

The NielsenIQ logo is displayed in white, bold, sans-serif font. The background of the entire slide is a dark blue with a pattern of numerous diagonal, brush-stroke-like lines in various shades of blue, teal, and purple, creating a sense of motion and energy.

NielsenIQ

Driving E-commerce Growth Across EEMEA & India in the Age of Agentic Commerce

The Full View™

Your Speakers Today...



Didem Şekerel Erdoğan
*EEMEA & INDIA E-Commerce Leader
& General Manager, Türkiye*



Turan Konu
*EEMEA Retailer Services
E-Commerce Director*



Ugur Karci
*APP CS Leader & EEMEA
Thought Leadership*



Kanaka Bhagwat
*Head of Ecommerce &
Omni India*

Agenda

- ***Redefining Commerce in the Agentic AI Era & The Next Wave of AI-Powered Insights by NIQ***
Didem Şekerel Erdoğan
- ***Navigating the Future of E-Commerce in EEMAI***
Turan Konu & Uğur Karcı
- ***The Future of Commerce in India: From Distribution to Agentic commerce***
Kanaka Bhagwat

Redefining Commerce in the Agentic AI Era & The Next Wave of AI-Powered Insights by NIQ



**Didem
Şekerel Erdoğan**

*EEMEA & INDIA E-Commerce Leader
& General Manager, Türkiye, NIQ*

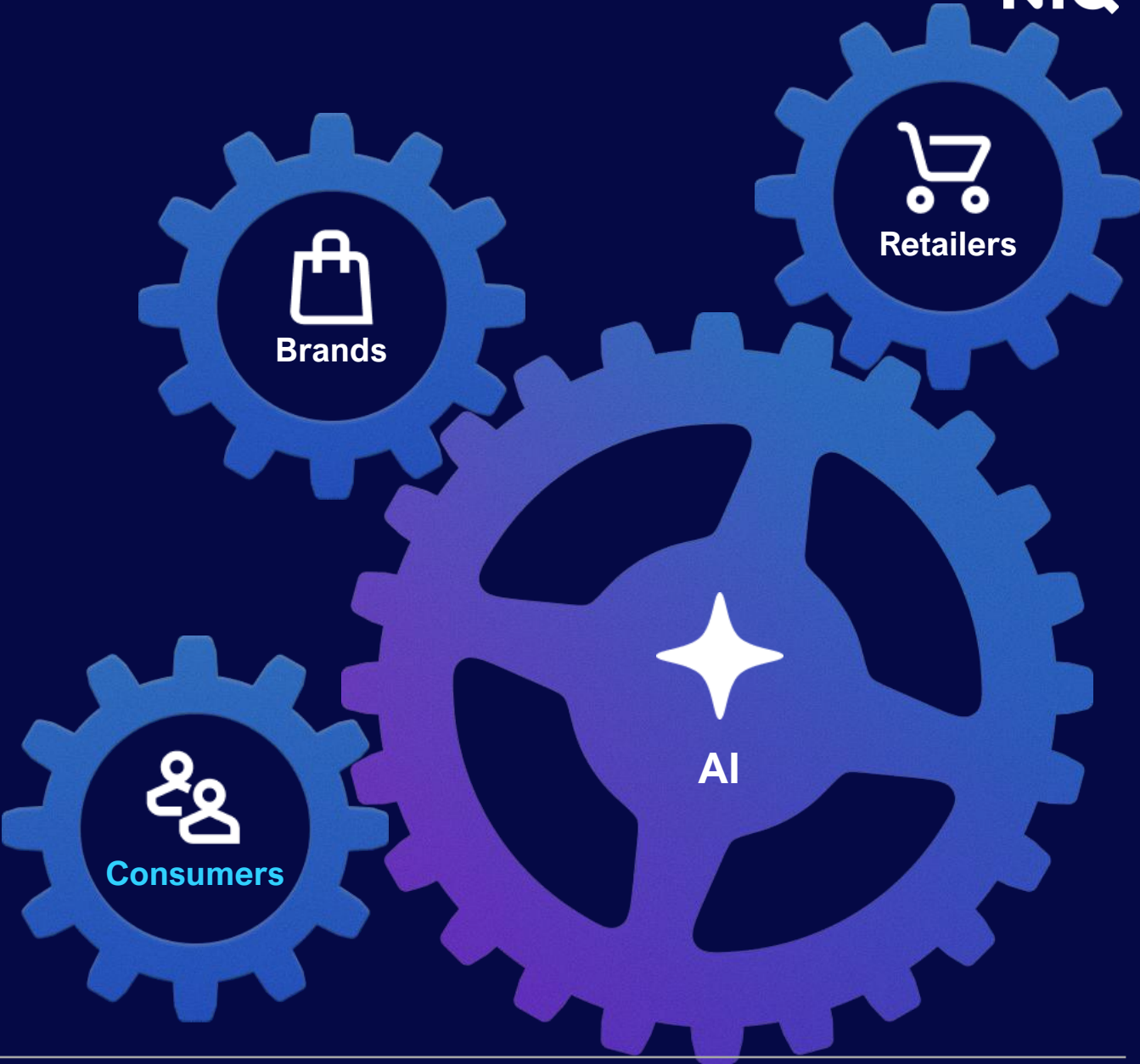
NielsenIQ

Pillars of AI-Powered Transformation of Commerce



AI is disrupting
your world.

Soon, it will
*underpin every
decision in
commerce.*

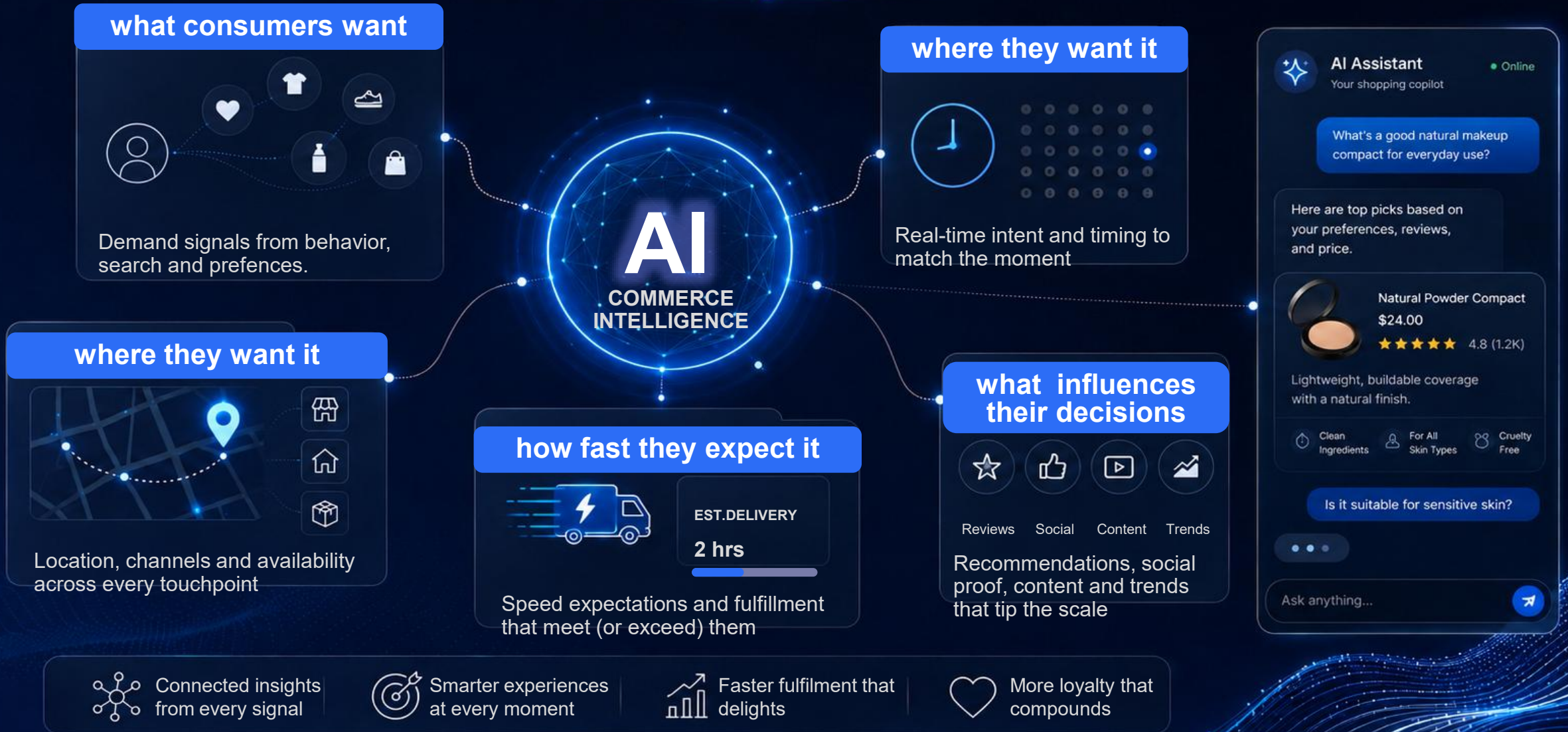


Consumer has become fluid across intents and touchpoints...



**Focus on consumer
moments & signals
not channels**

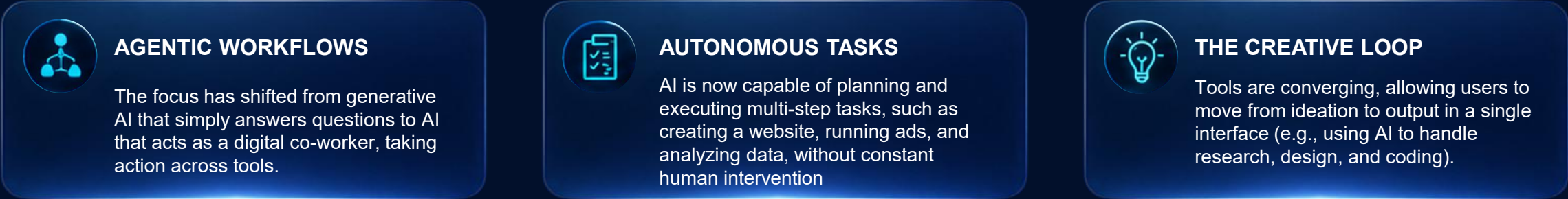
AI Is Becoming the Connective Tissue for Commerce



From *Search* to *Purchase Delegation*: *Agentic AI* is transforming shopping behaviour



Agentic Era: from "support" to "execution"



A new way people discover and decide

SEO

— Search Engine Optimization —

Step 1 Search with a keyword

Step 2 Choose from search results



Share of Search



Choose from search results



Rankings drive visibility



Brands compete for position

From keywords to conversations



GEO

— Generative Engine Optimization —

Step 1 Ask an initial question

Step 2 Ask follow-up questions

Step 3 Get curated recommendations



Share of Conversation



Answer follow-up questions



AI selects & recommends



Brands become trusted sources

New Metrics for a New Era



Today

Share of Shelf
Share of Search



Tomorrow

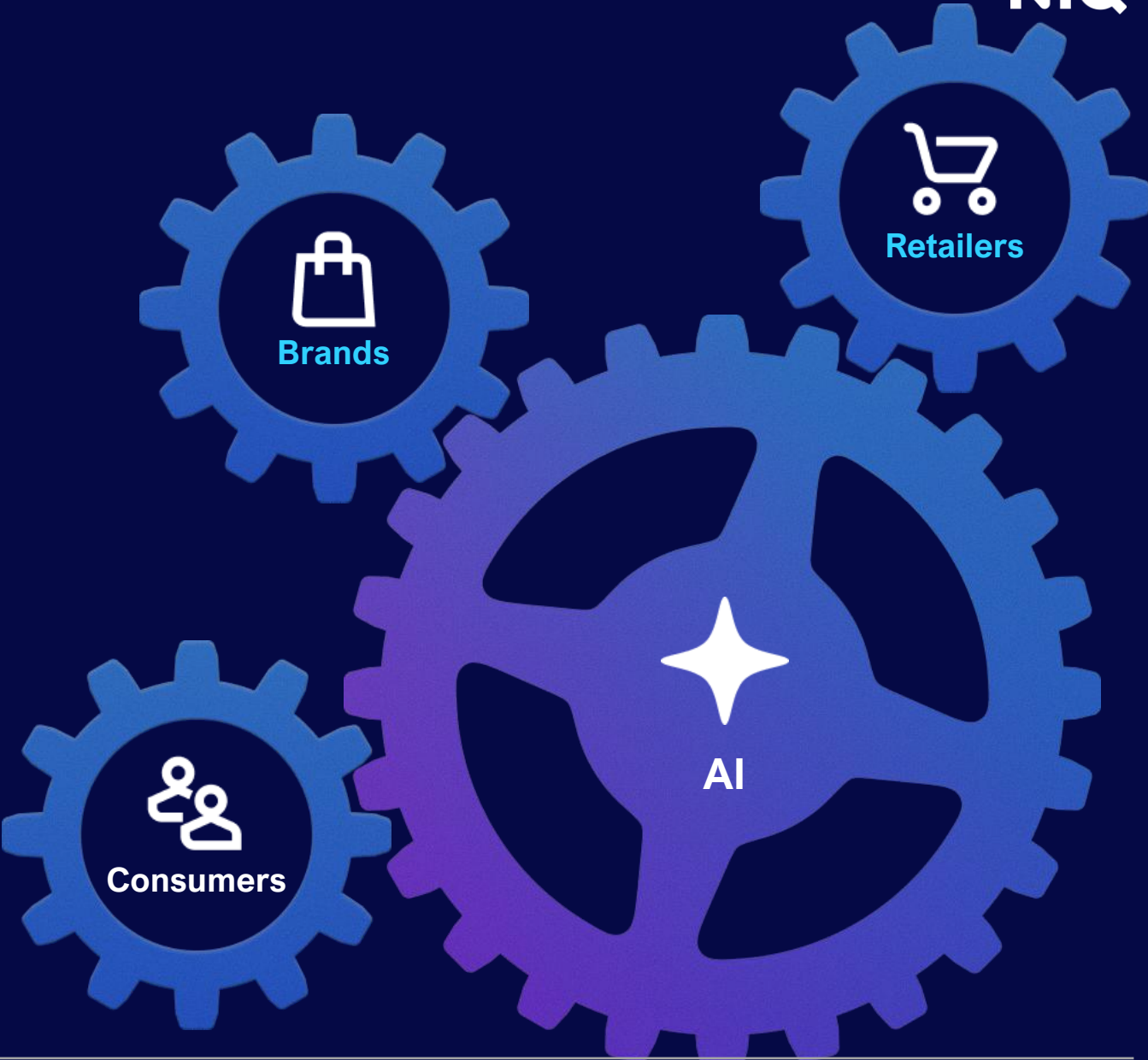
Share of Conversation
Share of Recommendation



Future/The next

Share of Trust

How to win in a world *where AI changes everything?*



For Brands & Retailers:

The goals are the same. The opportunity has skyrocketed.

Drive revenue

Accelerate decisions, grow faster

Create efficiency

Shorten cycles, expand capacity

Transform

Relevant workflows and value

\$4 trillion

Global B2C revenue could be orchestrated by AI agents by 2030

\$1.5 trillion

projected global corporate AI spending in 2026

\$140 billion

allocation to AI by retail and CPG companies in 2025

98%

enterprise CIOs reporting increased board pressure to demonstrate measurable ROI

74%

acknowledge their roles are at risk if AI does not deliver business gains within two years

We have
the IP to fuel
your AI experience

The data layer

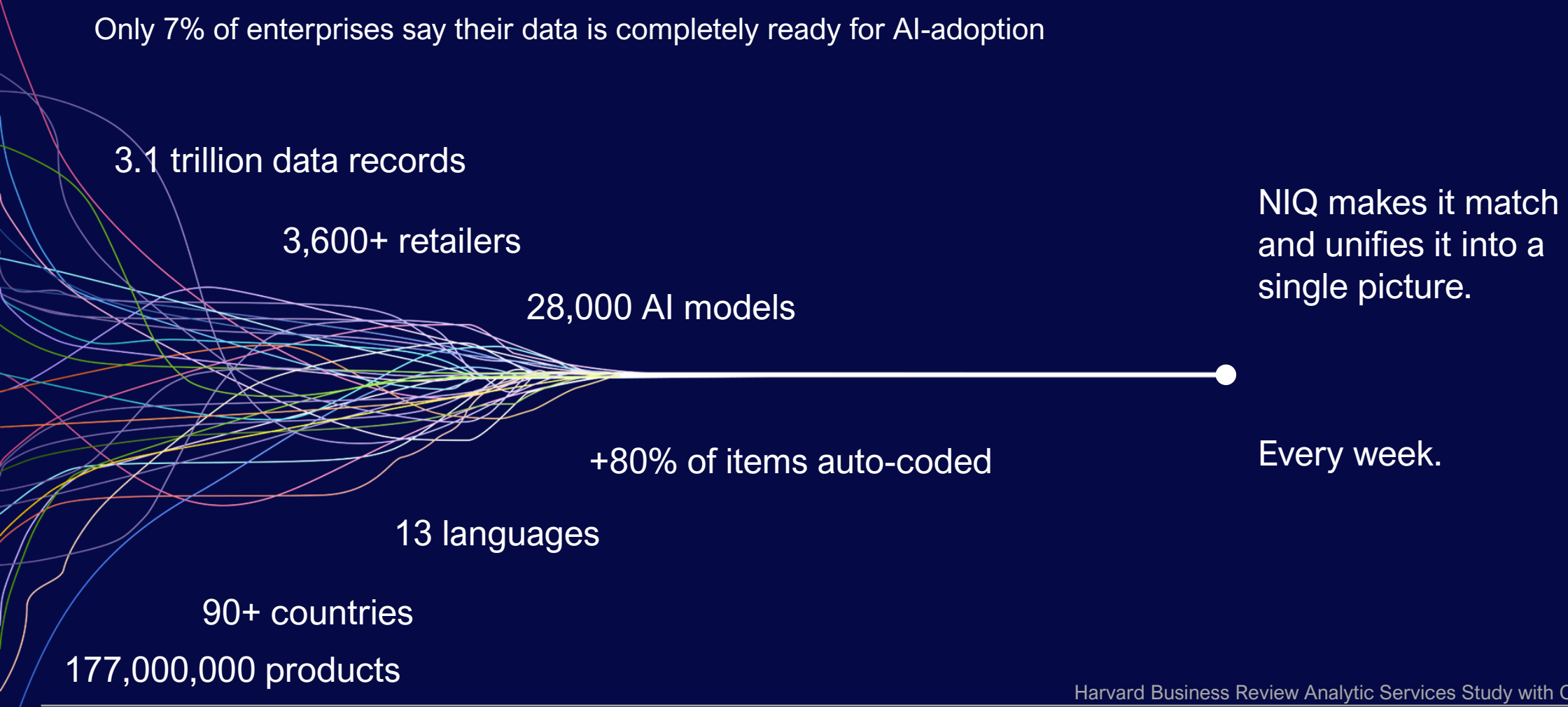
The breadth and depth of NIQ data cannot be recreated by AI



The context layer

Harmonization and integration

Only 7% of enterprises say their data is completely ready for AI-adoption



Harvard Business Review Analytic Services Study with Cloudera, March 2026

The semantic layer

Creating a shared language between data and LLMs

Imagine a user types a question asking about “breakfast cereal.”

