



The Hispanic Consumer

How Culture, Value, and Local Market Dynamics Are Shaping Growth

September 2026

Hispanic Heritage Month Thought Leadership



What's included

Four lenses on the growing influence of Hispanic consumers



Identity, values, and voice of Hispanics



Headwinds and tailwinds for Hispanics



What and where is the Hispanic shopper purchasing



How to connect with the Hispanic consumer

Note on Terminology: the Use of **H**ispanic

In this analysis, we use the term “Hispanic” because it aligns with the standardized language and classifications used across NIQ tools and datasets. Individuals included in this analysis self-identify as Hispanic within Census or panelist data. We recognize that Hispanic identity is not monolithic and encompasses people of different countries of origin, racial backgrounds, cultures, and lived experiences.

These terms are intended to be inclusive and respectful of the diverse identities within the Hispanic and Latin community. We remain committed to evolving our language and frameworks to better reflect the richness and complexity of the communities we serve, fostering deeper cultural understanding and more accurate insights.

What is the **HOLA** Employee Resource Group (ERG) at NielsenIQ?

The Hispanic Organization of Leaders in Action (HOLA) is a community of associates interested in creating an inclusive work environment that leverages diverse backgrounds to build high performing teams and make an impact on the NIQ business. By participating in HOLA, employees are able to learn and share unique perspectives on the Hispanic/Latino community, clients, and employee culture.



Identity, values, and voice of Hispanics



Culture Shapes How Hispanics Buy

Hispanics are the second-largest and one of the fastest-growing consumer segments in the U.S., but their purchasing decisions are shaped by distinct national origins, languages, immigration histories, and values.

Understanding this diversity is not a nuance — it's a prerequisite for relevance, trust, and growth.

Source: Pew Research Center — 2024 American Community Survey tabulations and 2025 National Survey of Latinos

68M

Hispanic individuals
in the United States



68%

Speak Spanish at
home; 71% speak
English proficiently

57%

Are of Mexican
origin, one of 10+
origin groups over
1M

33%

Are immigrants,
down from 40% in
2000

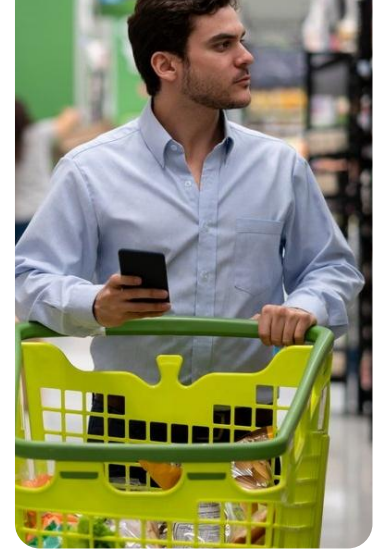


3 in 4

Say Hispanics have
many different
cultures, not one

1 in 5

Americans are
Hispanics, up from
13% in 2000



46%

Have some college
education, up from
36% in 2010

4 in 5

Are U.S. citizens,
two thirds of them by
birth



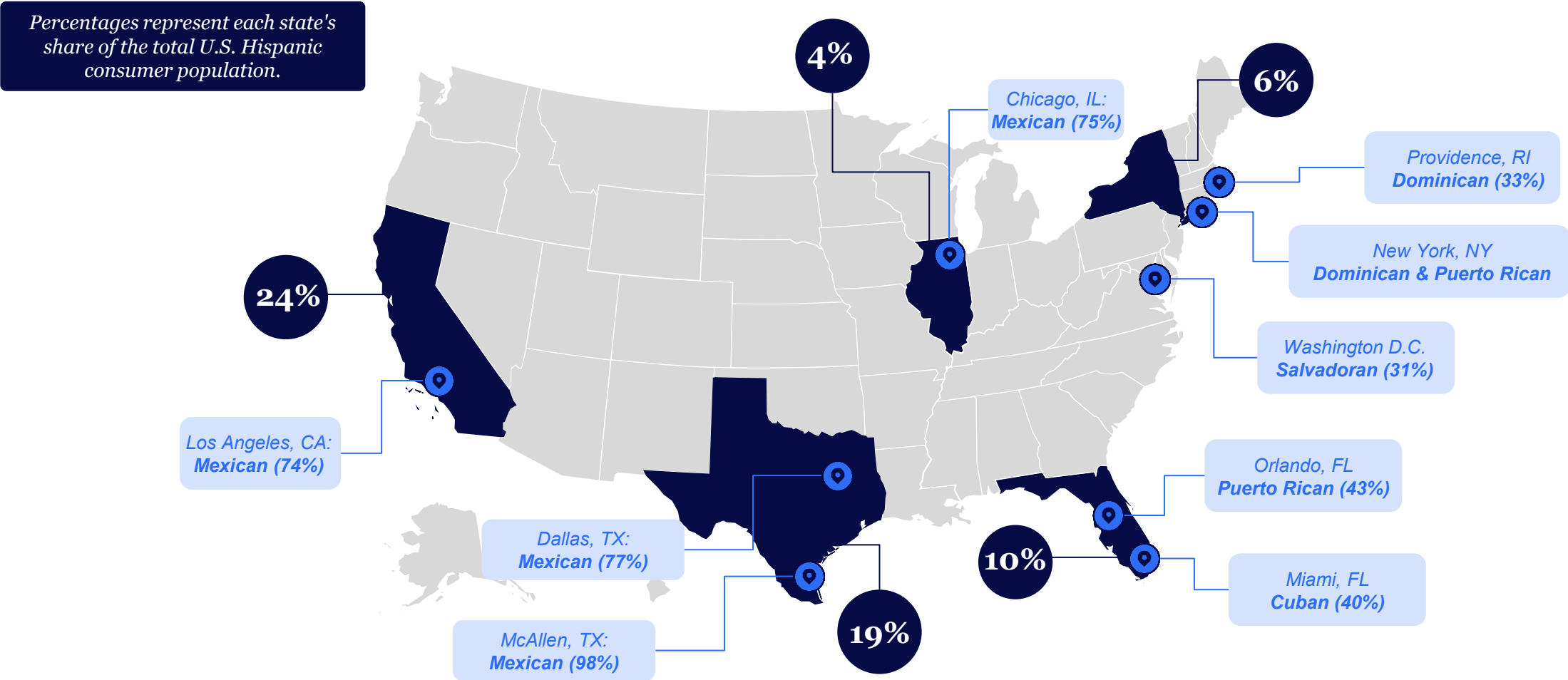
32.1

Is the median age,
compared to 43.2
for White Americans

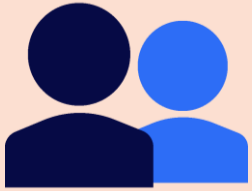
62% of Hispanic consumers reside in five states

