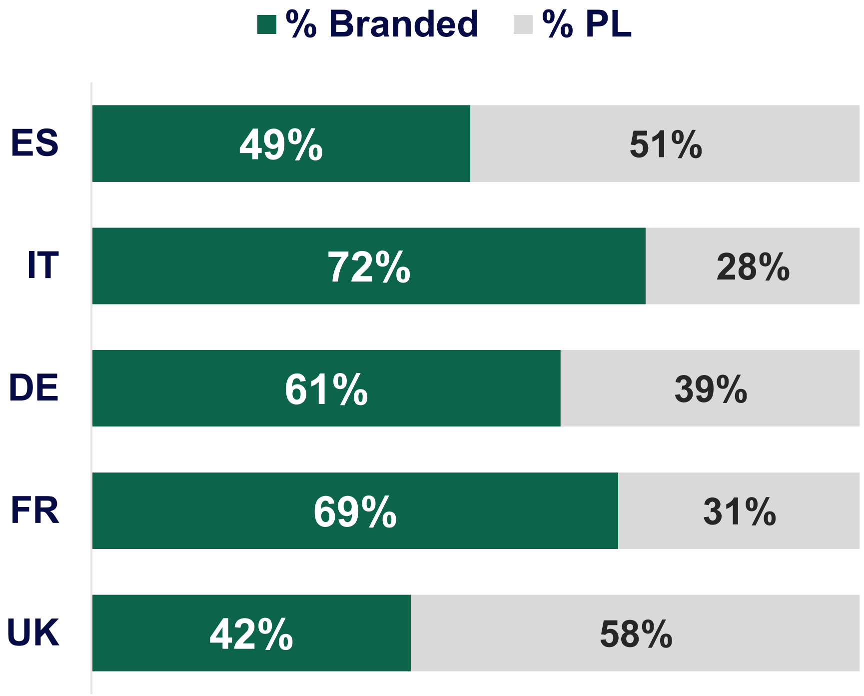
UK was the most active country in terms of new launches, almost 3x as much as France, which is over-represented against Germany, but also with very prominent representation of Private Label products (30% more launches vs. PLs value share)

How many new products were launched in 2025?



Country Val Share w/in EU5
12%
14%
27%
20%
27%

What was the proportion of Branded vs. PL new launches?

