

NIQ Perspective

America's celebration basket is evolving

“Consumers in the US continue to raise the bar on what earns a place in the basket. Independence Day staples still matter, but persistent cost pressures on categories like beef, the rise of functional soft drinks, and a shift toward fewer and smaller gatherings are reshaping how shoppers prioritize spending. Being a holiday tradition is becoming less important than delivering clear value, relevance, and benefit.”



Chris Costagli
Vice President,
F&B Thought Leadership

For brands...

Brands should shift from selling products for the occasion to earning a role in a more intentional, multi-moment basket, where inclusion is determined before the trip. This requires building portfolios around protein, functional benefits, and all-day usage, ensuring each product delivers clear value across preparation, consumption, and recovery.

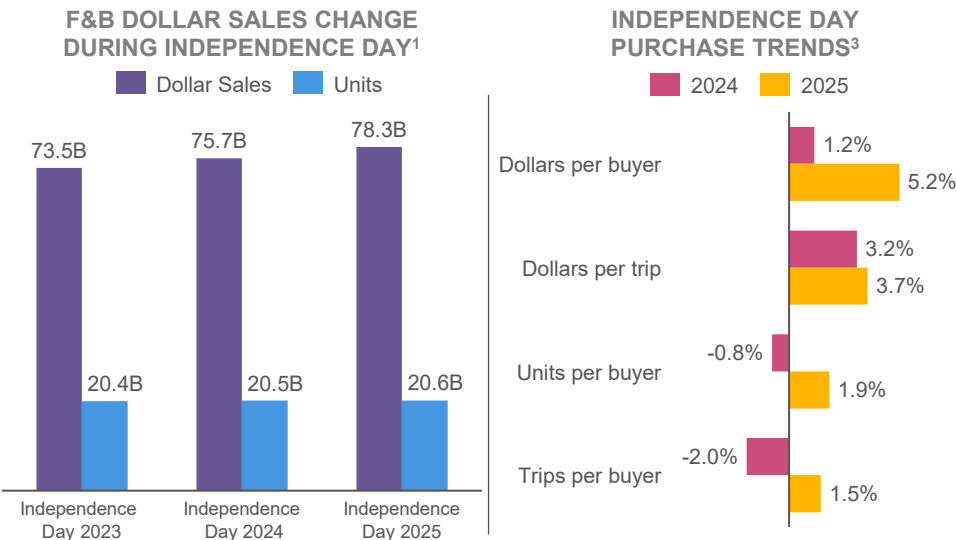
For retailers...

Retailers should move from organizing around categories to orchestrating the total Independence Day basket, aligning assortment and merchandising with how consumers shop. This means structuring stores and digital experiences around need states such as meals, energy, and hydration, while reinforcing planned purchasing with clear, high-utility solutions.

Implications for the Food & Beverage Industry

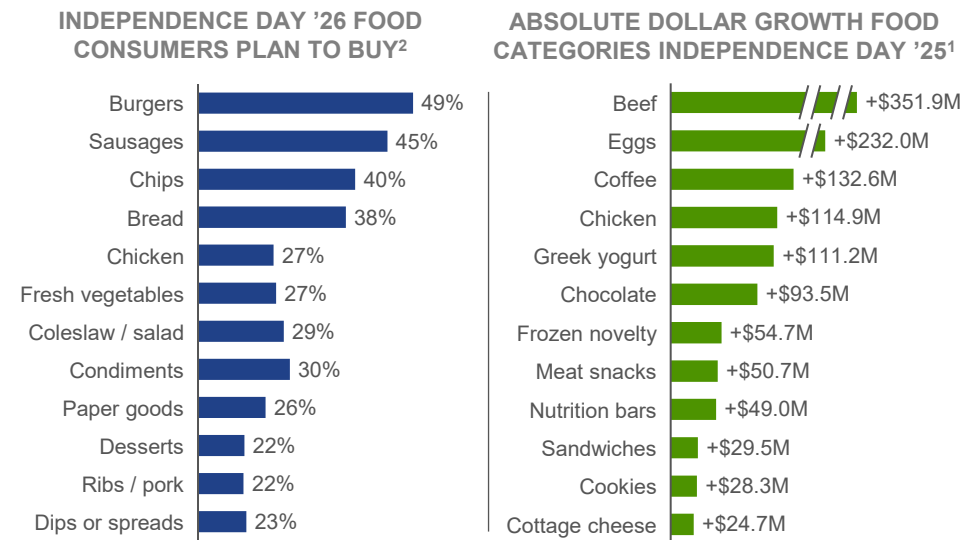
Winning requires maximizing each shopping moment

Independence Day growth is being driven by both spend and renewed engagement, with dollars per buyer rising +5.2%, trips per buyer increasing +1.5%, and units per buyer returning to growth at +1.9%. Consumers are entering the holiday with discipline, making more trips but with clear intent behind each one. This marks a shift toward structured, mission-led shopping, where frequency increases but waste disappears.



The grill is just the start

Independence Day intent remains anchored in core grill items, but growth is extending well beyond the center of the plate. Categories like eggs, coffee, and even Greek yogurt are driving significant gains, indicating a shift toward functional, everyday consumption layered into the occasion. What was once a single meal event is now full-day consumption, built around energy, protein, and sustained usage across multiple moments.



