NielsenIQ

Omnichannel Acceleration

Data-Driven Strategies for Brands & Retailers

NielsenIQ
OmniCommerce

Dec. 2025

The North America Omni Landscape

The omni landscape today

eCommerce, omni, and digital innovation have increased the pace of change in retail

Source: NIQ

Today, there are seven omni touchpoints retailers and brands must keep top of mind

1. **Retail**
(online and in-store)
2. **Direct-to-consumer**
(brand website, social media, apps)
3. **Marketplace**
(Amazon, Walmart.com, etc.)
4. **Social commerce**
(TikTok, Facebook, Instagram, etc.)
5. **B2B**
(selling direct to other businesses)
6. **Metaverse**
(virtual commerce and retail)
7. **Last mile**
(warehouse shelf to consumer)

Source: NIQ

Online Sales Represent

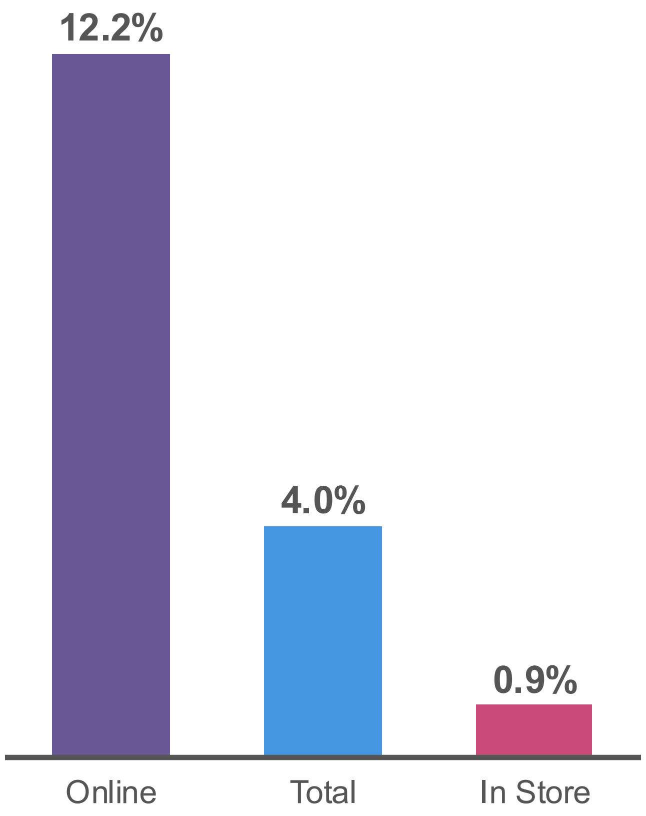
83.7%

of Total CPG Dollar Growth

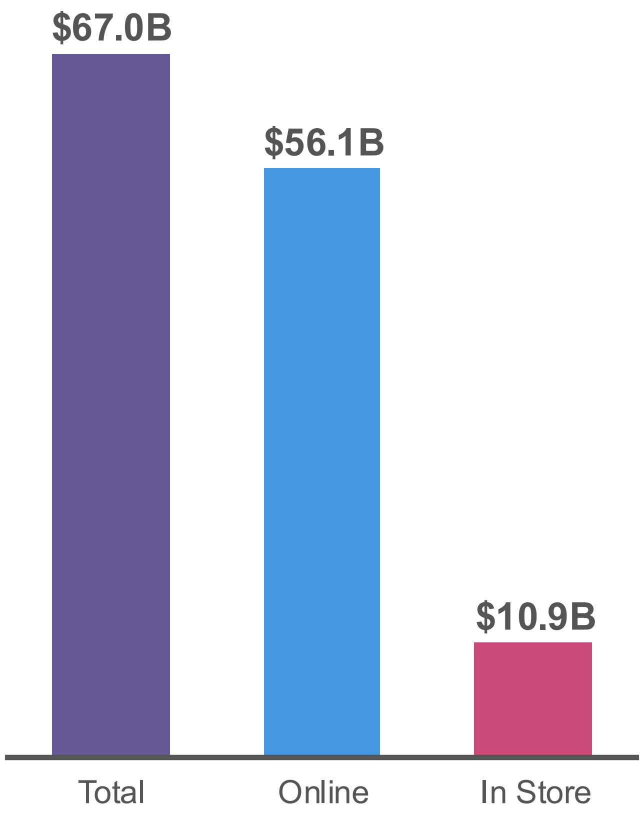
Online is driving almost all industry growth today

Online sales growth rate 3X that of total CPG

Sales growth rate vs YA



Dollar Sales Growth vs YA



Source: NielsenIQ Omnisales, $ %Chg YA and $ Chg YA for All Departments in Total US | Latest 52 wks w/e 8/23/25

Online is meaningfully taking share from store-based retail

eCom growing across almost all departments

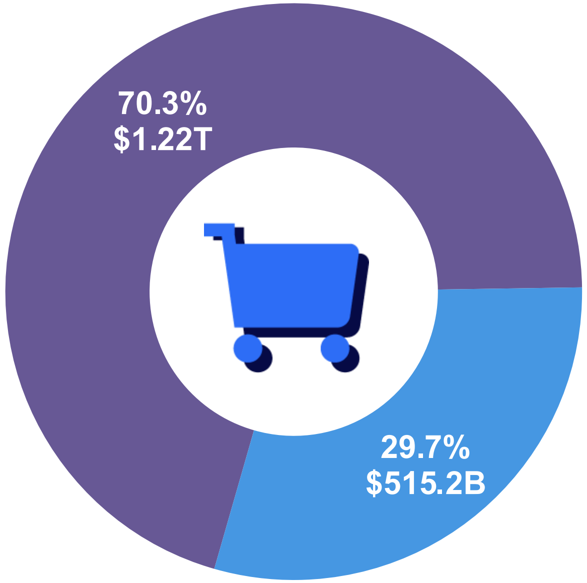
Total Online and In Store Share

$ Share and $ Change vs YA

Total Sales

$1.73T

+4.0% vs YA



In Store

(-2.2pp vs YA)

$ %Chg vs YA: +0.9%

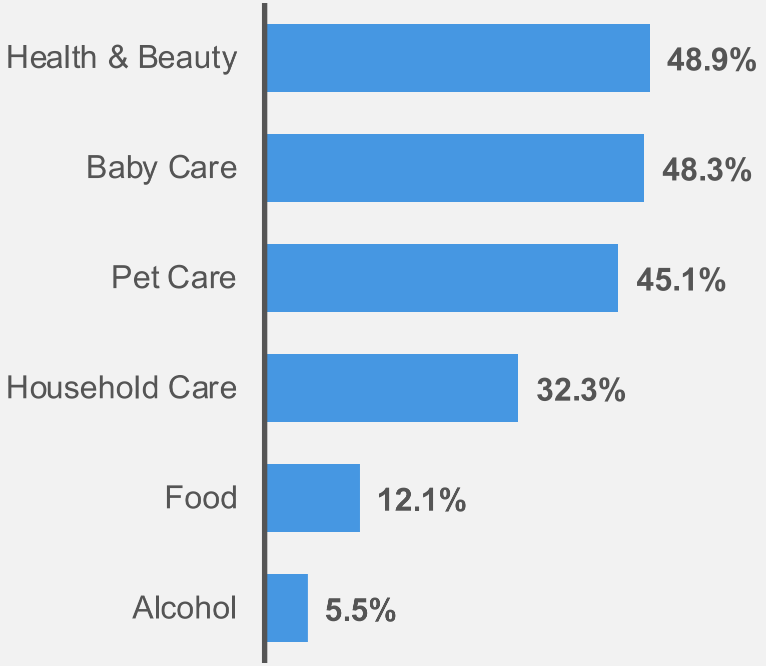
Online

(+2.2pp vs YA)

$ %Chg vs YA: +12.2%

Department Online and In Store $ Performance

Online $ Share of Total Department Sales



$ % Chg vs YA

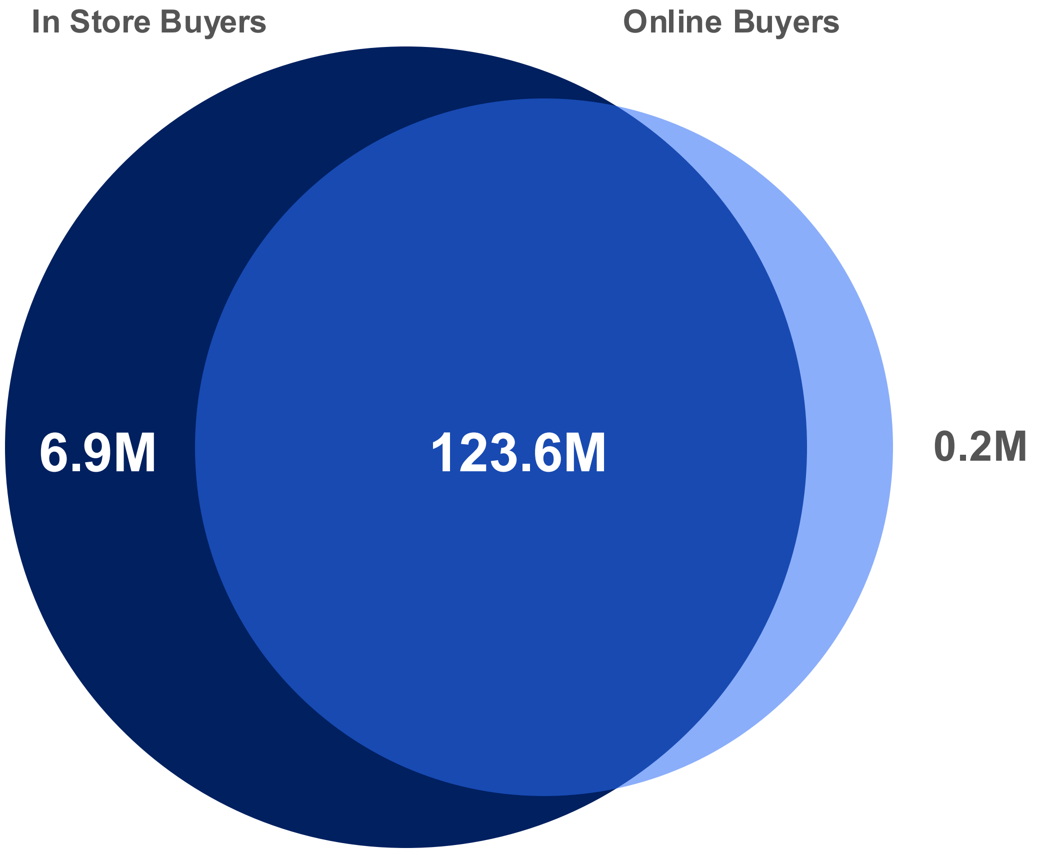
	Online	In Store
Health & Beauty	+16.5%	-1.3%
Baby Care	+5.3%	-0.8%
Pet Care	+11.8%	-3.1%
Household Care	+15.7%	-1.1%
Food	+19.5%	+1.9%
Alcohol	+7.9%	+3.7%

Source: NielsenIQ Omnisales, $, $ %Chg YA and $ Share for All Departments in Total US | Latest 52 wks w/e 8/23/25

