



NIQ

E-commerce Unlocked México 2026

The Full View™



NielsenIQ

The Fab Five of Omni

Examining 5 big bet trends that will have implications for Omnichannel strategies

1. Channel Fluidity

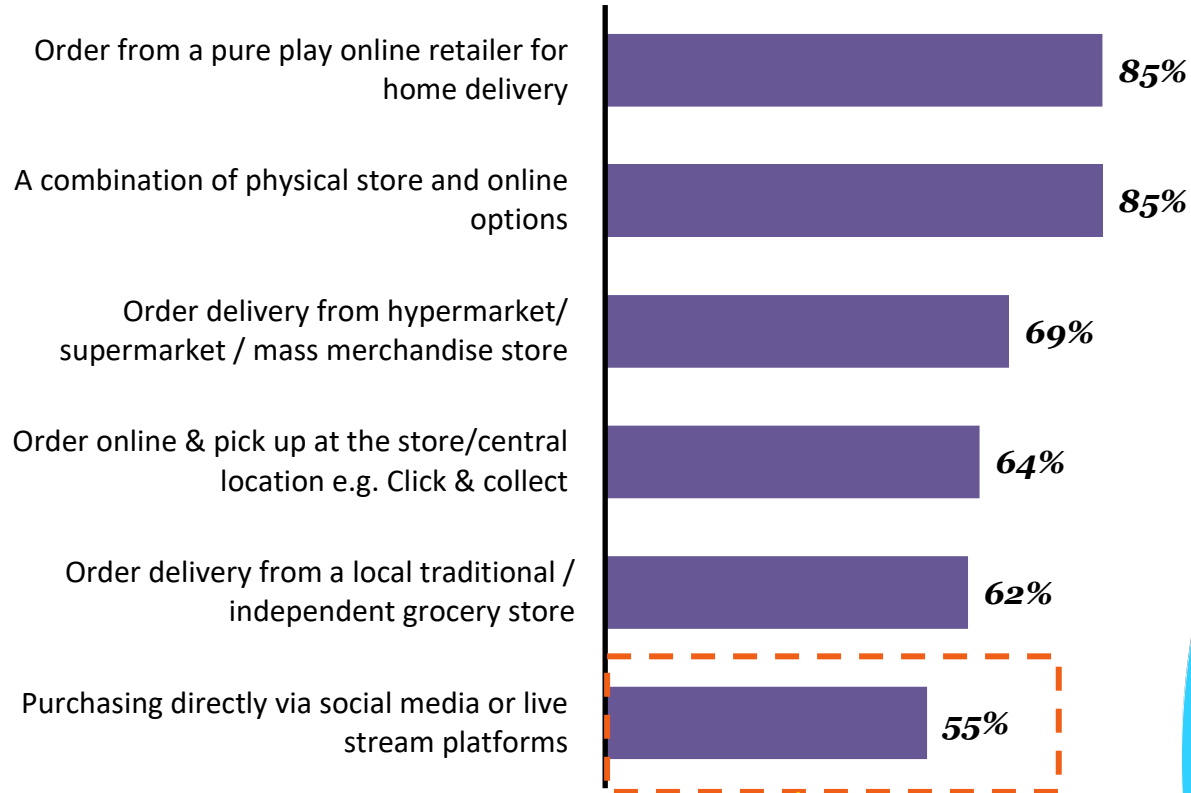
Concepts of “channel” are dissolving for consumers as well as for retailers making Omni-presence a strategic imperative



Social shopping is emerging to challenge traditional retailers

Where do you normally shop for grocery & household items?

% respondents who shop at this channel – U.S.



Source: NIQ 2024 Consumer Outlook, U.S.; TikTok Shop sales, NielsenIQ eCommerce ePanel 52wks ending 7/31/24



75% of TikTok \$ sales are from Health and Beauty

15% Of \$s are from Food

#7 TikTok Shop is already the Health and Beauty eCommerce retailer since it's launch in September 2023

#26 Food retailer

NIQ

2. Product over brand

Consumers rely on new influences beyond “brand” to drive purchase decisions – prioritizing what’s in the package vs what’s on it



Consumers
are less loyal ...

Yet it's more
important
than ever.

Less Loyal

56%

of Americans have
switched stores to
save money

Brands across the
store with increasing
loyalty in 2024
are growing

3.1x

faster than those
with stagnant or
declining loyalty



Seek Innovation

40%

of shoppers are innovation-
seekers, who try to keep up
with what's new and often are
on the lookout for new products

Impact of loyalty on
overall growth:

- 6.1x** Hair Color
- 4.9x** Hair Care
- 4.5x** Facial Skin Care
- 4.4x** Fragrance
- 2.5x** Cosmetics

NIQ

3. Cultural Transformation

Gen Z, Boomers
and Polyculturalism
transforming our culture



Gen Z will be the purest “Omni” shopping generation to date

Consumers begin their shopping journey online¹ and are heavily influenced by social media, their share of mass merch (in-store) dollars is higher than every other generation before them.²

Together, their in-store mass merch and grocery purchases make up almost 50 percent of their share of dollars.

Sources: NIQ Global Gen Z Spending Report: ¹Stephanie Chevalier, “Gen Z online shopping behavior – statistics & facts,” Statista, January 10, 2024,

²NIQ Omnishopper, Total FMCG Depts= Food, Baby Care, Health & Beauty Care, Household Care, Pet Care, Gen Merch; 52 weeks ending January 27, 2024. ³GfK Consumer Life Global 2022



77%

of millennials and Gen Z shop on social media platforms

53%

of Gen Z-ers say they have used “buy” buttons on social media networks³

- Prefer products that are high quality
- Value authenticity and transparency
- Are influenced by online trends, ratings and reviews
- Care about the planet and sustainability
- Seek out items that are on sale or are lowest price

Social media isn't just for purchases:

19%

of US shoppers have indicated that they use their phone whilst in store to aid their shopping experience. We know that shoppers are turning to their mobiles, and often to social media to answer key questions and get beyond the pack.

Ensuring that products are available after discovery on social media – whether online or in-store is essential to converting shoppers at the point of purchase.

NIQ

4. Three layer retail

Shelf performance” is no longer the only role a retailer expects a brand to fulfill, nor is it the only metric they care about



The evolving role of the store is also shifting retailer's values

From



To



NIQ

5. Transformative Technology

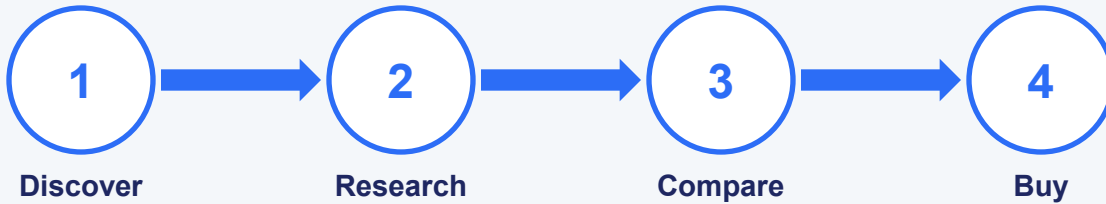
New technology will create new pathways for purchasing but require new modes of going to market



The shopper journey is moving from linear search to dynamic conversation with agents

BEFORE

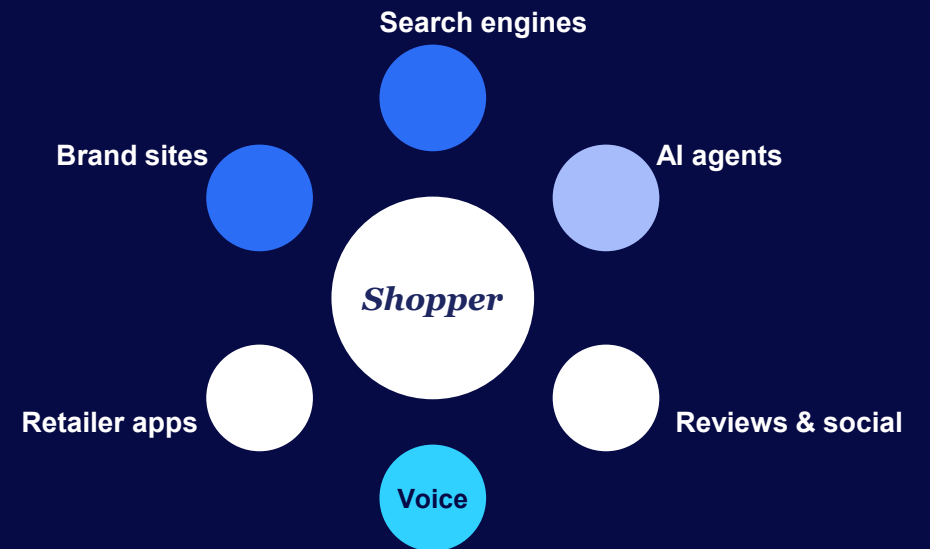
Linear search process



Shopper moves step by step — search, browse, decide

TODAY

Dynamic conversation with agents

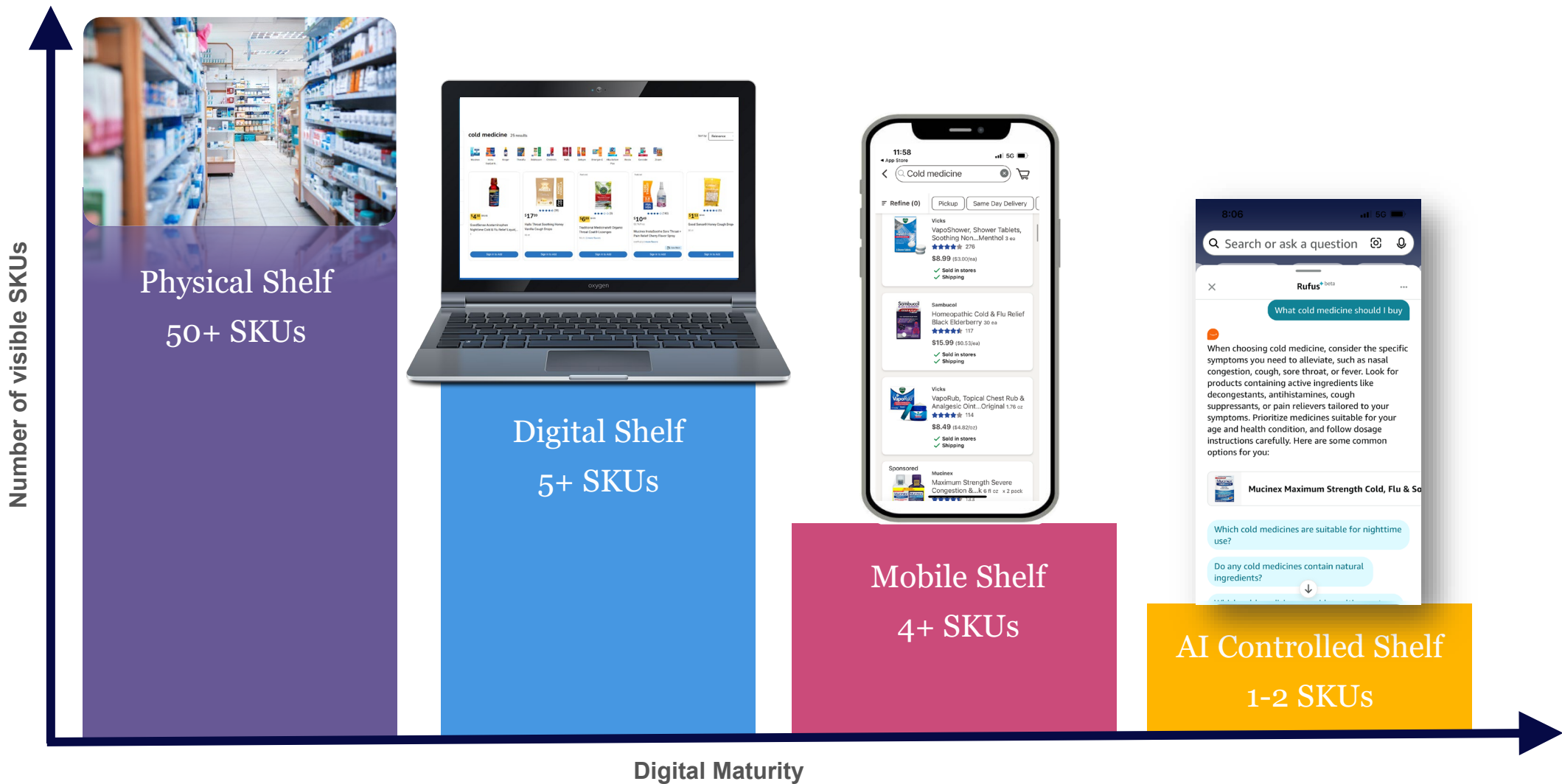


Shopper jumps between channels and agents in any order

Brands now need to win visibility inside the agent, not just on the search page

AI has the potential to transform shelf strategy

A new, even more challenging competitive environment



Source: NIQ Digital Shelf

Today, shoppers show a great appetite for AI-driven personalized solutions globally

Global | % Of respondents



84%

Would be likely to purchase a product if the retailer made it easy on their website or app to compare key product attributes

65%

Find it helpful when a retailer suggests products based on their previous purchases or preferences