Right now, if the word “breakfast” isn’t directly in the product name, AI cannot pull the right products that fall under “breakfast cereal.”

A semantic layer encodes core definitions and mappings of adjacent and related terms, essentially giving the AI a translation guide between natural language and the data.

milk

butter

breakfast

cereal

flour

eggs

sandwich

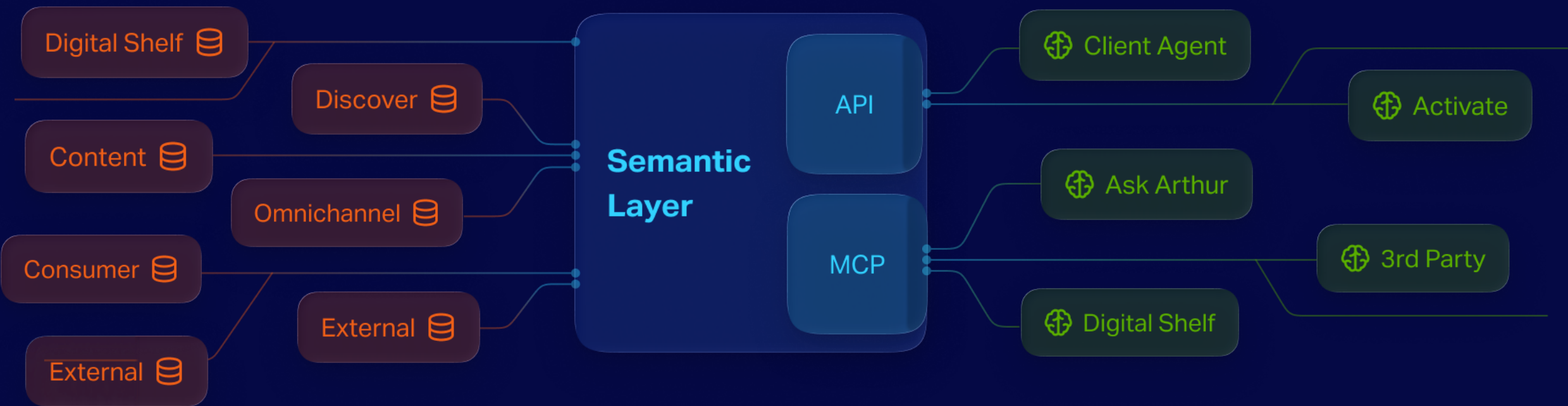
jam

bread

The semantic layer

NIQ has built a semantic layer tuned to the industry

Applications can access taxonomy, metadata, and data model in a single catalog without reference to human SMEs for interpreting end-user natural language questions into executable queries

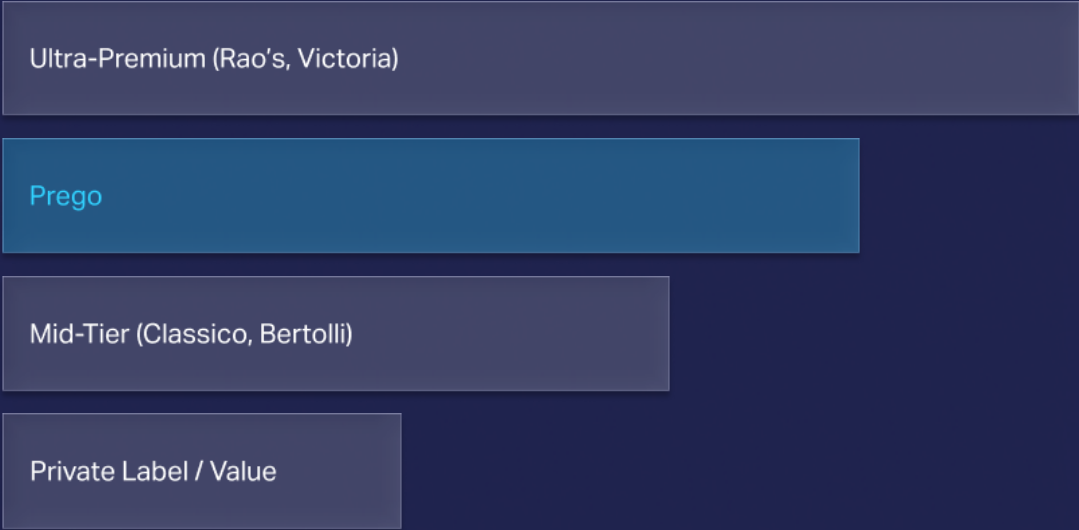


The semantic layer

AI alone is not enough. NIQ Data remains essential.

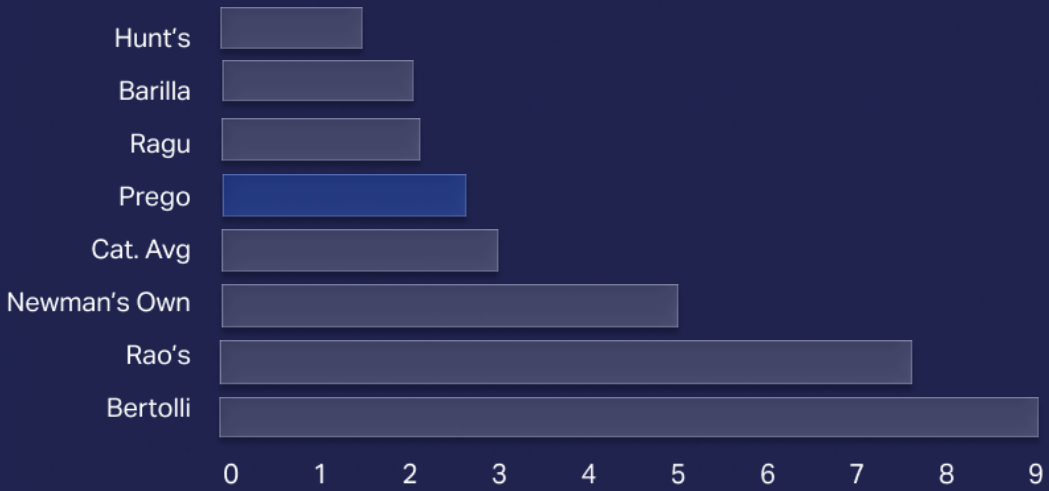
AI analysis without NIQ data

Prego occupies the premium mainstream tier — priced above private label but below ultra-premium brands like Rao's. Owned by Campbell's, the brand has implemented multiple rounds of price increases since 2022, prioritizing revenue growth over unit volume. Standard 24 oz jar retails at \$3.00–\$4.50 depending on retailer and region.



AI analysis with NIQ data

Prego at \$3.10 sits 11% below the category average (\$3.49). It's not cheap enough to compete with Hunt's (\$1.55) on value...and not premium enough to compete with Rao's (\$6.75) on quality perception. Rao's commands a 2.2x price premium over Prego — and is growing faster. Both brands are owned by Campbell's, creating an internal portfolio tension.



AI is disrupting your world...



Only NIQ delivers the IP and infrastructure to fuel your AI journey!

 *Optiq Bridge*

CADENCE™

NIQ *Digital Shelf*

**NIQ Price & Promo Optimizer
with Analytics AI**

NIQ BASES AI Product Developer



NIQ

We've built AI applications to transform your workflows

Everyday insights

Right insight, right moment

Optiq

Optiq Bridge

Growth Strategy

Accessible, dynamic, engaging

AI Chat for Segmentation

Panel Survey Modernization

Brand & Media

Breakthrough measurement powered by agentic AI, smarter continuous optimization, stronger ROI/ROAS

Cadence

Audience & Personalization

Price & Promotion

Sharper pricing, real-time promotion

Price & Promo Optimizer with Analytics AI

Shelf Architect + Precision Areas

Digital Shelf

No purchase missed on digital platforms

Search Optimizer

Content Advisor

Innovation & Renovation

More winning innovations, faster to market

AI Product Developer

NIQ Optiq: Frictionless access to NIQ data

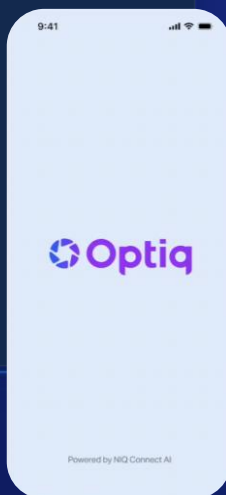
Optiq enables faster decisions, more efficient data access, and greater flexibility to build with NIQ data

Chat + Mobile

Answers inside the NIQ experience

Ask questions, explore insights, and act on trusted NIQ intelligence in Discover and on the go.

Broader access to NIQ intelligence across commercial, insights, and leadership teams



Bridge

Live NIQ data in your preferred LLM

Connect NIQ data with AI tools, 3rd parties, and into environments your teams already use

Continuously current data, faster workflows, and governed access without replacing existing channels

AI usage rights

Freedom to build and experiment

Use licensed NIQ data in AI-enabled workflows, analytics, automation, and internal applications

More clarity, more flexibility, and fewer gray areas around AI usage

OPTIQ MOBILE

Access on the go

Optiq in your pocket

Mobile access to Optiq insights on your smartphone

Natural language chat

All of Optiq's chat capabilities included

Your instance of Discover

Tied to your entitlements and views of the world

Your history

Connected to your account for cross-screen efficiency



Optiq Bridge: live NIQ data in AI tools

NIQ as an official connector to leading frontier model platforms



Right data

Quality NIQ data through a single connection.

Right time

Live connection with automatic updates and restatement handling.

Efficiency

Replace manual pulls with governed, AI-powered workflows.

Work where you are

Trusted NIQ intelligence inside daily tools.

Bridge adds a new access path. It does not remove existing ways to access NIQ data.

Optiq *Bridge*

Optiq Bridge

NIQ Intelligence in Your Workflow

The bridge between
NIQ Intelligence and the world's
leading AI platforms.
Seamlessly access trusted
insights, visualizations, and
presentations without leaving
your workflow.

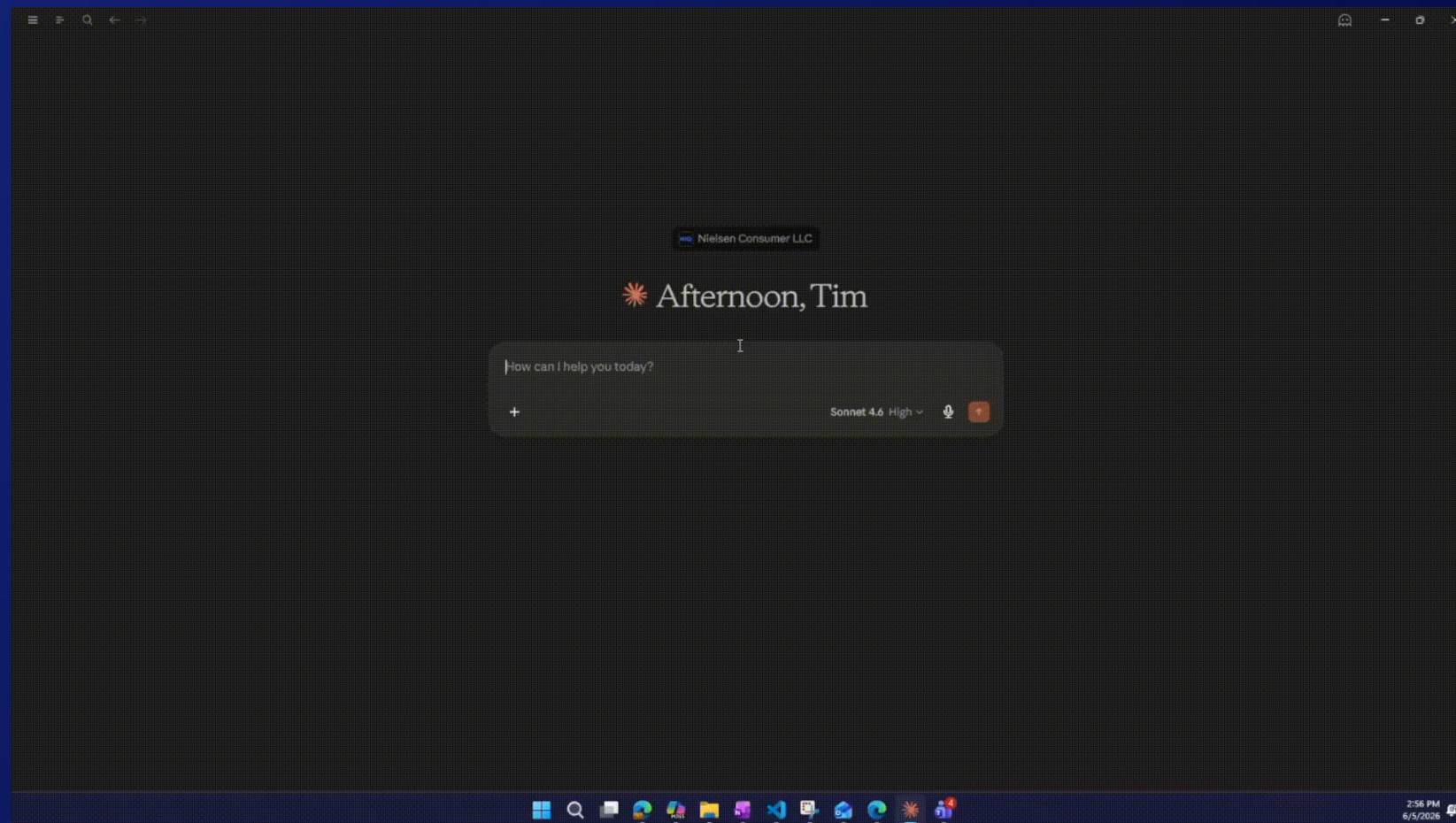
Claude

Microsoft Copilot

ChatGPT

Gemini

DEMO



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In the Age of AI, Digital Shelf Execution Determines Who Wins



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

Digital Shelf with AI in ACTION

Out of stock

cz CZECH REPUBLIC

Product

Categories/Brands

List of products

Retailers

Periods

Analyze

Share current query

Page walkthrough

NATIONAL VIEW

STORE VIEW

My out of stock rate

13.6% -2.6

Competitors

6.2% -0.9

View list

My out of stock products

55.5 -16.4

Competitors

553.1 -78.2

View list

My products with increasing OOS

46.8

Competitors

491.2

View list

My products with decreasing OOS

43.2

Competitors

201.3

View list

Key facts

Top decrease

My out of stock rate decreased this period, mainly due to these retailers.

-23.5

Retailer

Drmax CZ

-4.6

Retailer

Alza

-0.8

Retailer

Rohlik

At these top retailers, my rate decreased the most in these categories and/or sub- categories and segments.

-34.3

Drmax CZ

TOTAL WC CARE

-27.4

Drmax CZ

HAIR

-23.2

Drmax CZ

LAUNDRY DETERGENTS

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From strategy to tactics, Price & Promo Optimizer with Analytics AI provides a holistic approach to profitable growth

Where to **play**How to **win**What to **action**

Price and Promo learning and insights

- Optimize brand pricing
- Define competitive price points
- Assess pricing structure across pack types



Promo evaluation and trade optimization

- Assess current trade terms
- Set PPG list prices
- Plan retailer-specific execution



Portfolio Strategy development

- Estimate Price Promoted Group (PPG) growth potential
- Identify mix improvement
- Define action plan for mix shift
- Structure pack type pricing strategy



Customer account planning

- Align RGM strategies to key customer objectives
- Customize trade terms
- Tailor pricing and mix to retailer dynamics

The three pillars of AI across Price & Promo Optimizer

AI is integrated across every stage of the process

Smarter Models



Connected Data



Intuitive Software



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Marketing doesn't need another tool.

It needs

CADENCE™

*The **rhythm** of better decisions.*

Compound AI: four layers, jointly optimized.



Data

Connected, synced, harmonized continuously across every source.



Knowledge

Institutional memory and domain context every component reads from.



Modeling

Fit-for-purpose statistical models, calibrated and benchmarked.



Agents

Autonomous orchestration that ties the loop together and acts.

19+ specialist agents.
250+ tools.
One conductor.

NIQ  Optiq

Complexity behind the scenes. *Clarity at every decision.*

The *Full View*™.

Every business driver — marketing and non-marketing — connected in one measurement frame.

WHY IT MATTERS

Marketing rarely fails alone.

The Full View™ reveals what actually moved the business — grounded in NIQ's world-class global data assets.

Pricing	Promotions	Media
Sponsorship	Brand	Sales
Supply Chain	Financial	Macroeconomic

What changes when **Cadence** runs.

10×

Faster time to insight

Quarterly model refresh →
weekly recalibration.

25–40%

Improvement in ROAS

Continuous reallocation
across channels and geos.

60–80%

Lower cost-to-measure

Replace 5–15 measurement
tools with one OS.

One platform. Six connected systems.



THE E2E AGENTIC OPERATING SYSTEM

A dynamically choreographed socio-technical system for marketing ROI.



MyCadence

Your Command Center.
projects, reports, strategy
tools, team collaboration.



CadenceOS

BI that never sleeps.
Signals → Outcomes →
optimization → activation.



CadenceIQ

Purpose-built Intelligence.
Portfolio, Commerce,
Content, and beyond.



CadenceIO

Production Systems Go.
connect, sync, model,
metadata, and data-out.



