NIQ
Snap View

From Cans to Fresh: Soup Across Departments

Refrigerated and Hot Bar soups in the Deli department are finding growth, while Shelf Stable declines vs YA. How do soup buyers differ between departments?

Deli Soup units grew by **+4.2%** While Grocery Soup units declined by **(3.6)%** Vs YA	Deli Soup Buyers spend more per occasion at **$9.41** While Grocery Soup Buyers spend $5.24 per occasion	Deli Soup buyers purchase frequency is lower at **3.5** Occasions per buyer vs Grocery at 6.9 occasions per buyer

Understand key differences between shelf stable and fresh soup buyers

Grocery buyers sway towards central rural areas, while deli sway towards more prosperous populated areas

Grocery Soup Buyer

- ***Middle Class Countrysides***
  117 index | **14.2%** of dollars
- ***Central Census Region***
  111 index | **23.9%** of dollars
- ***Income $70k - $99k***
  107 index | **18.7%** of dollars
- ***Pinterest is most used social media***
  121 index
- ***Website used in past 30 days: NASCAR***
  126 index

Deli Soup Buyer

- ***Prosperous Cities & Suburbs***
  138 index | 30.1% of dollars
- ***East Central Region***
  120 index | 21.0% of dollars
- ***Income $100k+***
  129 index | 43.2% of dollars
- ***LinkedIn is most used social media***
  123 index
- ***Website used in past 30 days: CNBC***
  121 index

Source: NielsenIQ Panel On Demand Homescan | US HS - NDH Synd UPC+TSV Full View - 445 5yr | L52 w/e 10/26/24
Source: NielsenIQ Spectra Best Products MRI Simmons Adult Usage

Differentiate from Grocery by capitalizing on growing health trends within Fresh

Fresh soup is perceived as higher quality, heartier, and more nutritious

	Grocery Soup		Deli Soup*	
Proven Trends *$ % CYA*	OVER 500MG SODIUM PER SVNG QLFD	(3.3)%	PROTEIN RICH QLFD	+2.2%
	CALORIE CONSCIOUS QLFD	(5.4)%	POTASSIUM RICH QLFD	+4.9%
	FAT CONSCIOUS QLFD	(8.2)%	IRON RICH QLFD	+4.3%
Developing Trends *$ % CYA*	IRON RICH QLFD	+3.1%	PHOSPHORUS RICH QLFD	+7.5%
	NUTRIENT DENSE QLFD	+1.3%	NUTRIENT DENSE QLFD	+27.4%
	POTASSIUM RICH STTD	+11.9%	CARBOHYDRATE FREE QLFD	+12.1%

Source: NielsenIQ Retail Measurement | US NIQ Total Store Inc Fresh - 445 - Weekly (Synd) | L52 w/e 11/16/24 | *Deli driven by Refrigerated Soup

Key Takeaways

1. Deli soup buyers and grocery soup buyers are different consumers, both in demographics and how they shop the store. It is crucial for brands to understand the nuances of these differences to target the right buyers and appeal to their unique values.
2. Fresh soup buyers come from more prosperous, urban areas, higher income families, and eastern regions. Beyond these demographics, fresh soup buyers use different media types than grocery soup buyers. Brands need to tailor their marketing efforts and media used based on the department to effectively reach their buyers.
3. Fresh soup is perceived as heartier and nutrient dense, signaled by the growing health claims within the deli department. Fresh soup brands should continue to differentiate their products from shelf stable with attributes as their buyers value health and wellness.

Reach out to your NIQ representative to learn how NIQ Panel on Demand & NPI claims can illuminate opportunities across departments within Soup!

Scan the QR code for more fresh and frozen insights

Share your feedback with us here!