58%

Are comfortable with a digital shopping platform making product suggestions

51%

Would be interested in using tools powered by Artificial Intelligence (AI) to help manage their household shopping in the future

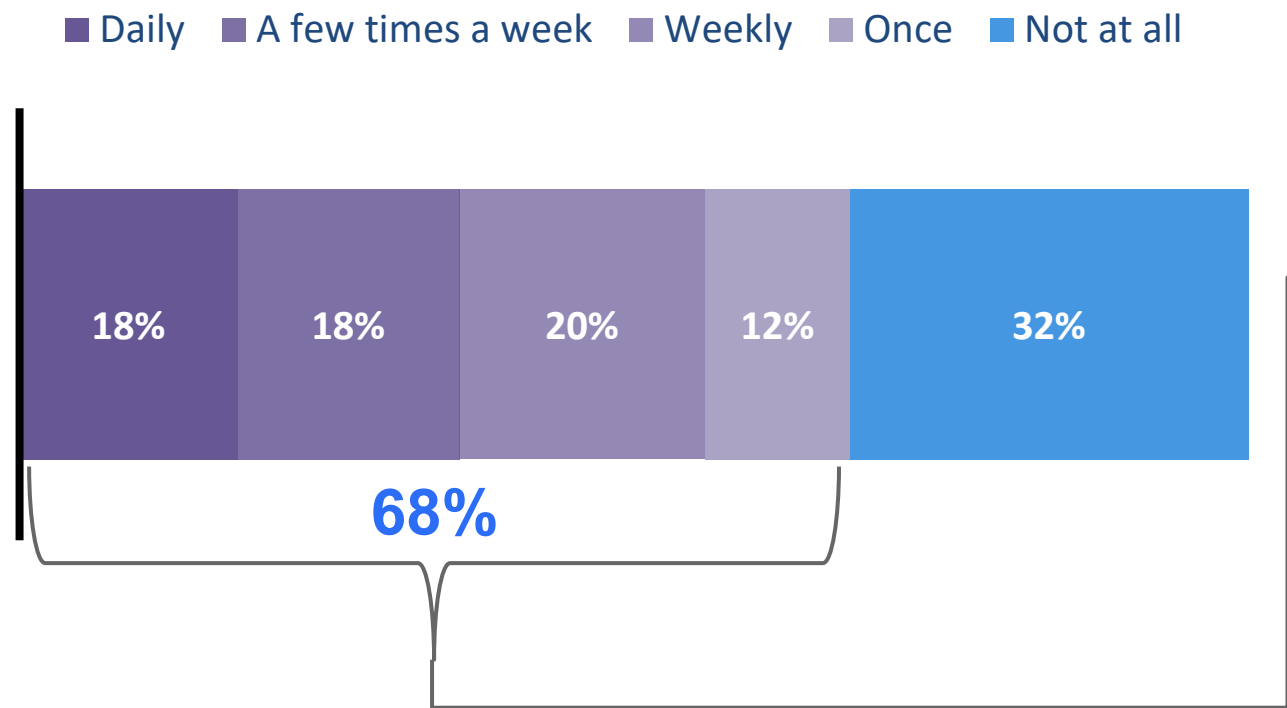
40%

Are comfortable with a digital shopping platform making purchase decisions for them

Source: NIQ Global Consumer Outlook Jul-25

Generative AI for shopping is in early days of adoption and primarily oriented around research versus full agentic processes

In the past month, how many times have you used Generative AI?



Have you used Generative AI while shopping to?

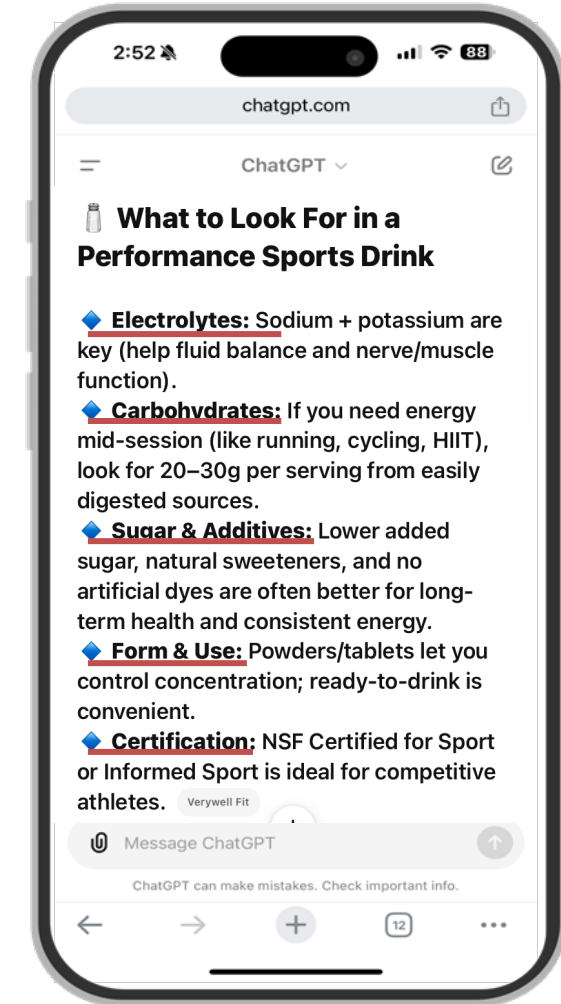


Source: NIQ BASES, AI survey Questions November 2025

AI is fundamentally changing the path to purchase



Help me with the right sports drinks to help improve my performance



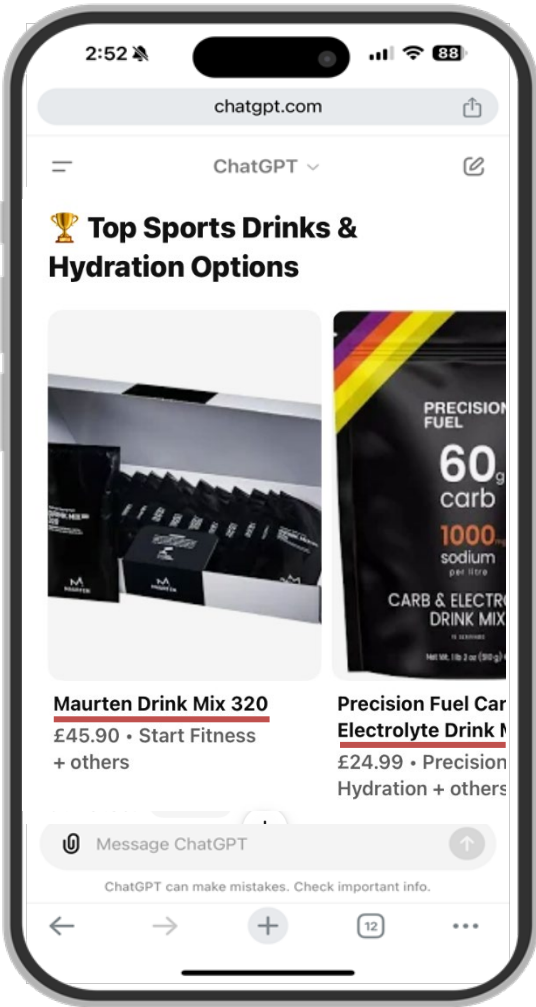
Source: ChatGPT

AI is fundamentally changing the path to purchase



Help me with the right sports drinks to help improve my performance

Include brand recommendations on highly-rated ingredients.



Source: ChatGPT

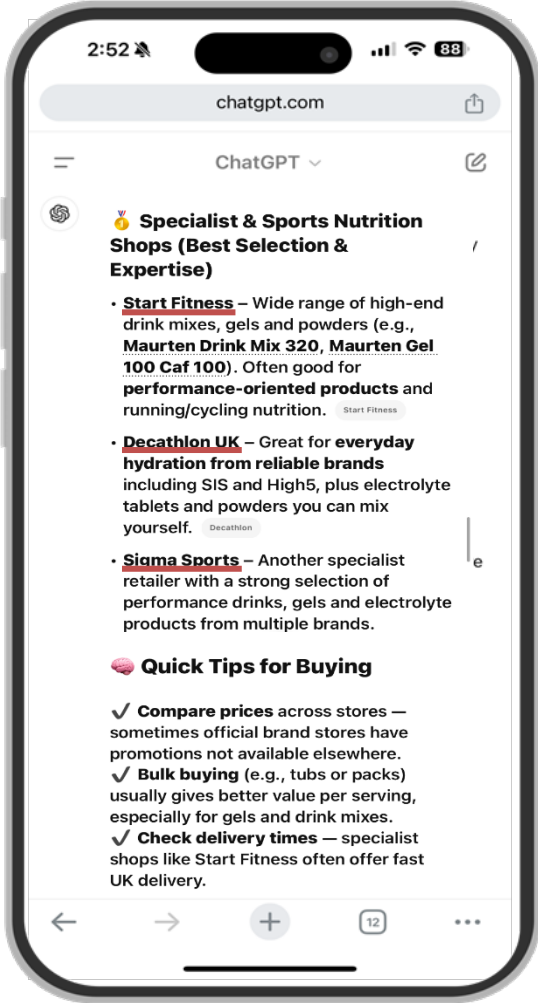
AI is fundamentally changing the path to purchase



Help me with the right sports drinks to help improve my performance

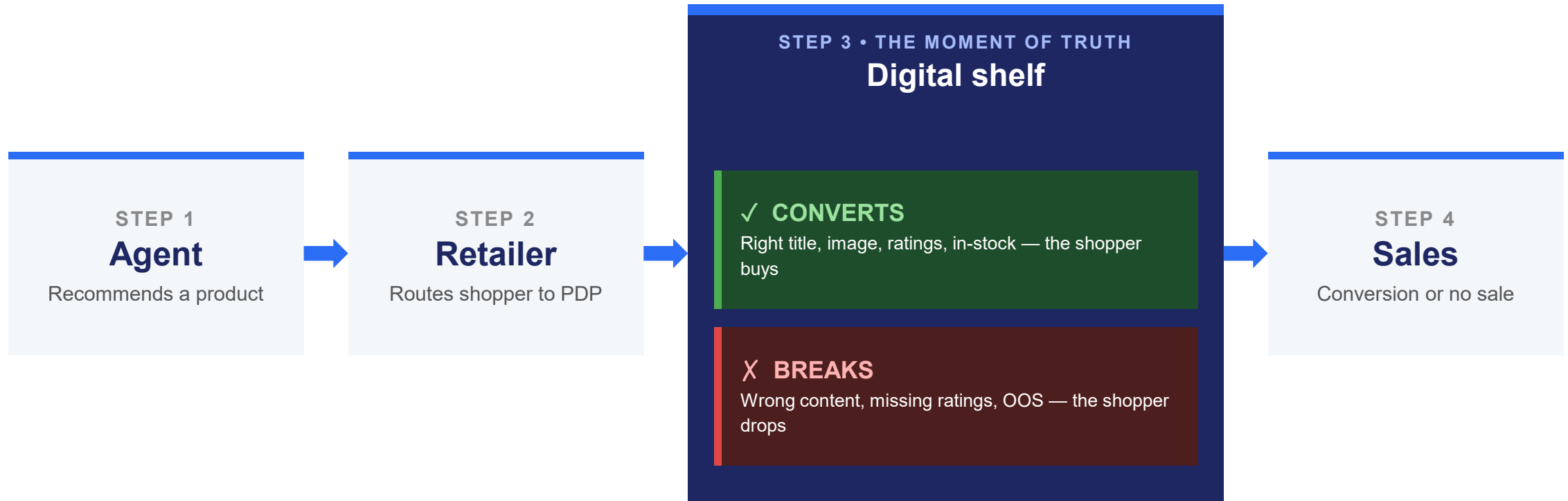
Include brand recommendations on highly-rated ingredients.

Where is the best place to buy all these products?