Almost all shoppers are omni shoppers

Almost all CPG buyers recorded Online purchases in latest 52 weeks

CPG Buyers Composition



94.7%

of CPG Buyers bought through Online Channels

Online Sales Penetration increased

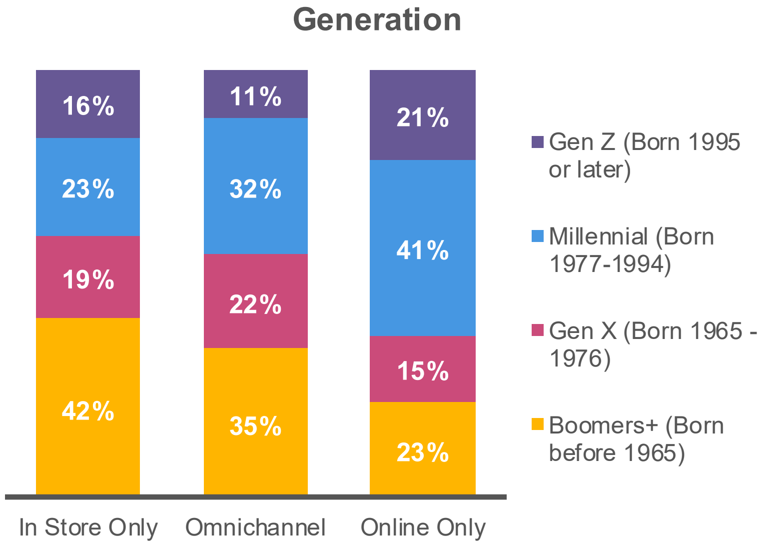
+5.5pp

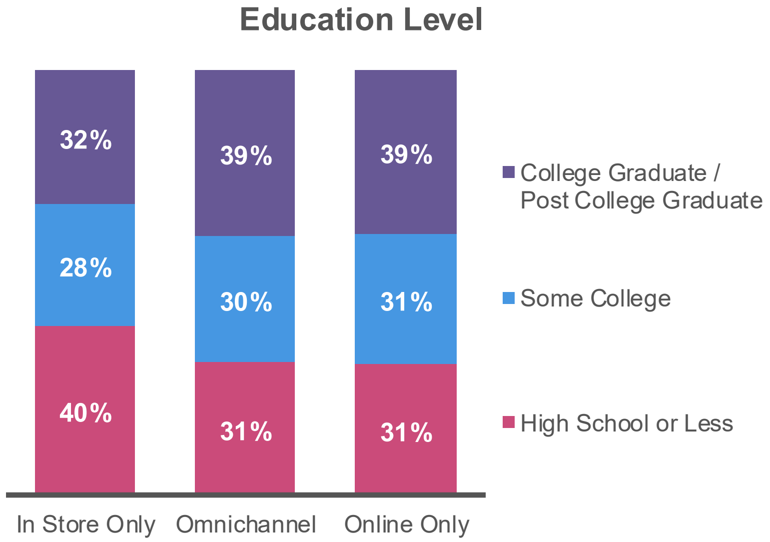
vs YA

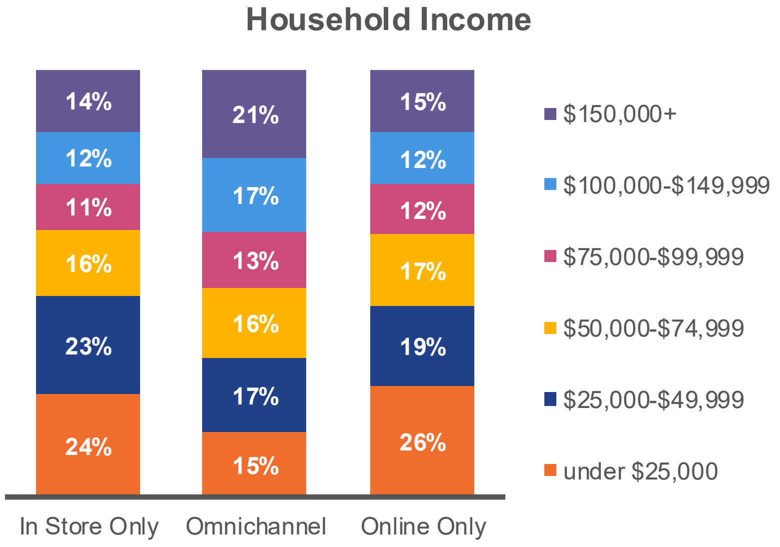
Source: NielsenIQ Panel On Demand Omnishopper for All Departments in Total In Store and Total Online in Total US | Latest 52 wks w/e 8/9/25

Omnichannel behavior exhibited by must-win demographics

L52 Week Share of Buyers by:







Top Demographic Categories by Shopping Behavior:

In Store Only Buyers

Boomers, High School or Less, Under $25,000

Omnichannel Buyers

Boomers, College Graduate / Post College Graduate, $150,000+

Online Only Buyers

Millennial, College Graduate / Post College Graduate, Under $25,000

Source: NielsenIQ Panel On Demand Omnishopper for All Departments in Total In Store and Total Online in Total US | Latest 52 wks w/e 8/23/25

Omnichannel shoppers are the most valuable shoppers

In Store Only Buyers

L52 Week
Value: $13,879.39
Units: 2,909
Occasions: 380

Omnichannel Buyers

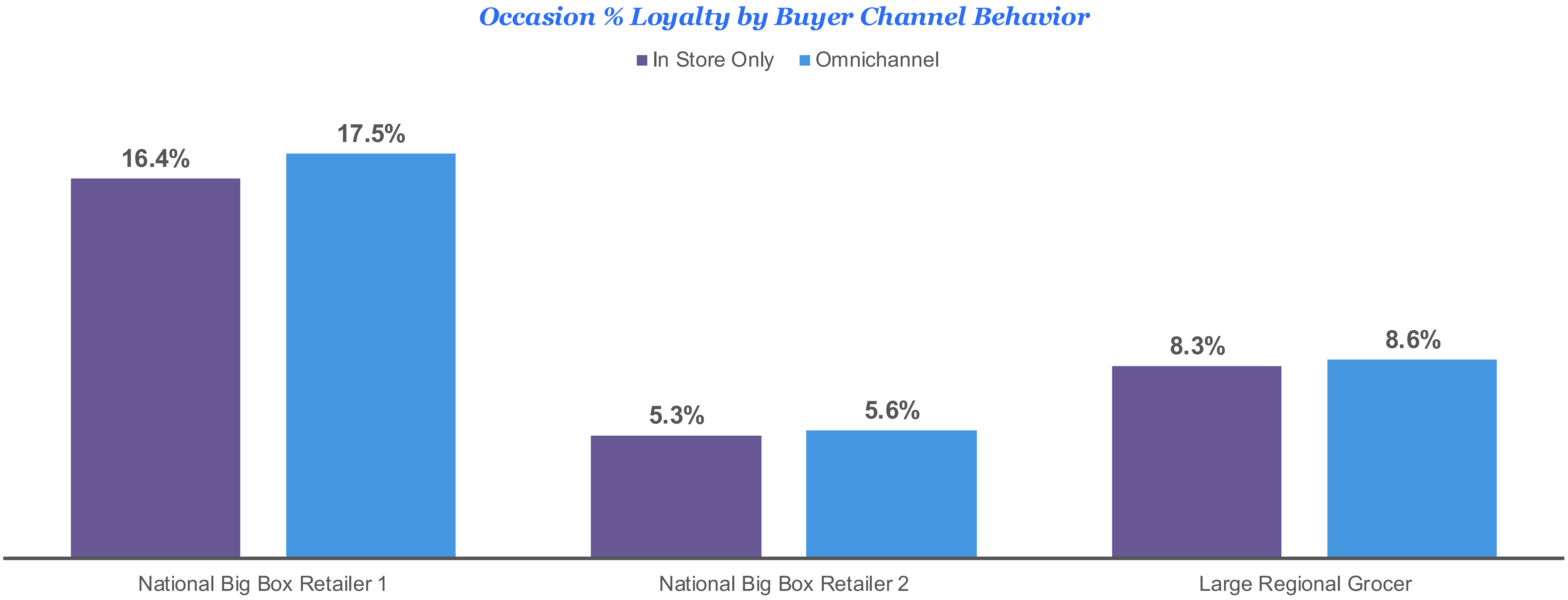
L52 Week
Value: $16,871.82
Units: 2,771
Occasions: 363

Online Only Buyers

L52 Week
Value: $16,570.97
Units: 2,263
Occasions: 285

Source: NielsenIQ Panel On Demand Omnishopper for All Departments in Total In Store and Total Online in Total US | Latest 52 wks w/e 8/23/25

Omnichannel and online shopping behavior associated with increased rates of retailer loyalty

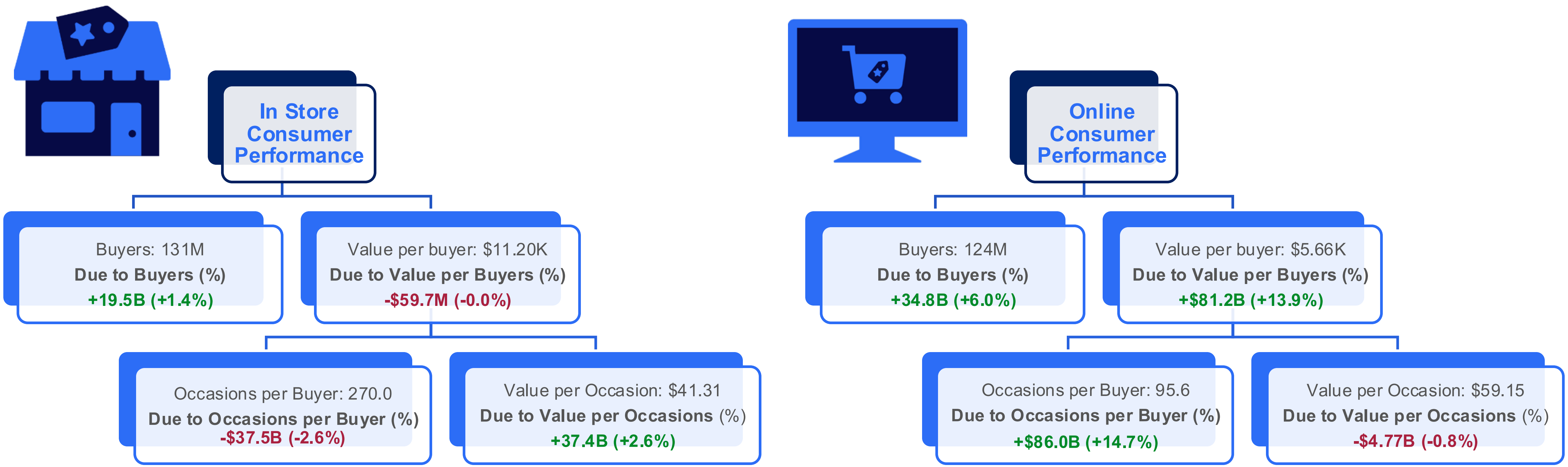


Source: NielsenIQ Panel On Demand Omnishopper for Food Departments in Total In Store and Total Online in Total US | Latest 52 wks w/e 8/23/25

eCommerce growth supported by buyers, value per buyer, and occasions per buyer

Online environment with more favorable shopper dynamics than in-store

Consumer Performance, In Store vs. Online

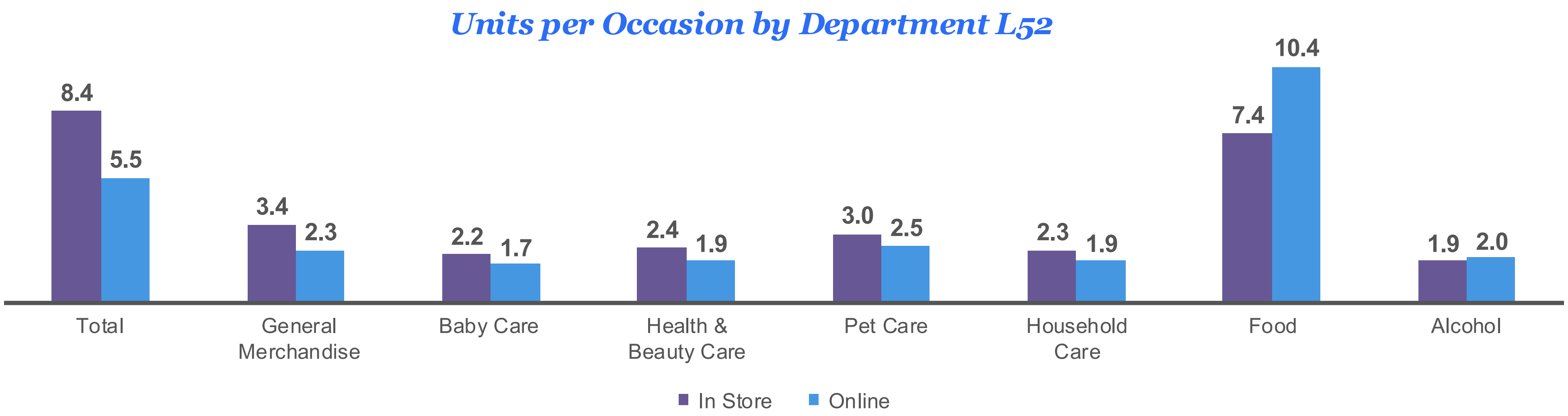


Sources: US NielsenIQ Omnishopper, 2025

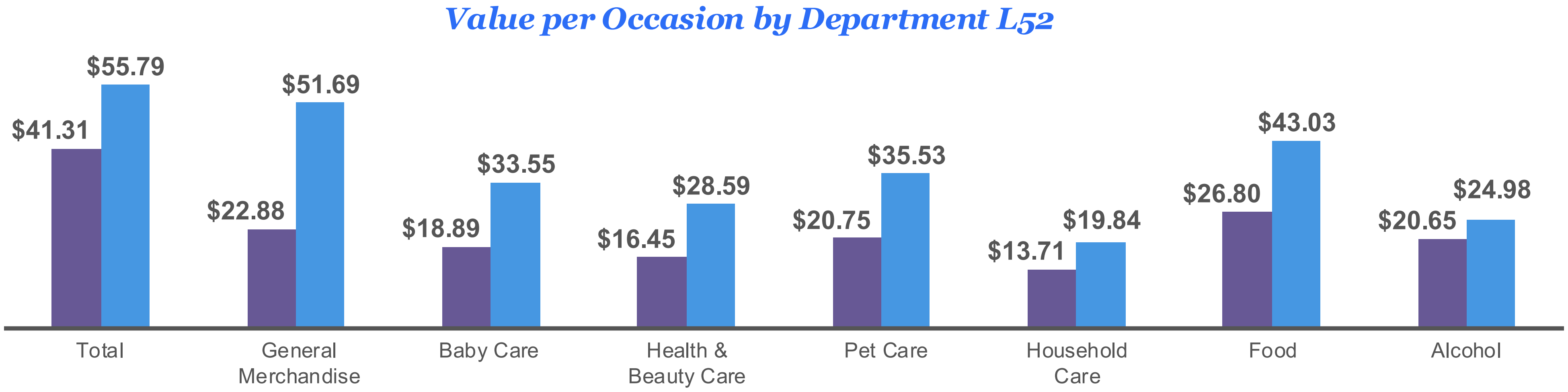
Across departments, online drives larger $ baskets with less units