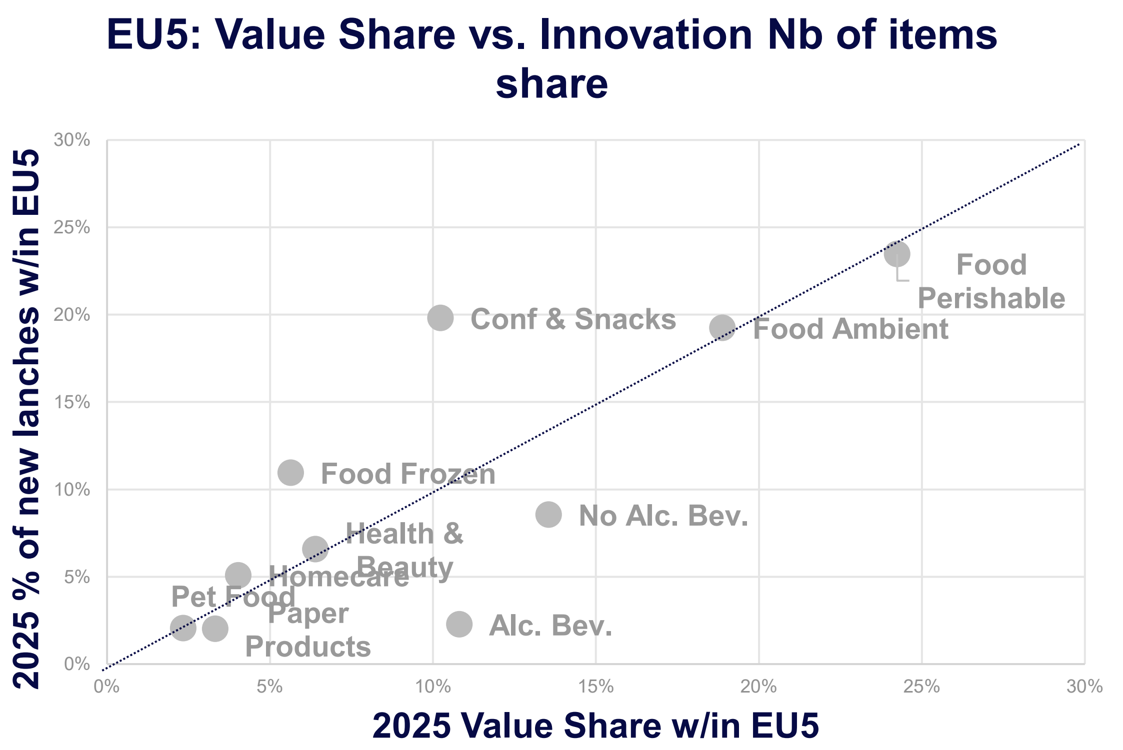


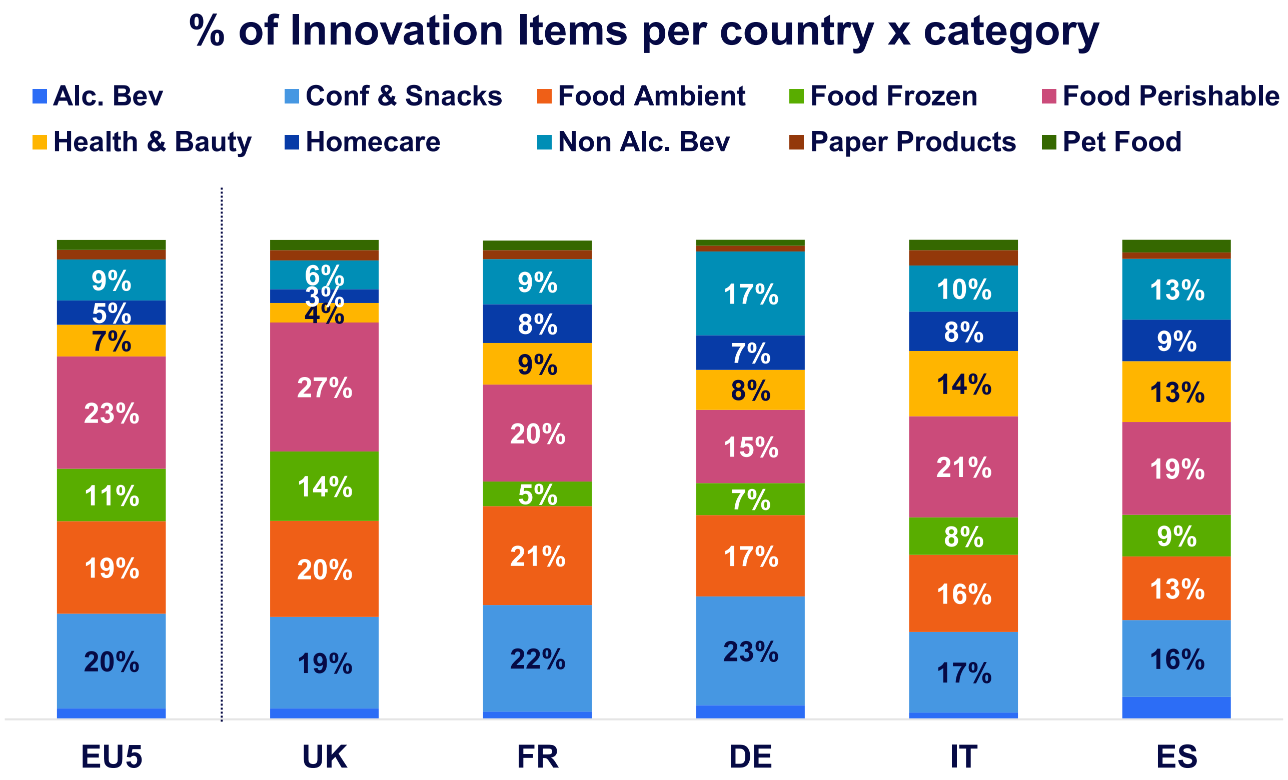
PL Val Share in Country
47%
30%
40%
35%
44%