Source: ChatGPT

The Digital Shelf is where the agent's recommendation converts — or breaks



Even with AI agents upstream, digital shelf execution still decides whether the sale converts or breaks

AI will affect more than just the shopper experience in retail today



Source: NIQ Digital Shelf

NIQ has powerful solutions across the Omni Commerce ecosystem



The right performance

- Harmonized **Omnichannel measurement**
- **Digital** sales and share measurement (Amazon +)



The right promotions

- Connection to **media** automation tools
- **Content** activation
- **ROAS** measurement



The right actions

- **Quantify levers** to pull
- Understand **causals** of performance – images, keywords, reviews, search, availability



The right product

- Market trends with dynamic **attributes**
- Insights on **consumers**, what they want and are searching for online
- **Innovation** concepts and testing



The right content

- Product imagery and content (**PIM**)
- **Search** optimization, keyword advisor
- On-pack and derived **attribution**



The right place

- **Digital shelf analytics** to manage performance at the store- and item- level,
- Optimize distribution



NielsenIQ

*The Omnichannel Playbook
Digital Shelf with the Rise of AI*

The pace of change in retail channels is accelerating rapidly



Mexico in 2026

Value-driven & price sensitive shoppers

Rapid growth:
online CPG +35% YoY

Mercado Libre:
#1 eCommerce platform

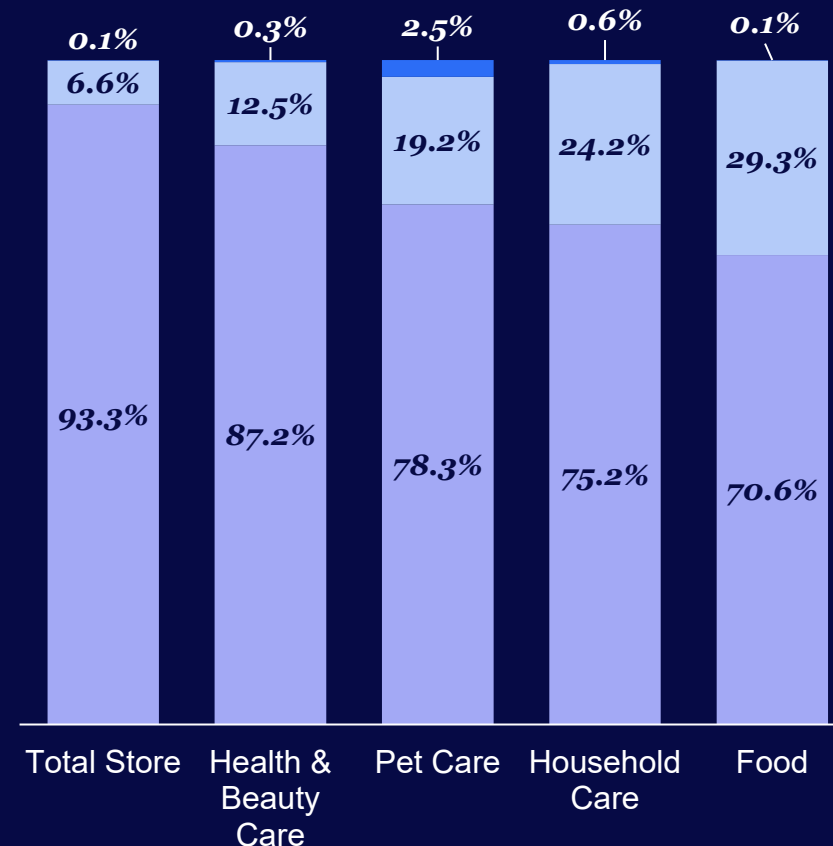
Mobile-first:
90%+ shop via
smartphone

*So, what does this **mean**?*

Today's Shopper is an *Omni* Shopper



% of \$ Volume



Online Share of Wallet
among *Omni* shoppers:



Source: NielsenIQ Omnishopper, Total Outlets, L52WE 1.27.24 vs PY. *FOOD includes total edibles (food and beverage), Total Store = Alcohol, Baby Care, Health & Beauty Care, General Merchandise, Household Care, Food, Pet Care, Departments

In-store & Online are *not mutually exclusive*



In-store



Online

In-store & Online

Impact Each Other



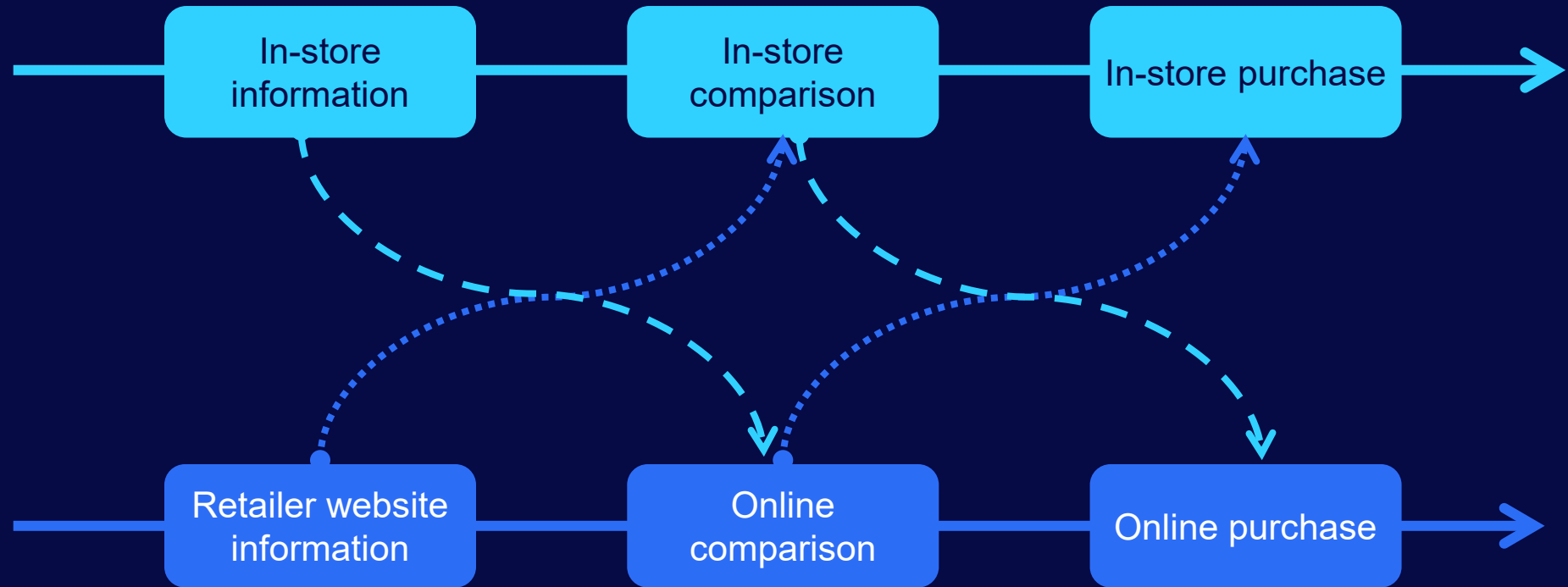
Digital shelf is not just for eCommerce



Offline



Online

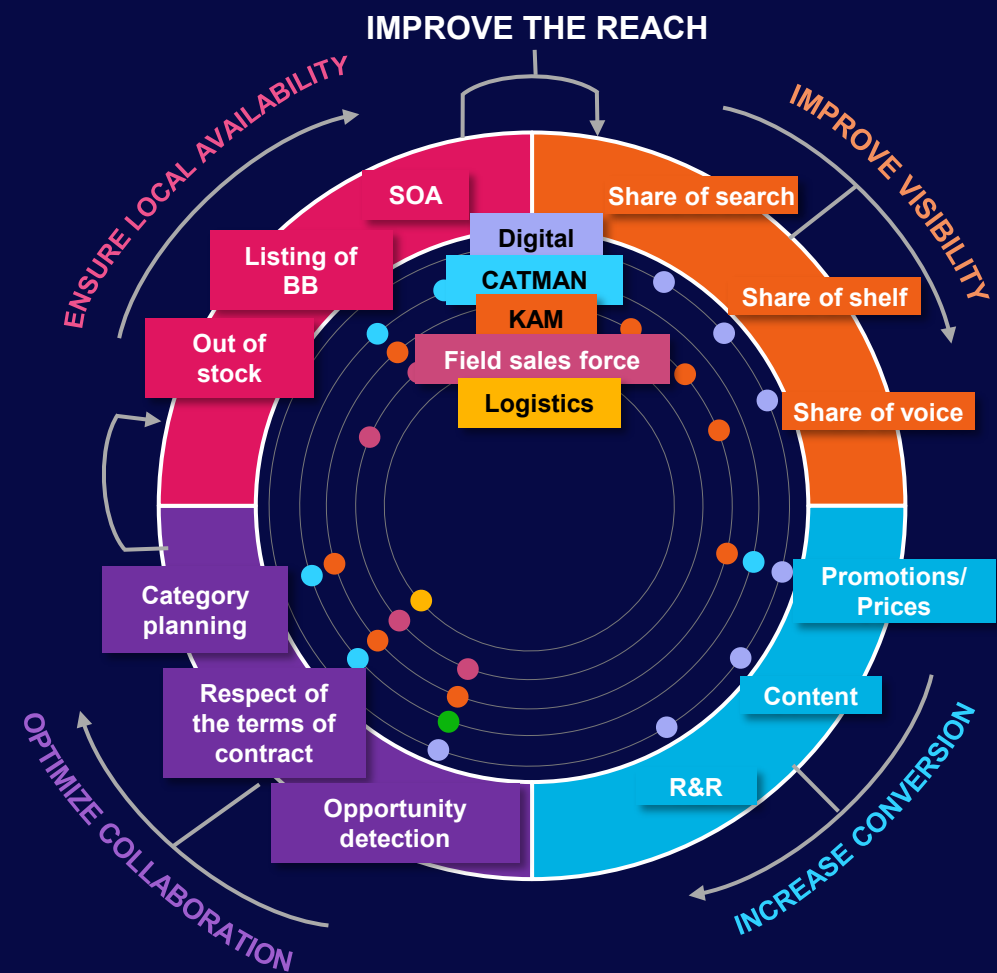


+ NEW LAYER: AI Search (ChatGPT / Perplexity) → AI Product Discovery → Agentic Purchase (auto-checkout without human click)

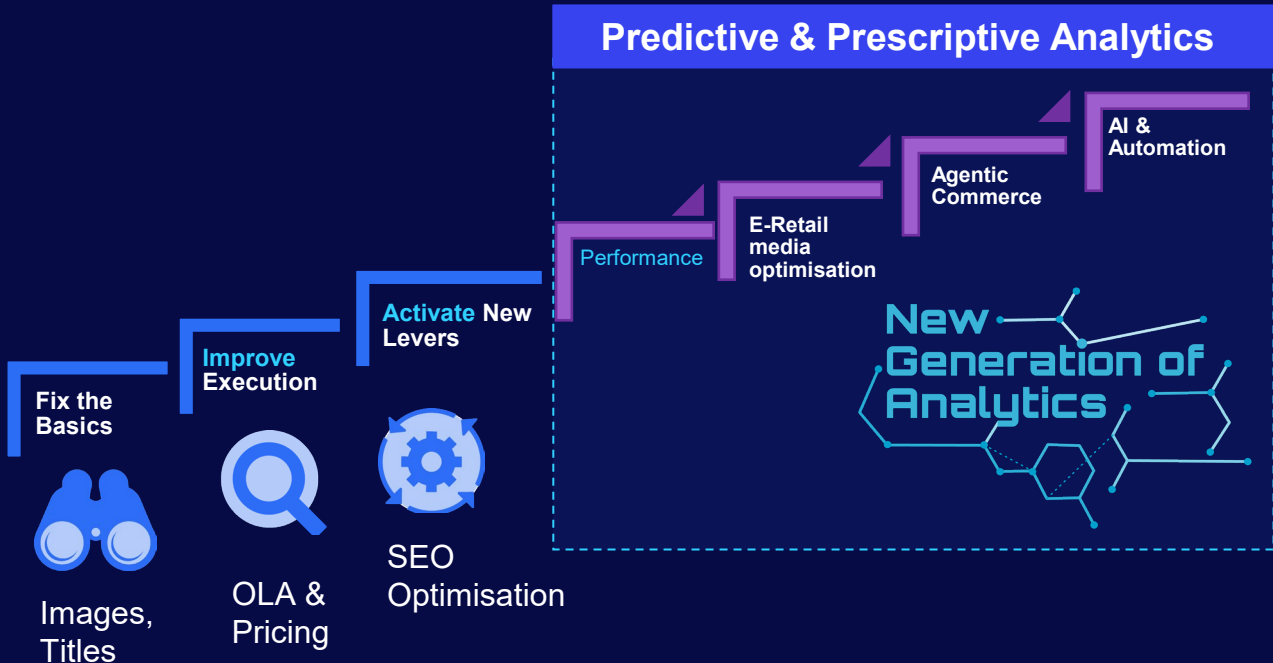
It is key for driving *awareness & conversion*

In order to be future ready, it's important to set strong readiness pillars

Journey of Digital Shelf & E-Commerce management



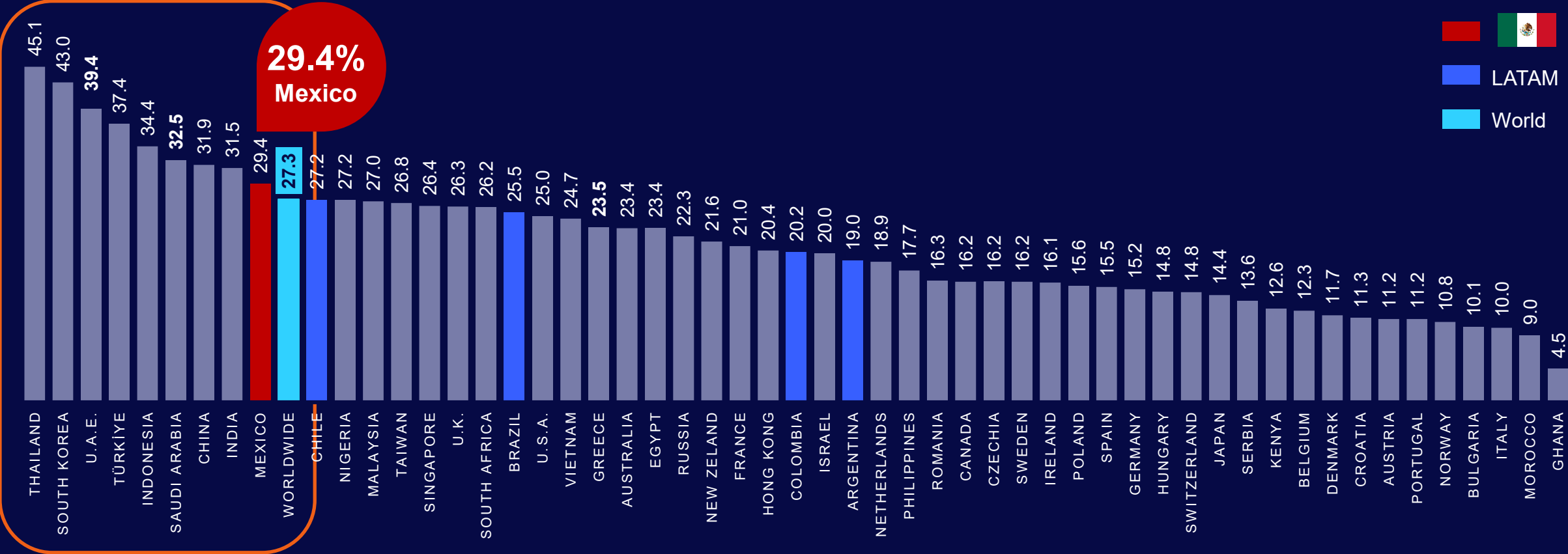
NIQ Digital Shelf



*Why should you **care**?*

Mexico is one of LATAM's fastest-growing online grocery markets

Weekly online grocery purchases (%)