Industry Analysis Sources: ¹NIQ, Retail Measurement Services, Total Full View, 4 w/e 07/05/2025; ²NIQ, BASES Quick Question Omnibus Survey, May 2026, n=2,007; ³NIQ, Expanded Omnishopper Panel, Total US, Total Outlets, 4 w/e 07/05/2026

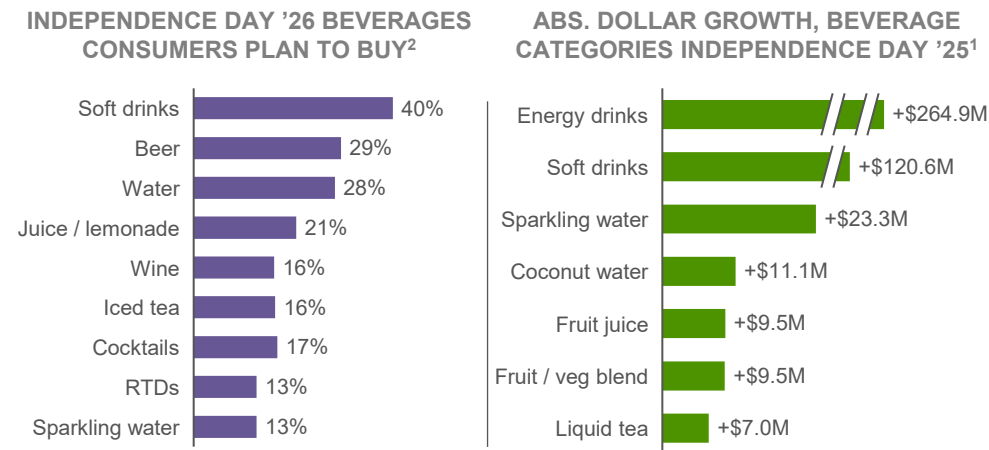
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The takeaway...

- Nostalgia still drives traffic, but it does not guarantee long-term relevance as consumers increasingly prioritize products that deliver clearer value, function, and everyday usefulness.
 - Function, convenience, and wellness are reshaping what consumers define as premium, especially as benefit-driven categories gain pricing power across the store.
 - Holidays are becoming more curated consumption moments as shoppers prioritize fewer purchases that feel worth the spend.
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- Your next move...**
- Prioritize innovation that helps consumers justify spending through wellness, convenience, flexibility, or everyday value.
 - Position products across multiple occasions and dayparts as consumers look for purchases that extend beyond a single meal or moment.
 - Rethink assortments and merchandising for smaller, more intentional gatherings where every purchase faces greater scrutiny.

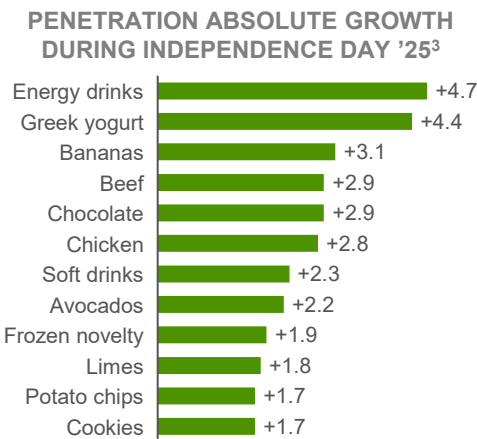
Function is redefining what consumers drink

Consumers are still buying the classics for Independence Day, but beverage growth is shifting toward functional alternatives, led by energy drinks. With 48% willing to pay more for benefits, 42% prioritizing no sugar, and 38% seeking hydration, consumers are upgrading their beverage choices.



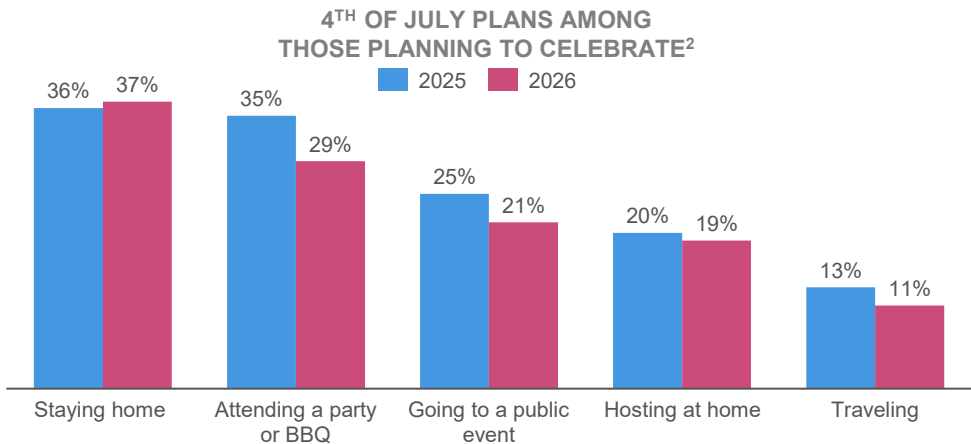
Impulse is giving way to purpose

The categories gaining the most Independence Day penetration are not simply benefiting from seasonal momentum. They are revealing a deeper shift in consumer expectations, as shoppers increasingly choose products with functional characteristics that matter before, during, and after the celebration.



Celebration is becoming smaller, sharper, and more curated

Independence Day gatherings this year might be smaller than in the past. Fewer shoppers are planning to attend parties, host parties, or go to public events this year. That does not mean the demand for party essentials won't be there, but it does mean smaller pack sizes designed for smaller gatherings will outperform this year.



Looking for more?

Independence Day will remain one of the largest consumption moments in the US, but the definition of value within the holiday basket is changing. Themes of purpose, function, and measurable benefit will play a larger role in shaping what consumers choose to buy, keep, and repeat. Traditional holiday purchases will increasingly lose space to categories and brands that evolve alongside shifting consumer priorities and deliver clearer everyday relevance. Retailers and manufacturers that understand this shift and build around it stand to capture disproportionate growth in the years ahead.