Origin-specific Hispanic enclaves concentrate by metro area: Mexican across the West and Midwest, Caribbean and Central American communities along the East Coast; sustaining distinct cuisines, media, and brand repertoires within one “Hispanic” segment

Examples of Hispanic Enclaves by City and Origin Group



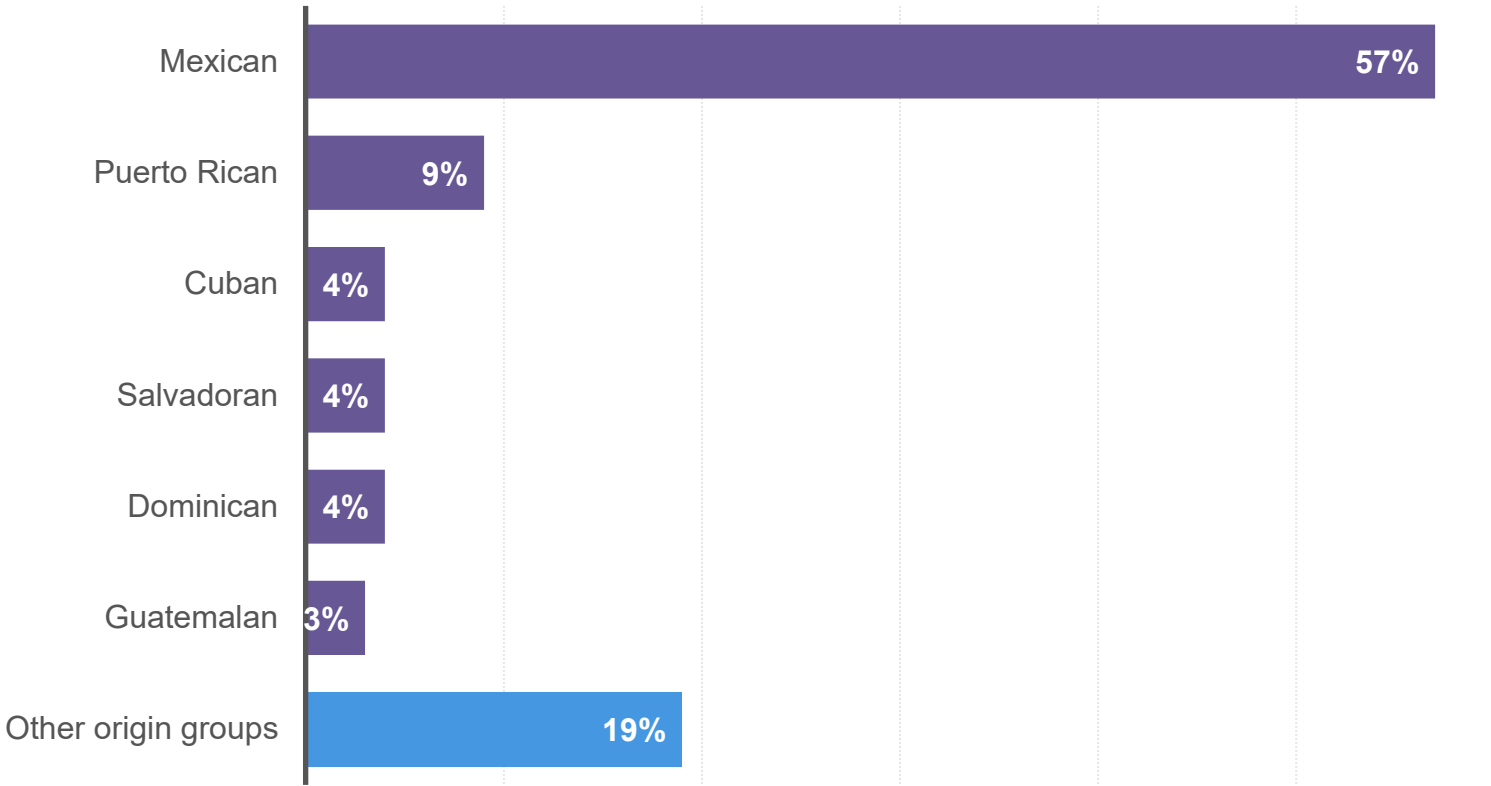
Source: Pew Research Center



Hispanics are not a monolith.

Each of these different groups – and oftentimes, even within each national origin, have their own languages, cuisines, holidays, and more.

% of the U.S. Hispanic population that is ____



Other origin groups covers all remaining origins — Colombians, Hondurans, Venezuelans, and Ecuadorians each top 1 million — plus Peruvian, Nicaraguan, Spaniard, and more.

