Inflection Points

Navigating the Road from Startup to Scaleup

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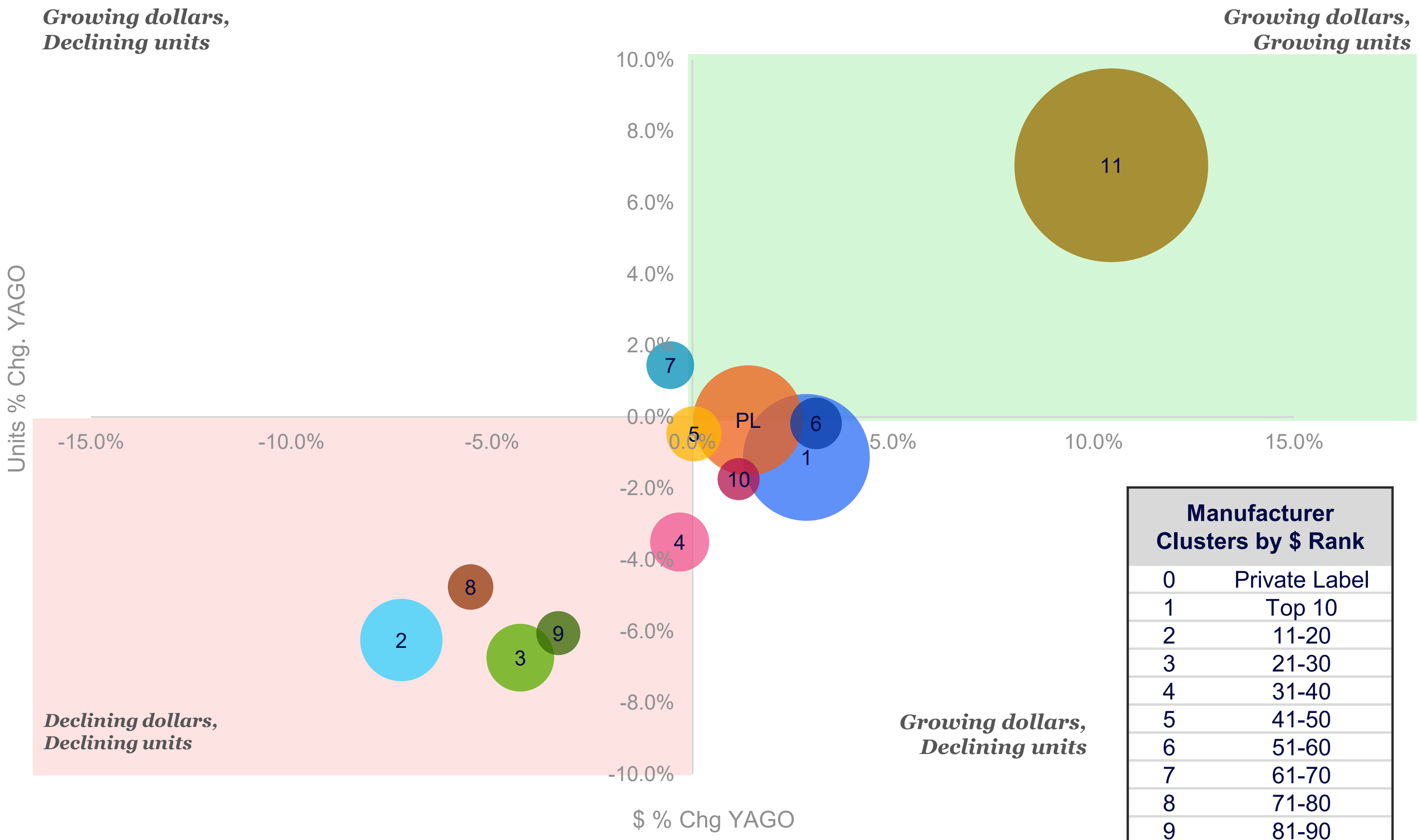
Growth can be hard…