CadenceAI

AI @ your Fingertips.
agents, MCPs, knowledge
graphs and governance.



CadenceKM

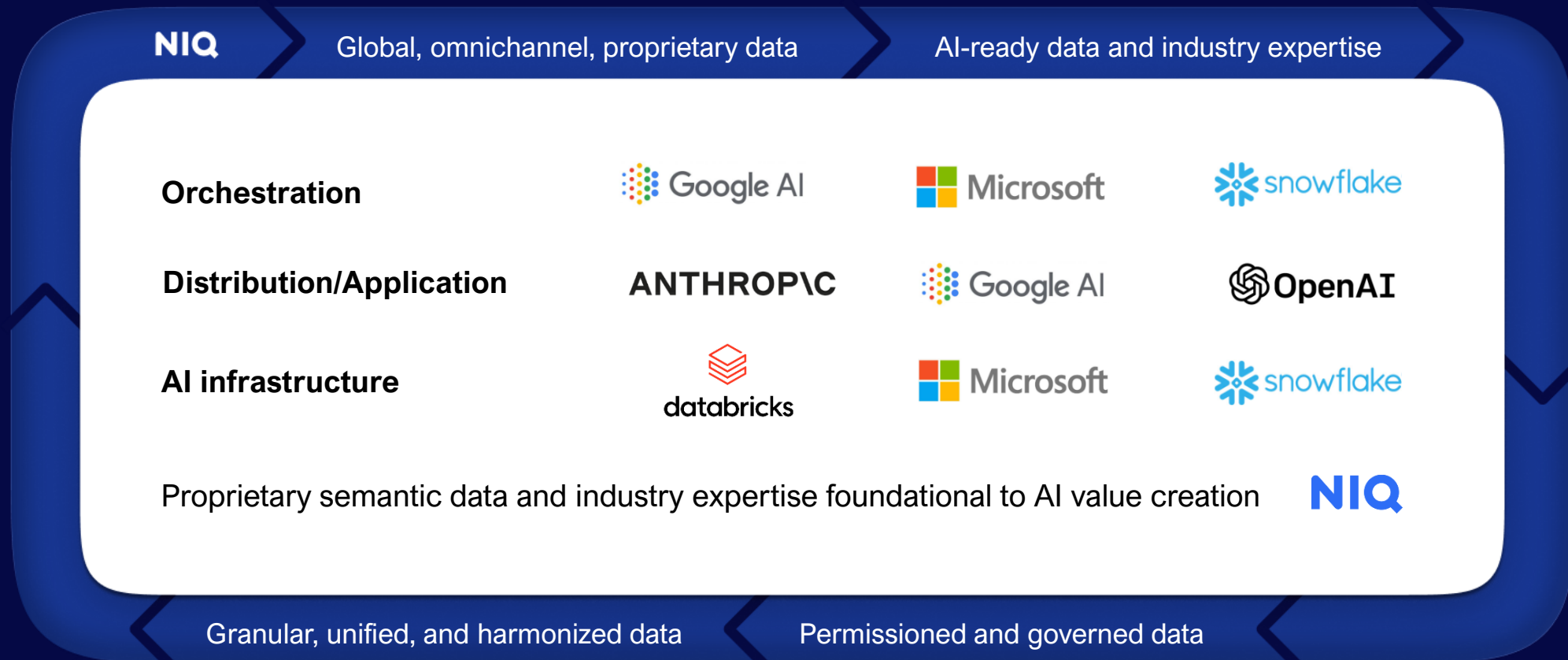
Your collective brain.
Insights, Playbooks, Academy,
and shared knowledge.

Continuously running, always learning. Where data, intelligence, agents, knowledge and people move in rhythm.

ROI Intelligence | Faster · Deeper · Cheaper



NIQ partners with leaders across the industry to integrate our assets



“

*The price of light is less than
the cost of darkness.*

”

-Arthur C.Nielsen

NielsenIQ



Navigating the Future of E-Commerce in EEMAI



Turan Konu

*EEMEA Retailer Services
E-Commerce Director*



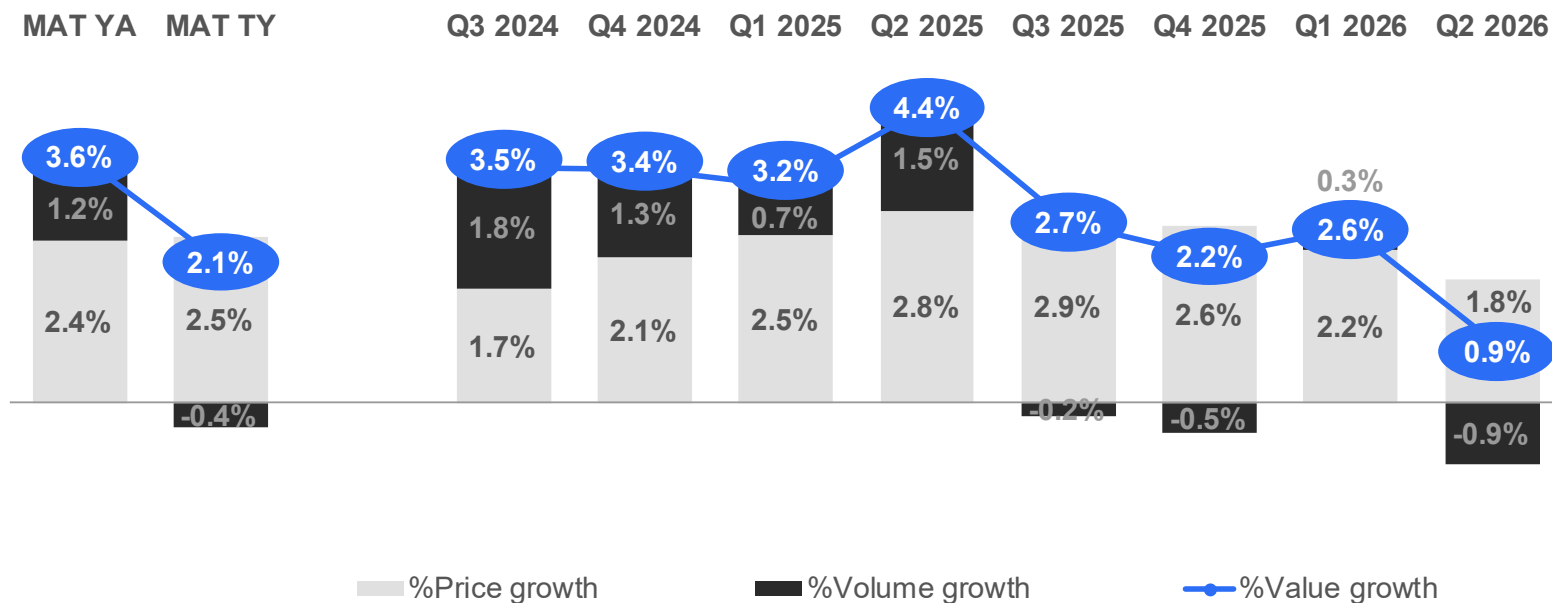
Ugur Karci

*APP Customer Success Leader
& EEMEA Thought Leadership*

NielsenIQ

Global FMCG value growth stepped down to +2.1% in MAT Q2'26

FMCG Market Dynamics



Pace of FMCG value growth stepped down globally in Q2'26, due to volume decline.

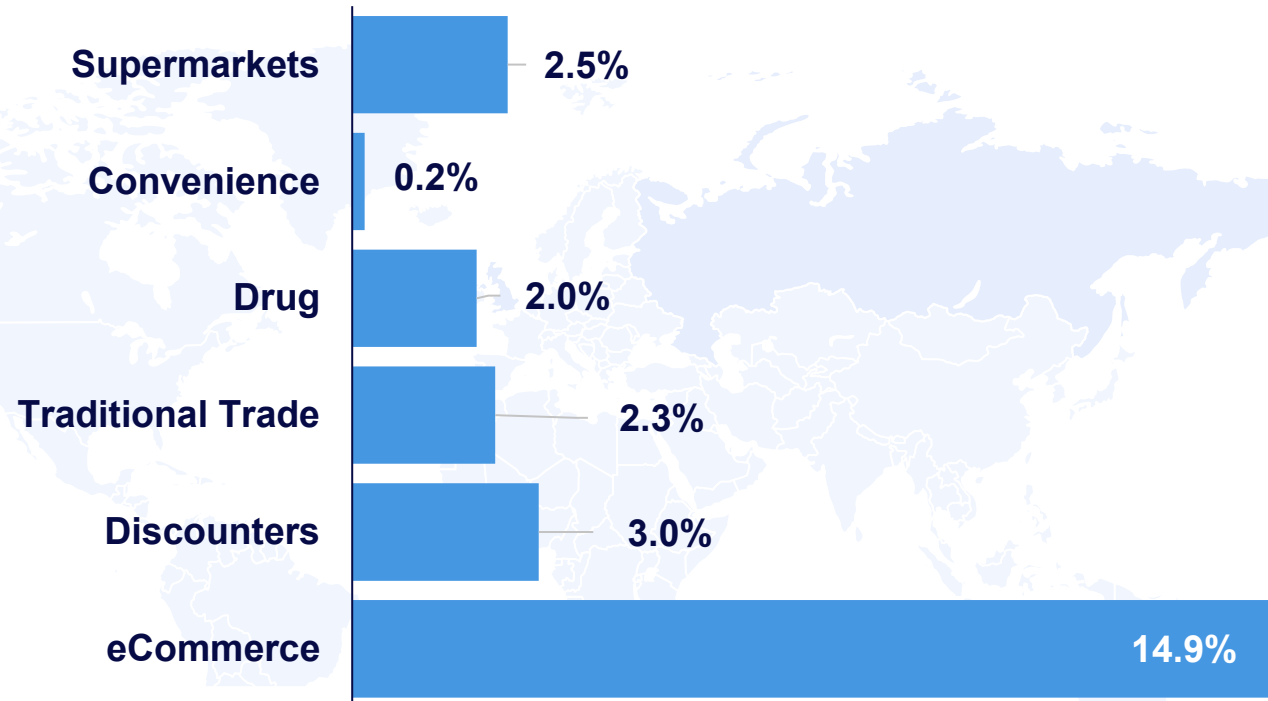
Source: NielsenIQ data up to Q2 2026

Notes: AR, BR, MX, CR, PE, EC, CO not included; Morocco and Egypt included from QBN Q3 22 release; data includes Oman, Qatar and Kuwait from Q4 23 release (monthly categories only); including Algeria from Q1'24 release; Russia is no longer included in QBN reports from QBN Q2'24; CL not included from Q2'25.

E-Commerce is the fastest growing channel, increasing +14.9 in the MAT Q2'26

Global FMCG channel value performance

%Growth MAT TY vs MAT YA and quarterly %growth



Channel Definitions

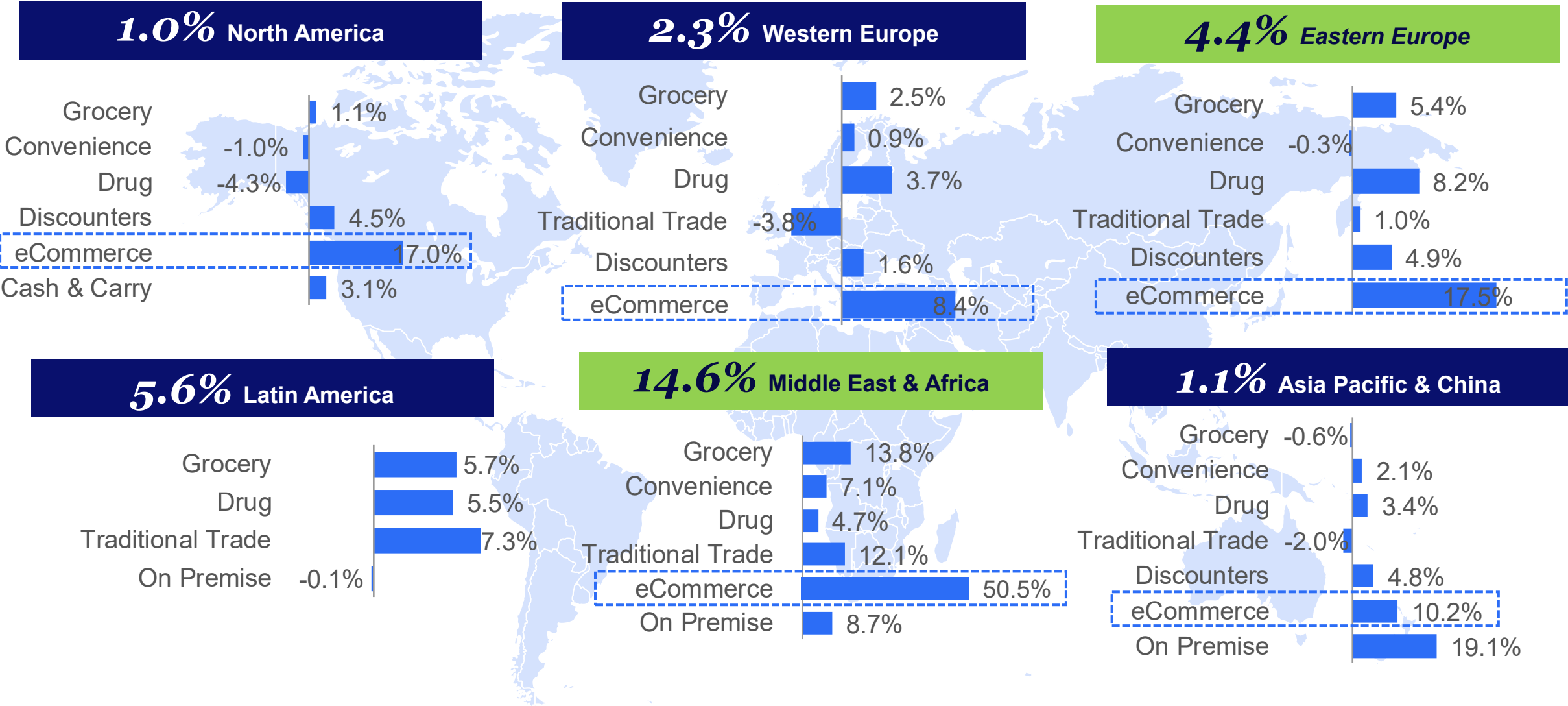
Convenience: DFV, Kiosk, Gas Stations

Drug: Perfumery, Pharmacy

Source: NielsenIQ RMS FMCG data up to Q2 2026

Ecommerce remains a key growth engine across regions

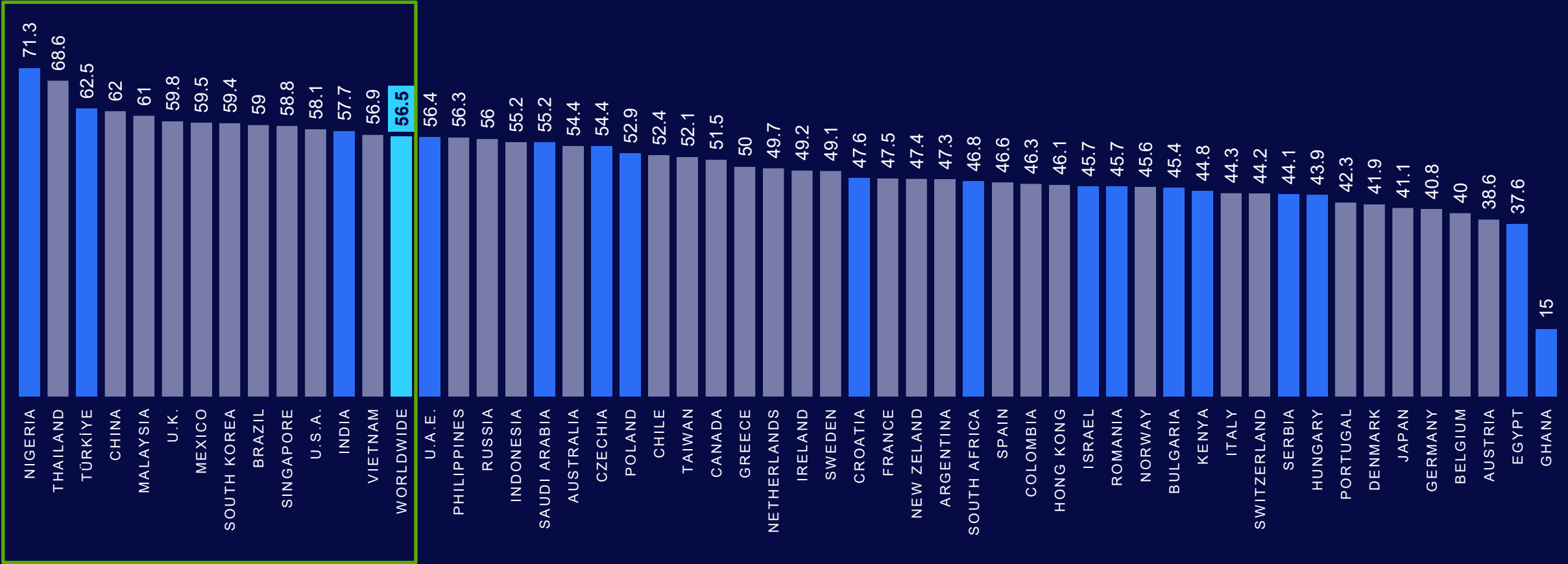
%Growth MAT TY vs MAT YA



Source: NielsenIQ RMS FMCG data up to Q2 2026

Türkiye, India and *Nigeria* score over world average in the percentage of internet users who buy something online each week.