Food the only department with higher units per occasion online than in-store

Units per Occasion **increased** +0.7% In Store and +1.3% Online vs YA



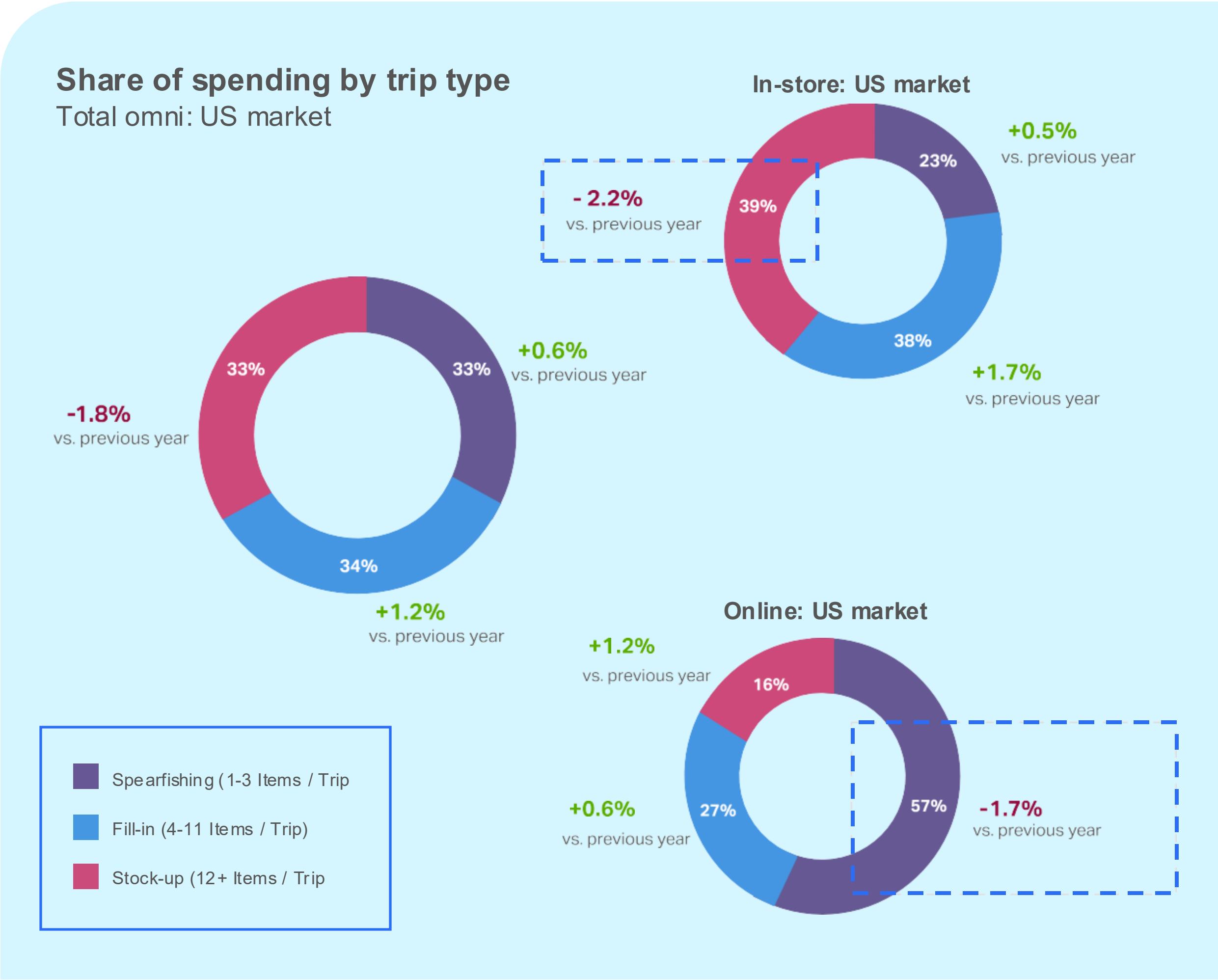
Value per Occasion **increased** +2.6% In Store and **decreased** -0.8% Online vs YA



Source: NielsenIQ Panel On Demand Omnishopper, Units per Occasion and Value per Occasion, for All Departments in Total In Store and Total Online in Total US | Latest 52 wks w/e 8/9/25

US online shoppers favor small trips

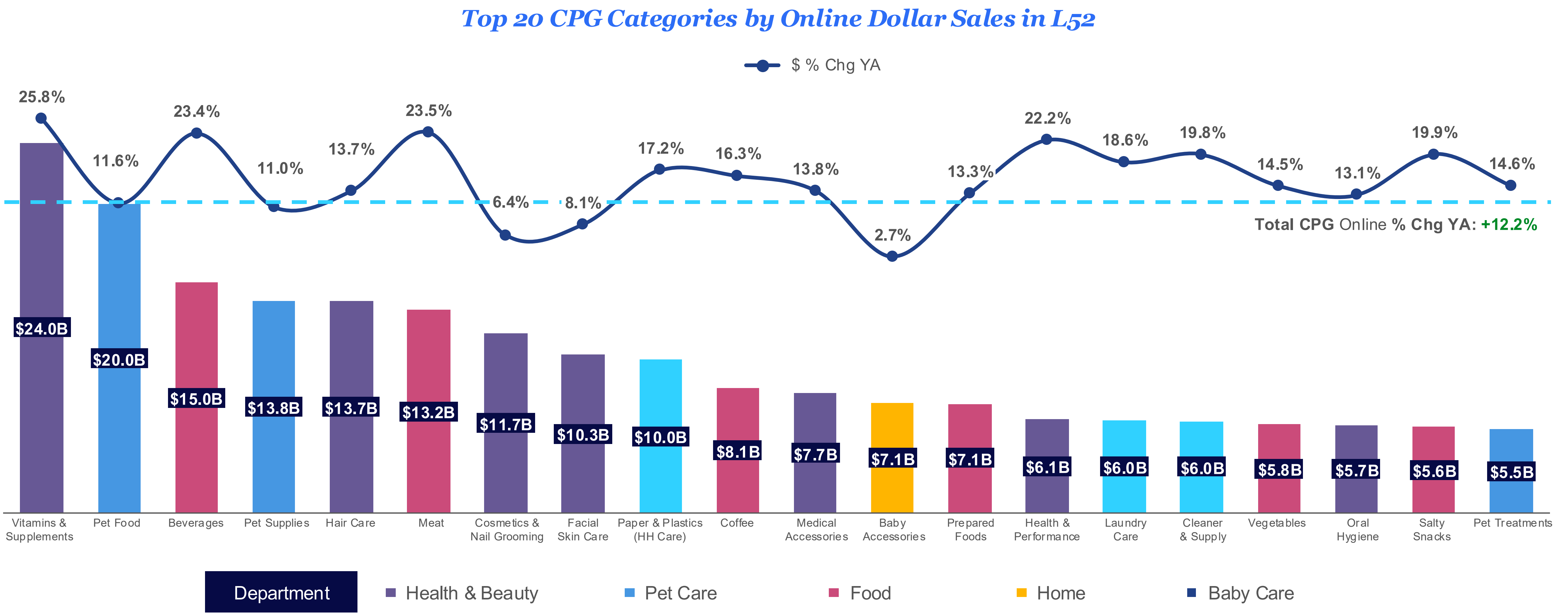
Consumers still overwhelmingly use online trips for spearfishing (1-3 items per trip)



Source: NIQ Omnipanel, Total US measures of different trip types, Total CPG (excluding Fuel purchases), 52 weeks ending June 15, 2024, vs. previous year

Top selling categories grow at faster rates than average CPG

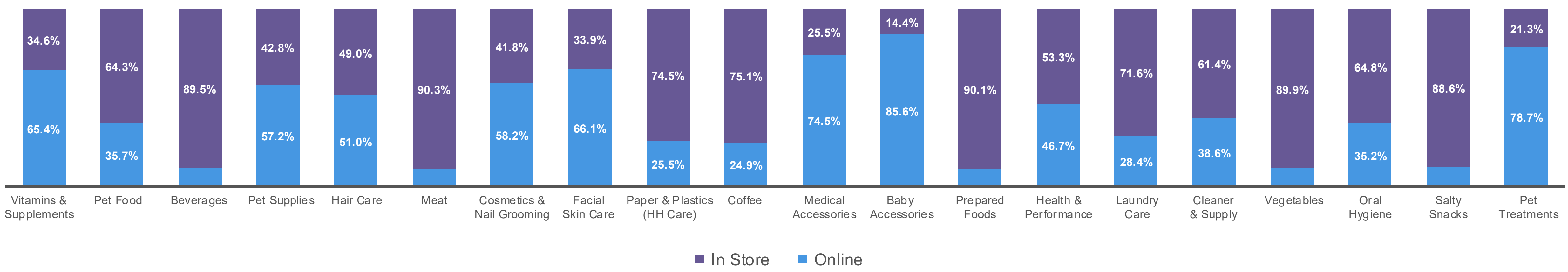
Growth is driven by top categories in Health-Beauty, Pet, Food, Home and Baby Care departments, with $202.3B accounting for 39.3% of Total Online sales.

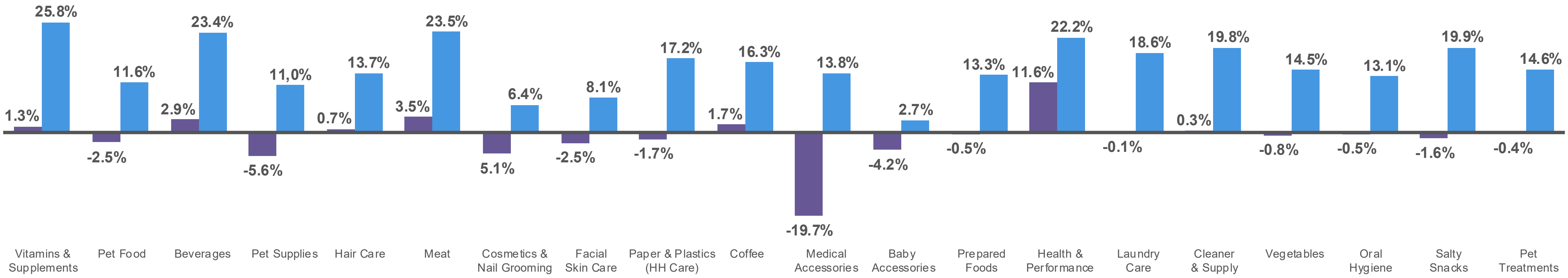


Source: NielsenIQ Omnisales, $, $ %Chg YA and $ Share for All Departments excluding General Merchandise and Floral in Total US | Latest 52 wks w/e 8/23/25

Categories are at varying places on their eCommerce adoption journeys

Physical retail remains dominant in food, but categories such as Health & Beauty, Home, and Pet see online as more relevant





Source: NielsenIQ Omnisales, $, $ %Chg YA and $ Share for Top 20 Categories in CPG in Total In Store and Total Online Total US | Latest 52 wks w/e 8/23/25