Source: NIQ / We Are Social Digital 2025

Ecommerce global top performers

Brazil & Mexico are among the top eCommerce growth markets

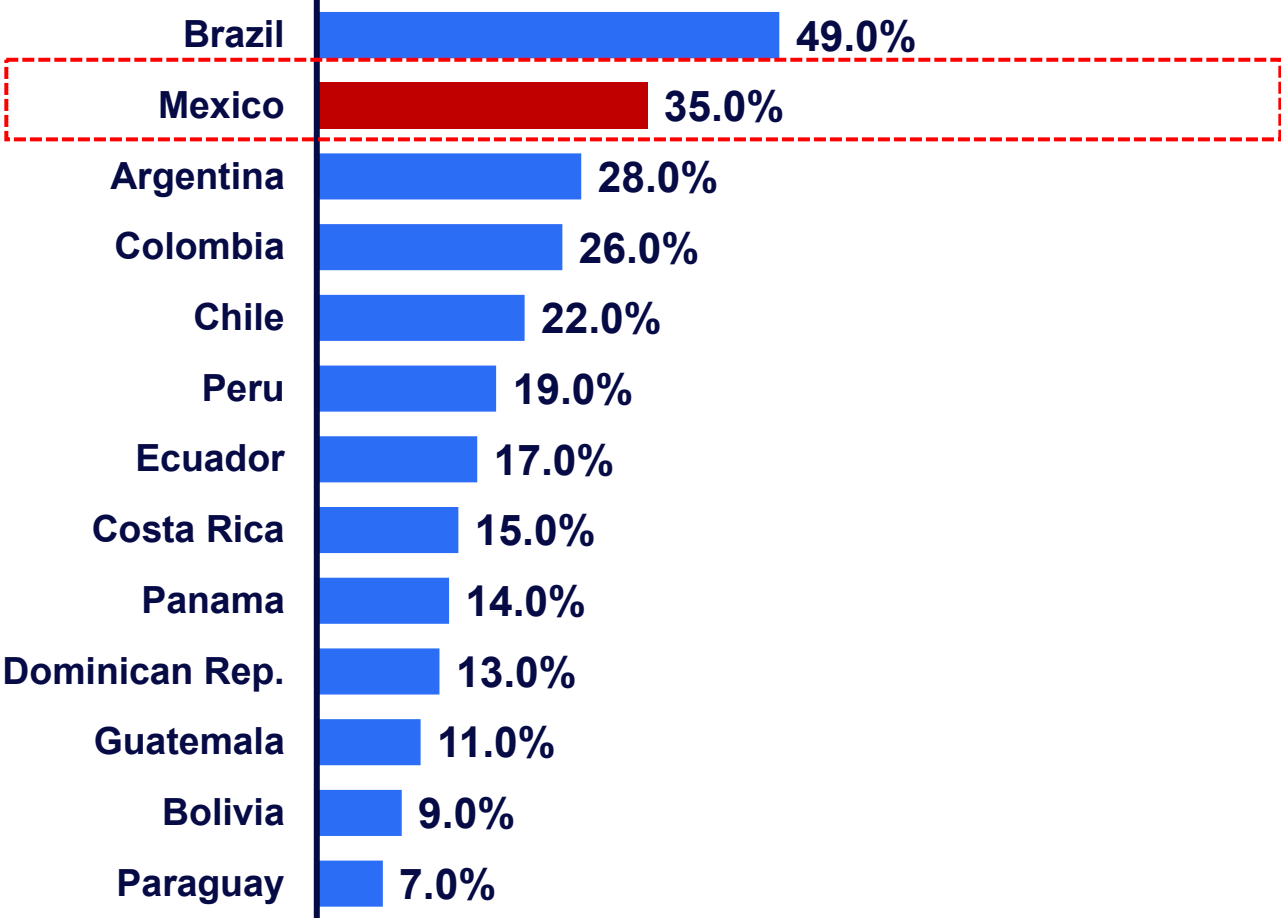
LATAM eCommerce is booming: Brazil ranks #1 in LATAM and #2 globally in eCommerce growth.

Mexico is the #2 LATAM market, with CPG eCommerce growing +35% YoY, driven by Mercado Libre and rapid mobile commerce adoption.



Market performance

Value growth 2025 vs 2024

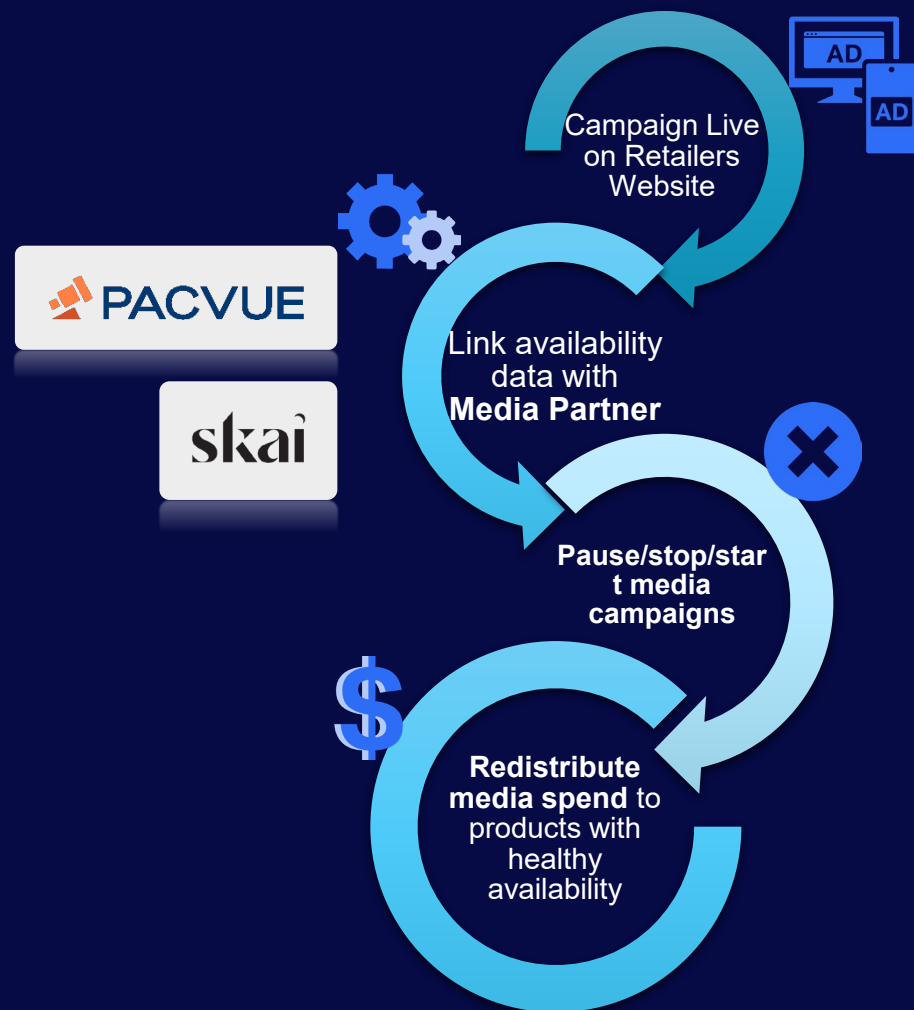


Source: NIQ RMS FMCG LATAM MAT 2026

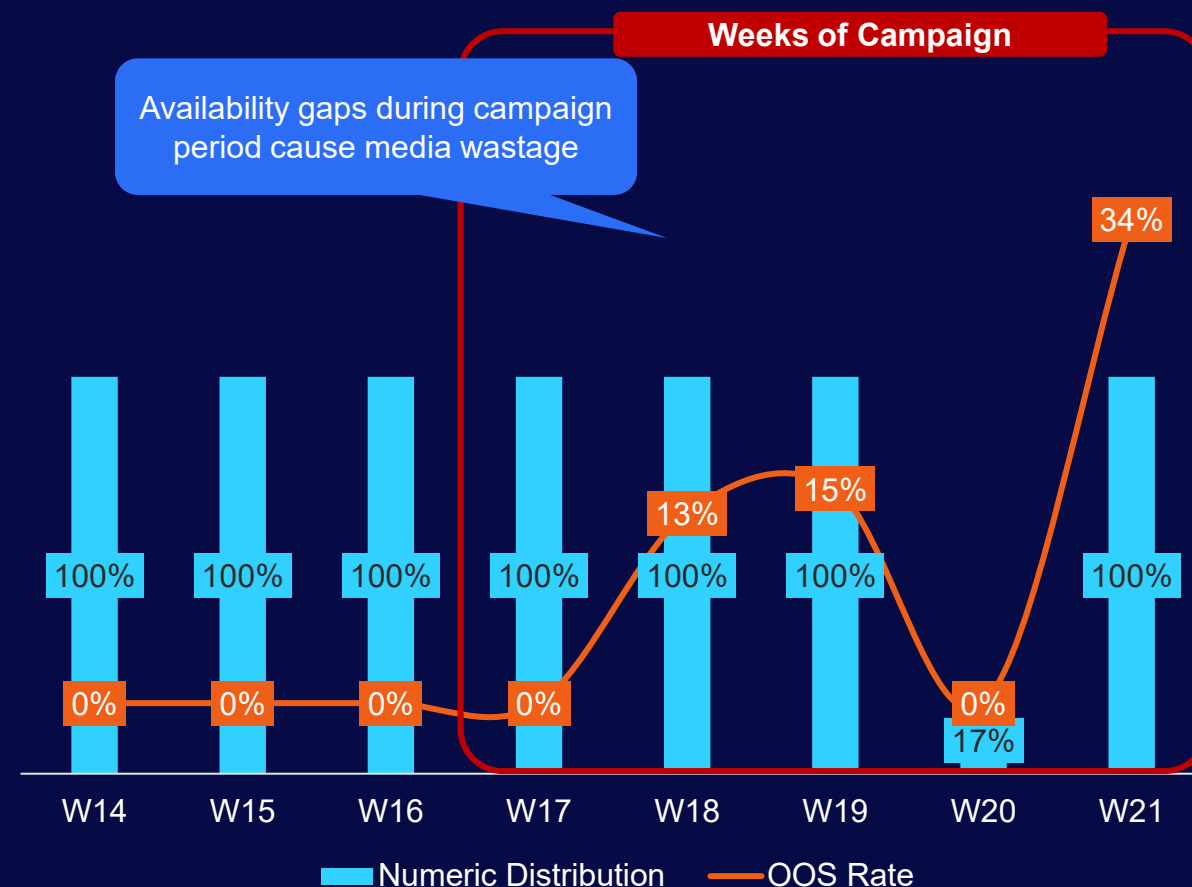
What **lessons** can we learn
from mature markets?