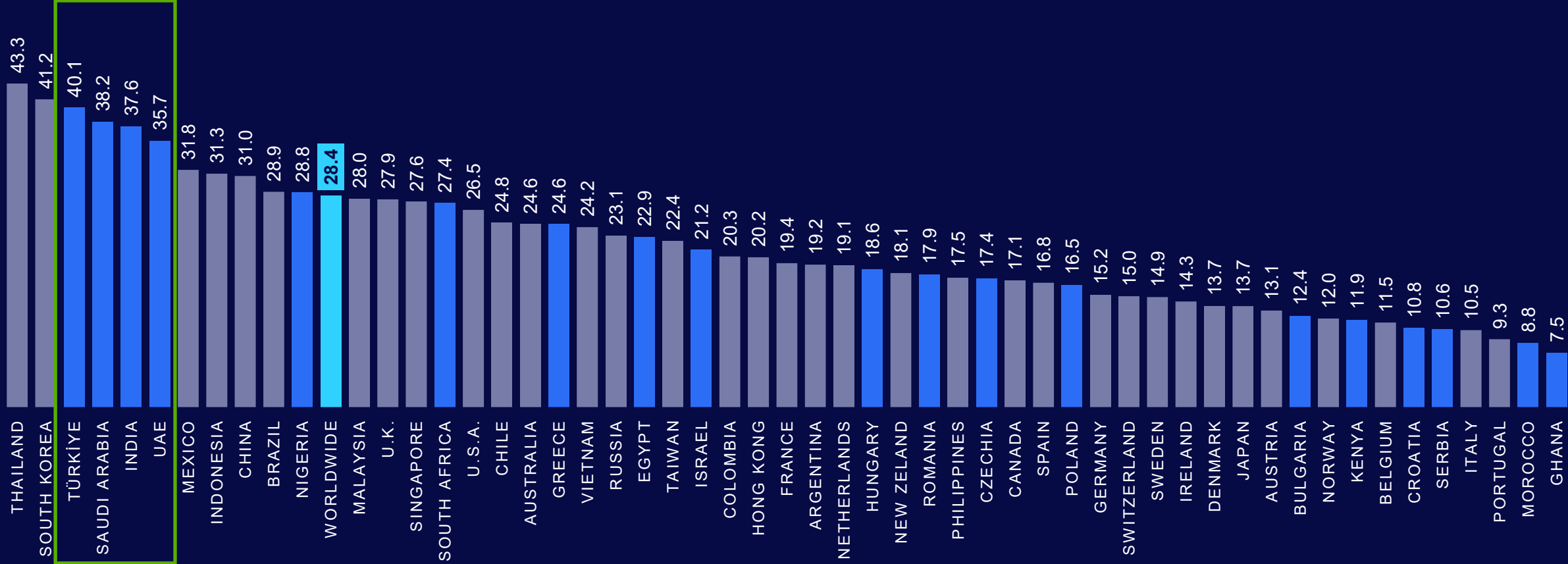
Weekly online purchases (%)



Source: We Are Social Digital Oct'2025

Whereas, *Türkiye, KSA, India* and *UAE* rank in Top 10 countries, in terms of the percentage of internet users who buy groceries online each week

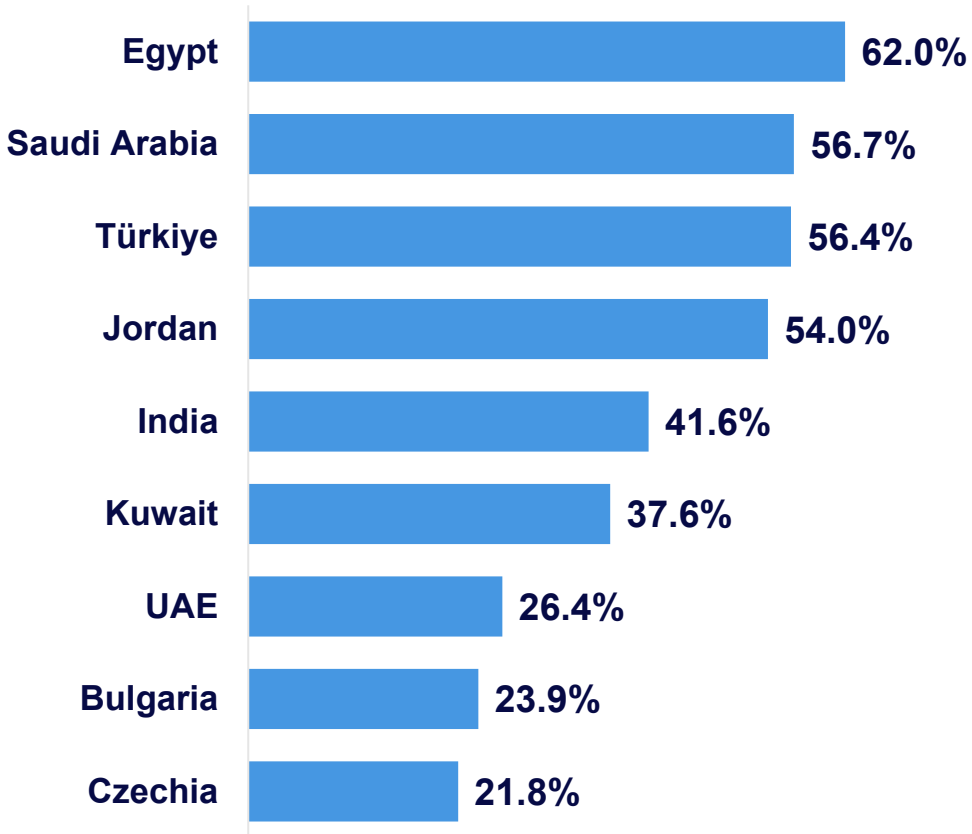
Weekly online grocery purchases (%)



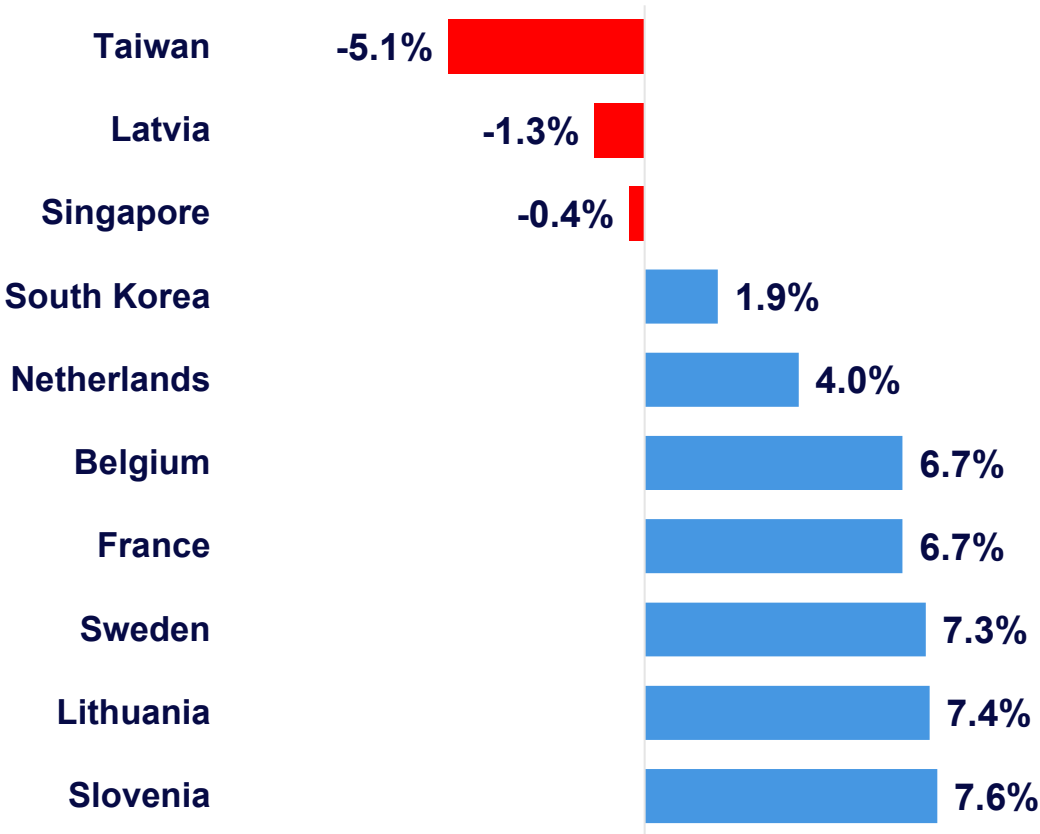
Source: We Are Social Digital Oct'2025

EEMEA Countries Account for All Top Growing E-Com Markets Globally

Top Performing Value Growth, % (MAT Q2'26 vs LY)



Bottom Performing Value Growth, % (MAT Q2'26 vs LY)



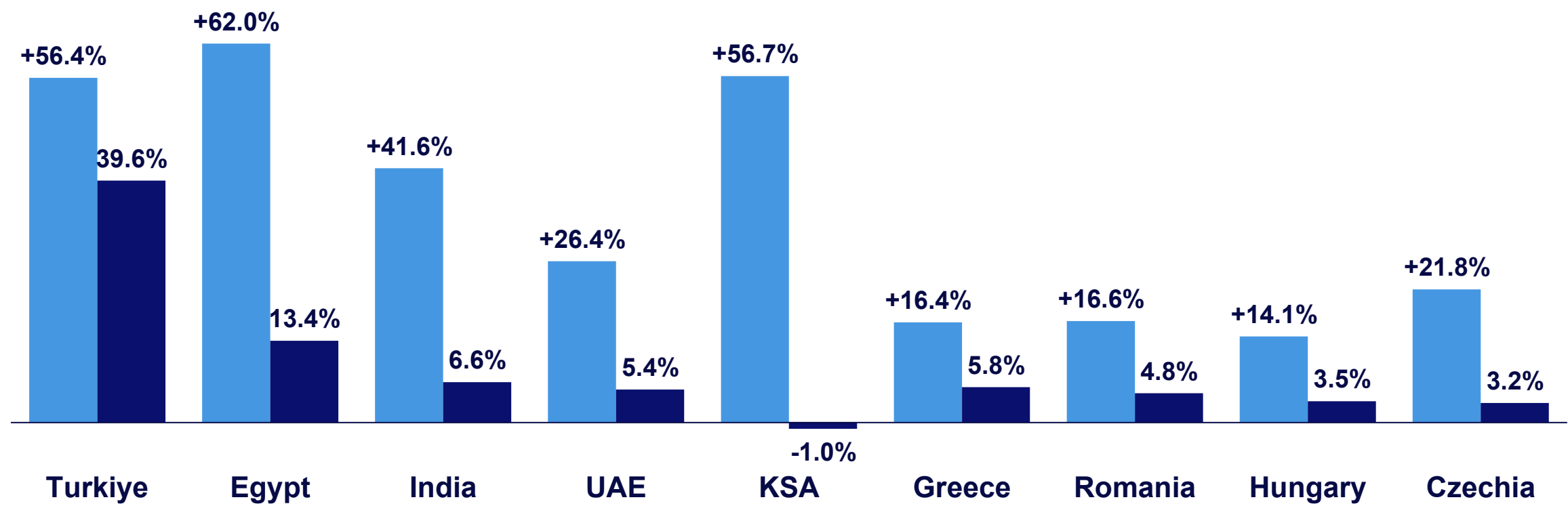
Source: NielsenIQ RMS FMCG data up to Q2 2026
Note: Jordan and Greece (4 retailers) eCommerce inclusion, China Ecommerce product enhancement and inclusion of Ecommerce pure players in KSA and UAE from Q1'25 edition; E-com expanded from 9 to 12 retailers in CZ, incl. additional categories UA and 2 new retailers in GR from Q1'26. ECommerce including Latvia and Lithuania from Q2'26 edition.

EEMEA Ecommerce FMCG Market Country Growth Rates

Ecom growth has been consistently double digit across EEMEA and in most of the cases growing x3-x4 times more than country average

Ecom
Value Growth, % (MAT Q2'26 vs. LY)

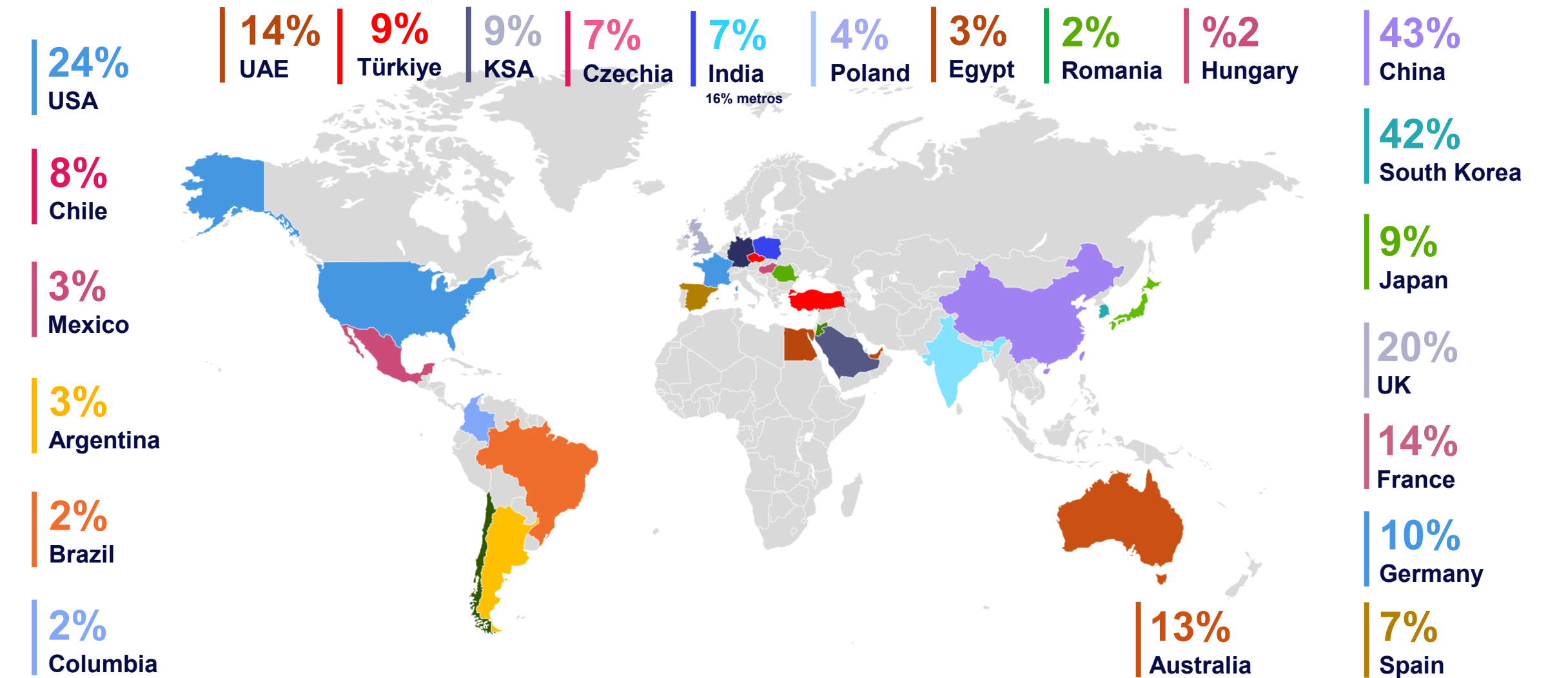
Total Country
Value Growth, % (MAT Q2'26 vs. LY)



Source: NielsenIQ RMS FMCG data

E-Commerce Value Share in Total FMCG by Country – YTD Q2'2026

Share of Online in Total FMCG value sales (%)



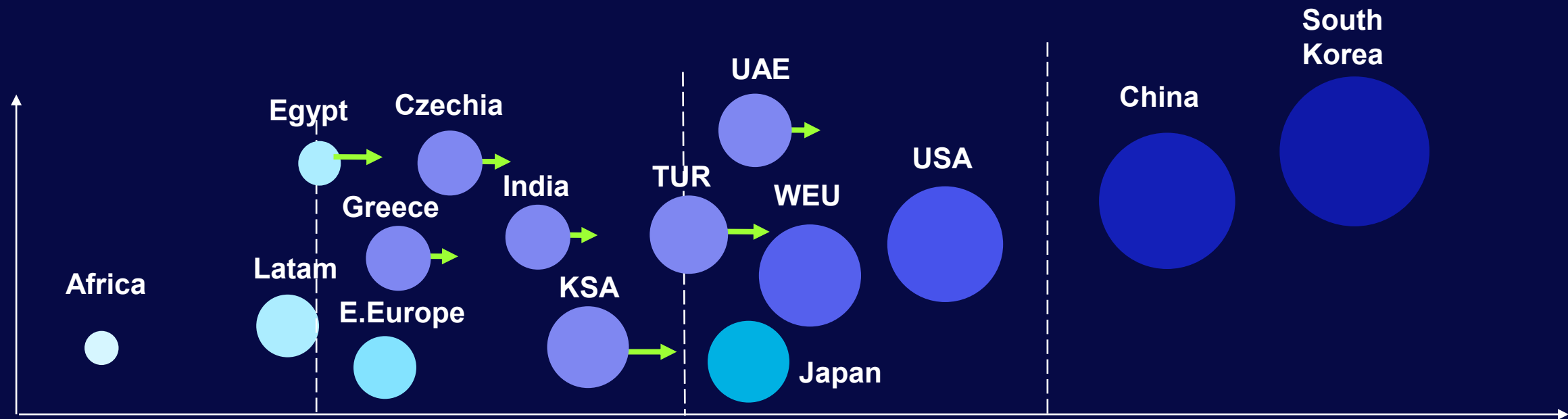
Source: NielsenIQ FMCG & eCommerce Panels and projections, 2025

E-Commerce Shares in EEMEA



Source: NielsenIQ Retail & E-Commerce Panels (India excluded)

UAE and Türkiye are progressing fast forward towards Phase 3



Phase 1: Low eComm <2% Infrastructure, (Internet, Payment, Logistics)

Phase 2: Mid eComm 2%-10% Profitability, How to do differentiation

Phase 3: High eComm 10% - 40% How to provide Omni-channel experience

Phase 4: Dominant eComm share 40%+ Full Integration between Online and Offline – Omni. How to get Loyalty How to increase Time & Wallet share



All products, services

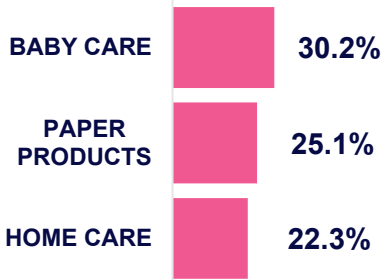
E-Commerce Share Reached Above Average Levels for Non-Food Categories