Top Channels & Retailers

Amazon dominating US retail landscape

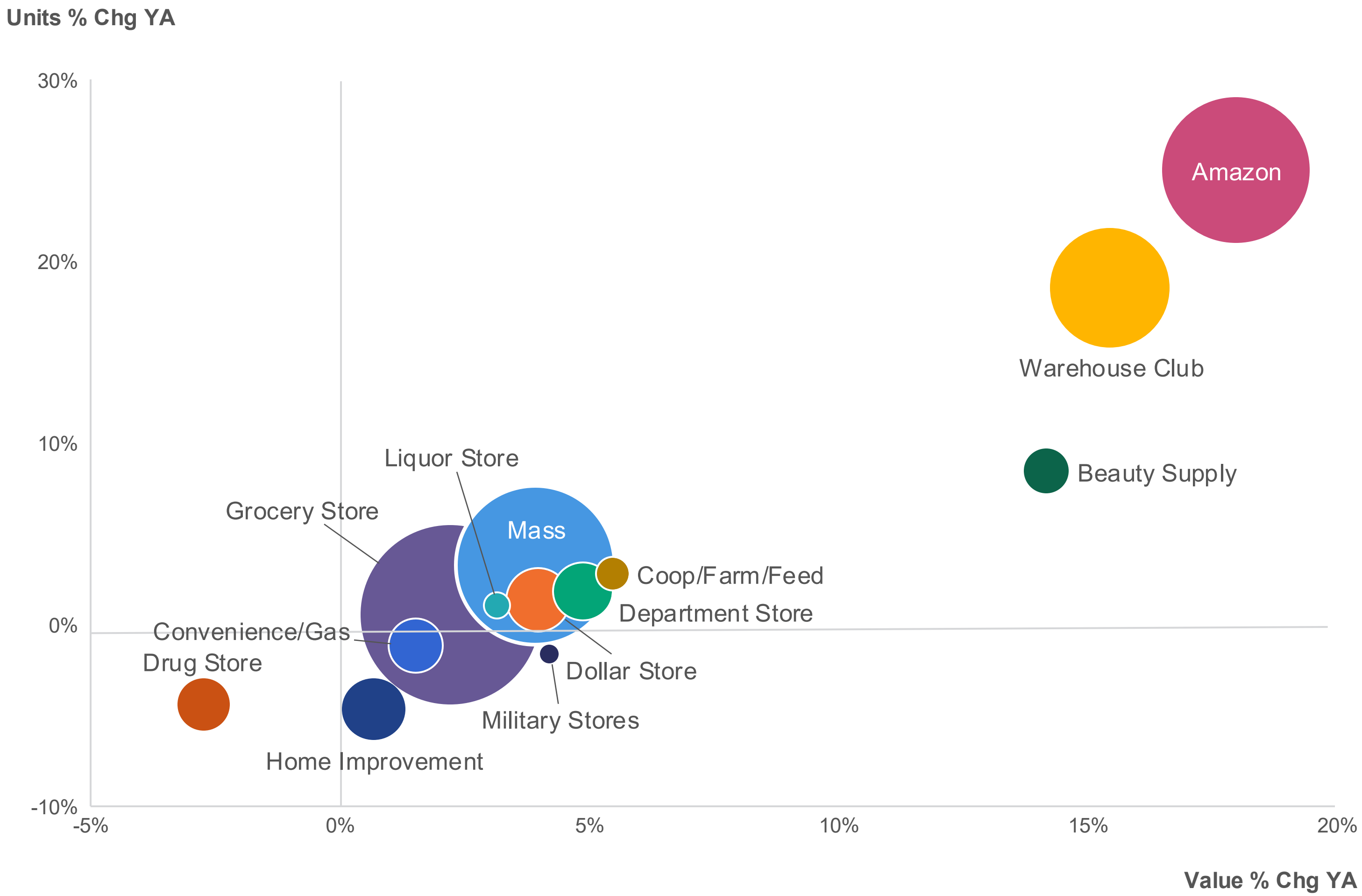
Only warehouse club rivals

CPG Sales performance by Channel L52 Weeks

Channel Value Share

Channel	Value Shr	Value Shr Chg YA
Grocery Store	27.6%	-1.2pp
Mass	21.8%	-0.6pp
Amazon	18.6%	+1.8pp
Warehouse Club	12.4%	+0.9pp
Home Improvement	3.4%	-0.2pp
Dollar Store	3.3%	-0.1pp
Department Store	2.8%	-0.1pp
Convenience/Gas	2.4%	-0.1pp
Drug Store	2.3%	-0.2pp
Beauty Supply	1.8%	+0.1pp
Pet Store	1.3%	Flat
Coop/Farm/Feed	0.9%	Flat
Remaining Outlets	0.6%	-0.2pp
Liquor Store	0.5%	Flat
Military Stores	0.3%	Flat

Value and Units performance vs YA

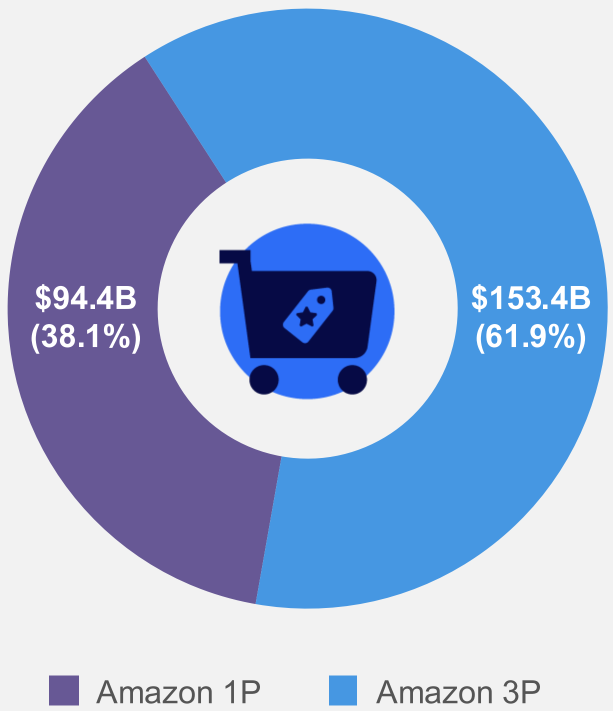


Source: NielsenIQ Panel On Demand Omnishopper, Entire Dataset, Value Share, Value Share % Chg YA, Units % Chg and Value % Chg, for All Departments in All Channels in Total Online | Latest 52 wks w/e 8/9/25

Amazon predominantly a third-party commerce platform

Understanding 1P versus 3P dynamics critical for fully understanding your category

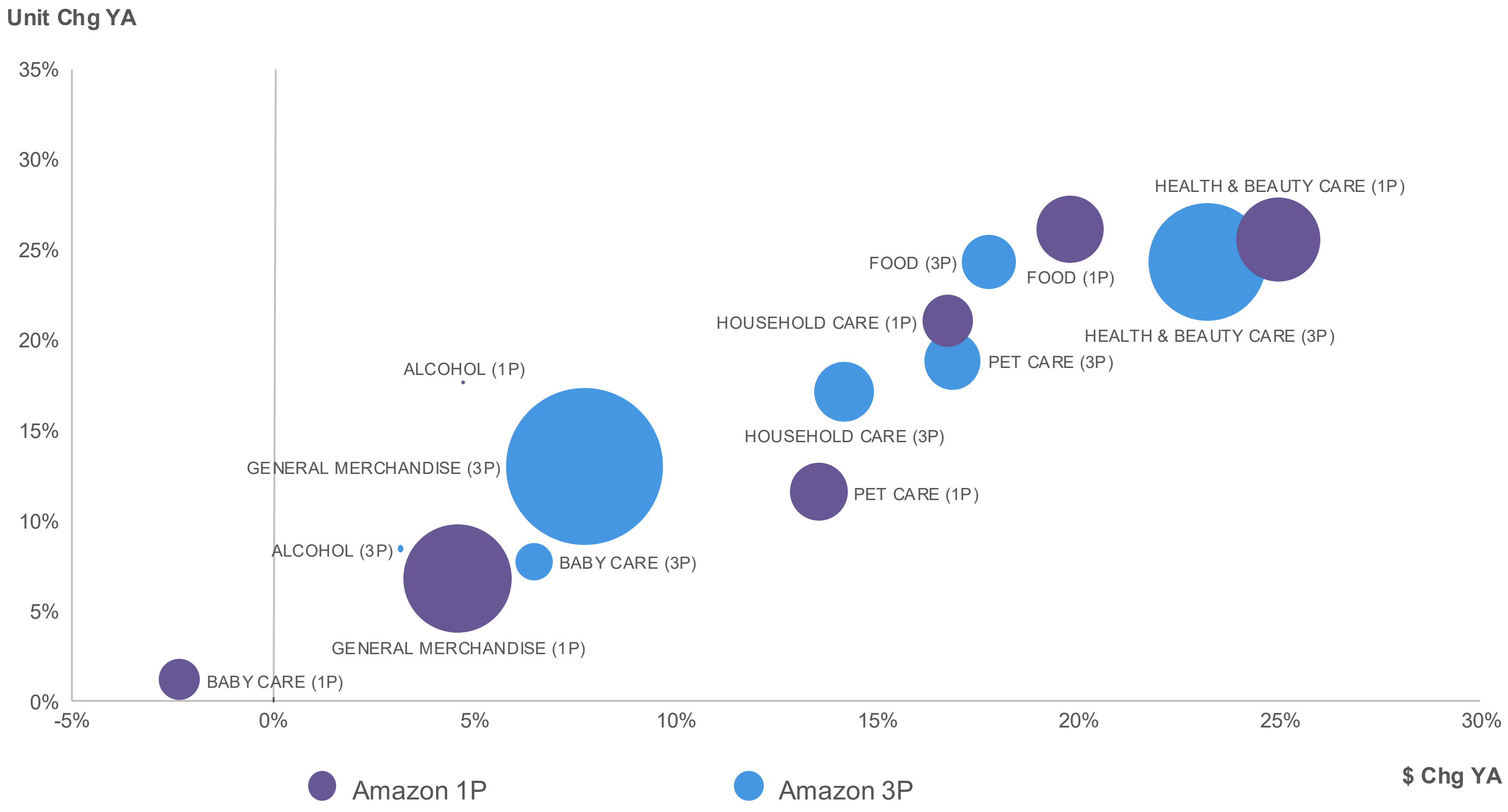
1P vs. 3P Sales Share



Most of Amazon sales are through Third Party Sellers

Amazon Sales Performance by Department

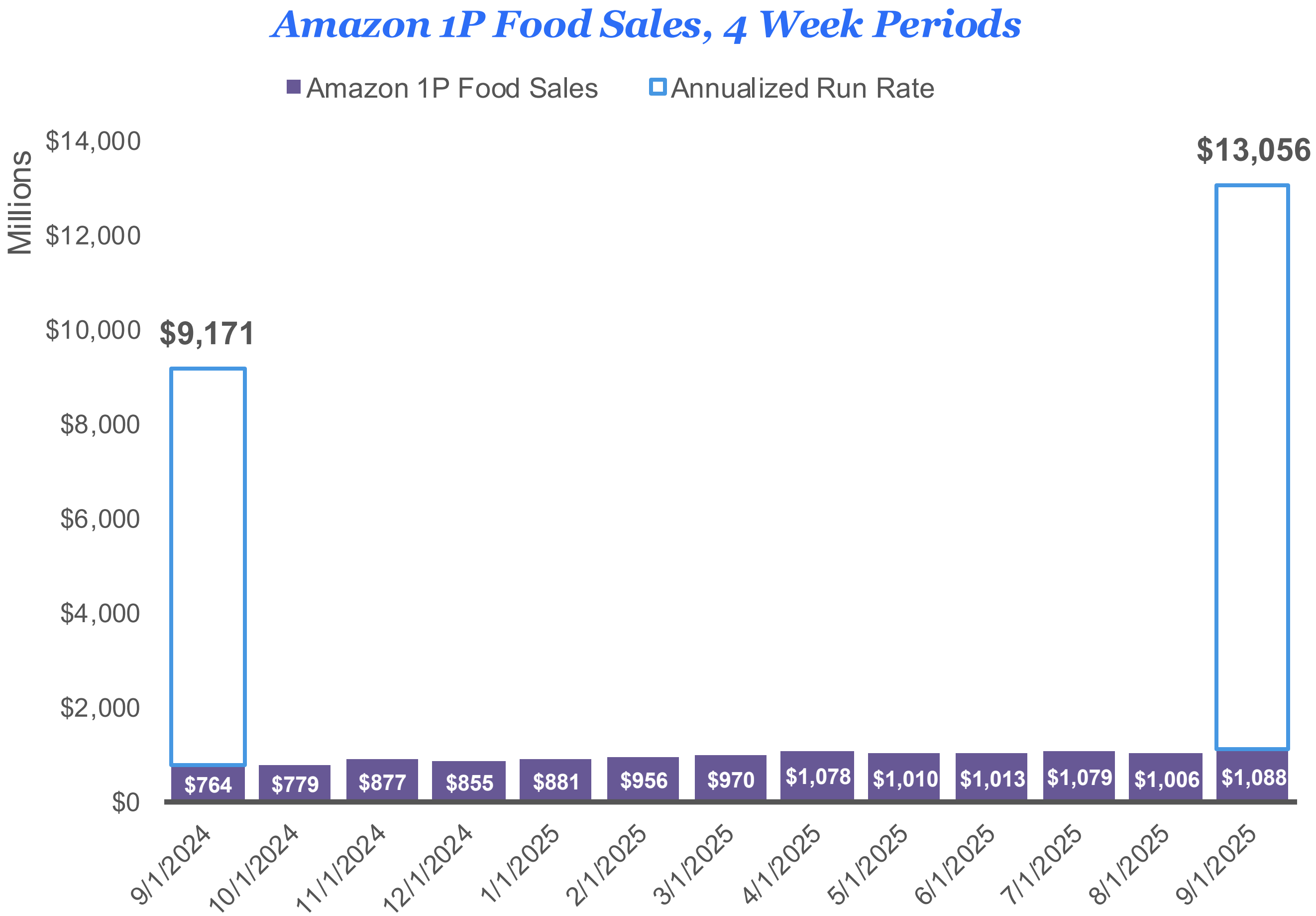
Amazon Value and Units performance vs YA