NIQ Digital Shelf can assist you by going beyond monitoring through *implementing automation* in the process that will prevent wastage & lost sales



Example: OOS & Numerical Distribution of Advertised Product Media Campaign in the Personal Care Category at Amazon US



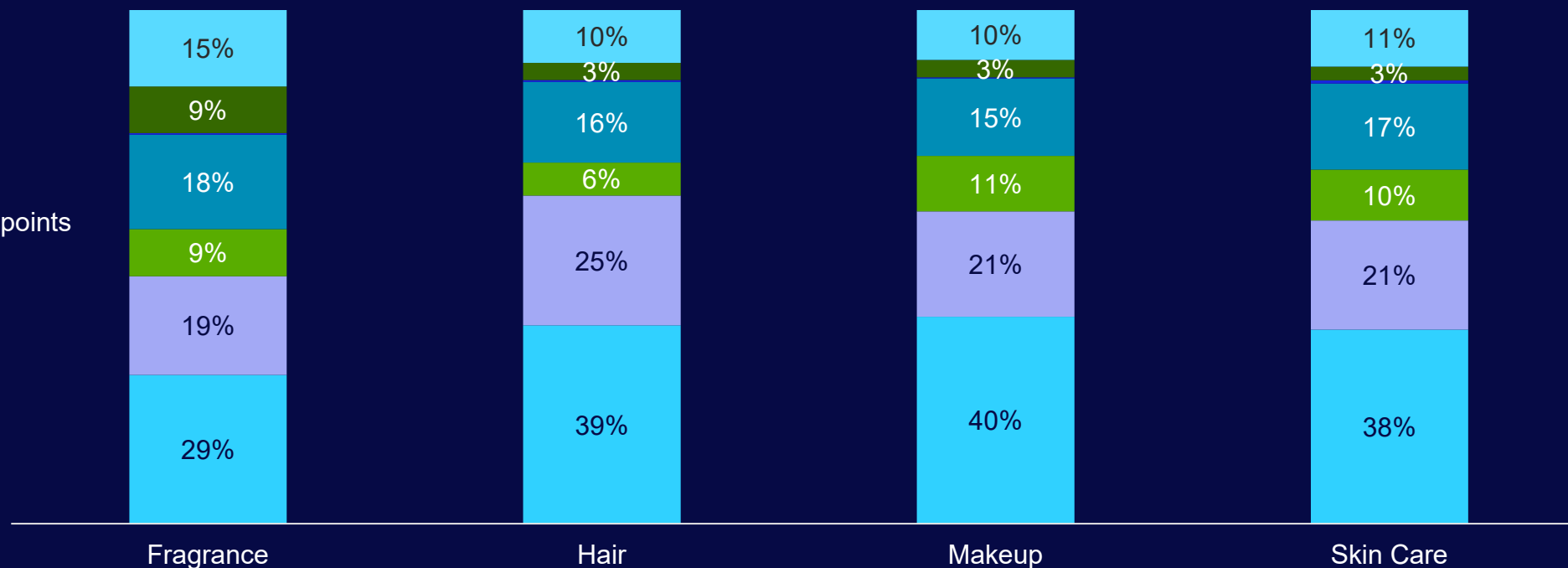


The *Product Page Elements* are important & impact search performance

Product Page Elements Importance on Search Performance

US, 2026

- Price and promotion
- OOS
- Enhanced Content
- Ratings
- Images and videos
- Description and bullet points
- Product title



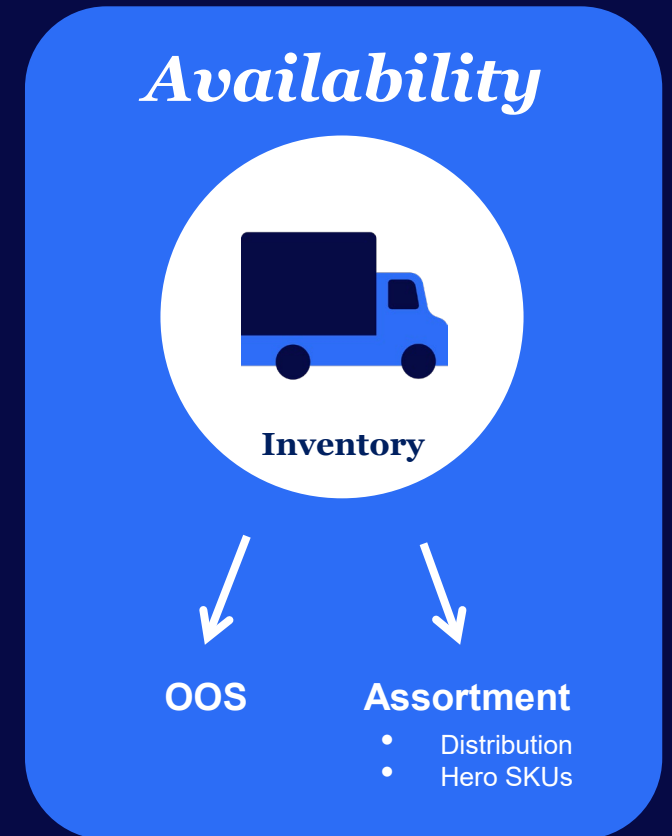
Content needs to be customized – search engine algorithms differ by retailer & category impacting the levers & weight of importance



How can brands track & leverage eCommerce KPIs in Mexico?

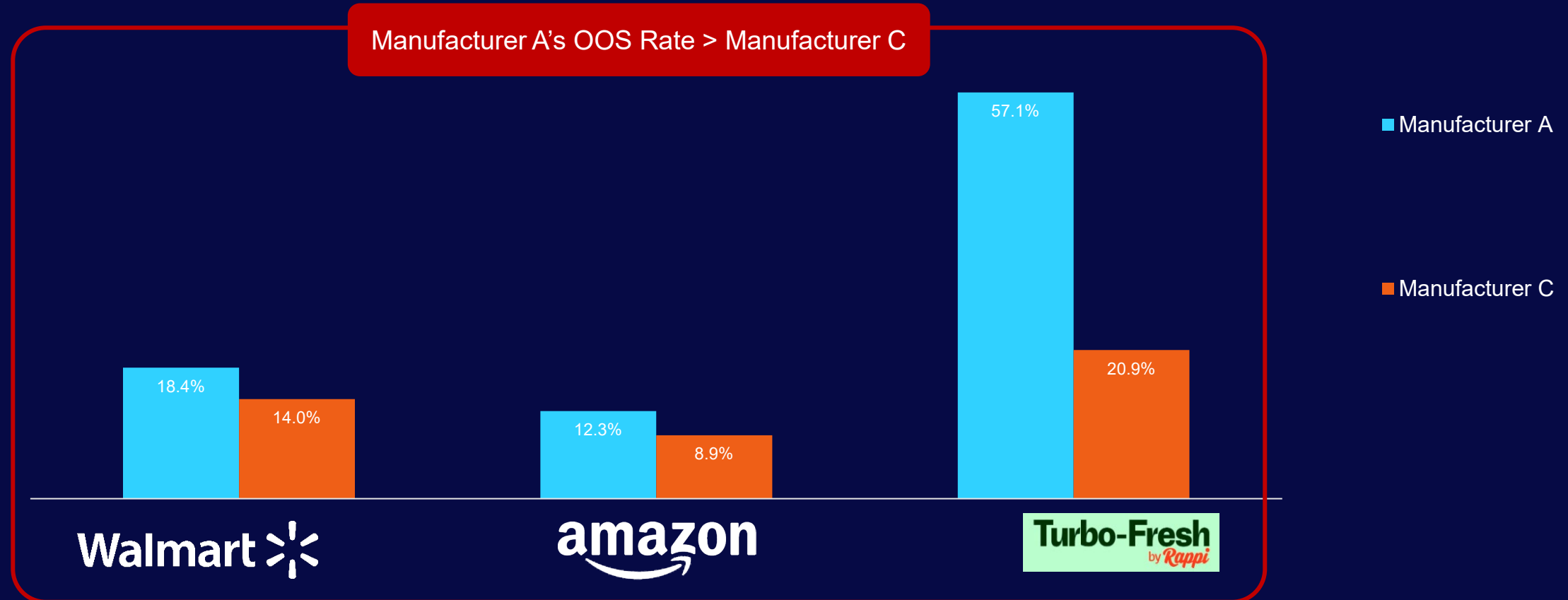
What products are listed online & are retailers *optimizing availability?*

LATAM Use Cases



Brands need to ensure products are in-stock & available for purchase to reduce the risk of consumer switching

OOS Rate (%) for Manufacturer A vs Manufacturer C : Leading Manufacturers in the Personal Care Category at select Mexican retailers
Q1 2026



Are my products *attractive* to the customer vs key competitors?

LATAM Use Cases

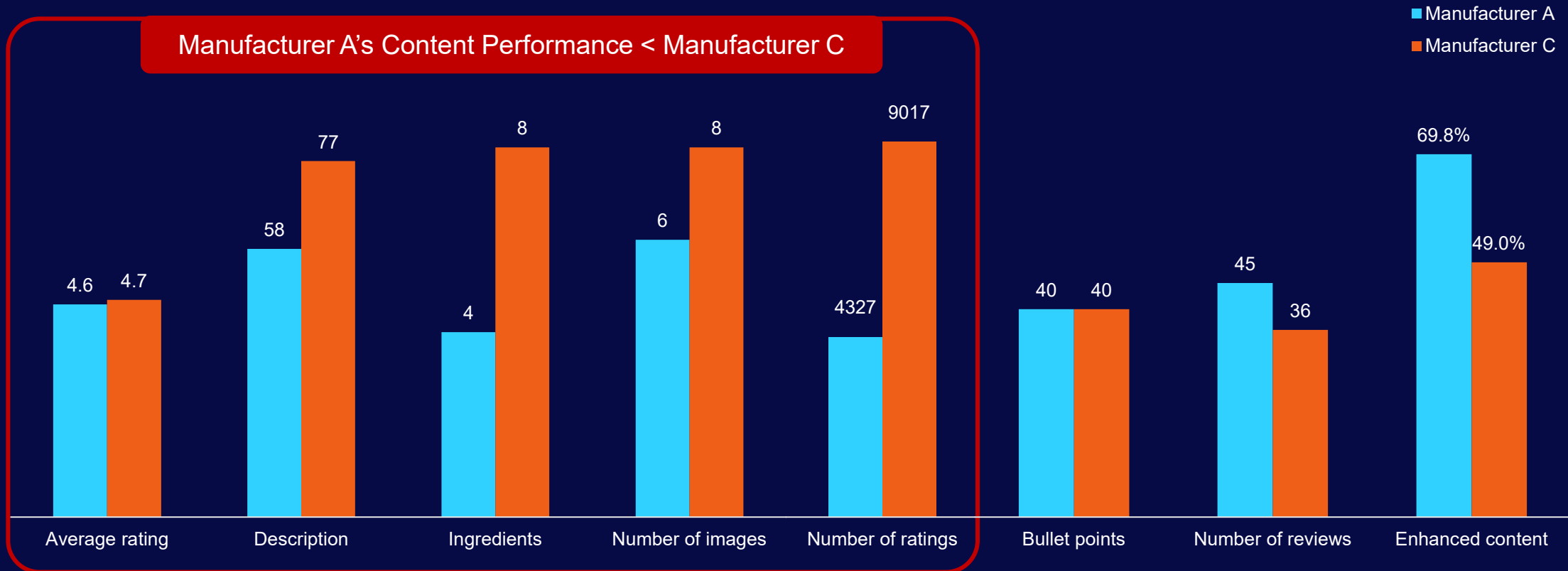




Content drives organic search & consumer trust - Images, titles, product description, ingredients and more

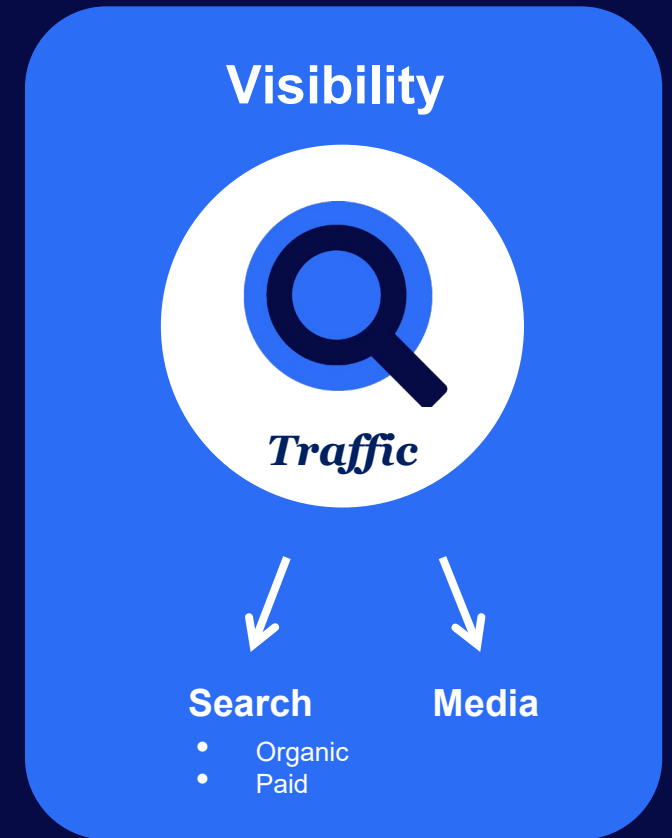
Especially for New Products that have just launched

Average Product Description Page KPIs of Manufacturer A vs. Manufacturer C for the Personal Care Category at Q1 2026



How *discoverable* are my products across retailers' websites?

LATAM Use Cases





Customers need to be able to find products easily that meets their needs – ensuring products are discoverable is key to driven awareness

Share of Search (%) in Top 20 Search Results for Manufacturer A across Personal Care keywords at 
Q1 2026

	<i>desodorante gel</i>	<i>desodorante en gel</i>	<i>desodorante hombre gel</i>	<i>antitranspirante hombre gel</i>	<i>desodorante</i>	Total
Manufacturer A	25%	7%	5%	5%	5%	9%
Manufacturer C	30%	20%	20%	10%	8%	18%

Assist the OmniShopper in *pre-purchase research, build trust & enhance the consumer shopping journey*



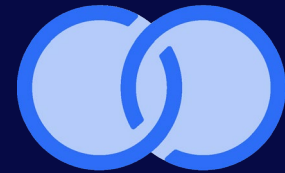
Pre-purchase research

Product information & availability



Build Trust

Customer ratings & reviews



Enhance shopper journey

Available & assist consumer across multiple touchpoints



Even AI is getting a voice, exerting influence on decision making

Within seconds ChatGPT can give consumers product recommendations, suggestions on where to shop and much more. That has real implications for retailers and manufacturers – is AI recommending your brand or your stores?

