

March 18, 2026

“Women are raising the bar for what earns a place in the basket. As spend concentrates around offerings that deliver immediate justification and everyday relevance—especially in health—the growth model shifts toward consistency over spikes. Repeatability, clarity, and usefulness now matter more than momentary excitement. The strategic advantage lies in deeply understanding what women expect at each level of the system: the retailer, the brand, and the product.”



Chris Costagli

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Did you know...

- Women who prioritize reducing daily stress are **2.6× more likely than men** to pay higher prices if it saves a meaningful amount of personal time³
- Women who are focused on improving their daily nutrition are **1.7× more likely than men** to believe they don’t get enough protein throughout the day⁴
- Women who actively manage household budgets are **1.5× more likely than men** to delay purchasing certain products until there is a sale or deal¹

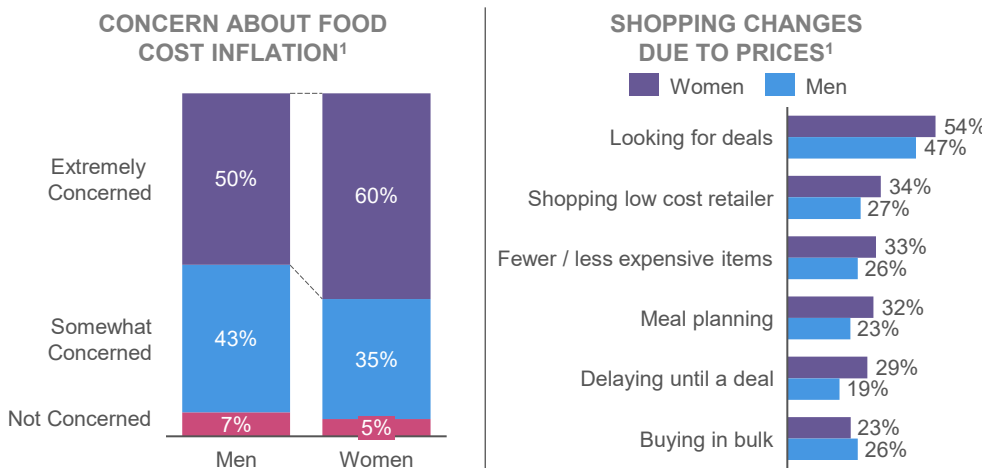


Winning Women Starts With Her Rules: Value, Channel & Health

Women

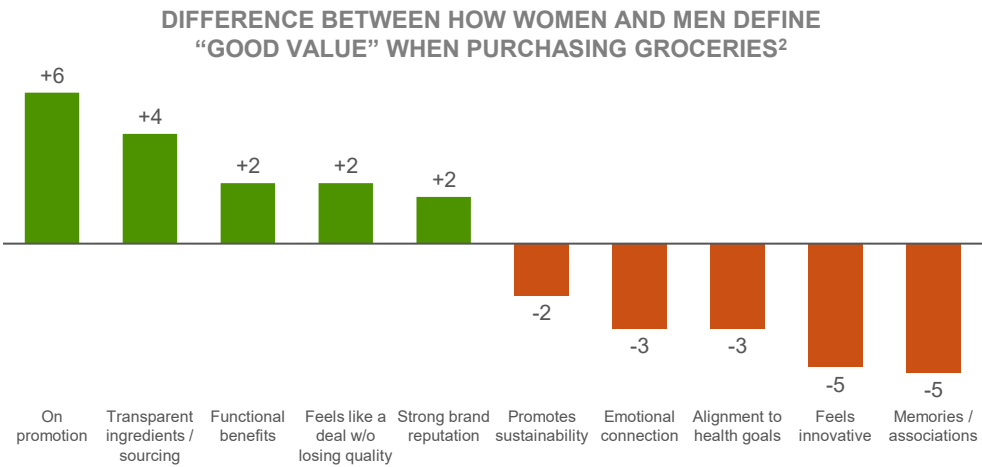
Women recalibrate choices with purpose

Women are restructuring everyday consumption under persistent economic pressure, and food is the front line. This shift favors brands that deliver consistency and utility over novelty. What looks like frugality is actually long-horizon optimization, where fewer products must do more work. The brands that win will be the ones that integrate seamlessly into planned routines rather than competing for attention.



Make value easy to see and faster to verify

Women are making it clear that trust is earned through value—49% point to “value for money” as the top factor in deciding which brands they rely on. Brands that miss that expectation risk losing them, which is why 55% have stopped buying premium items they once loved when prices stretched past what felt reasonable. Brands must prove the benefit and price it fairly to win a place in the basket today.



Industry Analysis Sources: ¹NIQ, BASES Quick Question Omnibus Survey, n=2,006, January 2026; ²NIQ, BASES Quick Question Omnibus Survey, n=2,006, December 2025; ³NIQ, BASES Quick Question Omnibus Survey, n=1,021, November 2025; ⁴NIQ, BASES Quick Question Omnibus Survey, n=1,020, August 2025; ⁵NIQ, Expanded Omnishopper Panel, Total US, Total Outlets, Total Product, 52 Weeks Ending 01/24/2026

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NIQ

Demographics

Food & Beverage

The takeaway...