Source: Pew Research Center, 2024



Language duality reflects Hispanics' immigration journeys

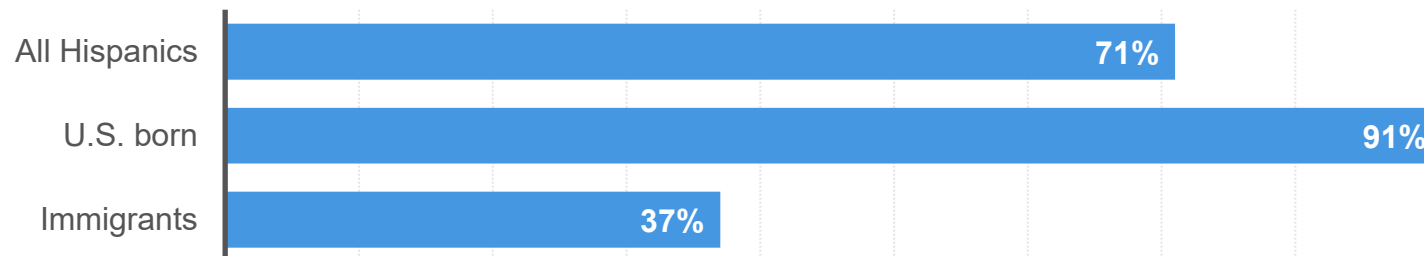
Spanish isn't fading — and English is advancing. **94% of immigrants speak Spanish at home**, while **91% of U.S.-born Hispanics speak English proficiently** — a deeply bilingual consumer base.

% of Hispanics in the U.S. ages 5 and older who speak ____

Spanish at Home



English proficiently *



Note — Overall figures are 2024; nativity splits are Pew's most recent published breakdown (2019). "English proficiently" = speaks only English at home or speaks English very well.

A younger Hispanic shopper base is driving growth across income and education segments

With prices rising across the CPG market, dollar spend per buyer is growing across all demographic breaks, most pronounced among highest income group

Hispanic Household **Income** Distribution

	<\$25K	\$25-49K	\$50-74K	\$75-99K	\$100-149K	\$150K+
	19%	20%	16%	12%	16%	16%
Index to Total Panel	131	114	99	93	90	80
\$/Buyer %change	+4.4%	+3.7%	+4.0%	+4.8%	+4.7%	+7.7%

Hispanic Household **Education** Distribution

	High School or Less	College Grad / Post Grad	Some College
	38%	33%	29%
Index to Total Panel	122	83	100
\$/Buyer %change	+4.9%	+6.3%	+5.1%

Hispanic Household **Generation** Distribution

	Boomers	Gen X	Millennials	Gen Z
	14%	27%	44%	14%
Index to Total Panel	42	93	153	173
CPG spend % change	+4.0%	+6.6%	+6.1%	+7.3%

Source: NielsenIQ Panel On Demand Omnishopper, 52 w/e 7/11/2026

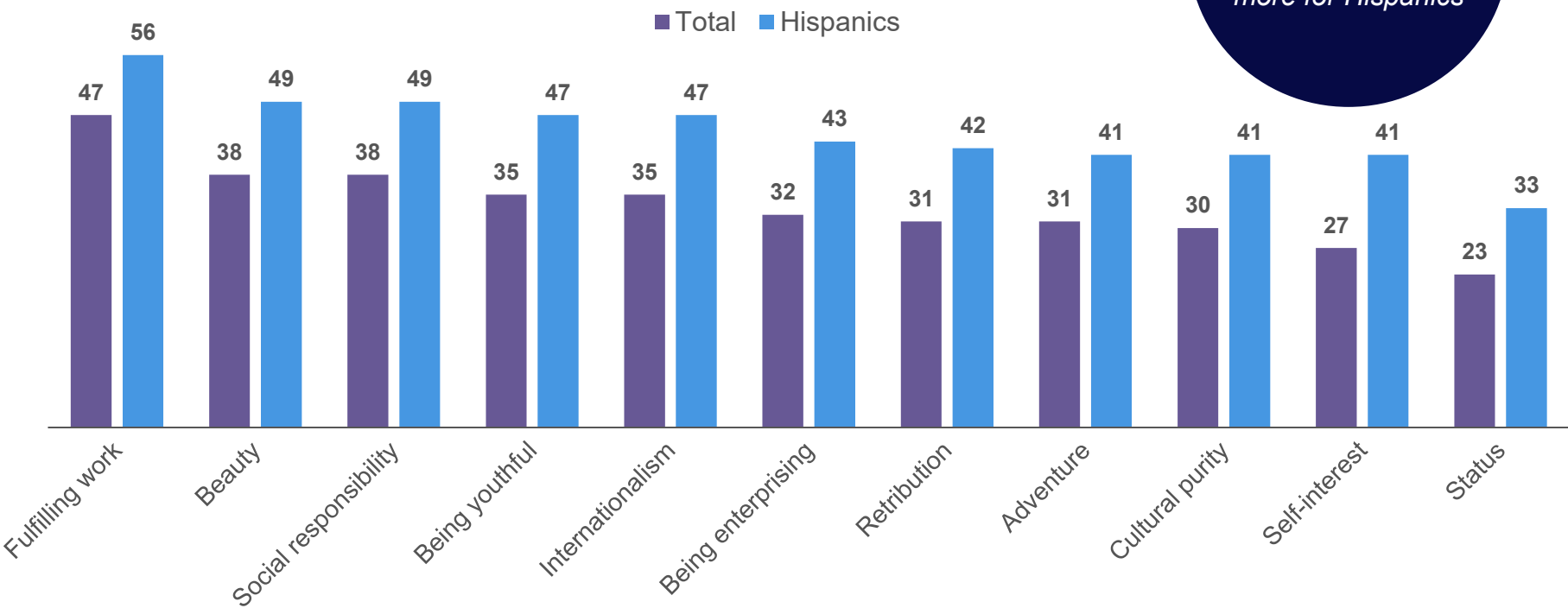
Hispanics stand out in their prioritization of hard work and self-interest, but also share a socially conscious mindset



Top 10 values for Hispanics

- Authenticity
- Protecting the family
- Honesty
- Self-esteem
- Working hard
- Enjoying life
- Knowledge
- Self-reliance
- Freedom
- Stable personal relationships

Personal Values with the largest gap between Total US and Hispanics



Looking good, Social recognition, and Modesty also matter more for Hispanics

Source: NielsenIQ Consumer Life 2026, % of respondents who agree that each value is a guiding principle in their lives (top-2 box agreement on a 7 point scale, total of 57 values are rated)