E-Commerce* value share %

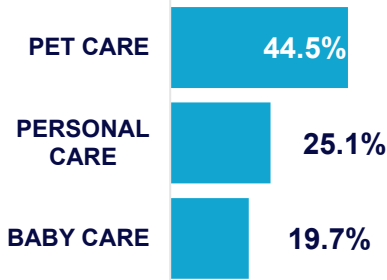
MAT Q2'2026 vs LY

Ecom Weight
Top 3
Industries by
Market

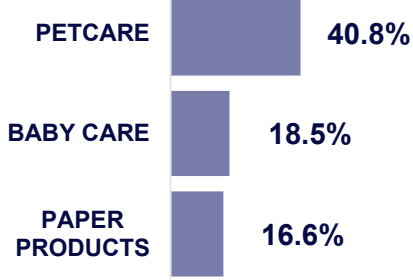
UAE (14%)



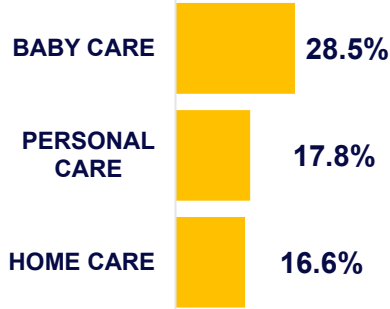
TURKIYE (9%)



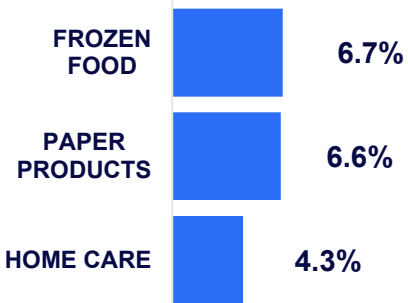
KSA (8%)



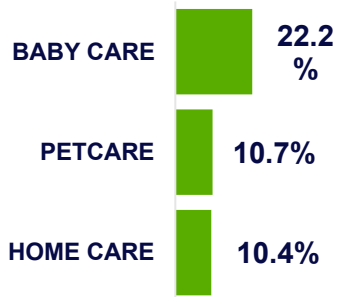
INDIA (15%**)



EGYPT (3%)



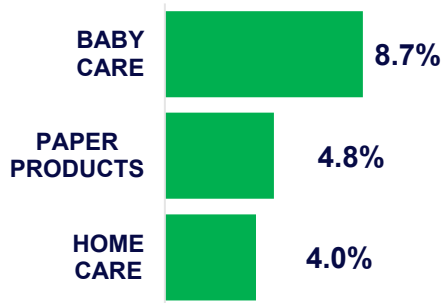
CZECHIA (6%)



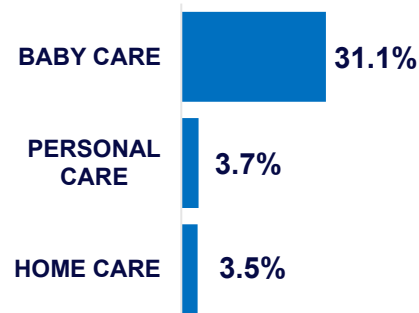
GREECE (4%)



HUNGARY (2%)



ROMANIA (2%)



Source: NielsenIQ Retail & E-Commerce Panels
*within reportable categories
**India data is shown within Metros for better representation of Ecom L4L comparisons

On the other hand, fastest growing industries are mostly Food categories as Ecom deliveries are becoming more convenient, quick and smart

Top 3 fastest growing E-com Industries Value Change (%)
MAT Q2'2026 vs. LY

Top 3 Fastest Growing Industries in Ecom

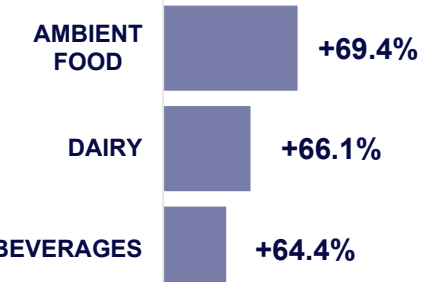
UAE (+26%)



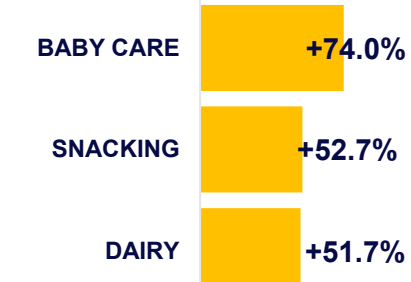
TURKIYE (+56%)



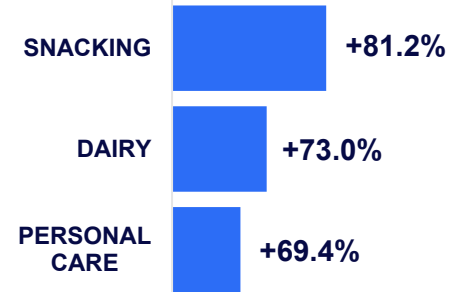
KSA (+57%)



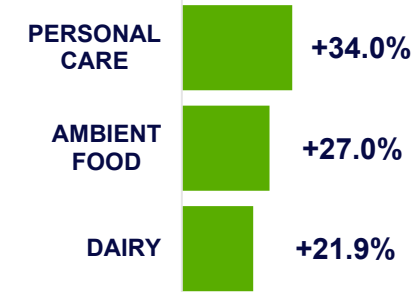
INDIA (+42%)*



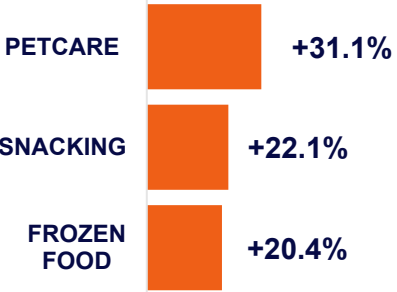
EGYPT (+62%)



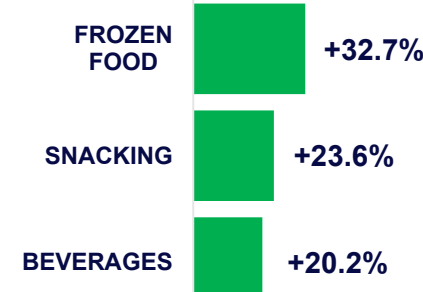
CZECHIA (+22%)



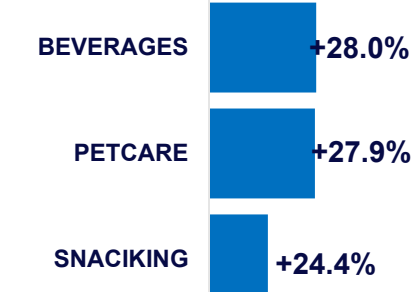
GREECE (+16%)



HUNGARY (+14%)



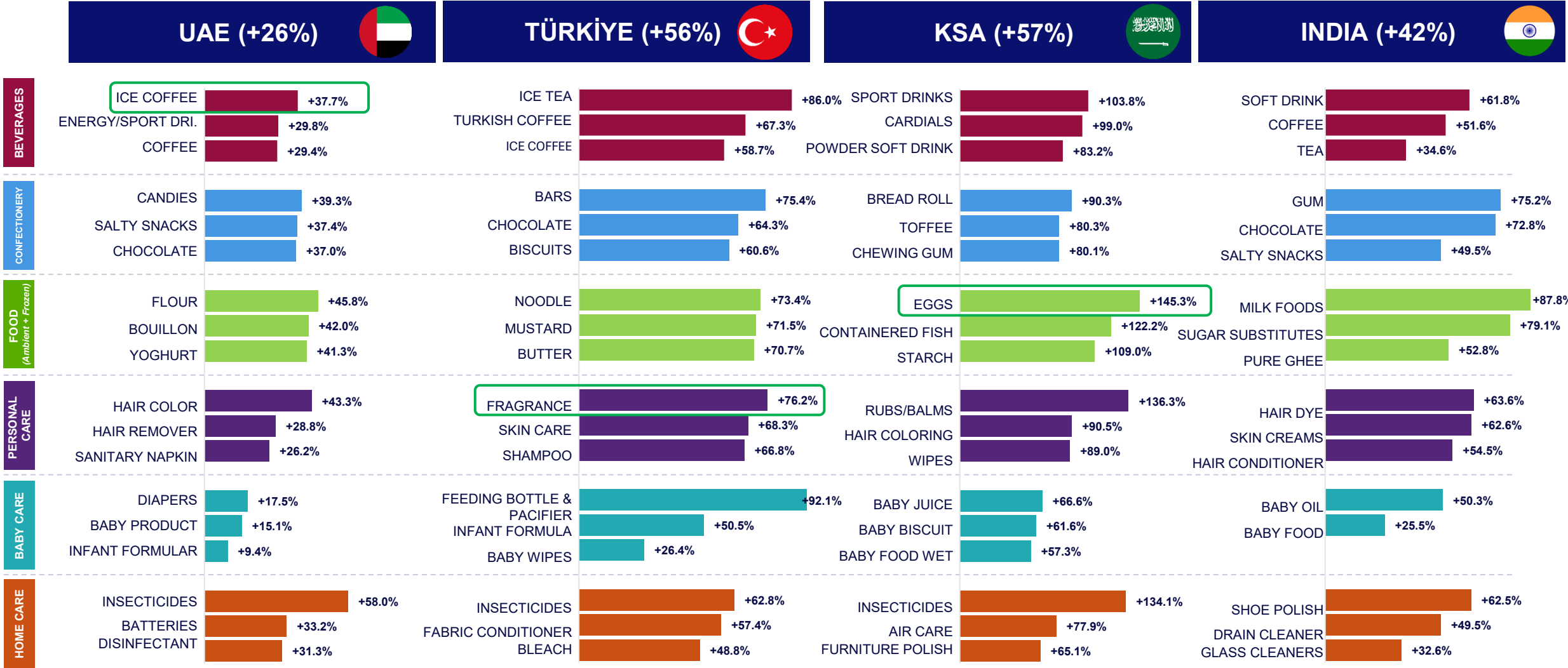
ROMANIA (+17%)



Source: NielsenIQ E-Com Panel
* India data is shown within Metros for better representation of Ecom L4L comparisons

AME E-Commerce growth of below top categories has been driving higher growth

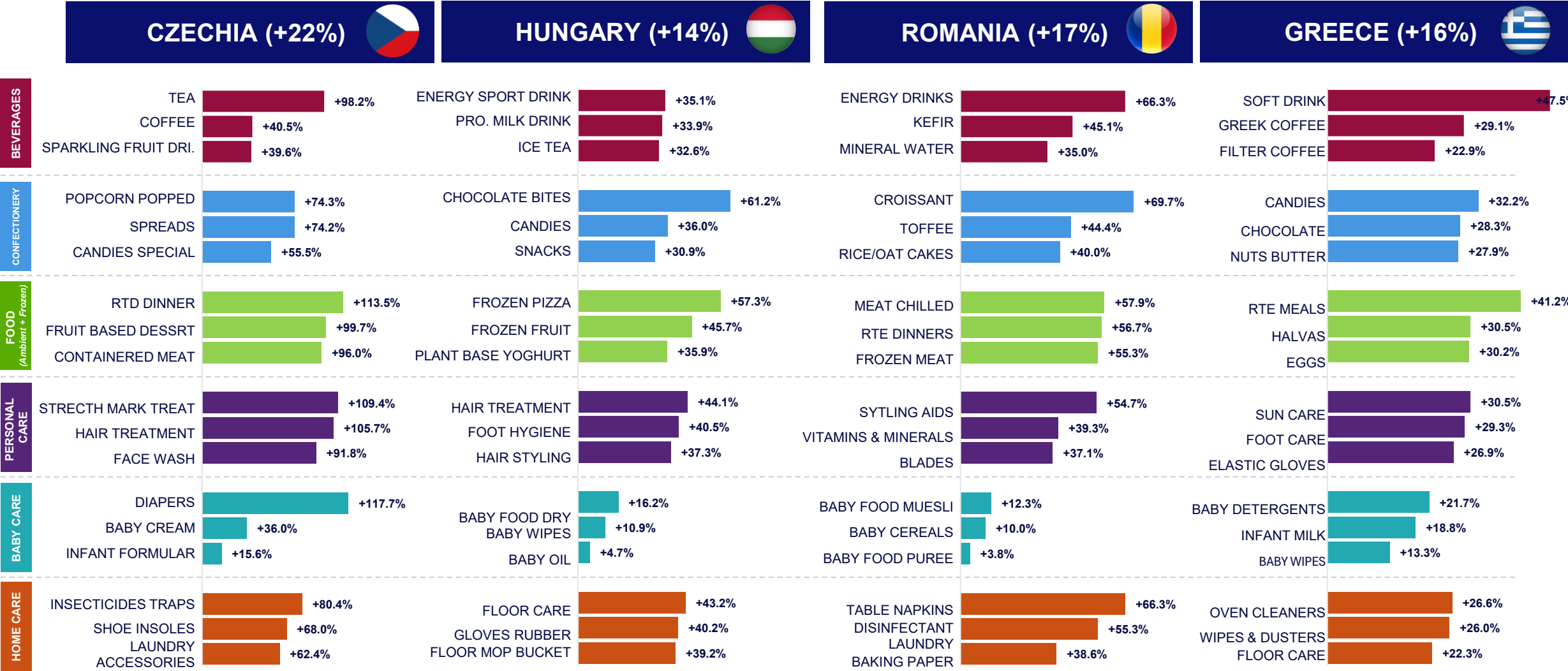
Value Growth of Online in MAT Q2'26 vs LY



Source: NielsenIQ RMS

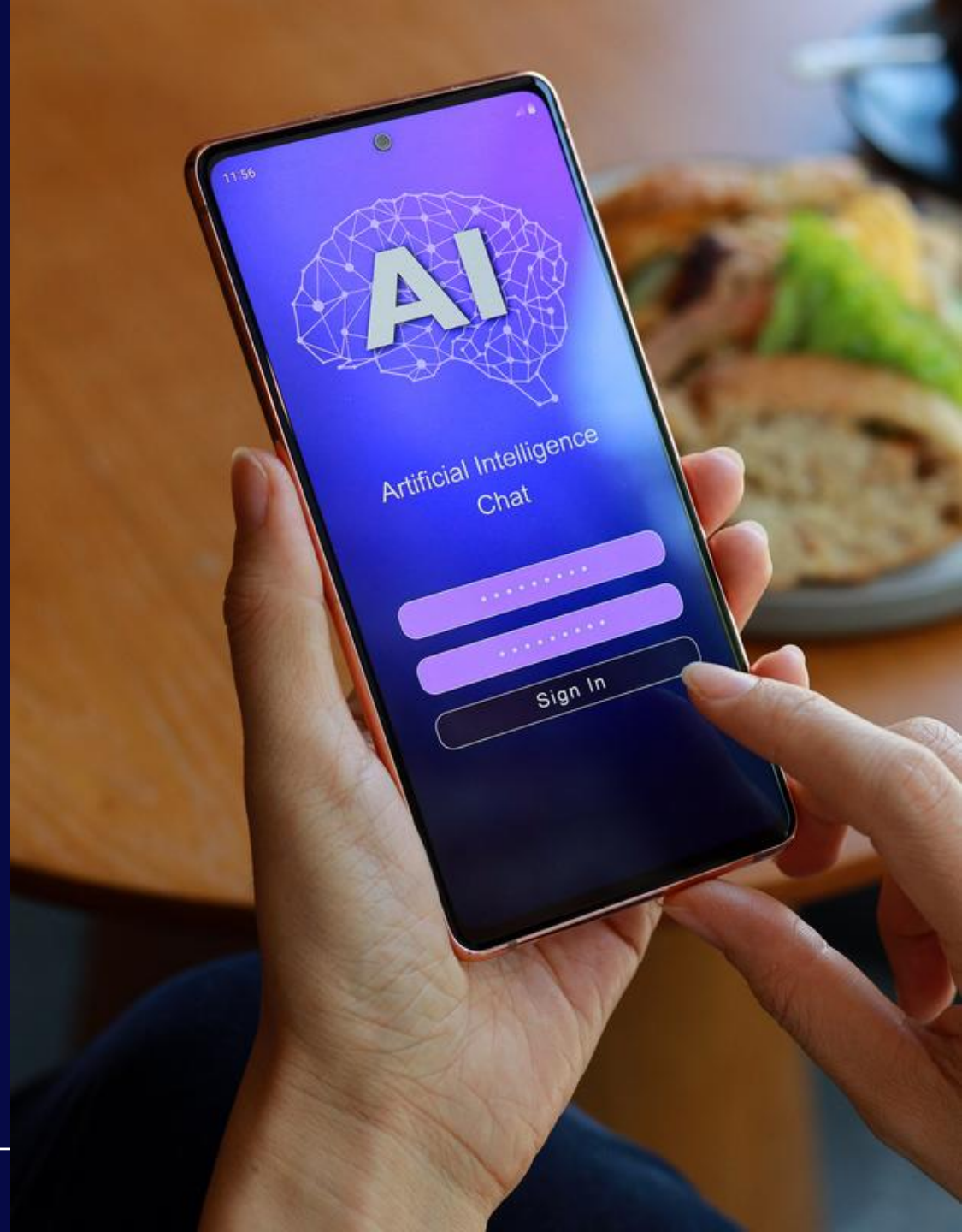
EE E-Commerce growth of below top categories has been driving higher growth

Value Growth of Online in MAT Q2'26 vs LY



Source: NielsenIQ RMS

EEMET AI Omni-Shopper: Agentic AI and beyond



EEMEA has not only been growing faster but also having more frequent visits vs global average to explore and discover new products online led mainly by GenZ

This is a strong indicator of conversion. AME & India leading the way while EE is catching up

General Population / GenZ

GLOBAL - Daily Adoption

13% / 21%

Discovered new products daily while using digital platforms to shop for grocery or household items

30% / 37% a few times a week

30% / 29% a few times a month

10% / 5% never

EEMEA - Daily Adoption

17% / 24%

AME & India

22% / 30%

EE

6% / 13%

Discovered new products daily while using digital platforms to shop for grocery or household items

33% / 36% a few times a week
(40% / 41% AME & India, 20% / 25% EE)

28% / 26% a few times a month
(26% / 22% AME & India, 33% / 35% EE)

7% / 5% never
(3% / 3% AME & India, 14% / 10% EE)

Source: NIQ Consumer Outlook Guide to 2026

AI → GenAI → Agentic AI is rewriting discovery and search



How comfortable are you with a digital shopping platform making **product suggestions** / **purchase decisions** for you?