Source: NielsenIQ Omnisales, $, $ %Chg YA and Unit % Chg YA for All Departments excluding Floral in Amazon | Latest 52 wks w/e 8/23/25

Amazon has mighty food ambitions in 2026

Amazon 1P will soon be a $15 billion a year food business



Source: NielsenIQ Retail Measurement | US Total Store | w/e 9/1/25

Almost all channels growing meaningfully online

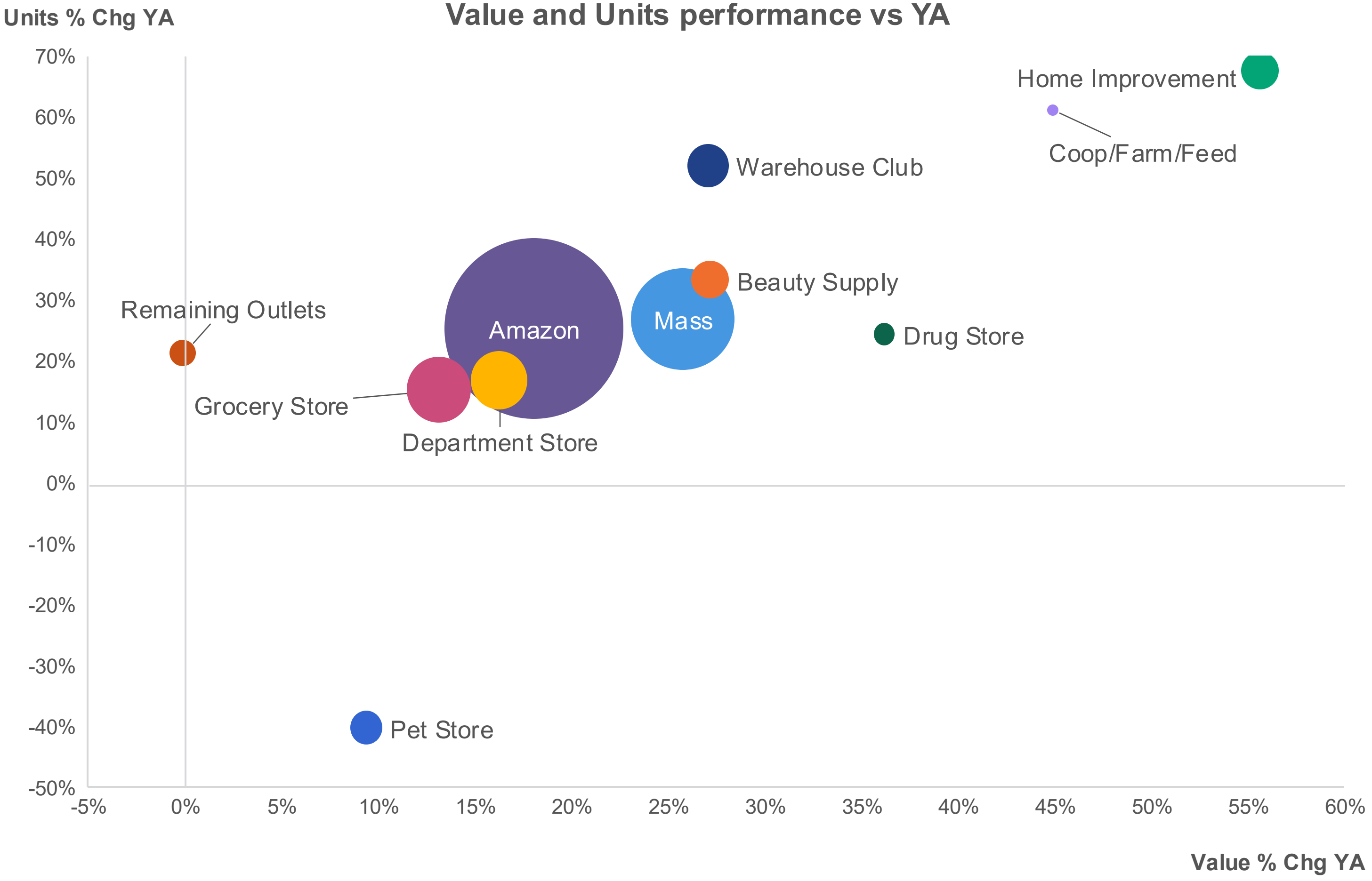
Amazon and Mass retailers remain dominant in eCommerce, with slight growth from Club, Beauty Supplies, Home improvement and Drug Store

CPG Online sales performance by Channel L52

Channel Value Share

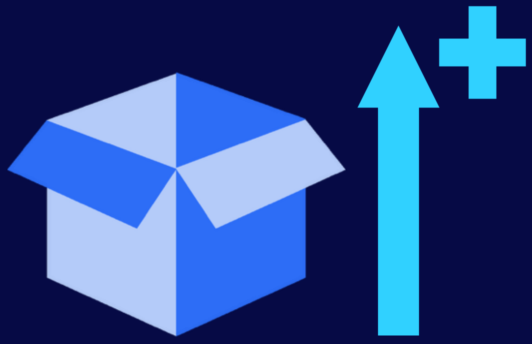
Channel	Value Shr	Value Shr Chg YA
Amazon	56.4%	-0.8pp
Mass	18.3%	+0.8pp
Grocery Store	7.5%	-0.5pp
Department Store	5.7%	-0.2pp
Warehouse Club	3.0%	+0.2pp
Beauty Supply	2.5%	+0.1pp
Home Improvement	2.5%	+0.6pp
Pet Store	1.8%	-0.2pp
Remaining Outlets	1.3%	-0.3pp
Drug Store	0.8%	+0.1pp
Coop/Farm/Feed	0.2%	Flat
Liquor Store	0.1%	Flat
Dollar Store	0.0%	Flat

Value and Units performance vs YA



Source: NielsenIQ Panel On Demand Omnishopper, Value Share, Value Share % Chg YA, Units % Chg and Value % Chg, for All Departments in All Channels in Total Online | Latest 52 wks w/e 8/9/25

Key Capabilities for Success



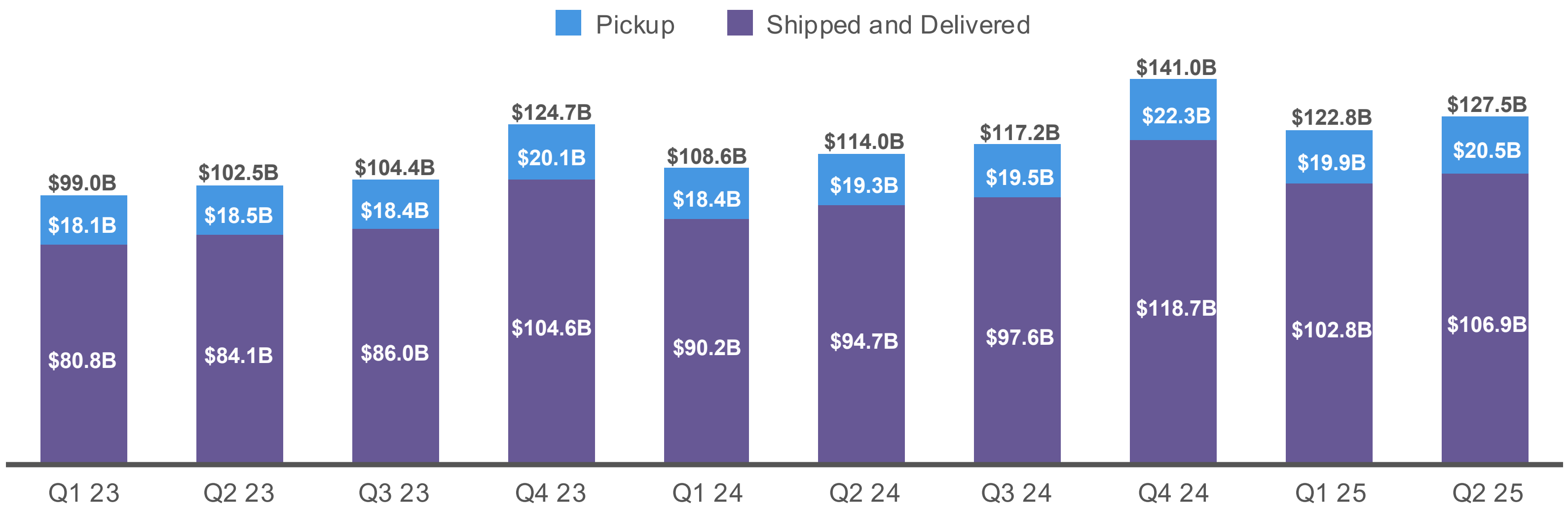
Shipped and Delivered quarterly sales are growing at a

3.2% CAGR

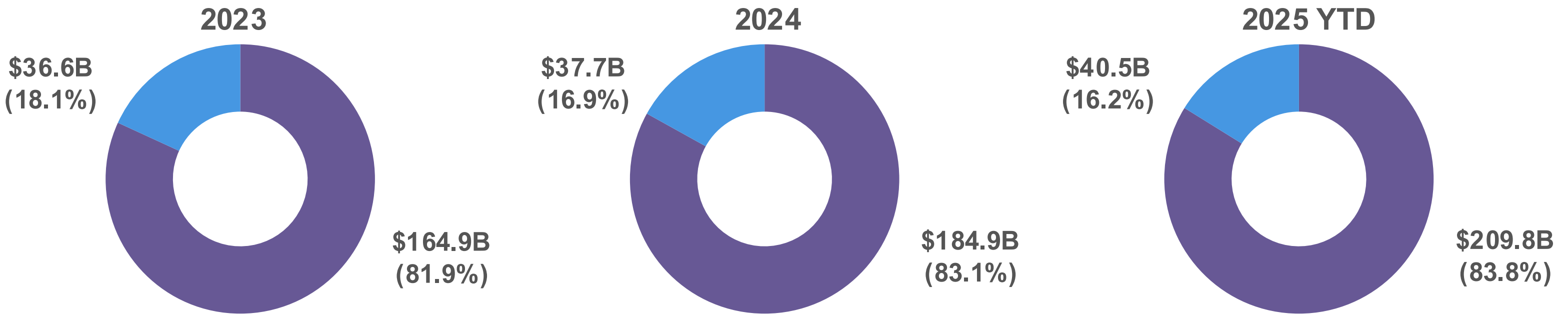
Shipped and delivery the dominant fulfillment modality

More than 83% of Online sales are Shipped and Delivered

Online sales Delivery type by Quarter



Online sales Delivery type by Year



Source: NielsenIQ Omnisales, $ %Chg YA and $ Chg YA for All Departments in Total US | Latest 52 wks w/e 8/23/25

Pickup more relevant to alcohol, food, and household care orders than other departments

Different shopper missions as well as differing fulfillment challenges (e.g., perishability) drive pickup usage