Source: NIQ Consumer Panel and Retail Measurement data for calendar year 2025 ((United Kingdom, Germany, France, Italy and Spain)
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

Innovation is not evenly spread: some categories activate more than their size suggests

Confectionery & Snacks and Frozen Food have almost 2x higher share of new items vs. their value share in EU5. At the same time, focus can differ across countries: UK with high representation of Perishable Food, Germany with Non Alc. Beverages, South Europe with Health & Beauty launches



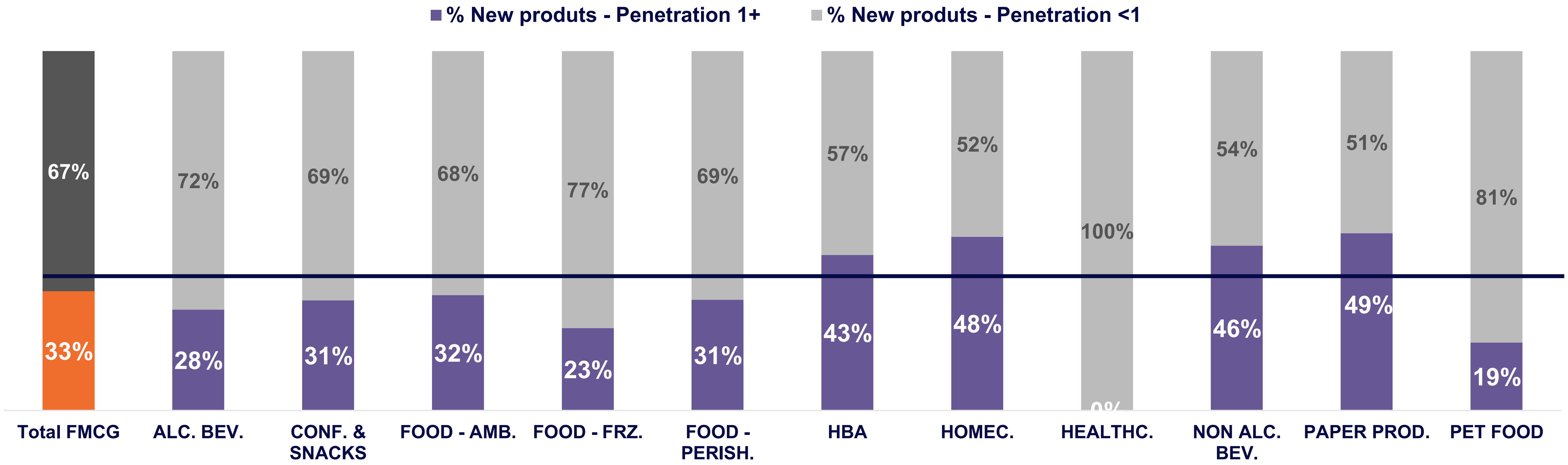


Source: NIQ Consumer Panel and Retail Measurement data for calendar year 2025 ((United Kingdom, Germany, France, Italy and Spain)
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months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

High innovation offer does not guarantee reach; only a third of new launches managed to reach 1% of EU5 households in 2025

Categories with a lower representation were the ones that over-delivered; with less competition in terms of innovation, consumers were able to try a higher portion of Non-Food and Non Alc. Beverages launches.

EU5: How many new products reached at least 1pt of penetration?