Cultural relevance extends far beyond Hispanic Heritage Month

Activation should reflect the heritage mix of each local market

Cultural Calendar	Jan-Feb: Family & Festivity	Mar-May: Faith, Family, & Spring	Jun-Aug: Local Heritage Season	Sept-Oct: Heritage at National Scale	Nov-Dec: Tradition & Togetherness
Holidays & Activation	- Día de los Reyes Magos/Three Kings Day (Jan 6) - Carnaval (dates vary)	- Semana Santa and Easter (dates vary) - Día del Niño/Día de la Niñez (Apr 30) - Cinco de Mayo (May 5) - Día de las Madres/ Mother's Day (May 10, Mexico)	Puerto Rican Day Parade and local Puerto Rican festival season	- Hispanic Heritage Month (Sep 15–Oct 15) - Independence Celebration Cluster - Sept 15: Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua - Sept 16: Mexico - Sept 18: Chile	- Día de los Muertos (Nov 1–2) - Día de la Virgen de Guadalupe (Dec 12) - Las Posadas (Dec 16–24) - Nochebuena / Christmas Eve (Dec 24) - Año Nuevo / New Year's Eve (Dec 31)
Local Cultural Events	Dominican Republic Independence Day (Feb 27)	Cuban Independence Day (May 20)	Independence Days - Venezuela (Jul 5) - Argentina (Jul 9) - Colombia (Jul 20) - Peru (Jul 28) - Bolivia (Aug 6) - Ecuador (Aug 10)	Brazil Independence Day (Sept 7)	Día de las Velitas (Dec 7) <i>especially relevant to Colombian communities</i>

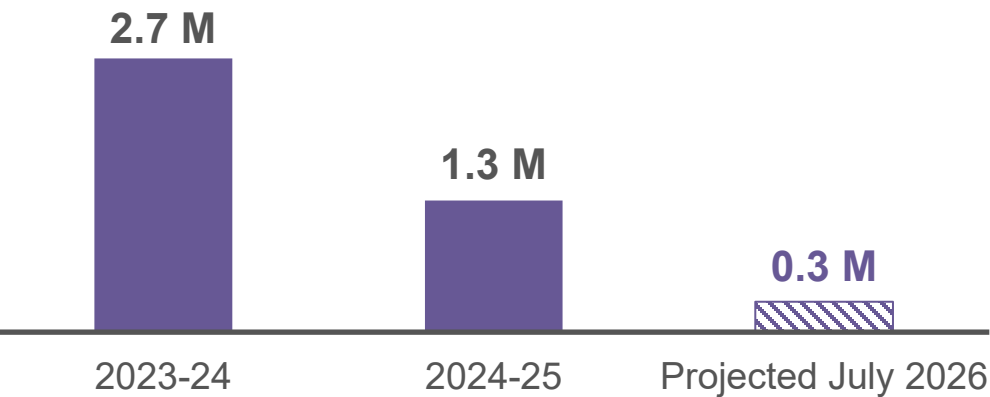
Illustrative, not exhaustive. Cultural observances vary by country of origin, faith, geography, and household tradition.

Sources: National Hispanic Heritage Month and September independence dates: <https://hispanicheritagemonth.gov/about/>; - Día de los Muertos in the United States: <https://americanart.si.edu/blog/dia-de-los-muertos-united-states>; Las Posadas tradition: <https://www.nps.gov/peco/learn/news/old-and-new-holiday-traditions-farolito-walk-and-las-posadas-at-pecos-national-historical-park.htm>; Cinco de Mayo historical reference: <https://www.loc.gov/item/today-in-history/may-05>

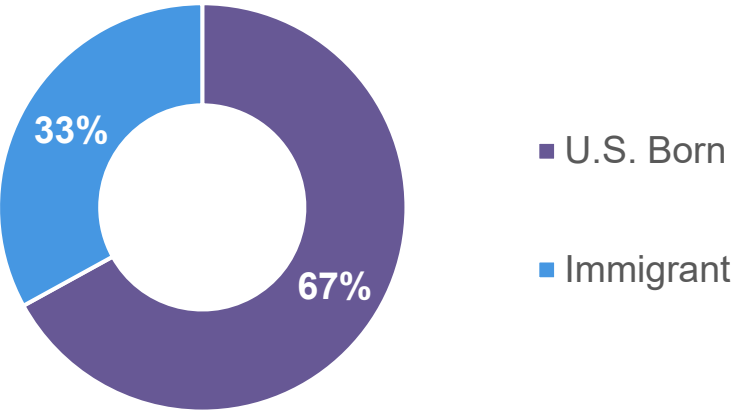
Headwinds and tailwinds for Hispanics

Slower immigration may temper near-term Hispanic household growth, while a largely U.S.-born base sustains long-term scale

Net international migration is falling sharply (all nationalities)



Two-thirds of U.S. Hispanics are U.S.-born



Source: Washington Post and The Wall Street Journal

The Washington Post
Democracy Dies in Darkness

U.S. population growth slowed last year as net immigration fell by about half

Net immigration totaled 1.3 million from July 2024 through June 2025, down from 2.7 million the previous year, new census data shows.

Updated January 27, 2026



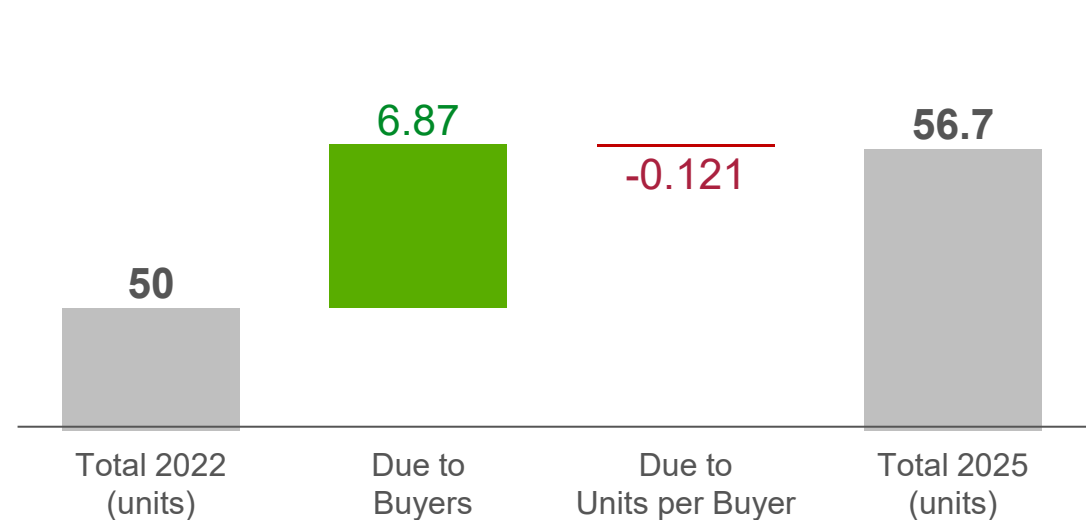
waited for the cashier at the Let's Go Market in Cleveland, Texas. DANIELLE VILLASANA FOR WSJ