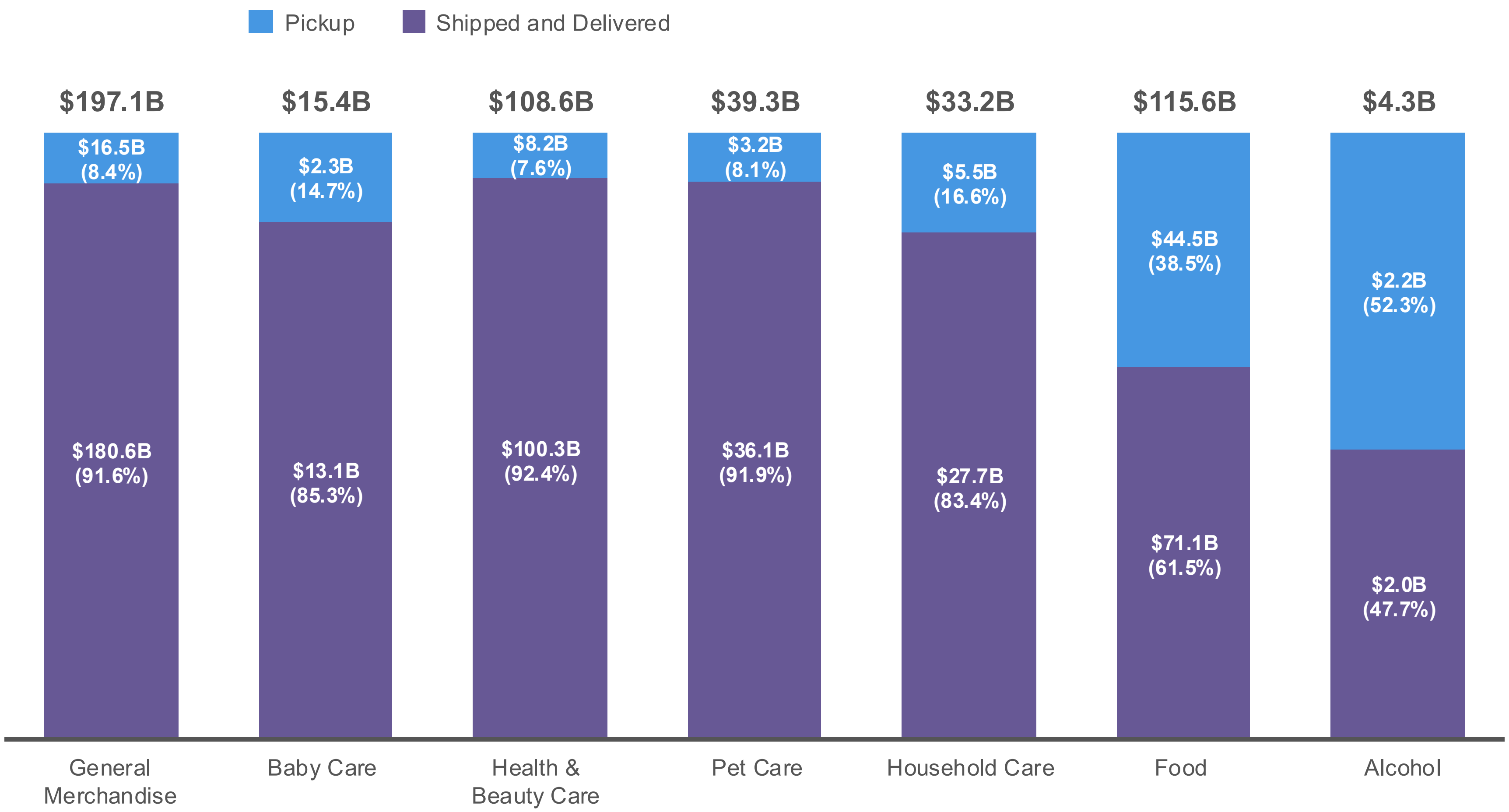
$82.4B

In Pickup Modality

$431.0B

In Shipped and Delivery Modality

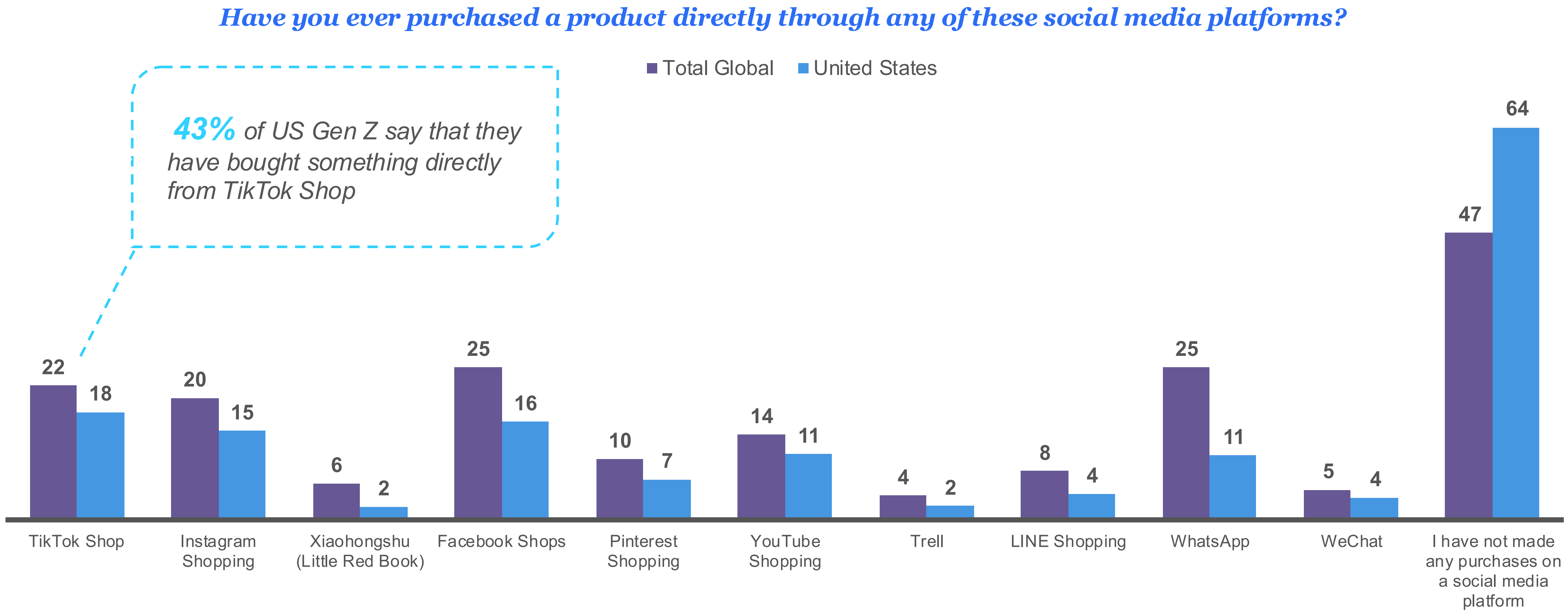
Online sales Delivery type by Department L52



Source: NielsenIQ Omnisales, $, $ %Chg YA and $ Share for All Departments excluding Floral in Total Online | Latest 52 wks w/e 8/23/25

Further growth found in commercializing social media, although the US trails Global

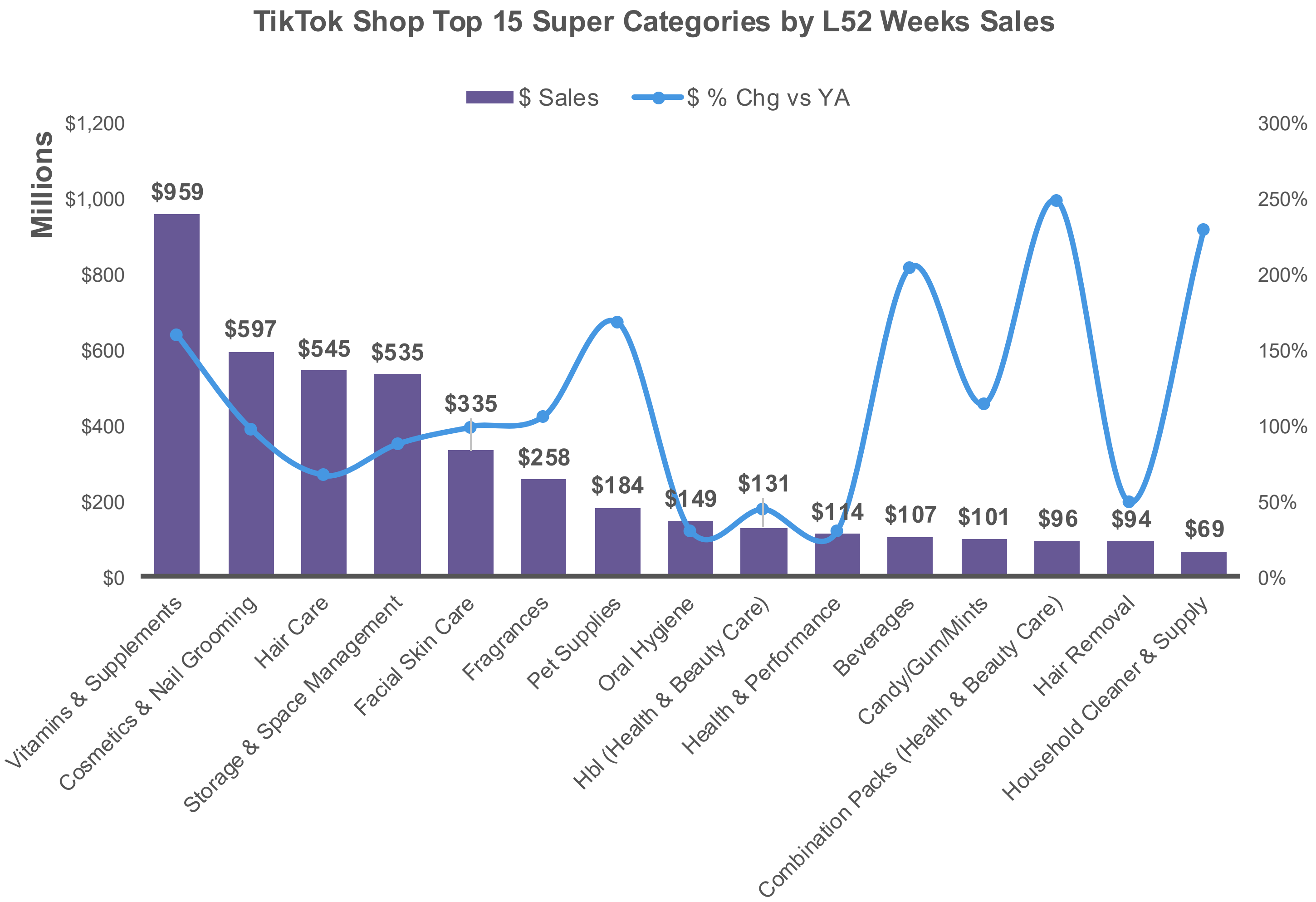
Adoption expected to grow substantially



Source: NIQ 2025 Consumer Outlook survey

TikTok Shop already a highly relevant commerce channel

HBC categories dominate, but strong growth also being seen elsewhere



NielsenIQ Omnisales, $ and $ %Chg YA Top 15 Super Categories in CPG TikTok Shop US | Latest 52 wks w/e 8/23/25