# of new products x countries combination:

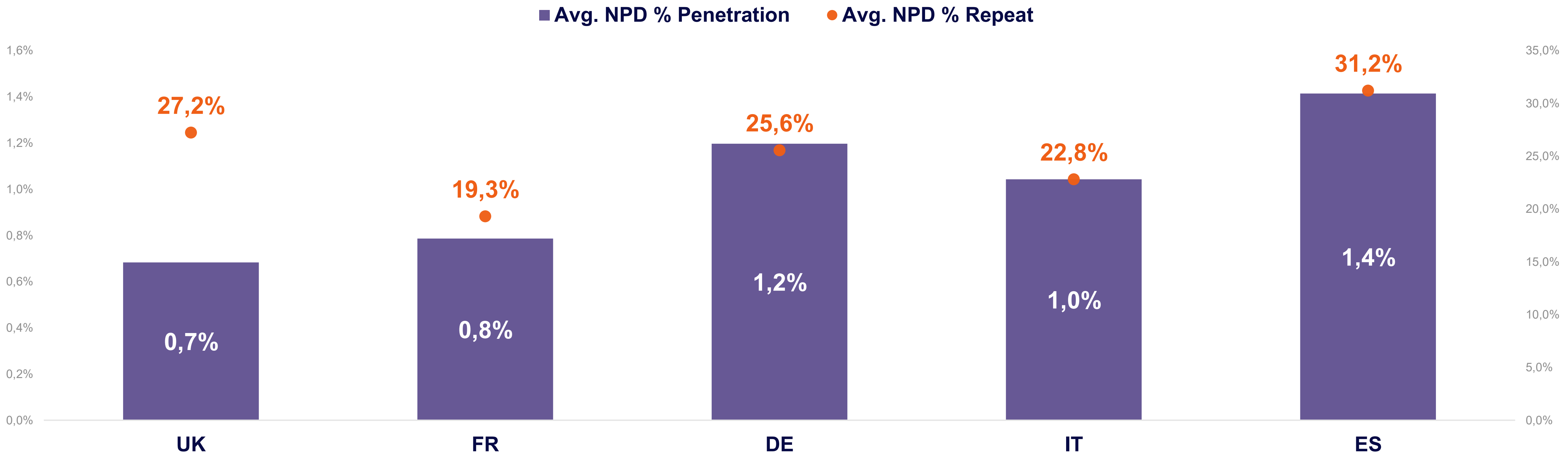
3.627	82	718	698	397	851	238	184	2	310	73	74

Source: NIQ Consumer Panel data for calendar year 2025 ((United Kingdom, Germany, France, Italy and Spain)
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

Early success metrics variate per country and are only partially connected with level of offer

A penetration target of 1% could serve as success in UK, France or Italy, but not necessarily in Germany and Spain. The variation is even greater in terms of repeat, ranging from getting 1/5th to ~1/3rd of trialists to repurchase, depending on the country

How many trialists and repeaters does an average new launch* reach after 36 weeks?