By Laura Cooper, Arian Campo-Flores and Enrique Pérez de la Rosa
June 11, 2025 9:00 pm ET

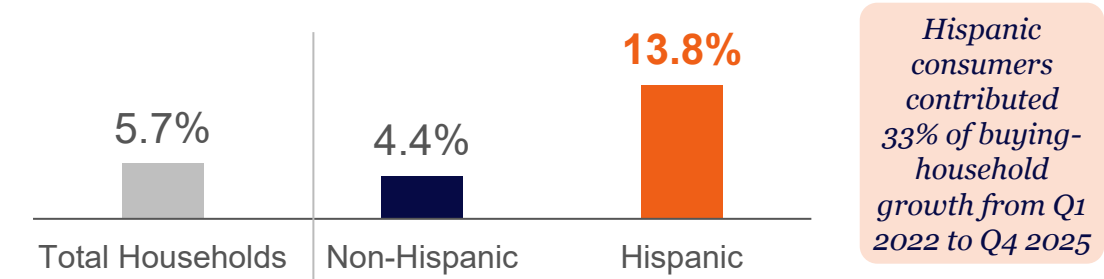
Hispanic households have been an outsized engine of CPG demand growth

With category growth increasingly dependent on adding buyers, not increasing consumption per household, the Hispanic population’s expanding household base has become disproportionately important to future demand

Consumer Drivers Due To (Units Billions)



Household Growth Q1 2022 vs Q4 2025



Between 2022 and 2025, nearly all CPG unit growth came from an expanding buyer base, while units purchased per buyer remained essentially flat. During that same period, **Hispanic households grew more than three times as quickly as non-Hispanic households** and contributed approximately one-third of the total increase in buying households.

Slower immigration could moderate the pace of new household formation in the near term, creating a headwind for buyer-led CPG growth. However, **the opportunity extends well beyond immigration: a large, predominantly U.S.-born Hispanic population** gives manufacturers and retailers an established consumer base to engage through stronger relevance, assortment and occasion development.

What this means for CPG: Future growth will require a two-part strategy: recruit households as the population expands, while earning more occasions and categories from the large Hispanic consumer base already in the market.

Source: NIQ Omnishopper Panel; Total US, Total Outlets, Total Store, Annual 2025 vs 2022

Declining SNAP participation may be reducing purchasing power in Hispanic-heavy markets

About 1.3 million Latinos dropped off SNAP in the past year,

according to USDA-based reporting summarized by Infobae and projections from UnidosUS

Nationwide SNAP participation is down ~12% (~5 million people)

since mid-2025, with declines concentrated in states with large Hispanic populations, per the Center on Budget and Policy Priorities (CBPP)

States with high Latino populations—especially Arizona—show the steepest caseload losses,

with Arizona alone losing 472,835 participants (54% decline) since July 2025, according to the Food Research & Action Center (FRAC)

Source: [InfoBae Article](#), [Center On Budget Article](#), [SNAP Participation Dashboard](#) - Food Research & Action Center

Hispanic growth strategies must be built market by market, not from a national average

Localized examples demonstrate how NIQ can connect performance with benefit, demographic, channel and assortment signals

Arizona: Store Level Diagnostic

Benefit participation may amplify localized retailer pressure

- Store-level analysis isolated border locations contributing disproportionately to retailer softness
- Overlaying performance with SNAP-linked spending surfaced a potential connection to purchasing power and trip behavior



Question to explore: Where could benefit participation or local economic shifts be changing trips, baskets, and retailer choice?

Texas: Border Market Growth Lens

Value seeking is reshaping channel and pack choices

- Market-level analysis connected local economic conditions with the growing relevance of value-oriented channels
- Smaller accessible packs, larger value packs, and culturally relevant segments demonstrated relative resilience



Question to explore: Are channel, pack and assortment strategies aligned with how local shoppers balance affordability, value, and cultural relevance?

The strongest Hispanic growth strategies begin with the local market, not a national average.

Illustrative market analyses reflect specific trade areas and should not be generalized to all Hispanic consumers. Observed relationships are directional and do not independently establish causation.

Aside from financial issues, Hispanic consumers are most concerned about threats to their environment, health, and social order