11:55

chatgpt.com

ChatGPT

🌮

Best Snacks & Drinks for Friday Night in Mexico City

Quick, crowd-pleasing options + where to order online.

1. Tacos al Pastor (Party Pack)

Company: **El Huequito**

Where to order: Uber Eats, Rappi

Why: Authentic CDMX flavor, perfect for sharing.

2. Guacamole & Chips

Company: **La Guacamaya**

Where to order: Uber Eats, Rappi

Why: Fresh ingredients, always a hit.

3. Esquites (Mexican Street Corn)

Company: **Esquites Durango**

Where to order: Uber Eats, Rappi

Why: Creamy, spicy, and addictive.

4. Boneless Wings

Company: **Wings Army**

Where to order: Uber Eats, Rappi

Why: Great variety of flavors.

5. Crunchy Snacks Mix

Company: **Totis**

Where to order: Amazon MX, Rappi Turbo

Why: Classic Mexican chips mix.

6. Beer Bucket (18 pack mix)

Company: **Model o / Corona / Pacifico**

Where to order: Amazon MX, Rappi, Cornershop

Why: The perfect mix for any party.

7. Paloma Cocktail Kit

Company: **1800 Tequila**

Where to order: Amazon MX, Rappi Turbo

Why: Easy to make, always refreshing.

11:56

chatgpt.com

ChatGPT

👤

The best places to buy top-rated snacks with 1-hour delivery in Mexico City:

1. Mercado Libre (Envios Full)

What it is: Mexico's largest online marketplace.

Best for: Snacks, drinks, bulk packs, imported items, and local favorites.

Delivery time: As fast as 1 hour in CDMX with Envios Full.

Where: App & website

2. Rappi

What it is: On-demand delivery for almost everything.

Best for: Snacks, chips, candy, drinks, ice cream, and more from local stores and supermarkets.

Delivery time: 10–60 minutes.

Where: Rappi app

3. Uber Eats

What it is: Popular food & grocery delivery.

Best for: Ready-to-eat snacks, grocery items, convenience store finds.

Delivery time: 20–60 minutes.

Where: Uber Eats app

4. Cornershop by Uber

What it is: Personal shopper from top grocery stores.

Best for: Supermarket snacks, beverages, and party essentials.

Delivery time: As fast as 1 hour.

Where: Cornershop app

5. Tienditas

What it is: Mexican online supermarket.

Best for: Snacks, pantry staples, and drinks.

Delivery time: Same-day & express (1 hour in select areas).

Where: App & website

11:56

chatgpt.com

ChatGPT

🛒

Resumen de tu pedido

Unica hoy por envio Full & Full

Envios gratis

Entrega estimada hoy 12:25 - 1:00 PM

Guaceta Crema Extra

12 unidades (250 g cada)

Ver detalles por separado

\$439.00

Tacos al Pastor

12 piezas con salsa, queso y cebolla

Ver detalles por separado

\$249.00

Chipsitos

500 g

Ver detalles por separado

\$89.00

Revolucion Wings

500 g

Ver detalles por separado

\$89.00

Papas Lay's Classic

Family 700 g

Ver detalles por separado

\$49.00

Productos (4)

Ver detalles

Total

\$1096.00

Wings por Mercado Pago

Confirmar pedido

11:56

chatgpt.com

ChatGPT

🛒

Resumen de tu pedido

Unica hoy por envio Full & Full

Envios gratis

Entrega estimada hoy 12:25 - 1:00 PM

Guaceta Crema Extra

12 unidades (250 g cada)

Ver detalles por separado

\$439.00

Tacos al Pastor

12 piezas con salsa, queso y cebolla

Ver detalles por separado

\$249.00

Chipsitos

500 g

Ver detalles por separado

\$89.00

Revolucion Wings

500 g

Ver detalles por separado

\$89.00

Papas Lay's Classic

Family 700 g

Ver detalles por separado

\$49.00

Productos (4)

Ver detalles

Total

\$1096.00

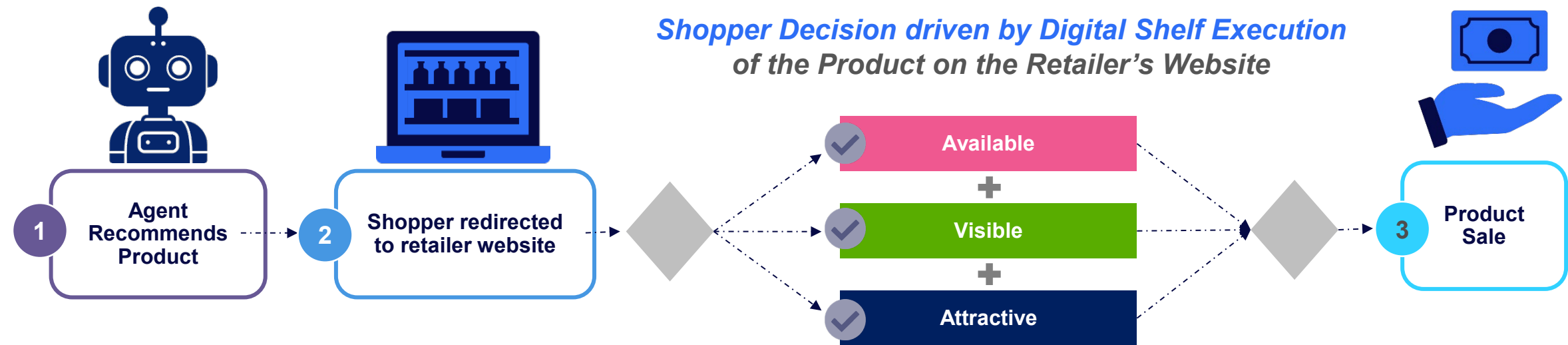
Wings por Mercado Pago

Confirmar pedido

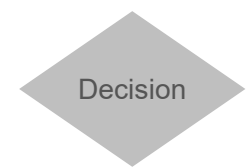
NIQ Source: ChatGPT, 2026

© 2026 Nielsen Consumer LLC. All Rights Reserved. 46

Making the right digital shelf analytics critically important today

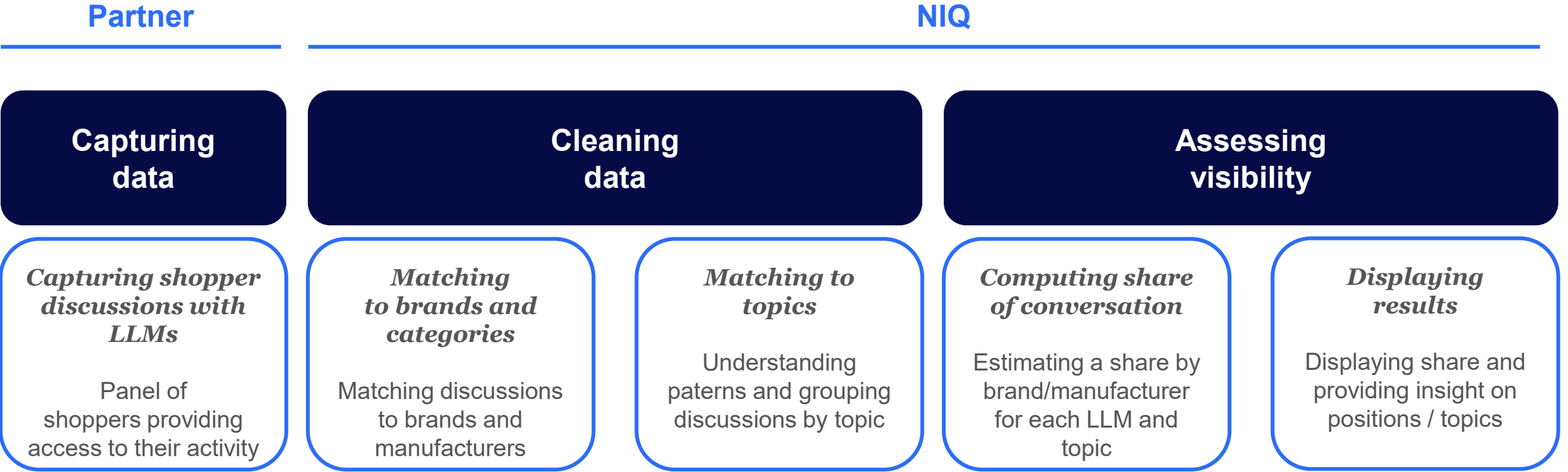


Not only enough to understand agent LLMs but brands need to be extremely good at Digital Shelf execution to win



Helping with agentic commerce

Measuring: combining our partner data and our intelligence



What can you do now to be ready?

Key Ingredients to Succeed Online
are:



The Right Data
Accurate & Exhaustive



The Right Content
Built Intelligently



The Right Execution
Across the Digital Shelf

Now live in Mexico & Brazil

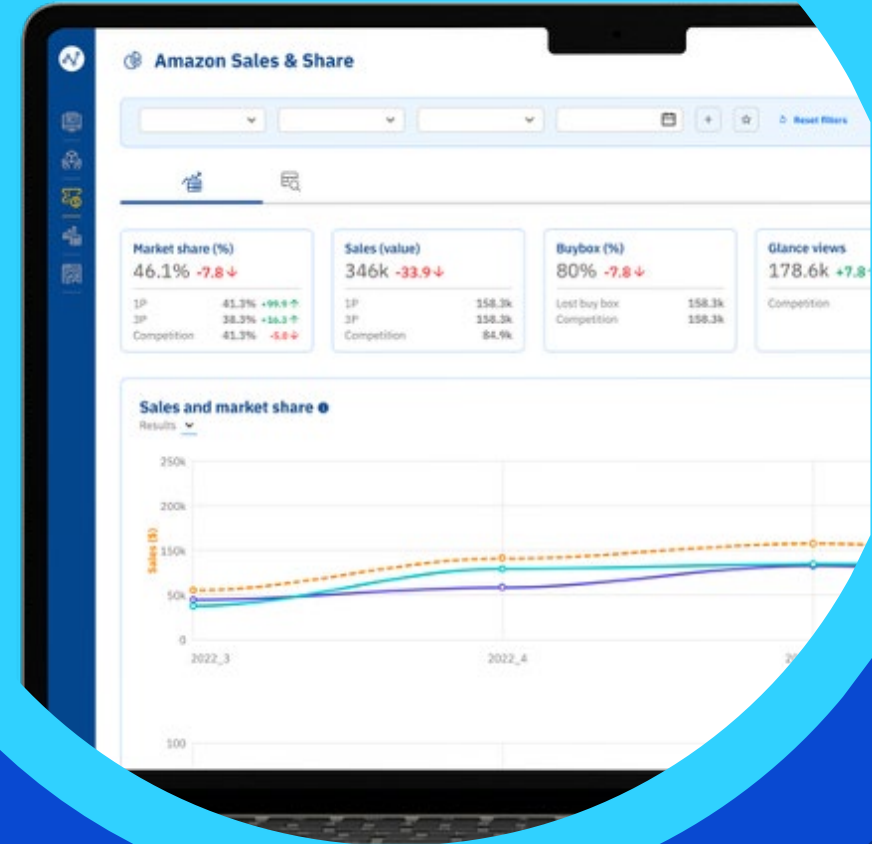
Granular sales and market-share measurement for every
CPG category on Amazon down to ASIN level

● **Mexico** LIVE

● **Brazil** LIVE

Free pilots for our first 50 clients

NielsenIQ



What Amazon Sales & Share delivers

Amazon Vendor Central access + Hourly scraping + Deep ML = Sales & Market Share

Full category view · AI-powered

Accurate even through key events like Prime Day & Black Friday

01 Track your products

A full view on your sales & market share performance from category level down to Asin level (1P, 3P or ALL)

02 Benchmark to competitors

Benchmark against your third-party sellers or your main competitors or even to Amazon private-label products.

03 Identify Opportunities

Cross-analyze sales and share gaps against OOS, Price, search (paid & organic), Content, traffic and conversion.