# of new products:

871	445	217	168	84

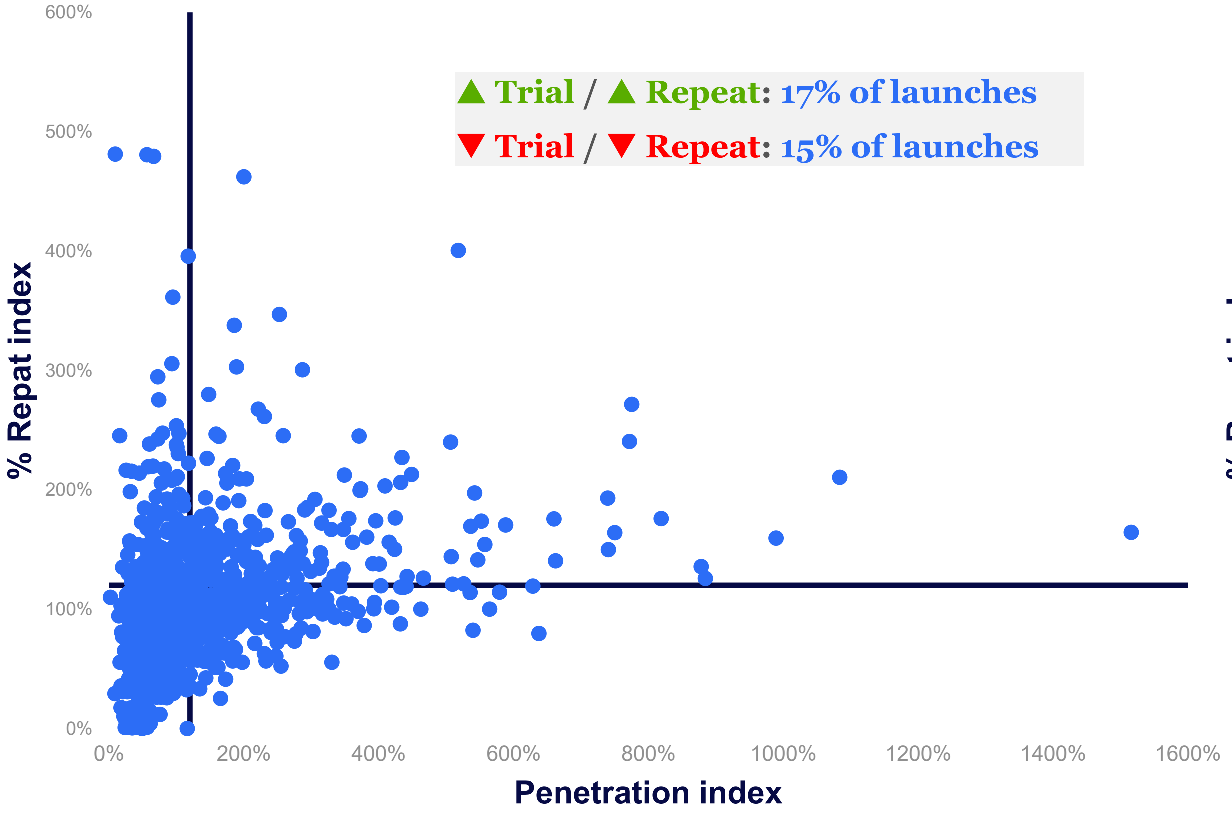
Source: NIQ Consumer Panel data for calendar year 2025 ((United Kingdom, Germany, France, Italy and Spain)
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025
*Average new launch referring to median for each category (i.e. half of new launches exceed 27,2% repeat after 36w as of launch)

Standing out on both trial and repeat is the exception, not the norm

Less than a fifth of branded launches stand out both in trial and repeat within their category – even lower for Private Labels