Top ranked financial concerns for Hispanic consumers



Inflation & High Prices



Cost of Healthcare



Housing Cost



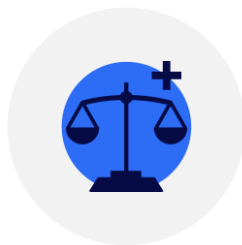
Savings & Investments

Concerns that Hispanic consumers rank higher compared to Non-Hispanics



Environmental & Public Health Issues

- Global climate change
- Pandemics

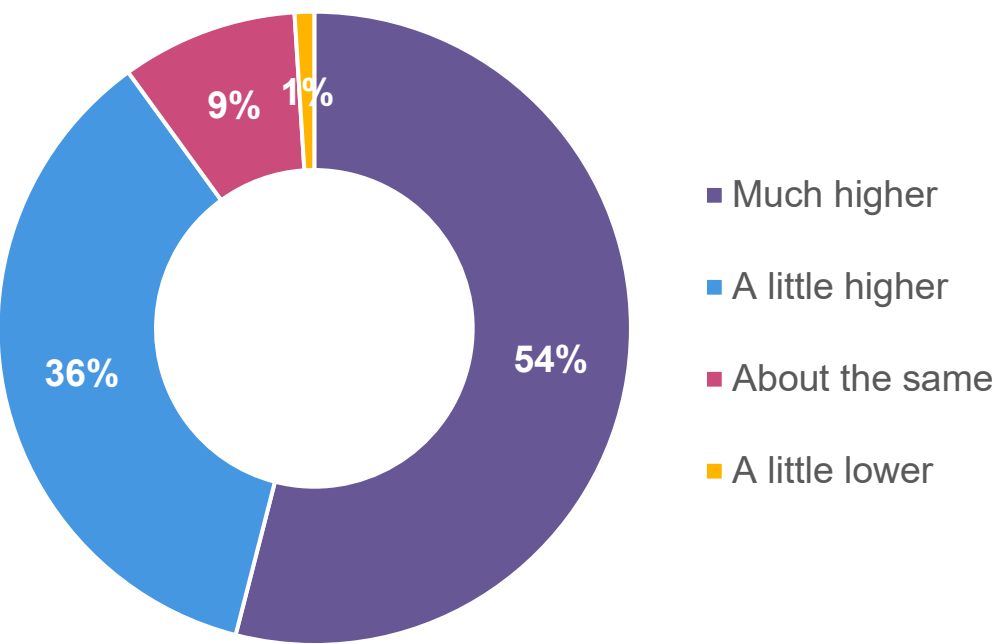


Inequality & Social Threats

- Drug abuse
- Relations between racial and ethnic groups
- Crime and lawlessness
- Educational quality
- Gender inequality
- Personal information getting into the wrong hands

Rising grocery costs are driving Hispanic shoppers to cut non-essentials, seek deals and manage baskets more tightly

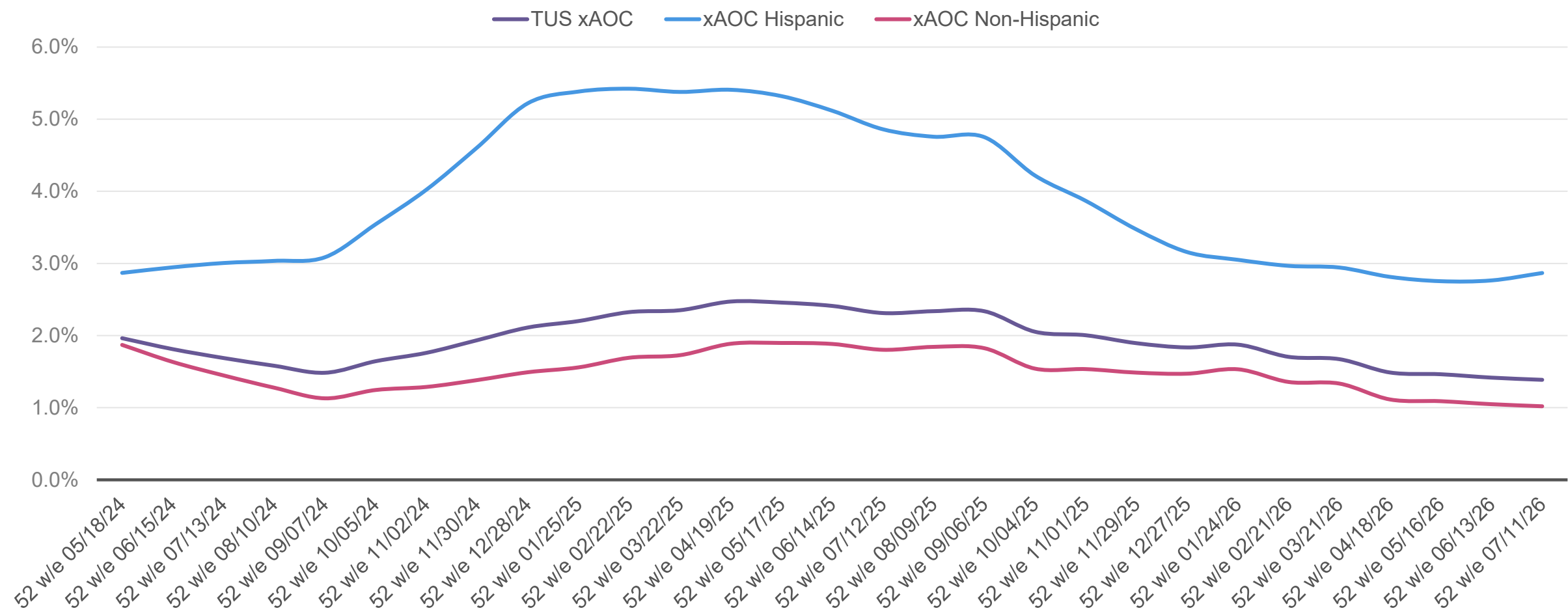
What is your perception of the cost of groceries and everyday household items compared to last year?
Among Hispanic Respondents



Source: Omnibus Survey Recurring- April 2026

Hispanic dollar growth has moderated, but remains ahead of Non-Hispanic growth

Hispanic vs Non-Hispanic Target Track Markets xAOC – Total Store Dollar % Chg vs YA