GET IN TOUCH NOW TO CLAIM:
ONE OF 50 FREE PILOTS



Danish Karim

Danish.karim@nielseniq.com

Granular sales & share for all CPG categories on Amazon

NielsenIQ

*Panel
de expertos*



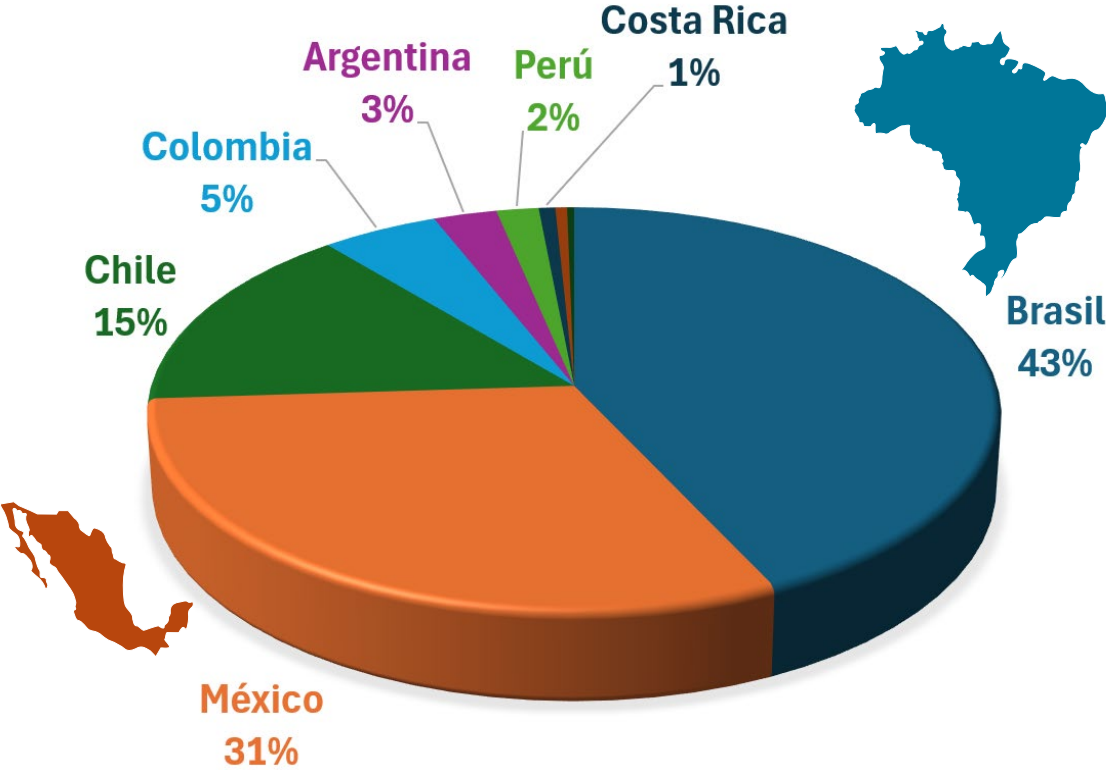
Panel

El E-commerce de FMCG en LATAM ya supera los 8,000 millones de dólares y crece más rápido que el canal offline.

¿Sus organizaciones estaban preparadas para este ritmo de crecimiento o tuvieron que reaccionar sobre la marcha?



El canal online de FMCG ya representa un mercado de 8,000 millones de dólares



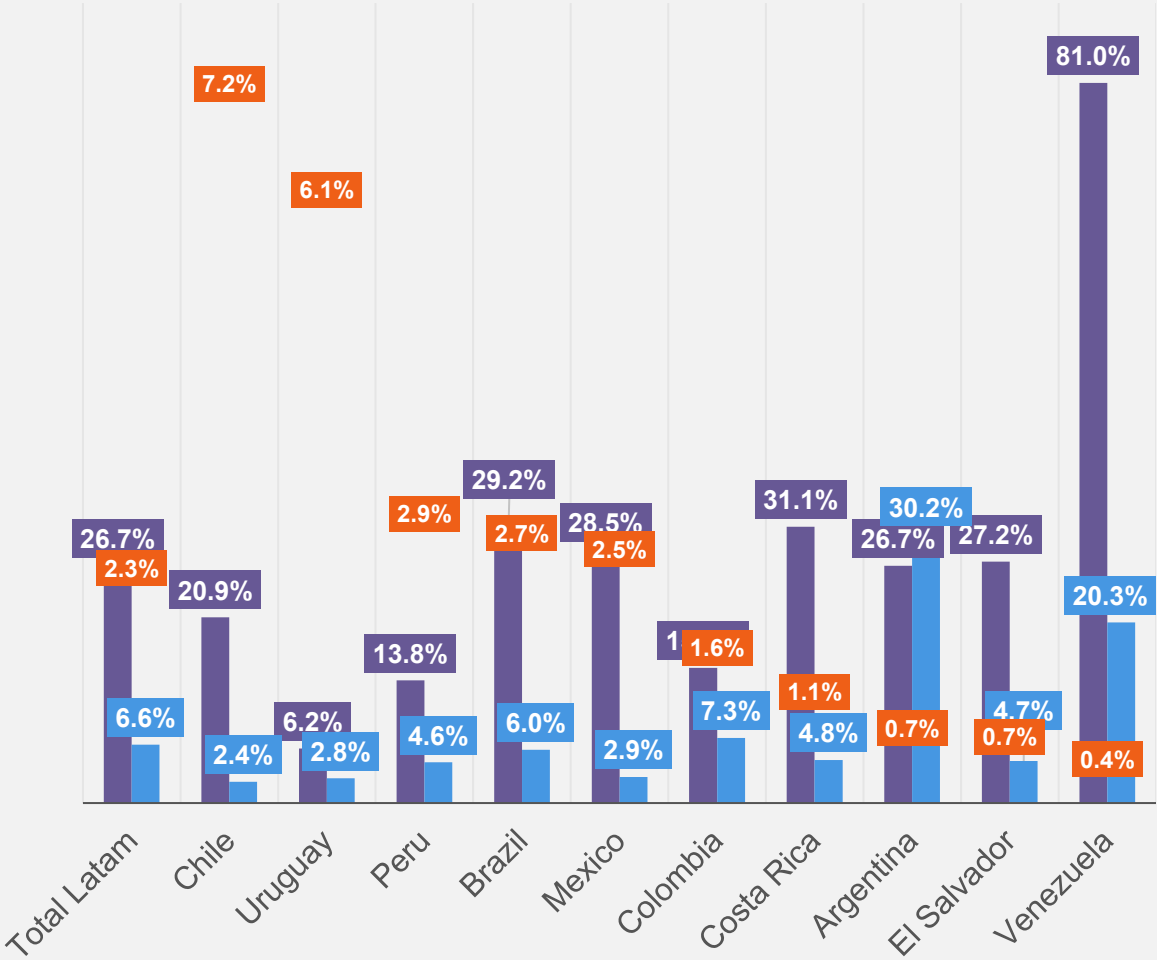
Source: NIQ eRMS – Rolling year up to April 2026



Online: 4x el crecimiento vs. Offline

Value sales variation | FMCG

■ Online ■ Offline ■ ecommerce importance



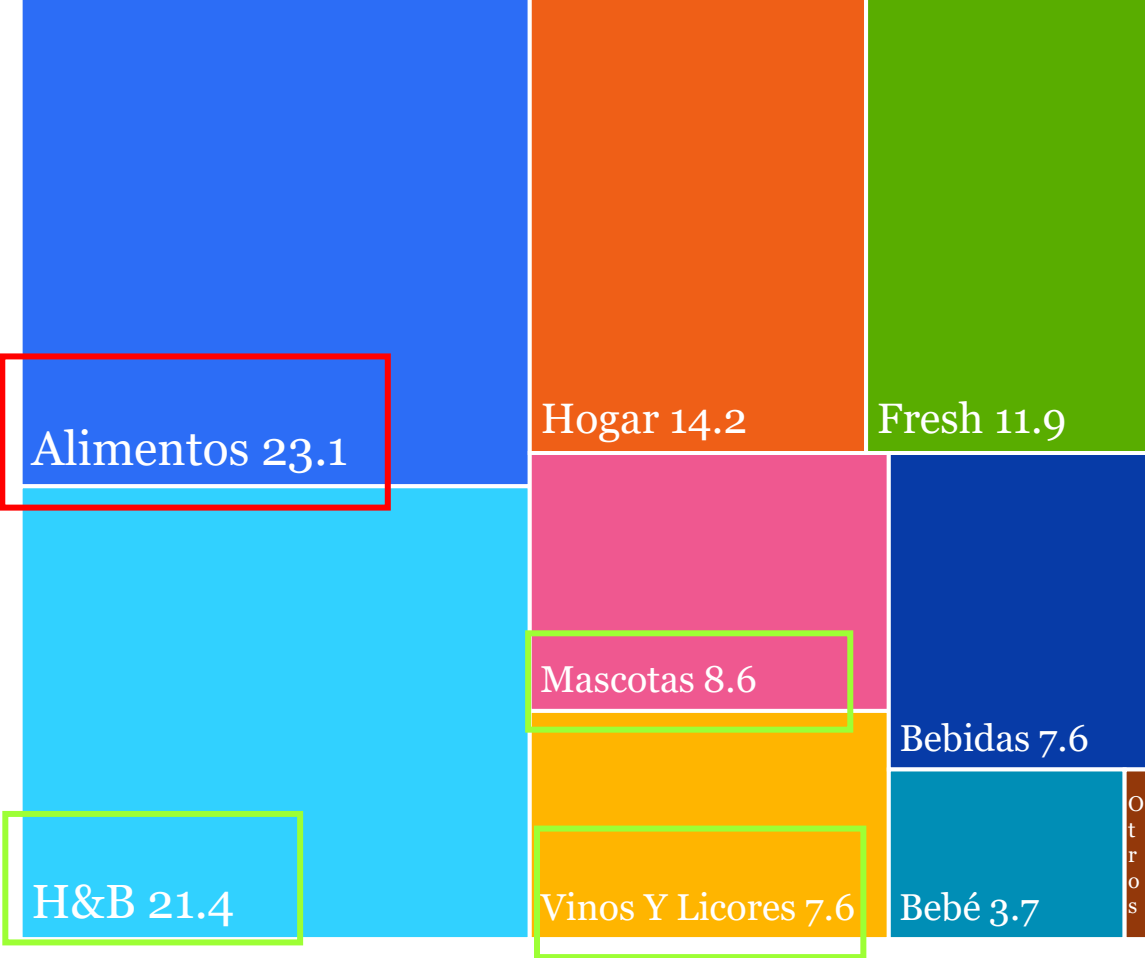
Dado que no todas las categorías están en el mismo punto de madurez digital, *¿En función de qué definen qué segmentos priorizar y qué plataformas utilizar?*

Panel



Canastos cómo H&B y Vinos & Licores más desarrollados en el canal digital.

Importancia de Canastos RY Online
(Var. vs el Año Anterior)



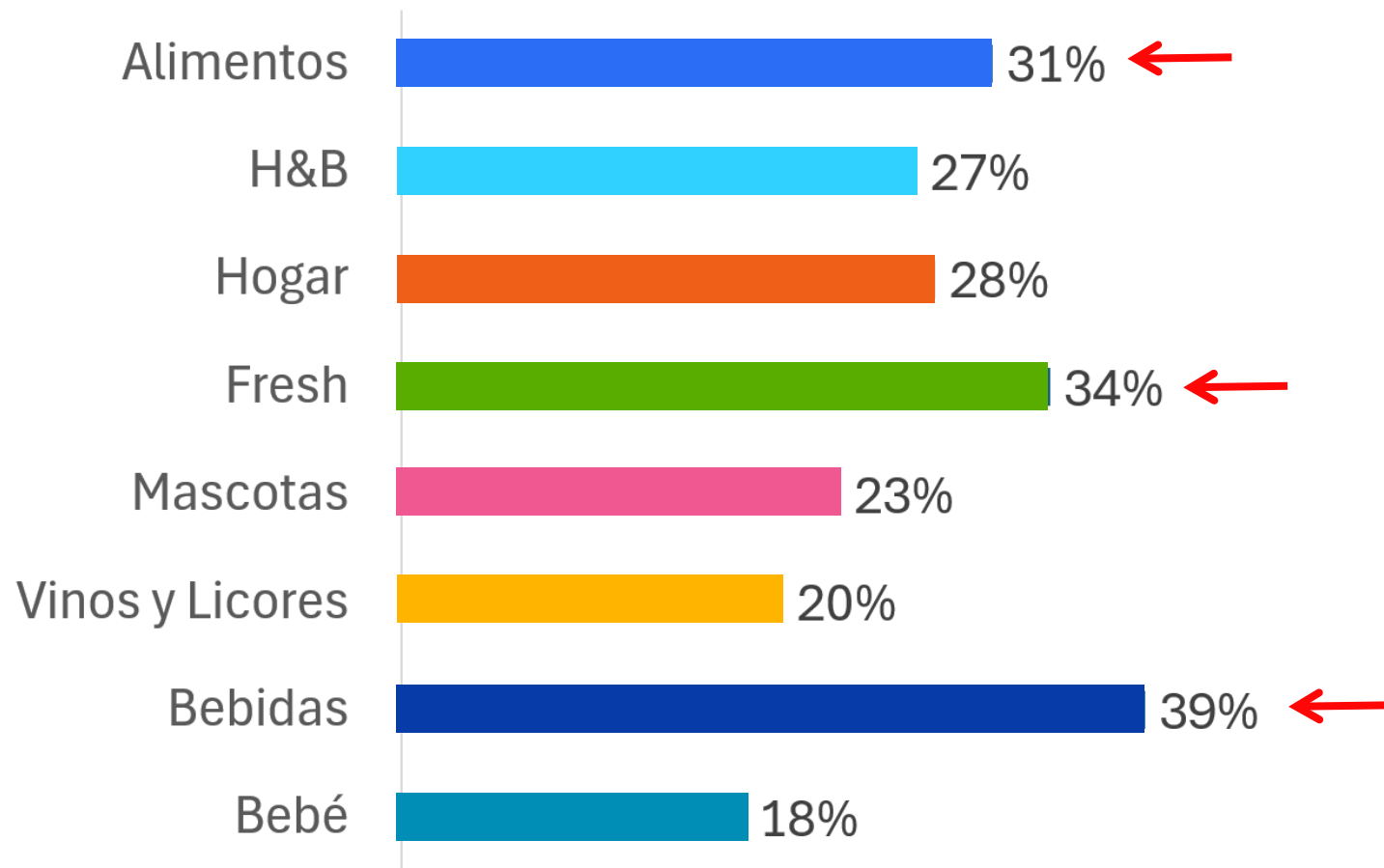
Importancia de Canastos RY Offline
(Var. vs el Año Anterior)



Fuente: eRMS NIQ MX 103 categorías RY a Marzo 2026

*Fresh: Carnes Frías, Chorizo, Comida lista para comer, Cremadores, Cremas comestibles, Leche blanca, Leche saborizada, Mantequilla, Quesos, Sustitutos de leche, Yoghurt

Crecimiento % vs RY Anterior en Valor



***Mayor aceleración
en categorías que no
eran naturalmente
digitales***

Fuente: eRMS NIQ MX 103 categorías RY a Marzo 2026

El 56% de los latinoamericanos ya ha realizado compras a través de redes sociales, y en México el comercio por WhatsApp incluso supera al de plataformas como TikTok o Instagram.