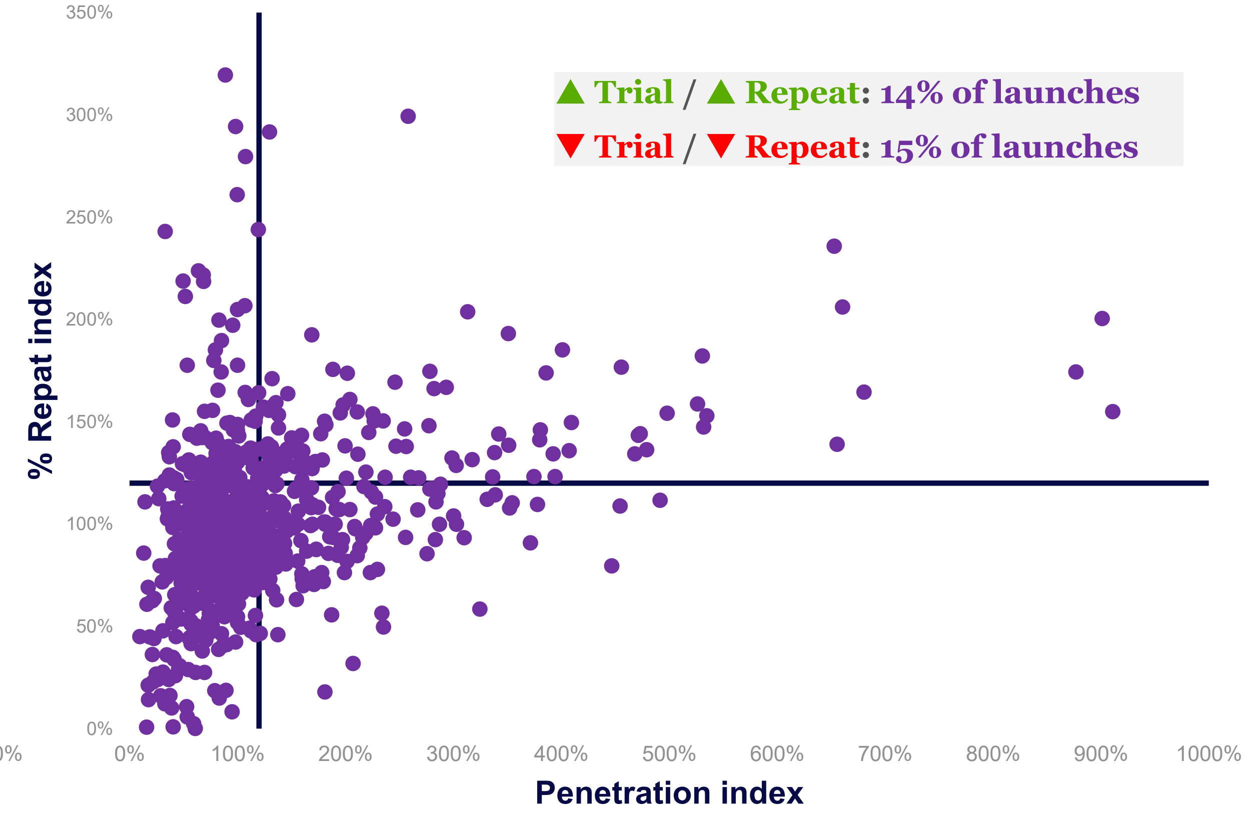
Branded launches after 36 of launch

Penetration & Repeat ix against respective country / category median



Private Label launches after 36 of launch

Penetration & Repeat ix against respective category / category median



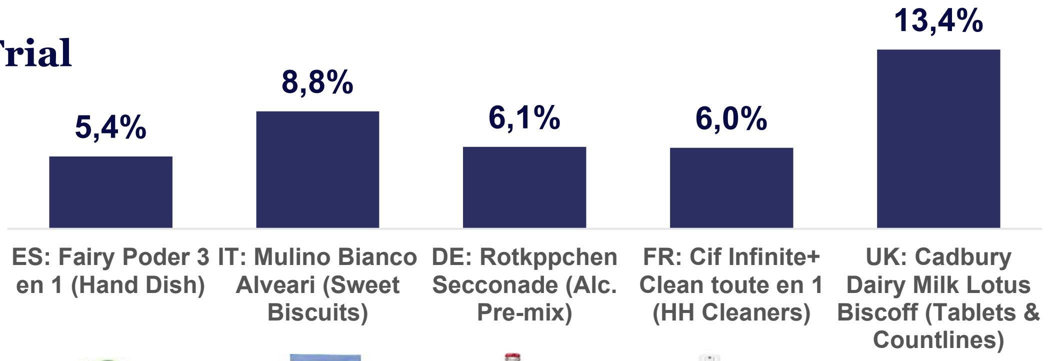
Source: NIQ Consumer Panel data for calendar year 2025 ((United Kingdom, Germany, France, Italy and Spain)
New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025
Index is calculated against the median of each category / country combination for Branded and PL, with an over-index level of 120 and under-index of 80