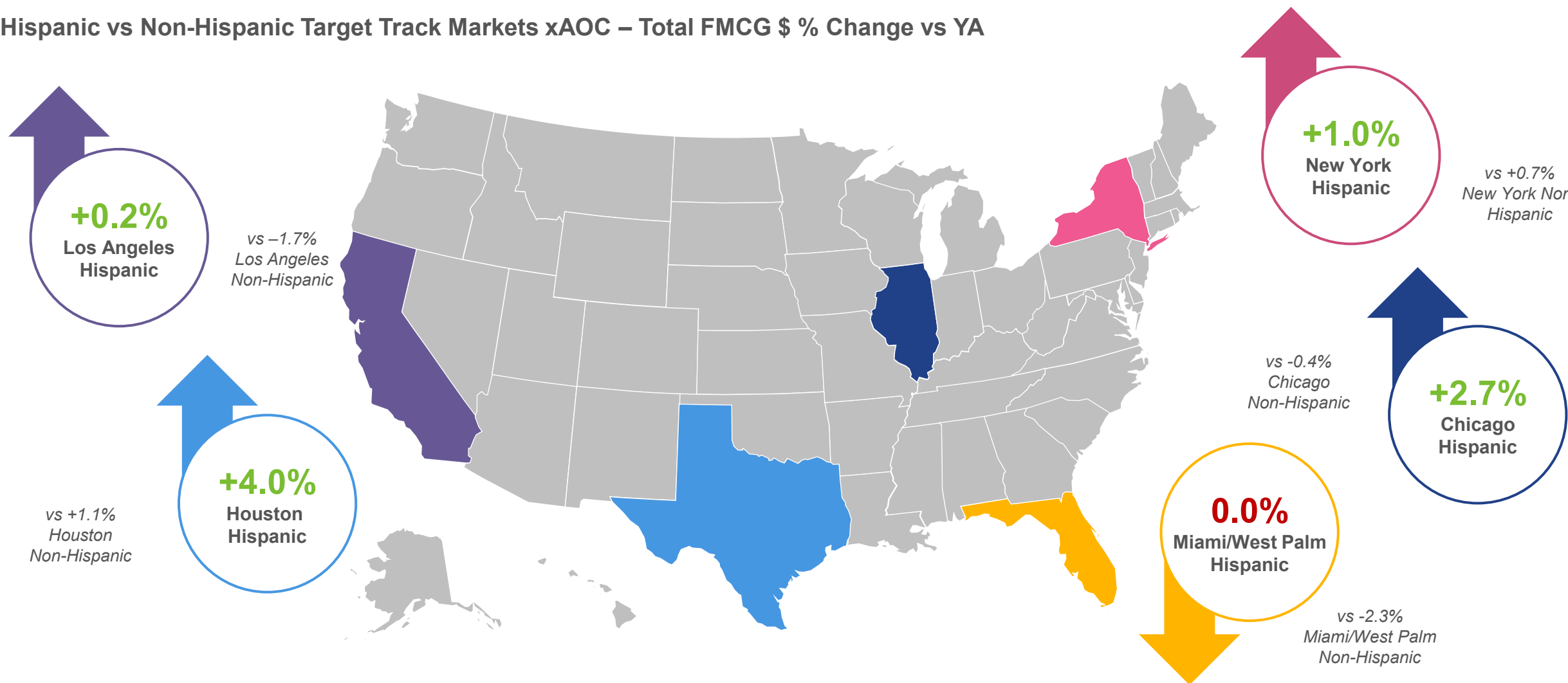


Source: NielsenIQ Retail Measurement Target Track | Latest 52 Wks – w/e 07/11/26

Location plays a role in varying trends across Hispanics

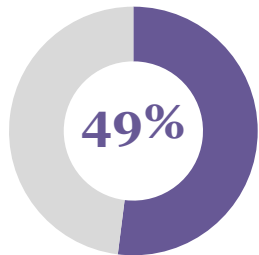
Houston is showing the largest momentum in Hispanic dollar sales, while Miami remains flat

Hispanic vs Non-Hispanic Target Track Markets xAOC – Total FMCG \$ % Change vs YA

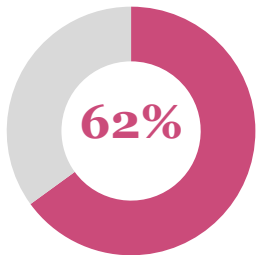


Source: NielsenIQ Retail Measurement Target Track | L52 w/e 8/22/2026 vs YA

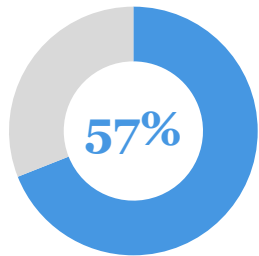
Hispanics are more negative on tariffs and likely to respond with value-seeking behaviors



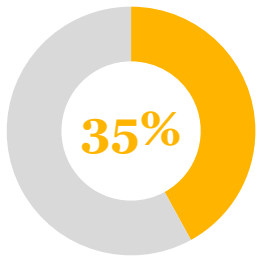
of Hispanic consumers think that the economy will worsen over the next 6-12 months *in line with 49% of total U.S.*



of Hispanic consumers think that tariffs will have a negative impact to the economy *compared to 59% of total U.S.*

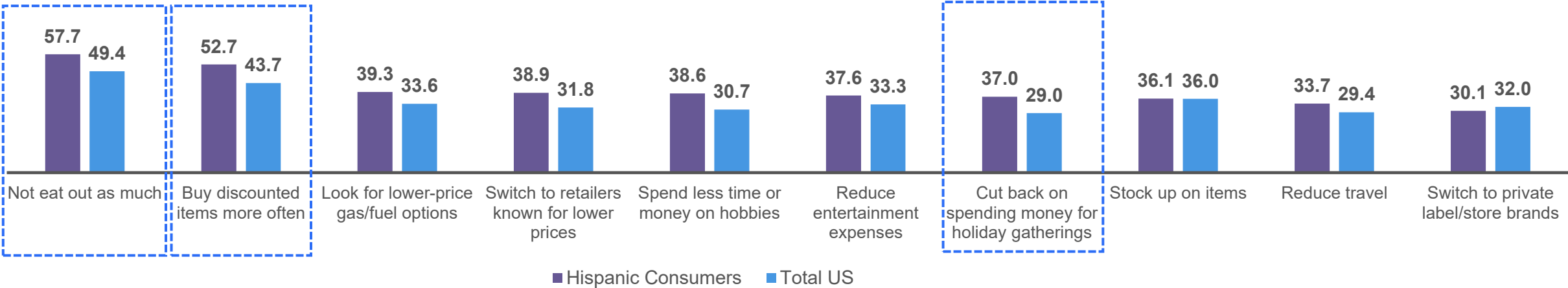


of Hispanic consumers are not in favor of the tariffs overall *compared to 53% of total U.S.*



of Hispanic consumers are expected to increase household spend *compared to 32% of total U.S.*