Retail media will enable some retailers to offset costly omnichannel operations

CPG Retail Media Spend Projections

$27 billion

By 2026

17.9% 2-Yr Forecasted CAGR

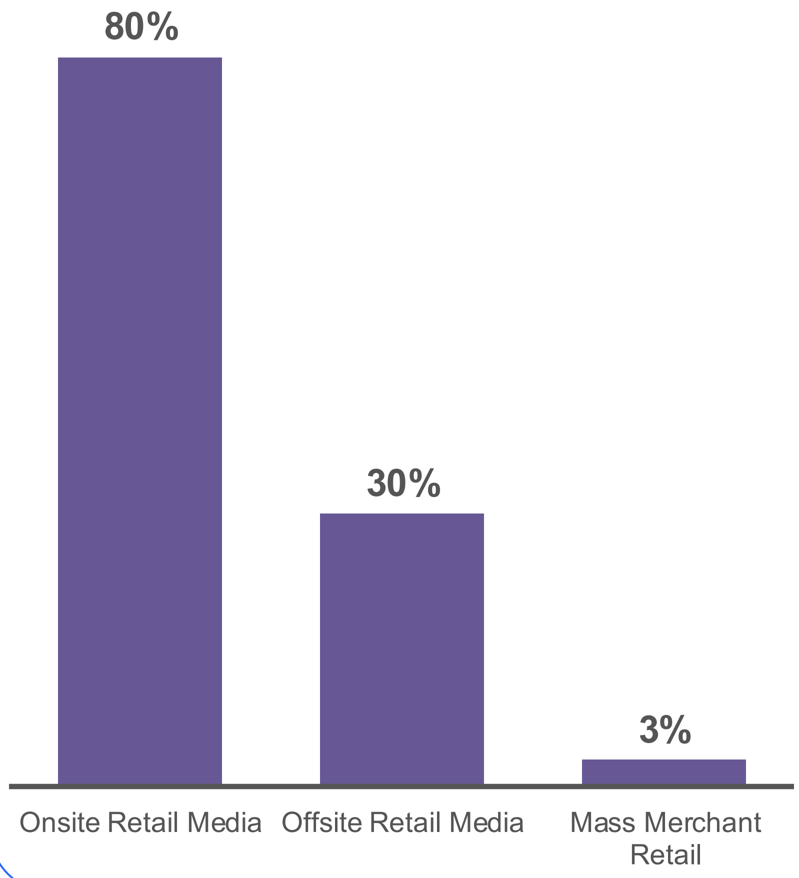
Driven by

Evolution of Consumer Expectations

Technological Development

Retailer Profitability Needs

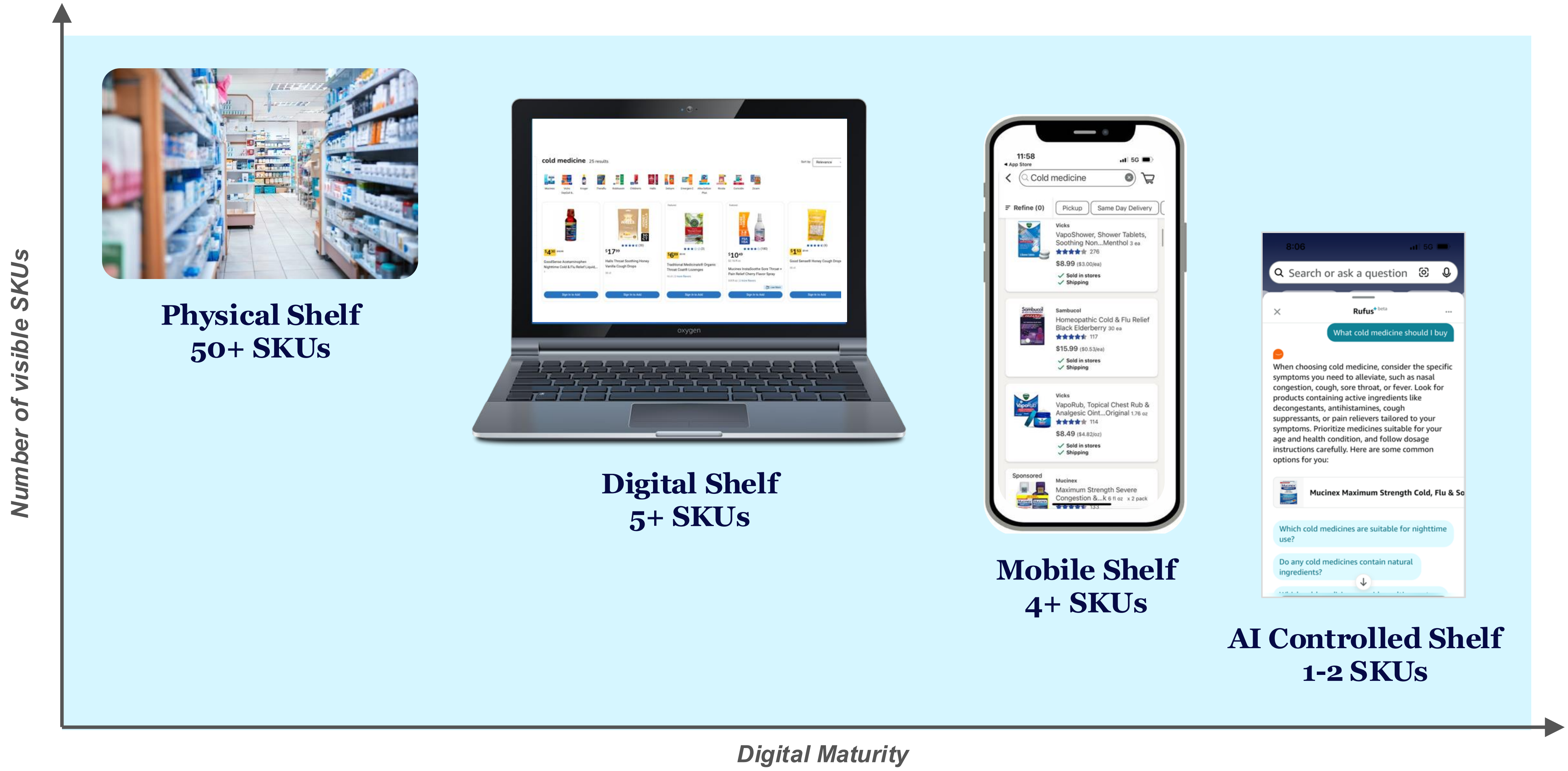
Estimated Margins by Operating Area



Source: The Evolution of Retail Media: Decoding What Works – And What Doesn't | FMI | NielsenIQ | Think Blue, Oliver Wyman: The Future Of Retail Media And Its Impact On Advertising

AI has the potential to transform shelf strategy

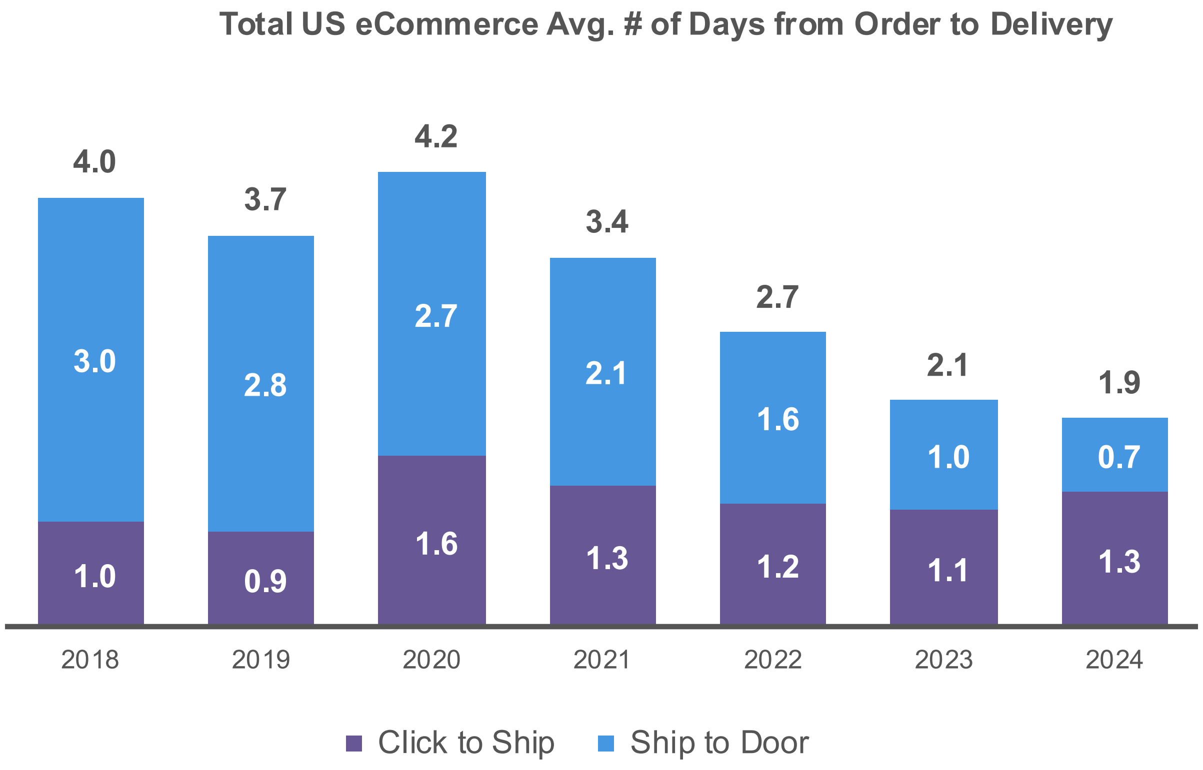
A new, even more challenging competitive environment