Los datos también revelan que la Generación Z es la que más integra su experiencia de compra entre lo físico y lo digital.

Ante este panorama, surge una pregunta clave: ***¿Están realmente llegando a ese consumidor?***

Panel

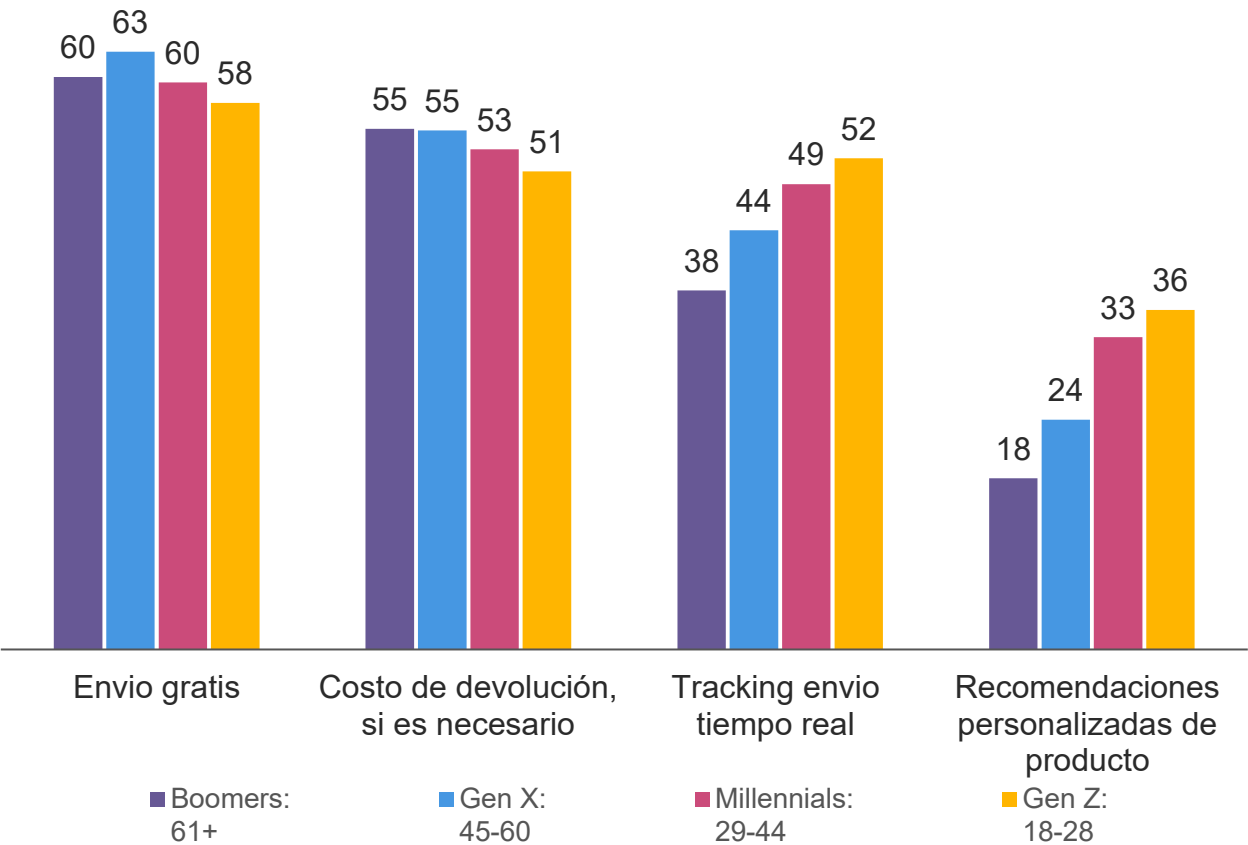


Nuevas generaciones de eShoppers redefinen los atributos clave del eCommerce

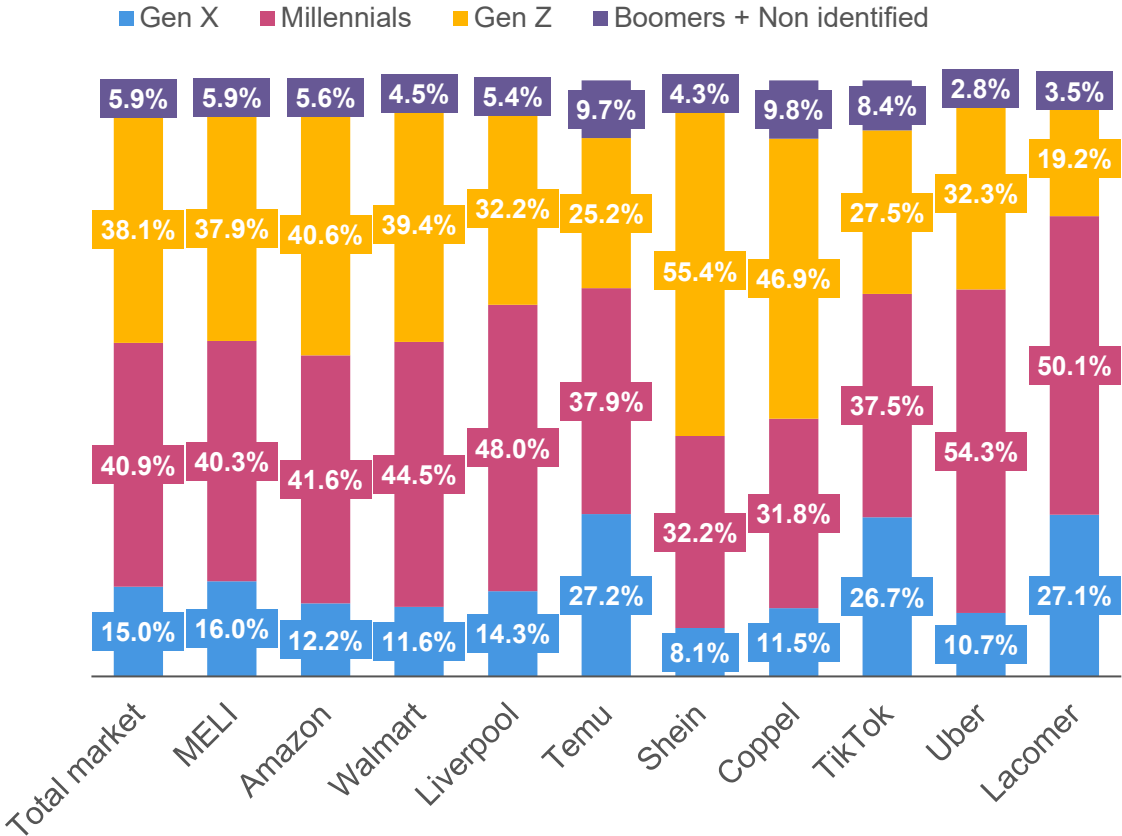


TikTok shop was the **9th largest retailer** on Mexico's Digital Purchases in 2025

¿Qué es lo que consideras cuando compras en una plataforma digital?
(%) Respuestas



Importance of generations for total expend



El eShopper mexicano está abierto a nuevas tecnologías, sin embargo, el 38% de los consumidores aún no se siente cómodo dejando que una plataforma tome decisiones por ellos.

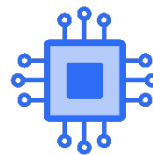
¿Cómo pueden las marcas reducir estas barreras de confianza y acompañar a los eShoppers para impulsar su transición hacia experiencias digitales más avanzadas?

Panel

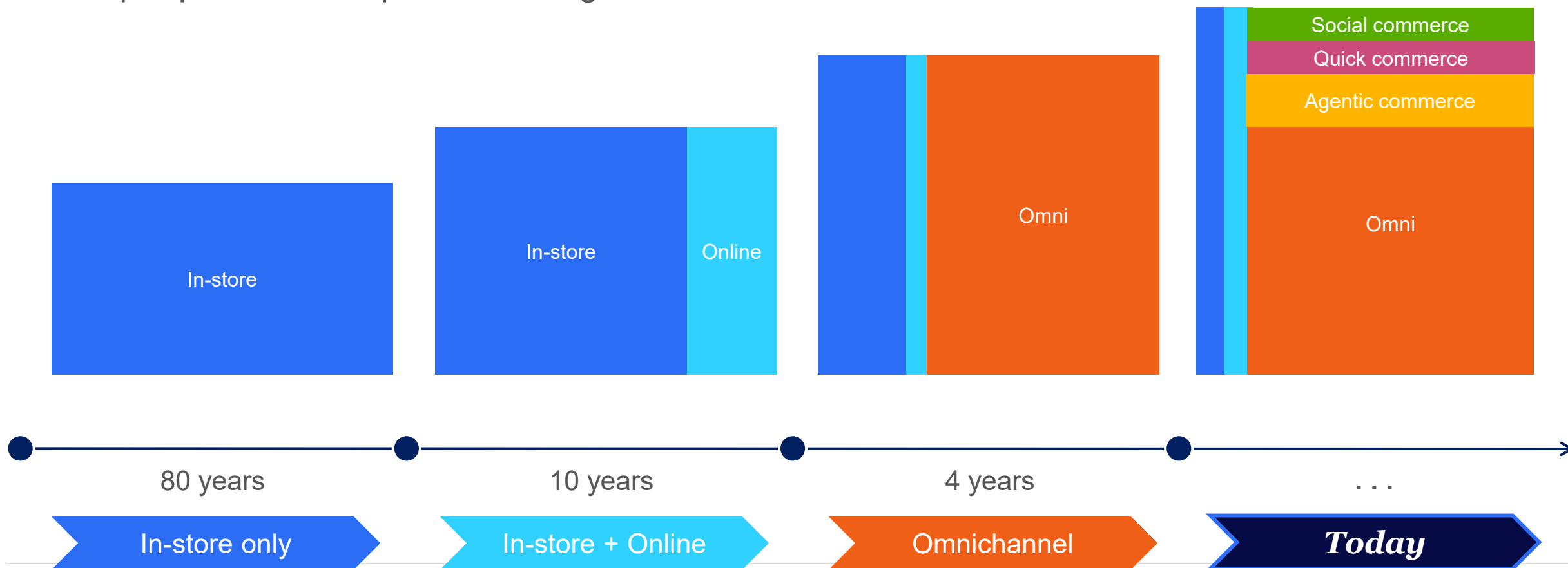


68%

De los mexicanos declaran sentirse cómodos recibiendo recomendaciones de productos por parte de una plataforma digital



Sin embargo, el **38%** no se siente cómodo con que las plataformas digitales tomen decisiones de compra por ellos.



Panel

Para ganar en la era del Agentic Commerce, en NIQ identificamos tres ingredientes clave: los datos correctos, el contenido correcto y la ejecución correcta en el Digital Shelf.

Mirando hacia los próximos 12 meses, ¿qué es lo que más les quita el sueño en su estrategia de E-commerce?





NIQ

*E-commerce
Unlocked
2026*

Gracias por acompañarnos

Equipo NIQ



**Armando
Uriegas**

Presidente para
Latinamérica,
NIQ



**Eduardo
Ragasol**

Managing
Director, NIQ
México



**Ramón
Melgarejo**

President of Omni
& Consumer
Intelligence, NIQ



**Danish
Karim**

Digital Shelf &
Amazon
Measurement
OmniCommerce, NIQ



**Alejandra
Tapia**

InStore &
E-commerce
Leader
Latinoamérica,
NI



**Dalia
Cardiel**

InStore & E-
commerce Leader,
NIQ México



**Benjamín
Calderón**

Líder Customer
Success, NIQ
México



**Alejandra
Yllescas**

Sales Leader,
NIQ México



**Laura
Calderón**

Líder Customer
Success Retail
Vertical, NIQ
México



**Alan
Gonzalez**

Digital Shelf -
Coordinador de
Customer Success,
NIQ



**Estephan
Bonilla**

Gerente
Asociado SMB,
NIQ México



**José
Antonio
Orozco**

Director Comercial
Industria de Bebidas,
NIQ México



**Gerardo
González**

Director
eCommerce y
T&D, NIQ México



**Alfonso
Hernández**

Líder de Desarrollo
de Cuentas, NIQ
México



**Othon
Hernández**

Director Industria de
Alimentos y Lácteos,
NIQ México



**Iván
Valadez**

Director Comercial
Industria de
Golosinas, Hogar y
Tabaco, NIQ México



**Edgar
Rodríguez**

Gerente de Desarrollo
de Cuentas, NIQ
México