Product Suggestions



58%

AME&I

72%

EE

40%

Purchase Decisions



40%

AME&I

55%

EE

20%



I find it helpful when a retailer suggests products to me base on my **previous purchases** or **preferences**



65%

AME&I

77%

EE

52%



Interested in using tools **Artificial Intelligence** for household shopping in the future



51%

GenZ/62%

AME&I

65%

/ 73%

EE

33%

/ 47%

«Would you be interested in using tools (e.g. : Virtual Assitants, Smart Carts) powered by Artificial Intelligence (AI) to help manage your household shopping in the future?»

India standing out in Agentic AI Deployment Opportunity in EEMEA

Another high opportunity country Türkiye has room to grow in last phase

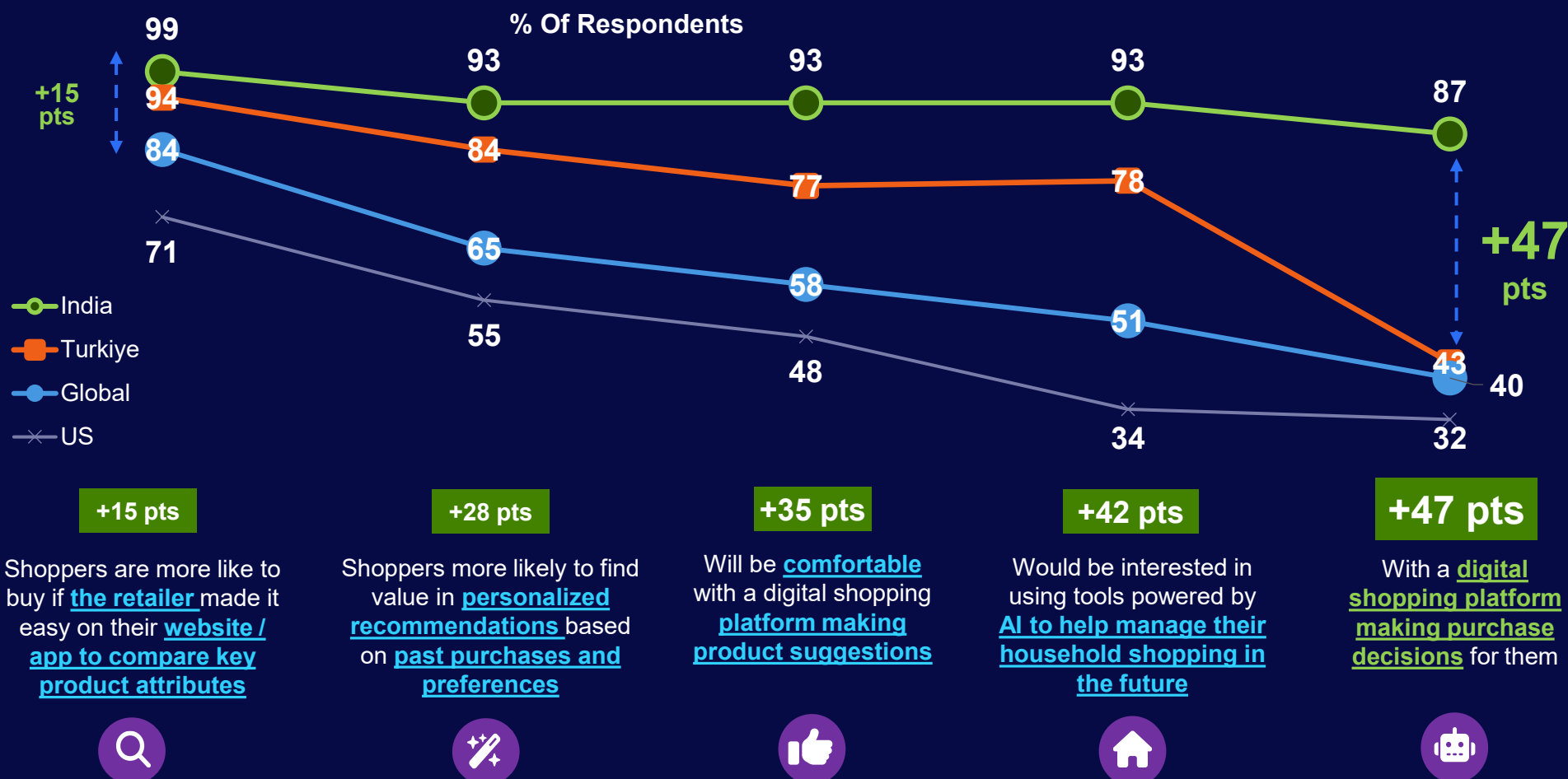
AI



Gen AI



Agentic AI



Compared to globe, shoppers in the region (especially in India) show a strongly greater affinity for benefiting from Agentic AI-driven offers from both retailers & brands.



Hundreds of options,
it's hard to decide.



It is being analyzed for you
Your tastes, habits and preferences
are being examined



Popular
products were
reviewed.



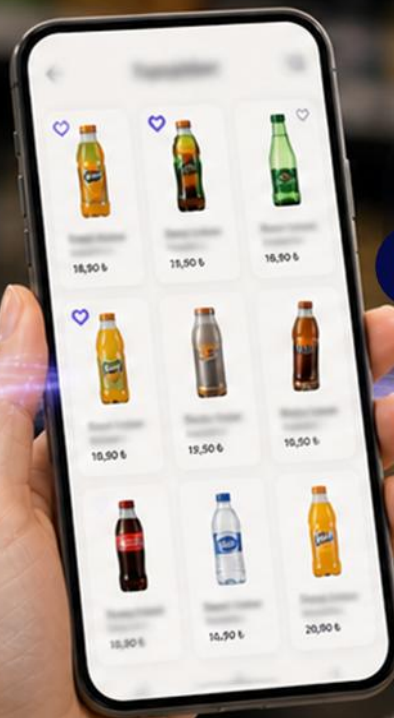
Your budget
has been
reviewed.



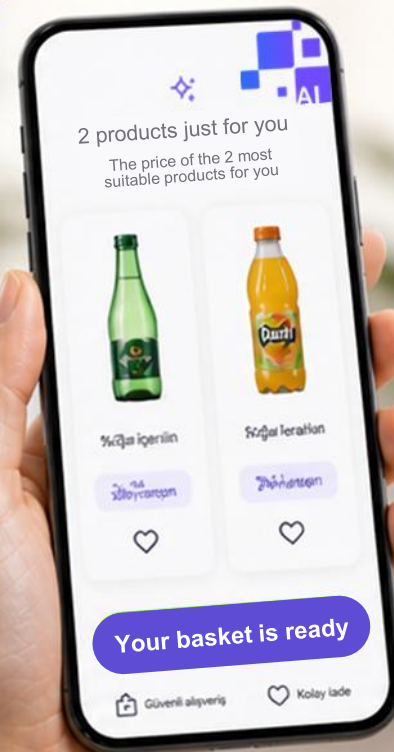
Your
preferences
were analyzed.



Your likes
have been
matched.



Selected especially for you.
2 suggestions are ready.



1

So many options

Many products, unlimited choices Finding
the right choice is difficult

NIQ

2

AI scans for you...

We identify the most suitable products for
you from thousands of products.



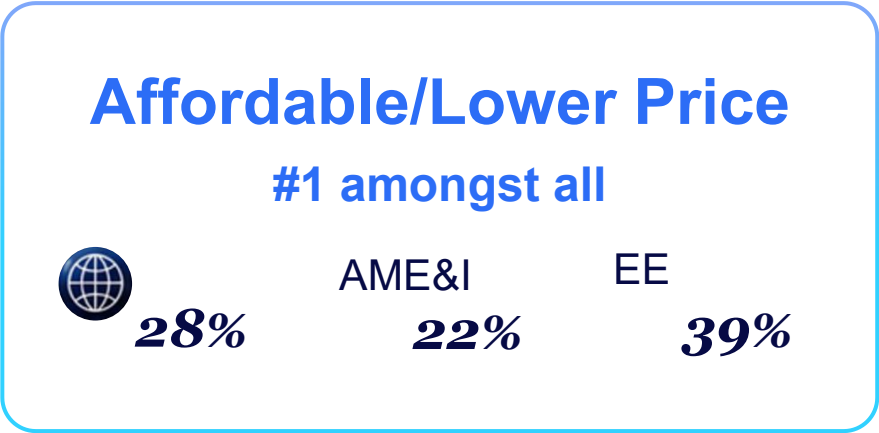
Making the right choice is **very easy**
with artificial intelligence.

3

**2 personalized
recommendations for you**

AI selected these products specifically
for you from hundreds of options.

What is the most important reason for choosing a brand?



The new expectations are driving a new reality: tale of two consumers

The consumer market is no longer organized around a single “average” shopper.

Across generations, income groups, and markets, consumers are increasingly switching between two mindsets:

Upgrade mindset

- Willing to pay more for products that deliver clear value
- Driven by performance, wellness, convenience, trust, and relevance

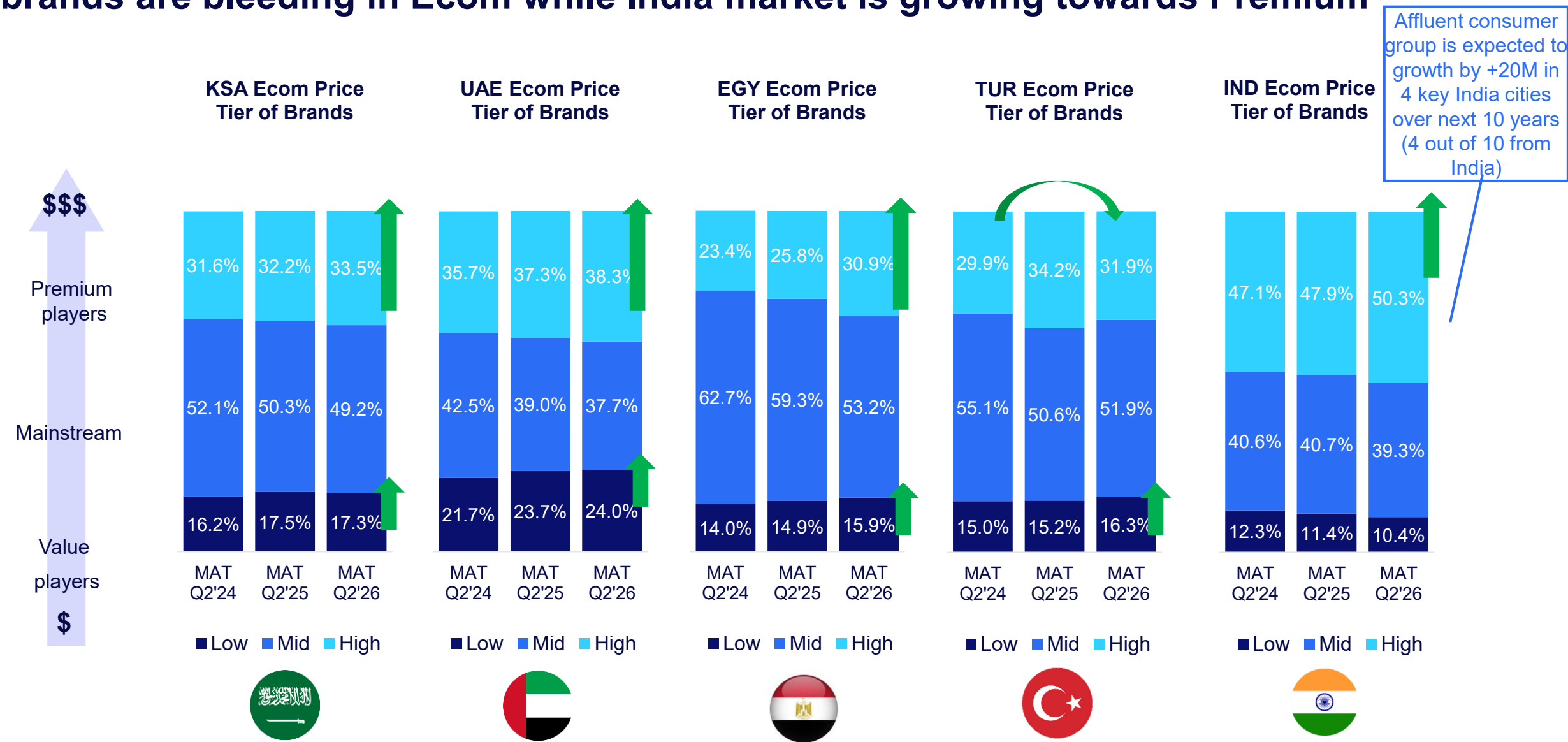
Value mindset

- Actively seeking savings, promotions, and private label alternatives
- Quick to trade down when differentiation is unclear

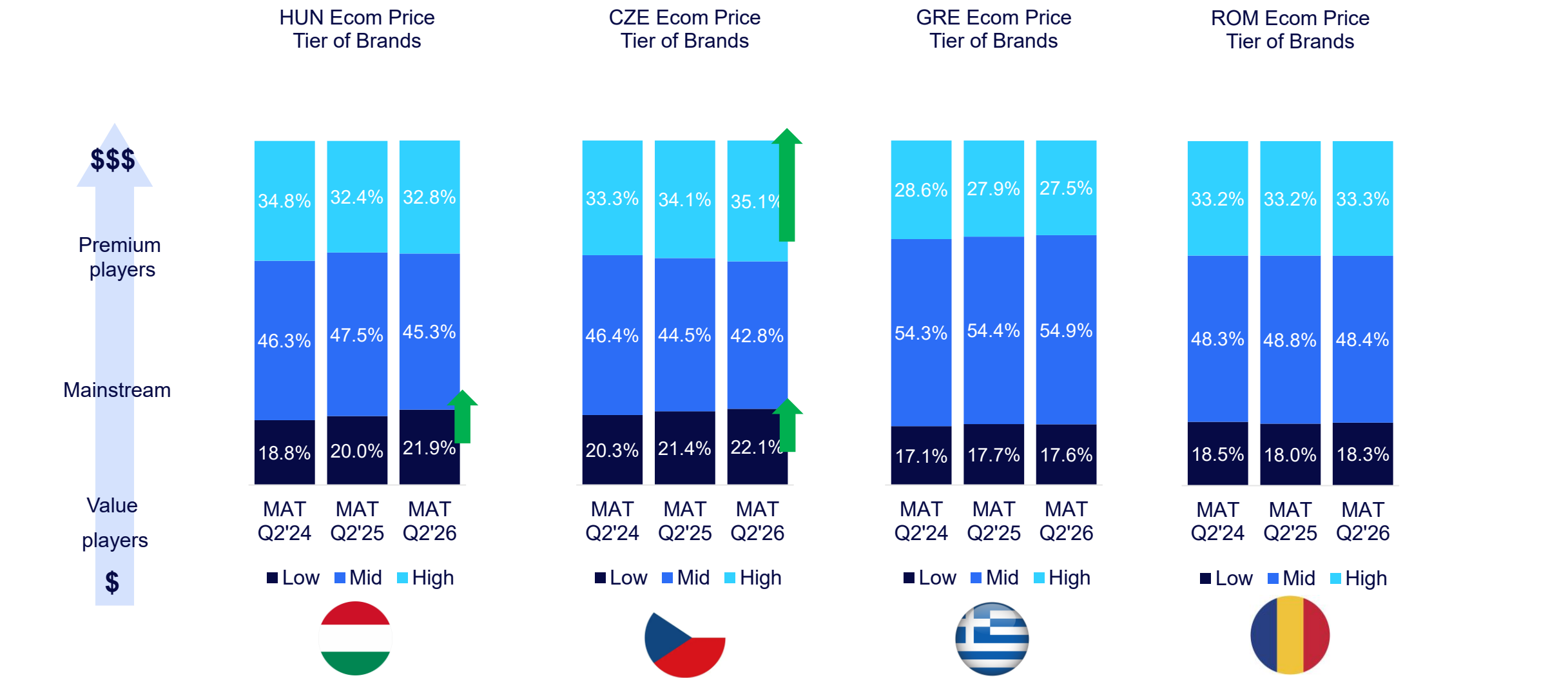
The same consumer may trade up in one category and trade down in another, making traditional demographic segmentation less predictive than behavior and perceived value.



Polarized consumer situation is more vocal in Middle East and Türkiye as mainstream brands are bleeding in Ecom while India market is growing towards Premium



While Eastern European markets are not yet showing this trend. As per the evolution of Ecom, we expect those markets to polarize in next 5 years whereas Czechia leading the way



Here are the *key actions CPG leaders* can take today to shore up their Omni/Ecom strategy in EEMEA:

1

Champion Omnichannel internally

Omni-Commerce is the future growth engine of your business by testing, measuring, and optimizing strategies. We expect E-Com will continue to grow double digit in EEMEA until it reaches to T&D levels.

2

Expand your categories scale to broader industries

Despite Personal Care and Home Care categories have higher online shares today, Food & Beverage industries are driving the growth faster, thanks to improved & convenient delivery methods and rise of Q-Com.

3

Prioritize EEMEA AI strategy, focus on Agentic AI

EEMEA shoppers have a stronger affinity&adoption to AI and Agentic AI offers by industry, led by India. GenZ is the frontier to this adoption across the region. Set your market strategy around AI powered search environment and Agentic AI offers.

4

Adopt new commercial rule of “two consumers”

The future belongs to brands that serve both consumer mindsets, not two separate consumer groups. A dual-track innovation strategy that works on both premiumization and value is essential to drive both growth and profitability.