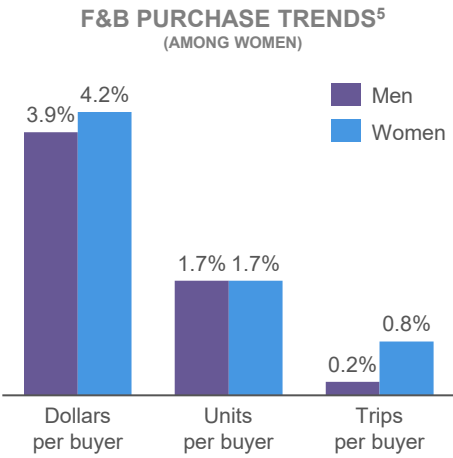
- Trips are the growth multiplier. Higher trip frequency gives brands more chances to win and retailers more chances to drive larger baskets.
- Women are concentrating spend around channels and products that justify value immediately, raising the bar for premium and margin strategies.
- Everyday relevance beats episodic wins. Durable growth will come from brands that fit seamlessly into women's routines—especially around health.

Your next move...

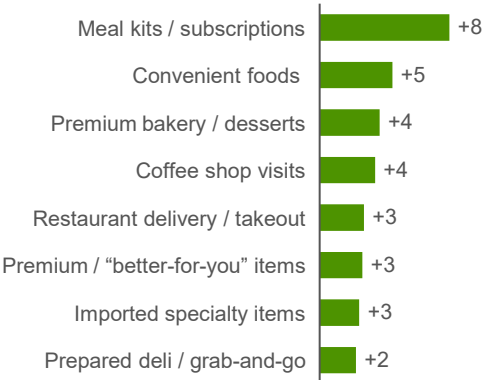
- Merchandise around routines and outcomes—especially health—so shoppers can quickly see what belongs in everyday life, not just special occasions.
- Make value obvious and defensible across channels by reducing complexity, improving comparability, and eliminating ambiguity at shelf and online.
- Design stores, assortments, and experiences around repeat visits—optimize for trip efficiency, confidence, and productivity, not just basket size.

Women are driving the trip opportunity

Women are giving the industry more chances to get it right. Higher frequency increases the odds of trial, cross-category expansion, and habit formation—especially when trips are planned and purposeful. This shifts strategy away from chasing occasional big baskets and toward earning a role across many small decisions. Growth leaders will be the companies that treat trips—not products—as the primary unit of competition.

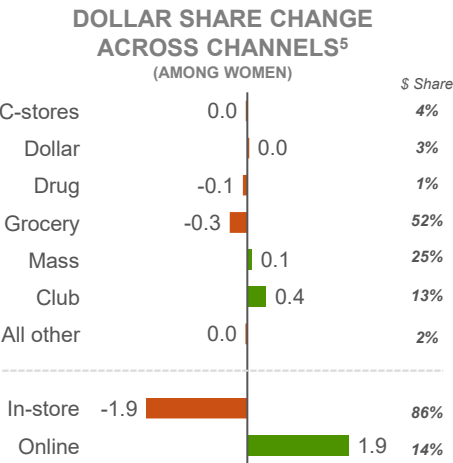


DIFFERENCE BETWEEN WHAT WOMEN & MEN SAY ARE NOT WORTH IT¹



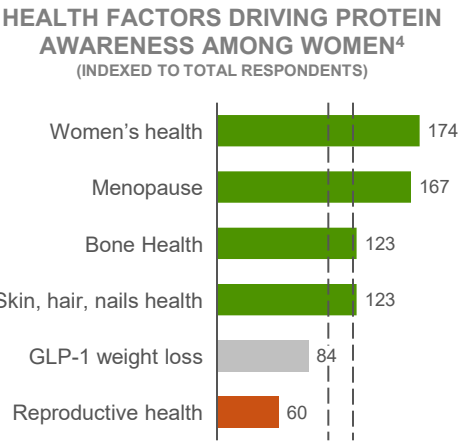
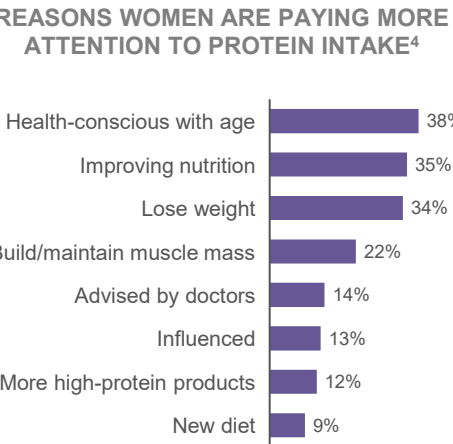
Women are rewarding the math that works

Women are reallocating spend toward channels that deliver clear value with minimal friction. Club and eCommerce reflect a shared advantage—reduced decision burden paired with stronger economic logic. This trend pressures traditional store models to rethink assortment efficiency and margin resilience. Expect continued capital and consumer flow toward channels that make value obvious rather than implied.



Women are rewriting America's protein market

Women are redefining the economics of health and wellness in food. Demand is moving toward products that integrate functional benefits into everyday consumption rather than episodic or extreme use cases. This expands the addressable market for health-driven food while raising expectations for credibility and consistency. The result is a longer-term growth runway—but one that will reward discipline over hype.



Looking for more?

Women are shopping smarter—and they're done carrying the burden of bad design, vague value, and inflated promises. Rising trip frequency creates more selling moments, but spend is concentrating around channels and products that justify value immediately. That shift is pressuring traditional margin strategies and raising the bar for what premium must deliver. Health and wellness are moving to the center of everyday food consumption, expanding the addressable market while intensifying scrutiny. The brands that help women feel confident, in control, and supported—quietly, consistently, and at scale—will define the next era of industry leadership.