Average global volume growth across the CPG landscape was only >1% in 2025

The market relies on challenger brands to drive growth

US Food & Beverage Manufacturers: Dollar and Unit Trends vs Last Year



Manufacturer Clusters by $ Rank	
0	Private Label
1	Top 10
2	11-20
3	21-30
4	31-40
5	41-50
6	51-60
7	61-70
8	71-80
9	81-90
10	91-100
11	Bottom 3K

Source: NIQ RMS, Total US Full View Measurement. xAOC+, Total Food & Beverages, L52W we 1/24/26 vs YA

Chasing continual growth looks different for disrupter brands than established brands

Growth Opportunities

- Volume growth via new buyers/new usage
- Retail whitespace allows YoY growth
- Permission to be disruptive with innovation
- Founder/storytelling advantage
- Greater agility and relevance

Challenges & Risks

- Lower brand awareness
- Lack of a compelling retailer sell-in story
- Distribution outpacing velocities
- Suboptimal shelf placement
- More risky trade spend

*Source: Bain & Company based on data analysis of NIQ retail measurement services

There are several growth inflection points throughout your journey to scale

Phase one

Proving Scalability

100–200% YOY Revenue Growth

Goal: Show that early traction wasn't a fluke

Drivers:
- Rapid door expansion
- First major retail wins
- Early DTC or Amazon scaling
- Heavy trial-driven growth

Healthy signals
- Growth driven by distribution, not just promo
- Velocity that holds after initial launch
- Clear path to repeat purchase

Phase two

Distribution + Velocity Flywheel

80–120% YOY Revenue Growth

Goal: Demonstrate that growth compounds as distribution widens

Drivers:
- National retailers or deeper penetration at existing chains
- Improved velocities
- Expanded SKUs or pack formats
- Marketing efficiency improving

Healthy signals
- Same-store sales growth alongside door growth
- Reduced reliance on trade spend to drive volume
- Competition reacts

Phase three

Scale With Discipline

50-80% YOY Revenue Growth

Goal: Transition from "emerging" to "established brand

Drivers:
- Velocity growth becomes more important than new door count
- Brand awareness reaches tipping point
- Sustained innovation levels
- Balanced trade & marketing spend

Healthy signals
- Profitability trajectory starts to matter
- Leadership reliance on data vs. gut feel
- Strategic buyers start paying attention

Phase four

Efficient Growth

30-50% YOY Revenue Growth

Goal: Prove the business can grow profitably and predictably

Drivers:
- Strong repeat purchase
- Stable velocity across cohorts
- Less promotional dependence
- Trade/Marketing ROI discipline

Healthy signals
- Contribution margin
- EBITDA trajectory
- Acquisition interest

Phase five

Durable Category Brand

20-35% YOY Revenue Growth

Goal: Show long-term sustainability and brand defensibility

Drivers:
- Incremental innovation (not core reliance)
- Loyal customer base
- Strong retailer relationships
- Global or adjacent-category expansion (optional)

Healthy signals
- Growth quality (real demand, competitive gains)
- Brand equity on the rise
- Innovation longevity
- More efficient unit economics

Winning brands use a common growth framework

Lead with the consumer

Address an unmet or underserved need to ensure relevance

Develop strong ideas that resonate with your brand story

Stay true to what you stand for and who you serve

Provide a high-quality product experience

Earn consumer trust to ensure positive reviews, and garner repeat purchase and loyalty

Prioritize the right doors at the right price

Stand out on shelf, communicate value, and drive physical availability

Market your brand effectively

Reach the right audience in the channels that matter most to them

And are cautious to avoid areas where you can get stuck...

Growth pathways don't align with the brand promise

Innovation pipelines dilute focus and don't add incrementality

Distribution asks without proof of category growth

Pricing decisions driven by instinct

Trade/marketing spend without clear incremental ROI

NIQ

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Please join me in welcoming our industry experts!

Meet our Panelists

Imran Manji
Partner
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Jennifer Purcell
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Joseph Trousdale
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Karen Ivanis-Rogers
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NIQ

Thank you

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