INDIA COMMERCE 2026

The Future of Commerce: From Distribution to Agentic Commerce

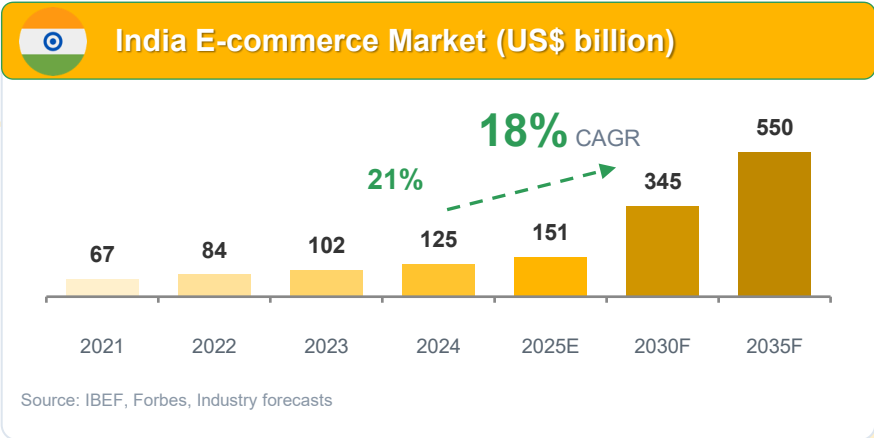
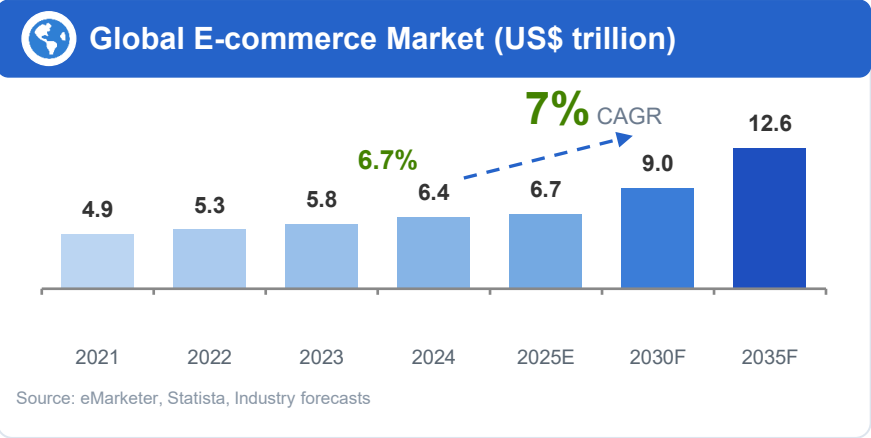
How Convenience, Innovation and AI are Reshaping Shopper Decisions



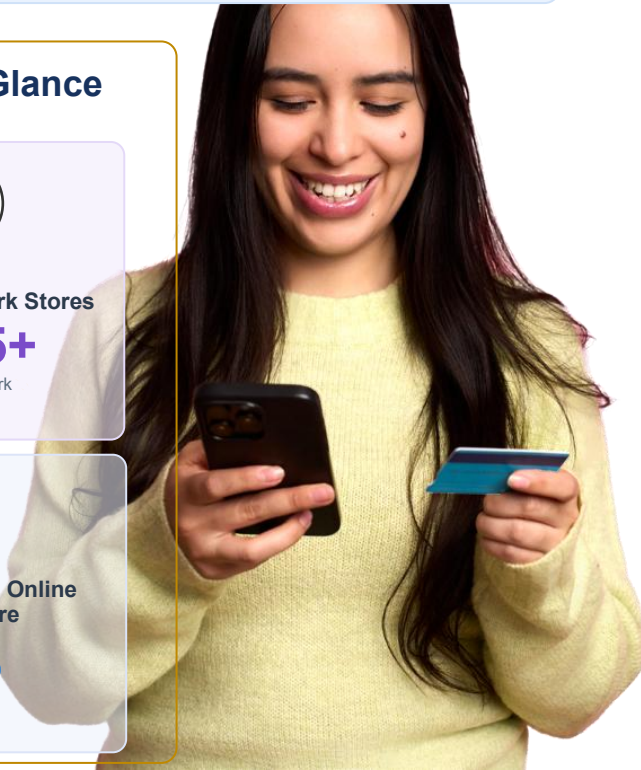
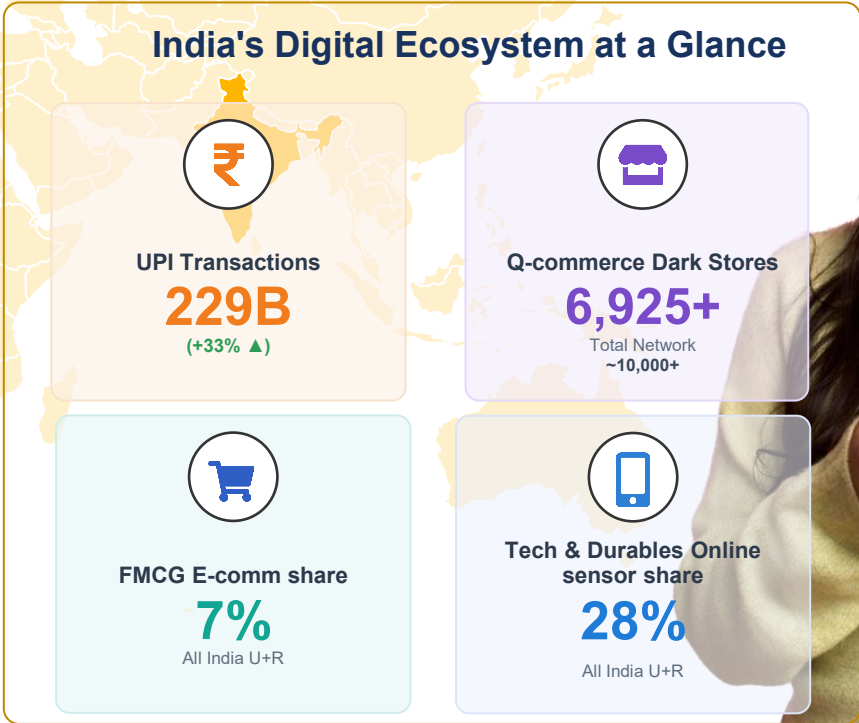
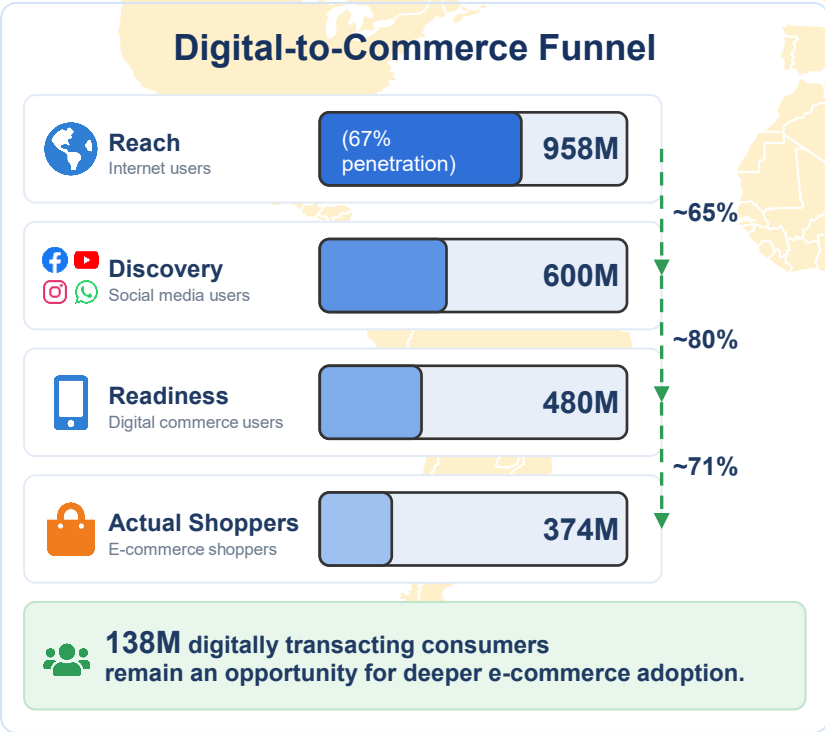
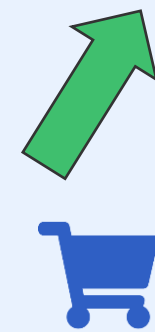
Kanaka Bhagwat
*Head of Ecommerce
& Omni India*

NielsenIQ

India's Digital Ecosystem is scaling rapidly, outpacing global E-commerce growth by ~2.5X



India growing
~2.5X
faster than
global e-commerce

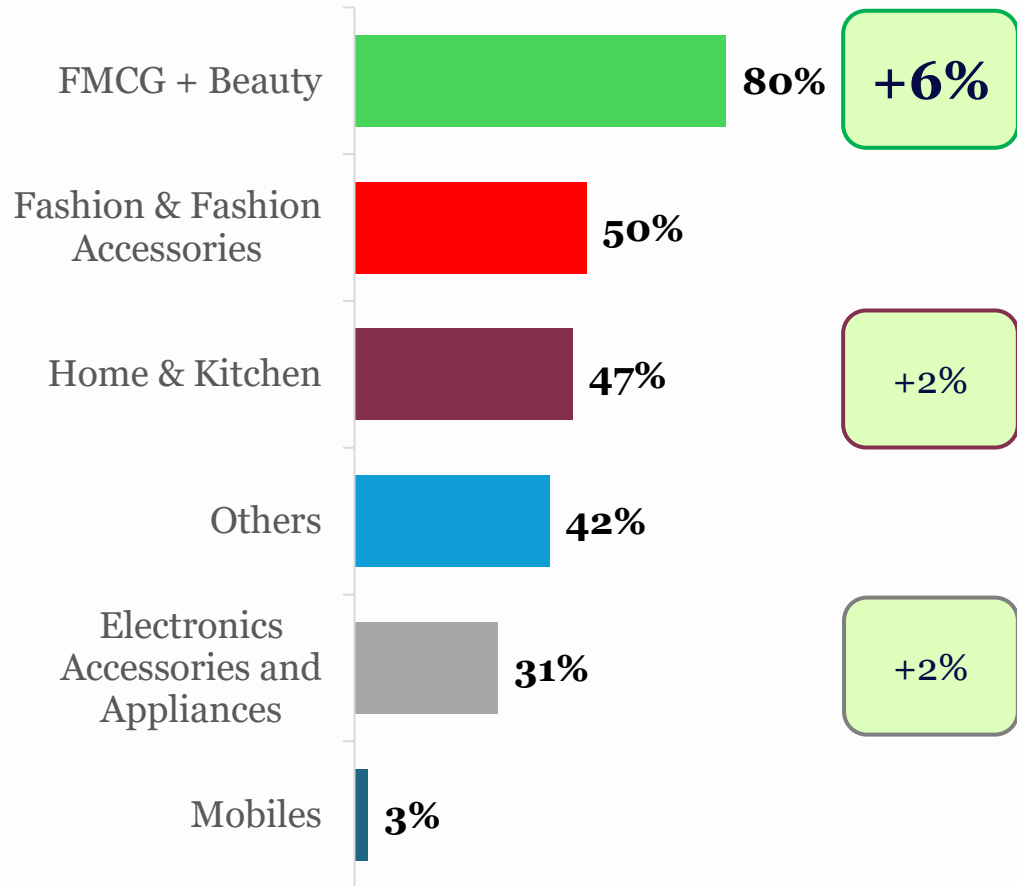


4 in 5 E-commerce shoppers buy FMCG + Beauty, making it the largest contributor to online value

E-commerce Shopper Penetration

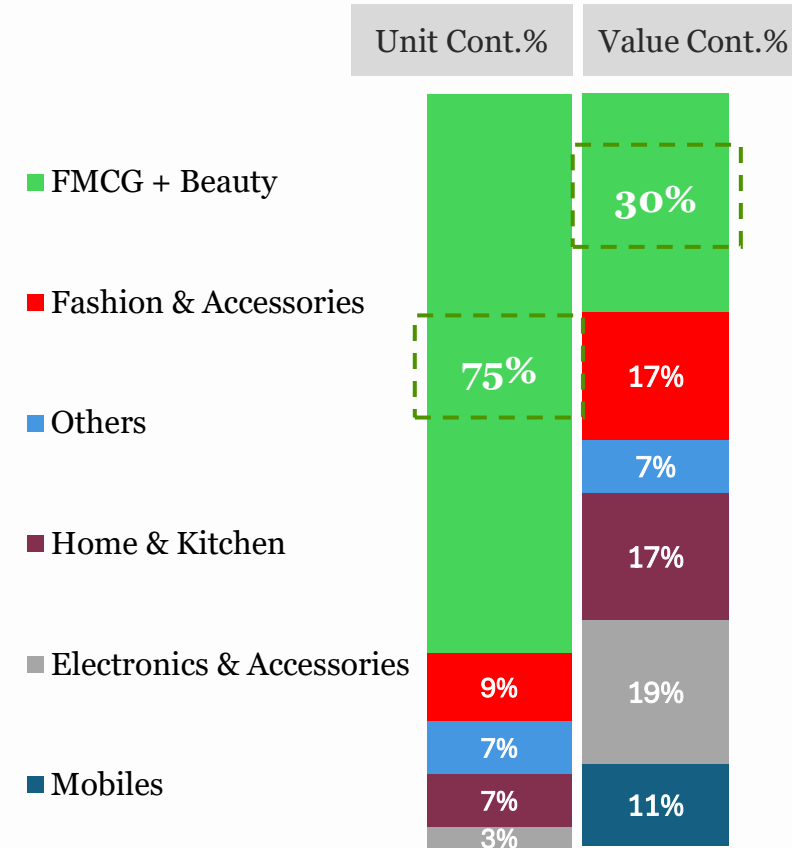
On the base of all E-comm (L9M)

Delta
Q2'26 vs. Q4'25



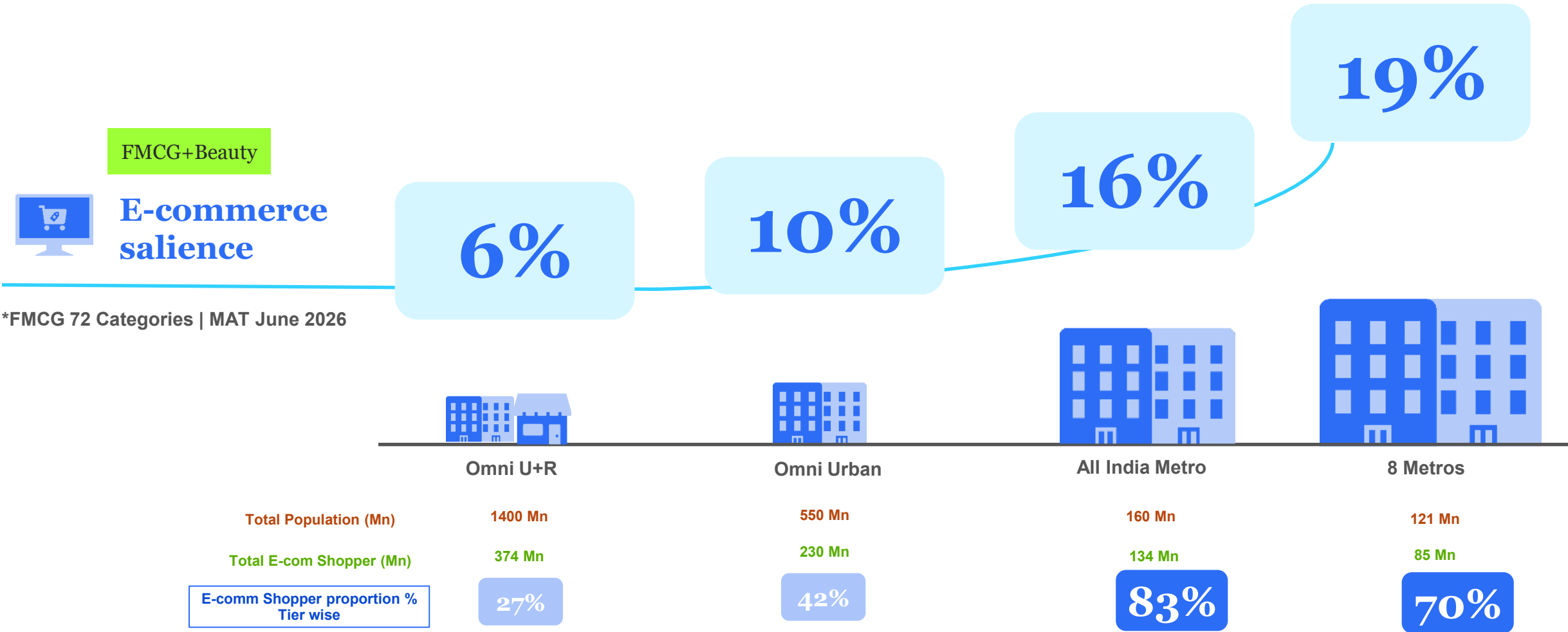
Units & Value Contri. %

On the base of all E-comm



Digital Shopper concentration fuels FMCG E-commerce Salience

India's FMCG e-commerce opportunity is increasingly concentrated in urban centers



Note: Data of TT & MT is projected while E-comm is only Co-op data.

All India Urban* includes E-comm ie. TT(Urban)+MT+E-comm metros

All India Metro ie. 52 metros aggregate with 1Mn+ population

8 metros includes Ahmedabad, Bangalore, Chennai, Hyderabad, Delhi NCR, Kolkata, Mumbai, Pune

Caveats in EMS data

- e-POS data from co-operating retailers (marketplaces, majority of Q-coms and grocery dot coms)
- Value information is End Consumer Price (net of discounts)
- No estimation for non co-op retailers

7 in 10 Metro FMCG Shoppers use Q-commerce, driving 85% of E-commerce Value

INDIA



FMCG + BEAUTY

All India Metro

Q- Comm Value Share

On the base of E-comm FMCG

85%

+8% ch.

Q- Comm Shopper Penetration

On the base of Metro FMCG

70%

+10% ch.

1.5X compared to Non- Q Comm

Q- Comm Shopper AOV

Average Order Value

Rs. ~ 400

+15% gr.

0.6X compared to Non- Q Comm

Q- Comm Shopper U/C

Units per customer

U/C 40

5X compared to Non- Q Comm

Quick-commerce is evolving beyond Grocery.

No. of orders (by Gen Z) are increasing for
Electronics & Appliances
Home & Kitchen

10PM - 2AM window
gaining importance
on Quick-comm
driven by Impulse
(Chocolates, Ice-cream),
Beauty, Fashion &
Electronics.

...and Younger Gen Z (18-24 Years) driving these trends

Source: NIQ Digital Purchase

Quick-comm emerges as a key channel for Personal Care & Beauty and OTC driven by significant shopper penetration gains

at shopper penetration gains

All India Metro-Online

FMCG Gr.