Top innovations in terms of % Trial

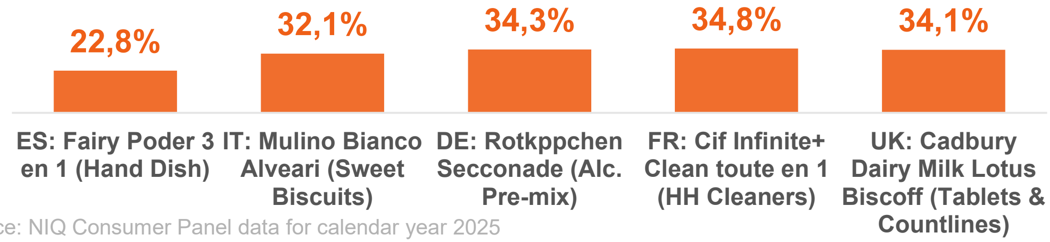
Most successful innovations in terms of trial cover a variety of categories, from local players (IT, DE) to international giants (ES, FR, UK)

Top innovation per country in terms of % Trial after 36w as of launch*

% Trial



% Repeat

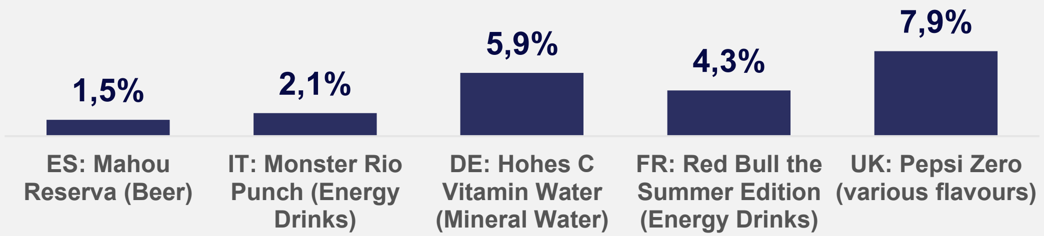


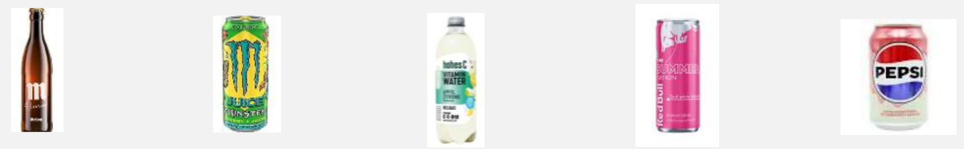
Top innovations in terms of % Repeat

Successful beverage products outperform rest categories in terms of getting their trialists to repeat purchase, across EU5

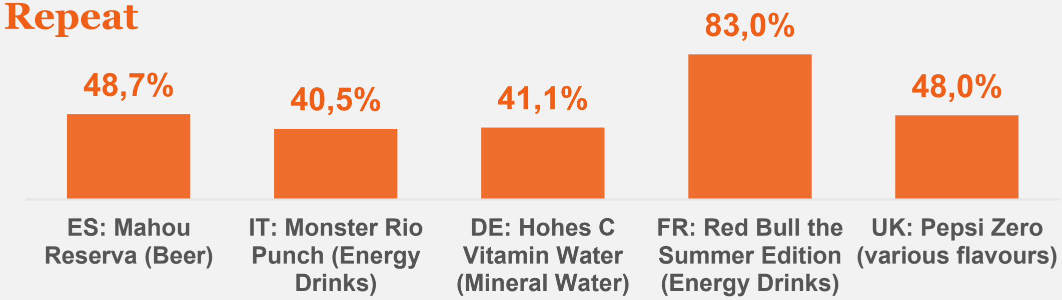
Top innovation per country in terms of % Repeat after 36w as of launch*

% Trial





% 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
*Best performers are defined based on BOTH 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

Not all products scale at the same pace.

- By analysing the performance of 2025 launches during their first months, we identified clear, **category-specific trial and repeat benchmarks** across the **United Kingdom**, **Germany**, **France**, **Italy** and **Spain**.
- These early indicators are critical to guide launch **decisions** and demonstrate **credibility** with retail partners.

Want to find out more?

Click here to download the full report with details per country and category.

Thank you!

Contact your NIQ partner to help you assess your Early Innovation Performance.

NielsenIQ