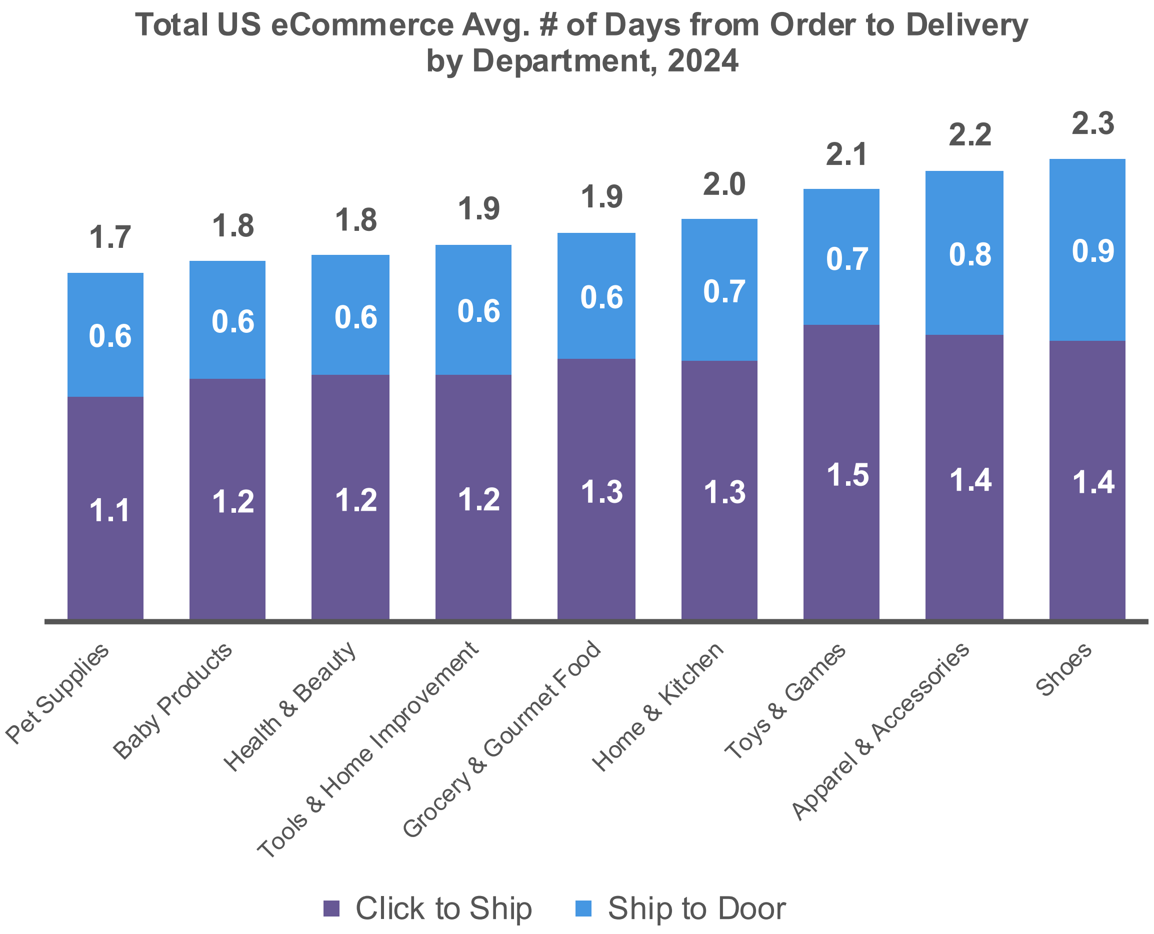


Source: NIQ Digital Shelf

Fulfillment speed will be a major competitive battleground

Shoppers becoming accustomed to same-day delivery in some areas

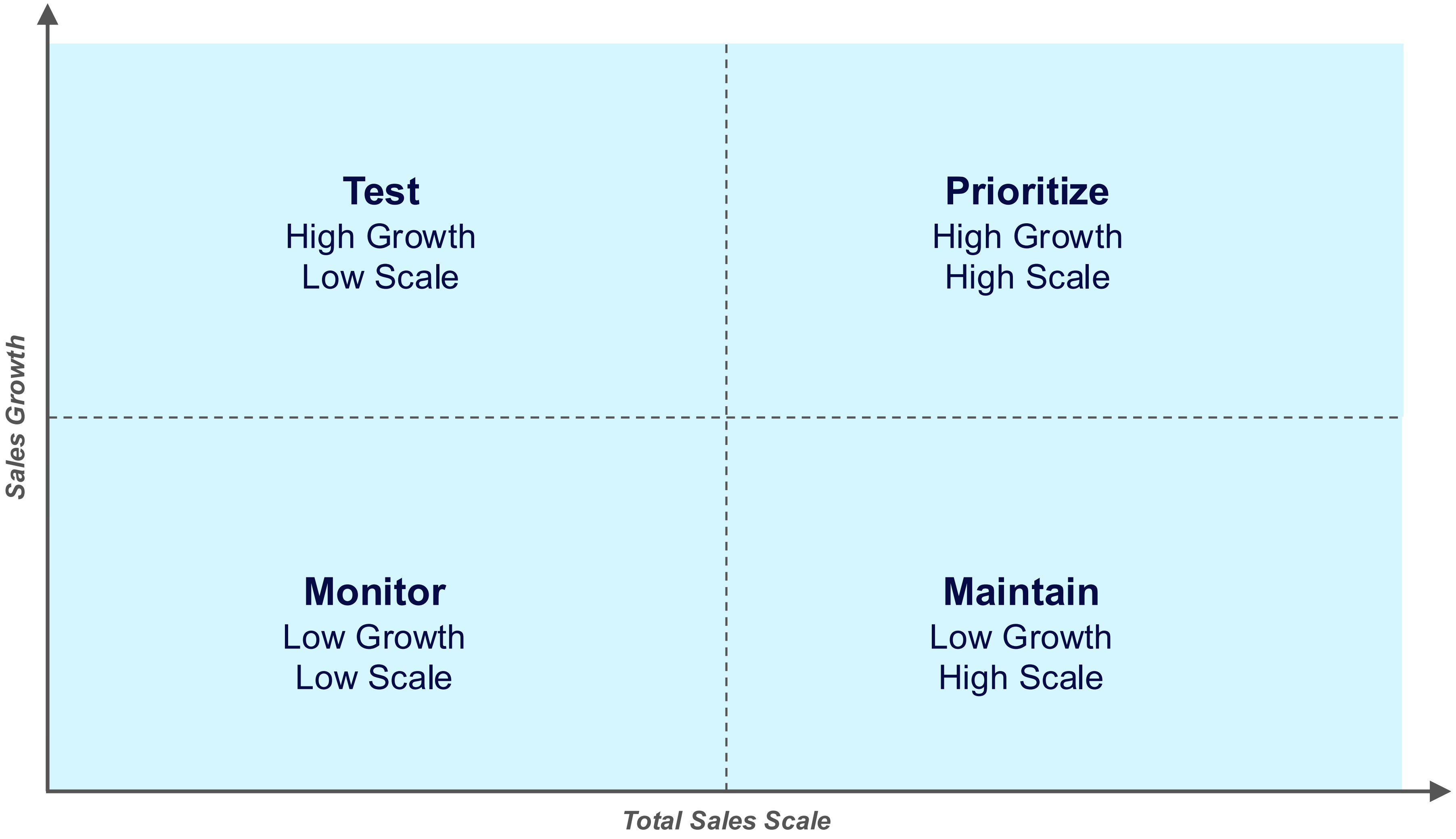




Source: NIQ eCommerce Digital Purchases

Actions to Take

Strategic prioritization of numerous business models, channels, retailers, and capabilities requires accurate opportunity measurement



Source: NIQ

Distribution must be considered in coordination with price and pack size in an omni environment

	Retailer Exclusive	*Tailored Distribution*	*Exclusive → National*	*National*
Description	Products that launched primarily with an exclusive retailer partnership	Products that launched in a specific channel or subset of channels, often category specialty stores/sites	Products that launch in 1 retailer/channel before expanding rapidly	Products that launched with wide availability in multiple channels
Omni Benefits	• Eliminates EQ price matching • Focused investment • Retailer-tailored economic profile (dim/weight/pack/price) • Sometimes more favorable terms negotiations	• Minimizes EQ price matching • Broader awareness & sales potential • Channel-tailored economic profile (dim/weight/pack/price)	• Establishes price norms • Builds awareness & interest before expansion • Controlled volume growth, minimizing OOS • Scales with organization	• Significant marketing support and distribution drives rapid awareness • More favorable terms negotiations • Scales most rapidly
What to focus on	• Digital shelf excellence • Packaging most compatible with partnered retailer • Tailored best-in-class content • Supply chain / demand planning for OOS minimization • Retailer program participation	• Digital shelf excellence • Channel-ready packaging • Internal team capability / coordination • Prioritization playbook for channels / retailers	• Digital shelf excellence • Multi-channel compatible packaging • Internal team capability / coordination • Supply chain / demand planning for scaling	• Digital shelf excellence • Multi-channel compatible packaging • Internal team capability / coordination • Supply chain / demand planning for scaling

Source: NIQ

Retail Media needs to be integrated into Joint Business Planning

Collaboration & Partnership

Execution Accountability

1. OOS & Distribution
2. Campaign compliance

Knowledge Sharing

1. Keywords volume
2. Key Audiences
3. Case Studies

Optimizing True ROAS

1. All KPIs in calculation
2. Strategic media allocation

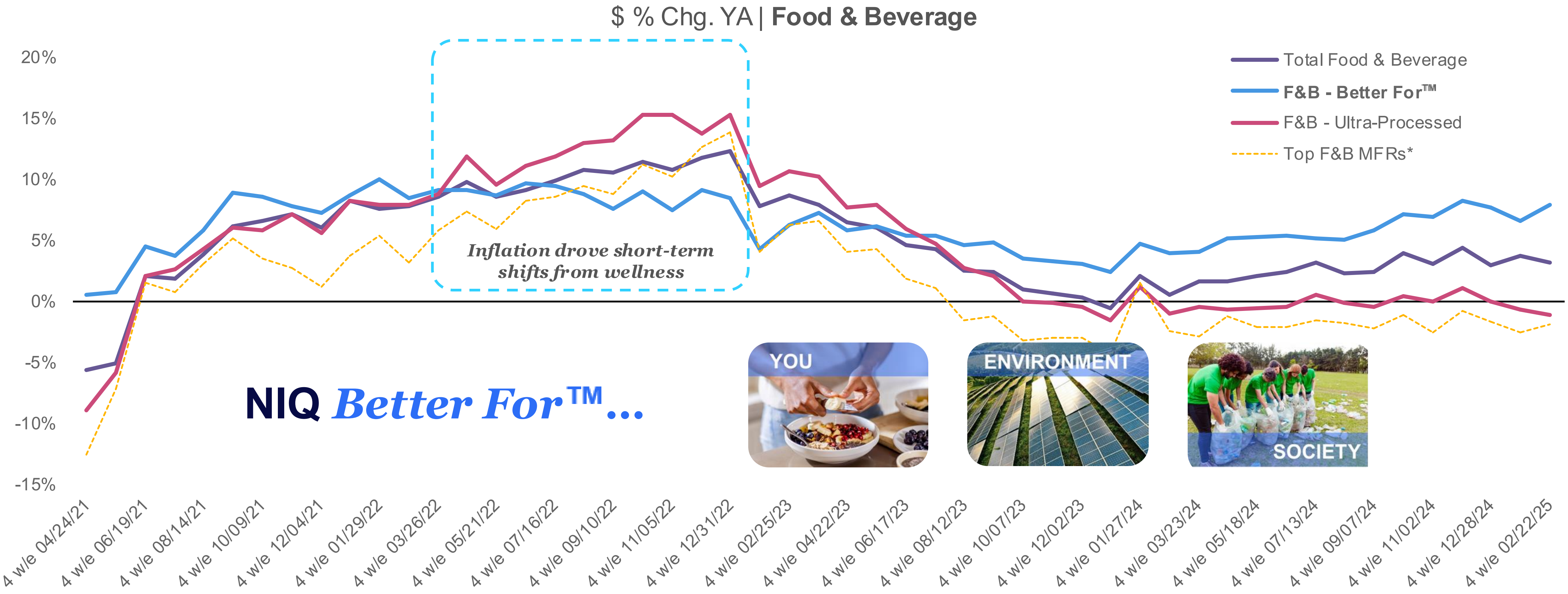
Protection & Exclusivity

1. Branded keywords exclusivity
2. Limit competitiveness of campaigns

Source: NIQ

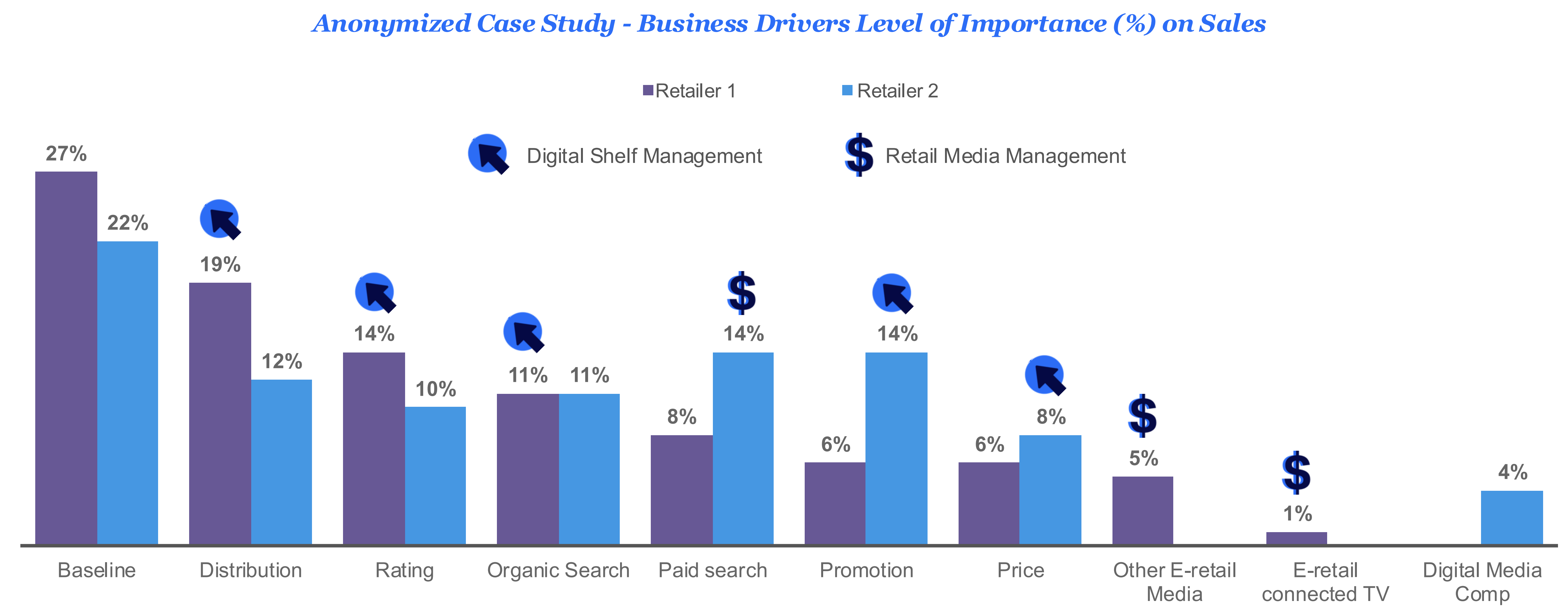
Reach shoppers through attributes, ingredients, and benefits

Better For™ is a bellwether of wellness trends and consumer priorities



Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage vs Better For segment; $ % Change vs year ago; 4-week trended through week ending February 22, 2025

Retail media alone does not guarantee success, multiple other drivers contribute to eCommerce performance



Source: NIQ Digital Shelf – Anonymized Case Study

Don't neglect digital shelf fundamentals

Availability × **Visibility** × **Attractiveness** = **Performance**

Availability
- **OOS**
- **Assortment**
  Distribution
  Hero SKUs

Visibility
- **Search**
  Organic
  Paid
- **Media**

Attractiveness
- **Content**
- **Ratings & Reviews**
- **Price & Promotion**

Performance

Market Share
Share of Wallet
Online/Offline Index

80% of in-basket products appear in the top 10 results generated by a keyword search

Source: NIQ

Your next steps

Here are the ***top six actions CPG leaders*** can take today to shore up their omni strategy:

1

Champion Omnichannel internally as the future growth engine of your business

2

Accurately measure retailers, channels, and emerging business models with category granularity to set your omnichannel strategy

3

Internally continue building omni capabilities across functions, break down siloes within the organization

4

Drive digital shelf excellence to capture fair share of omnichannel growth, invest in the data and tools to measure this

5

Integrate sustainability and health and wellness attributes into your product development plans, content, and retailer catalog setups

6

Begin optimizing for an AI powered search environment and integrate AI into your operations for efficiency gains

Source: NIQ

Thank you!

NielsenIQ