40%

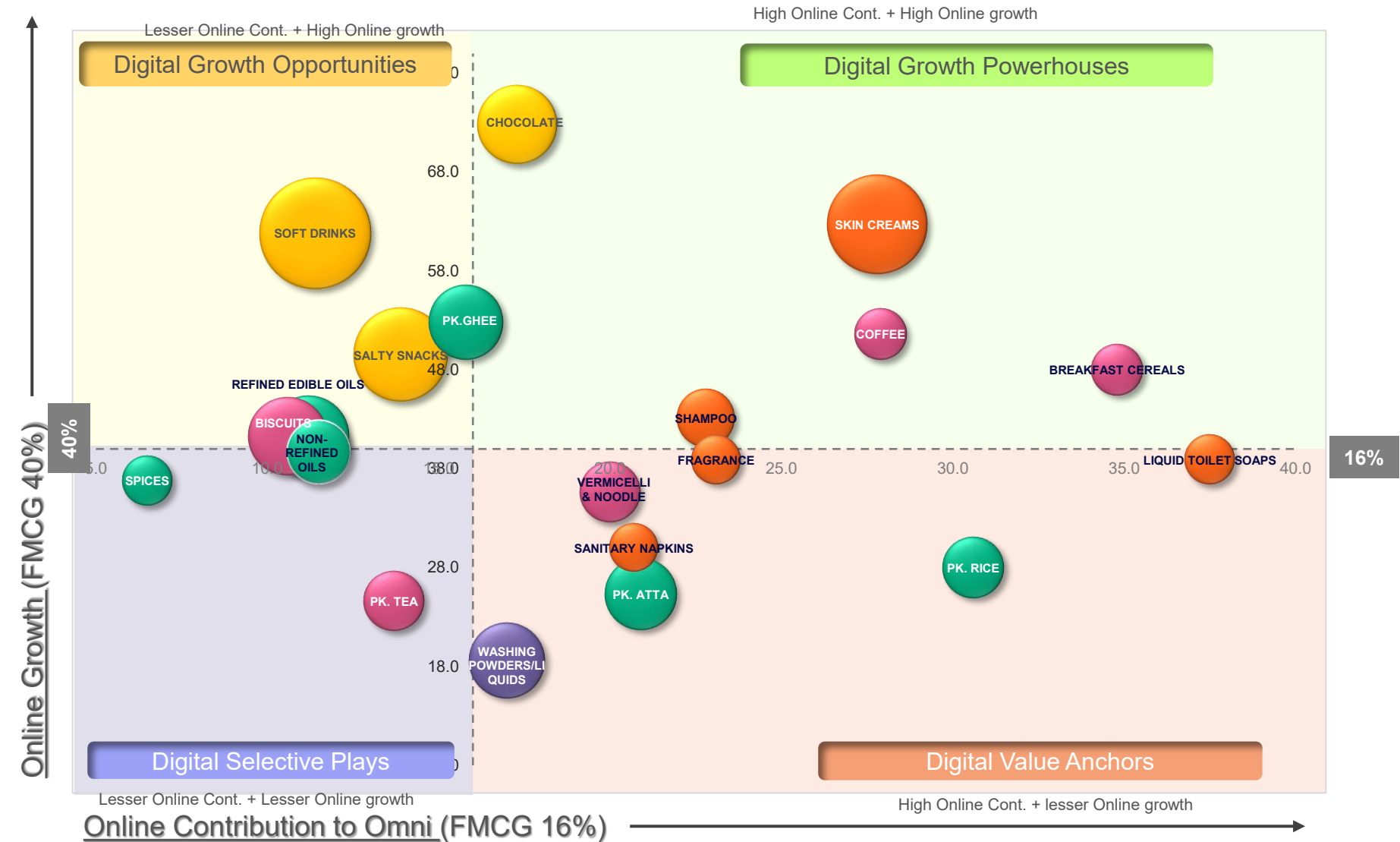
57%

	Basket	Value Contribution%	Val Gr. Indexed to FMCG E-comm	Val Gr. Indexed to FMCG Q-comm	Q-comm Shopper Penetration (On the base Metro FMCG)	Q-Comm Shopper Penetration increase
	Personal care & Beauty	24%	1.0X	1.2X	54%	+10%
	Staples	22%	0.9X	1.0X	94%	+3%
	Impulse	21% ➡	1.4X	1.1X	97%	+2%
	Habit Forming	19%	0.9X	0.9X	93%	+4%
	Home care	11%	0.5X	0.7X	71%	+9%
	OTC	4% ➡	1.3X	1.1X	63%	+8%

EMS: MAT Jun'26; Digital Purchases; 52 Metros; L9M Jun'26

Shopper penetration delta- Q4'25 vs. Q2'26

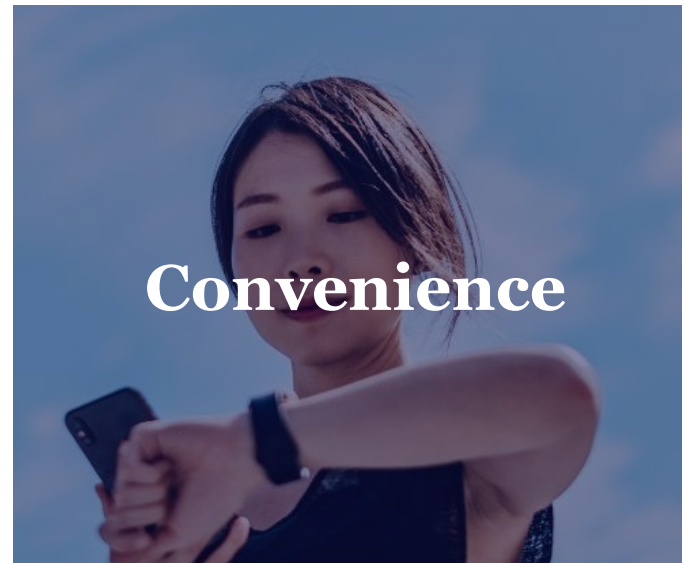
Beauty and Convenience categories dominate the Digital Growth Landscape, While Snacks and Chocolates Present the Next Wave of Opportunity



Other high growth Categories	E-comm Growth
Indian Sweets	75%
VMS	66%
Frozen Foods	54%

Trends driving growth in E-commerce

INDIA



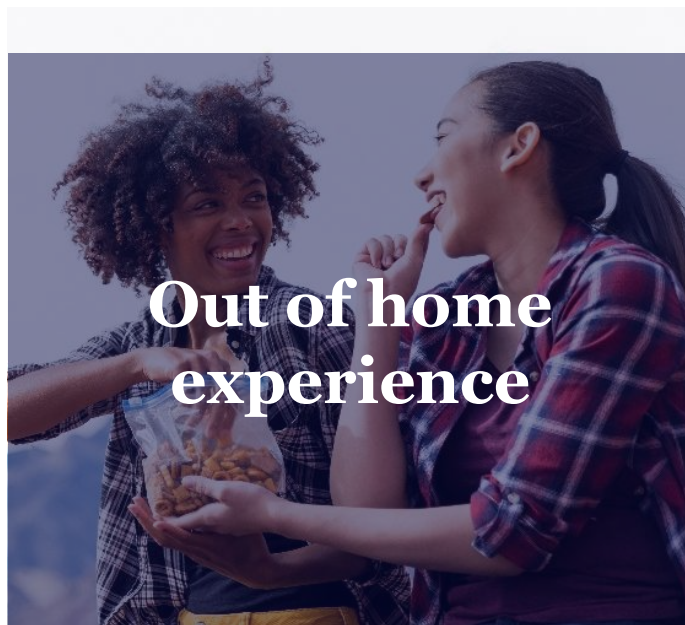


From Traditional Biscuits to Protein Bars

Cereal Bars				
Channel	Val Contr.%	Chg.	No. of Brands	Proportion of new launch
Online	11%	+3%	64	31%
Offline	1%	+0.3%	35	5%

Capturing lighter beverage trend with a soft drink

Zero Sugar Drink				
Channel	Val Contr%	Ch.	No of Brands	Proportion of new launch
Online	17%	+4%	10	3%
Offline	1.4%	-	10	1%



Delivering Targeted Hair Care in Easy-to-Use Pack Formats

Hair Serum 30ml Convenient Pack				
Channel	Val Contr.%	Chg.	No. of Brands	Proportion of new launch
Online	18%	+13%	47	15%
Offline	0.1%	-	12	4%

Addressing Time-Pressed Skincare needs with Mask-Based Formats

Sheet Mask/Peel Of Mask				
Channel	Val Contr.%	Chg.	No. of Brands	Proportion of new launch
Online	5%	+0.7%	60	19%
Offline	3%	+0.1%	42	21%

Usage of minimum one AI tool
to shop within the past month

92%

Against 42% US

Used AI to discover &
compare brands / products

64%

Against 52% US

GEN Z

73%

MILLENNIAL

70%

GEN X

56%

Market- 8 Base Metros

Source: NielsenIQ AI Survey India; n=350

AI engagement by category

INDIA

- 

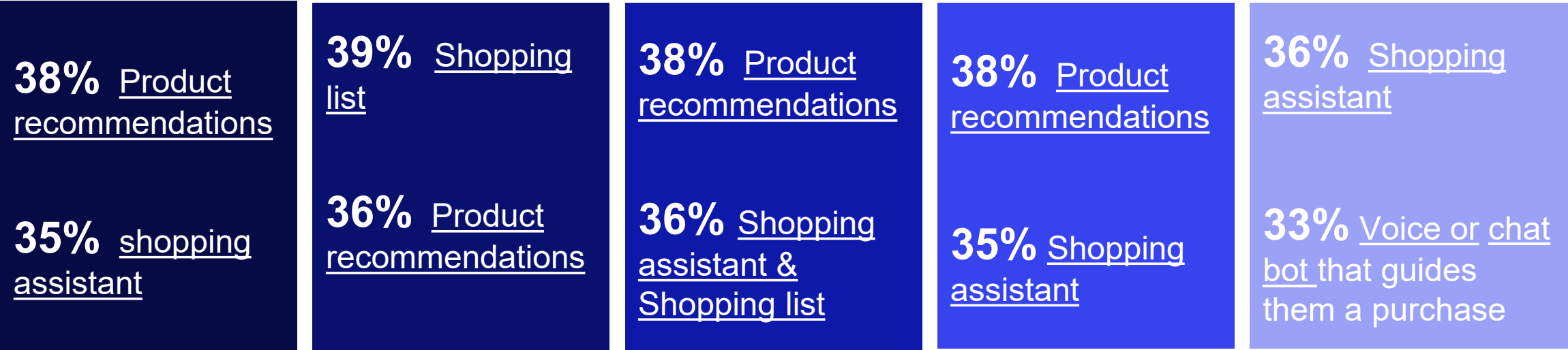
Clothing, shoes & Accessories
- 

Baby & Kids
- 

Grocery & Household Essentials
- 

Beauty & Personal Care
- 

Home Appliances



used AI-powered

Top AI platforms used

 ChatGPT



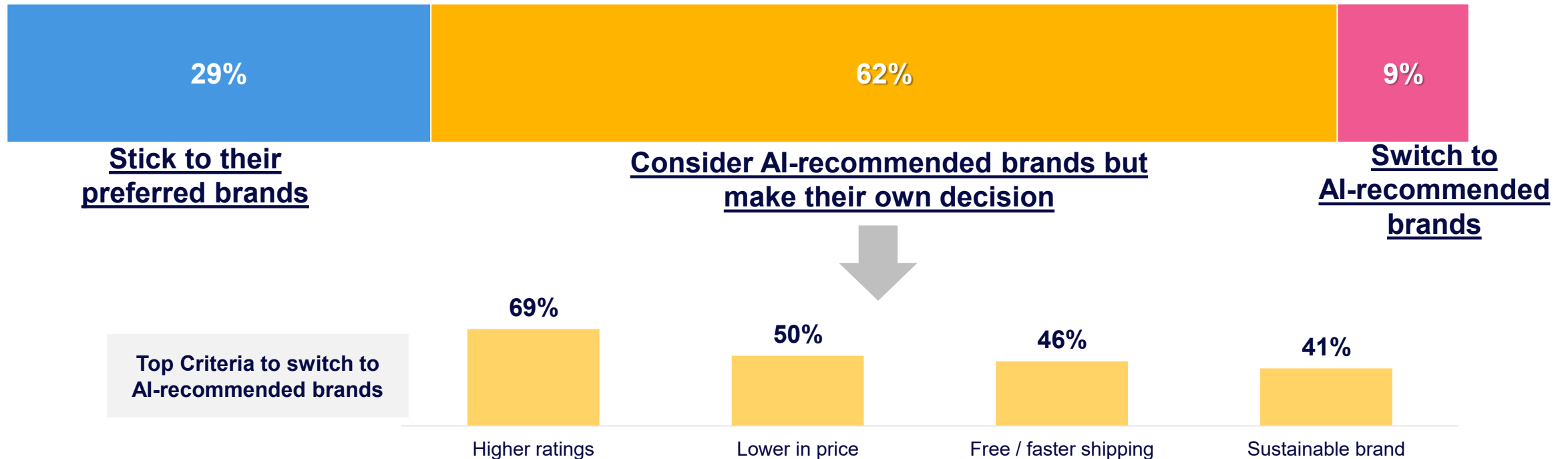
Retailer apps/sites



Market- 8 Base Metros
Source: NielsenIQ AI Survey India; n=350

Brands have an opportunity to capture new shoppers

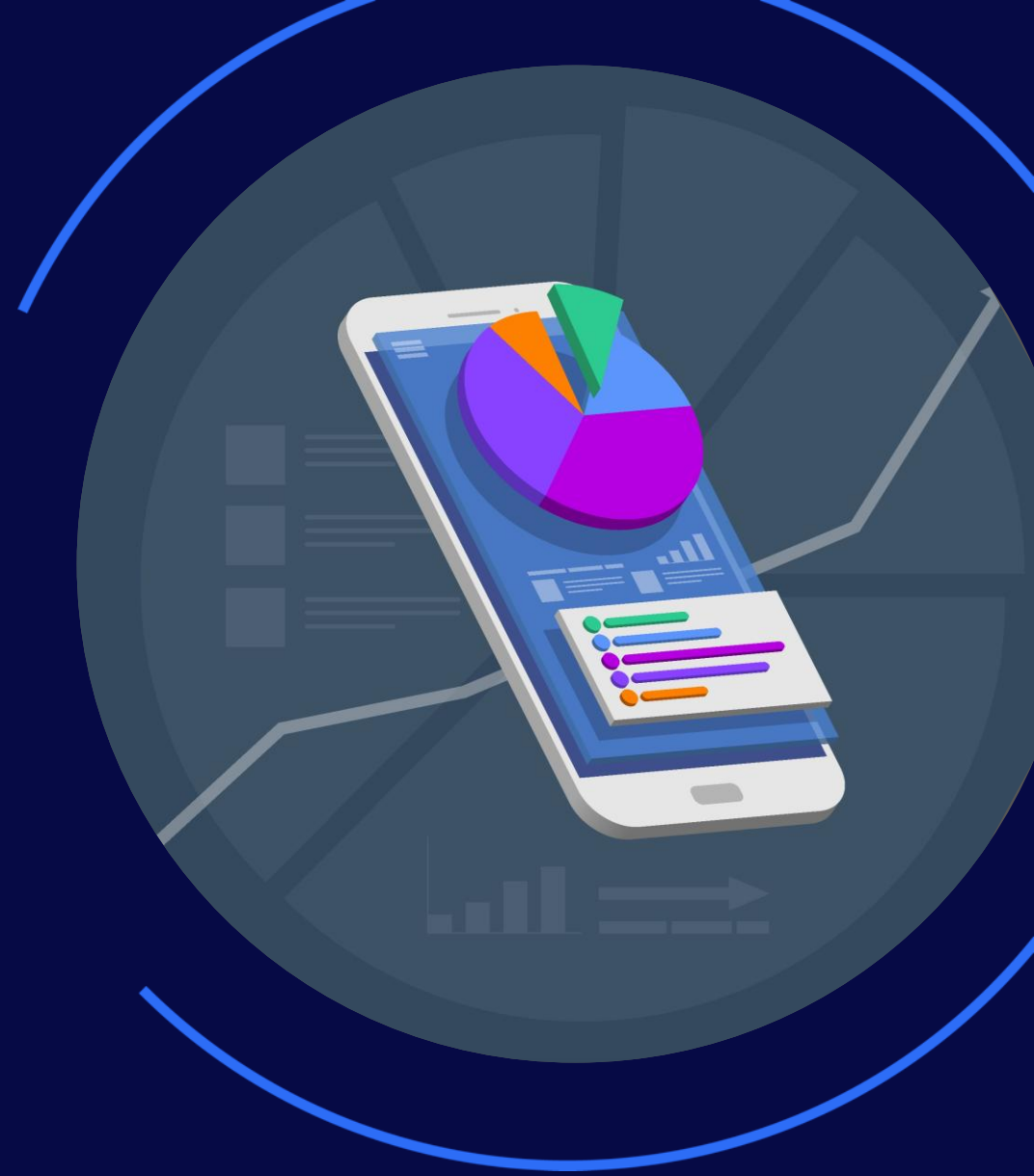
Most shoppers are willing to consider a new-to-them/ non-preferred brand when AI recommends it.



AI Era Journey: AI Discovery → Trust & Product over Brand → Agentic Commerce

Market- 8 Base Metros
Source: NielsenIQ AI Survey India; n=350

Winning in Next Era of Commerce



From Distribution to Agentic Commerce :

Yesterday: Win Distribution

Be present in stores

Today: Win Convenience

Be present where consumers want instant fulfillment.

Tomorrow: Win AI Recommendation

Be recommended before the consumer even searches

To remain discoverable, chosen and trusted in the next era of commerce, brands must:

Win omnichannel availability

Be available across all digital touchpoints

Build for convenience-led missions

Design products and packs for Q-comm occasions

Use E-Commerce as an Innovation Launchpad

Accelerate trial and scale winning innovations

Optimize for AI-discovery

Ensure products are visible and recommended by AI

Strengthen product trust signals

Ratings, reviews, value signals and product superiority

*The future belongs to brands that are **available everywhere**, **built for convenience**, **discovered by AI**, and **chosen on the strength of their products**.*

NielsenIQ

Thank You

The Full View™