Actions taken in response to the tariffs

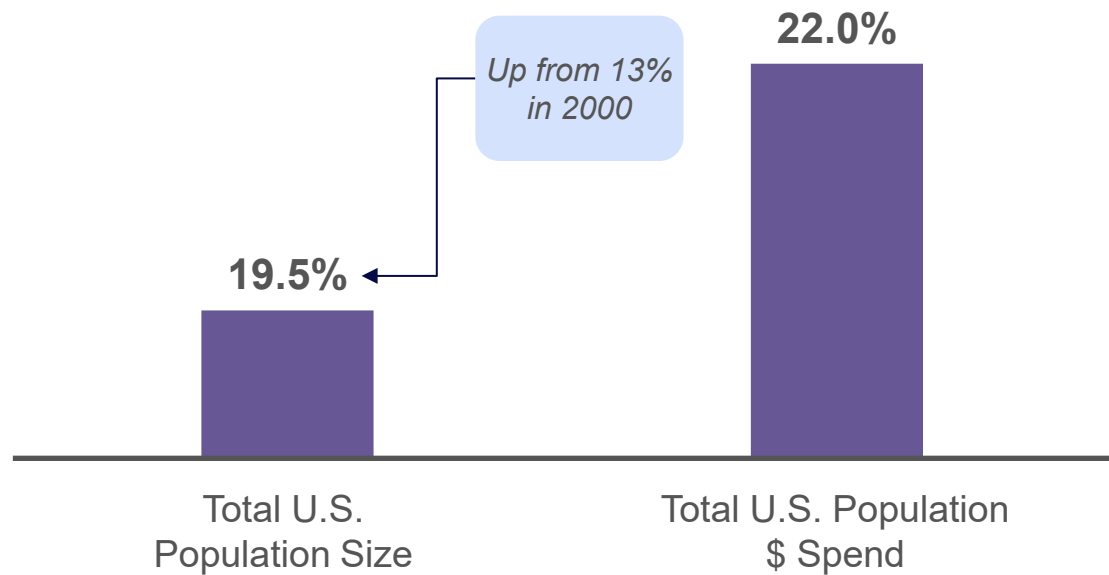


Source: NielsenIQ Tariff Survey Wave 4 US

What and where is the Hispanic shopper purchasing

Hispanic consumers contribute a disproportionate share of U.S. spending relative to population size

Hispanic Representation within...



Hispanic shoppers spend more and shop more often than the total market



Hispanic value per buyer in 2025

\$16,890

3.5% more than total panel



Hispanic occasions per buyer in 2025

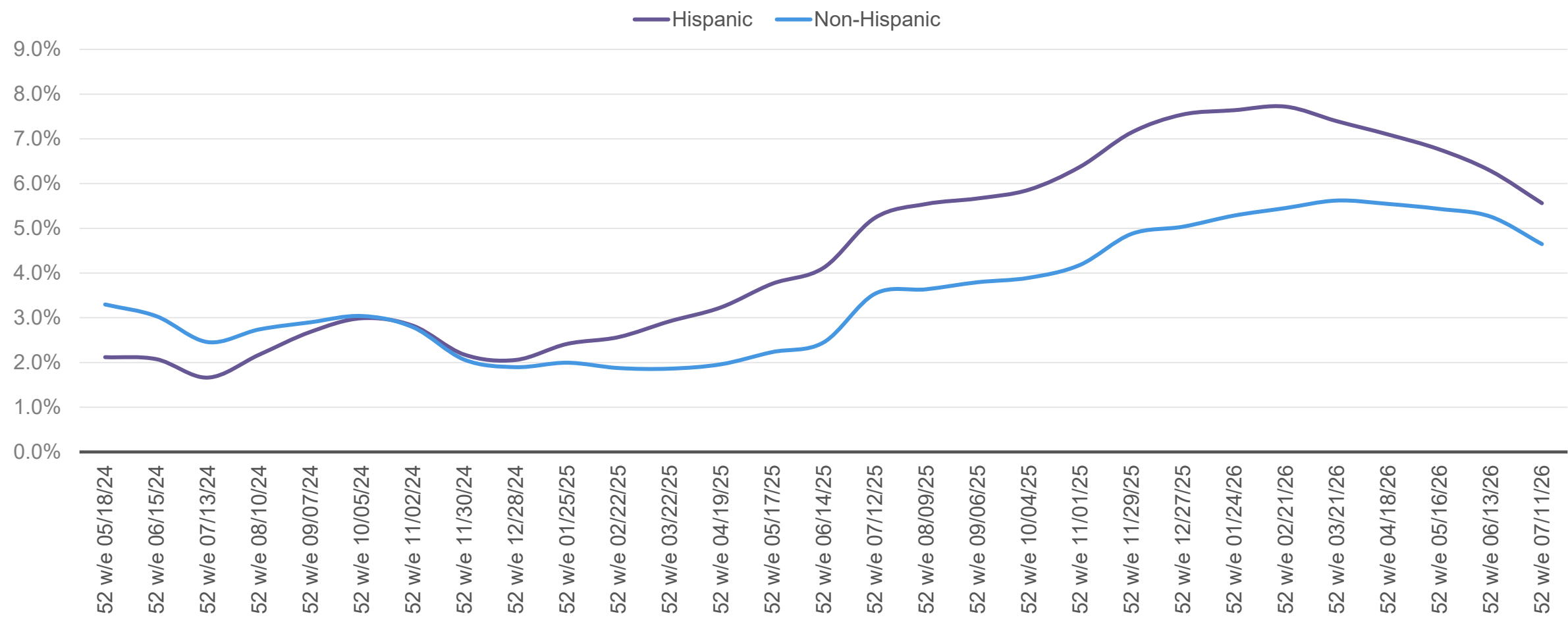
363

2.0% more than total panel

Source: NielsenIQ Panel On Demand Omnishopper | Cal Yr 2025 - 12/27/2025;

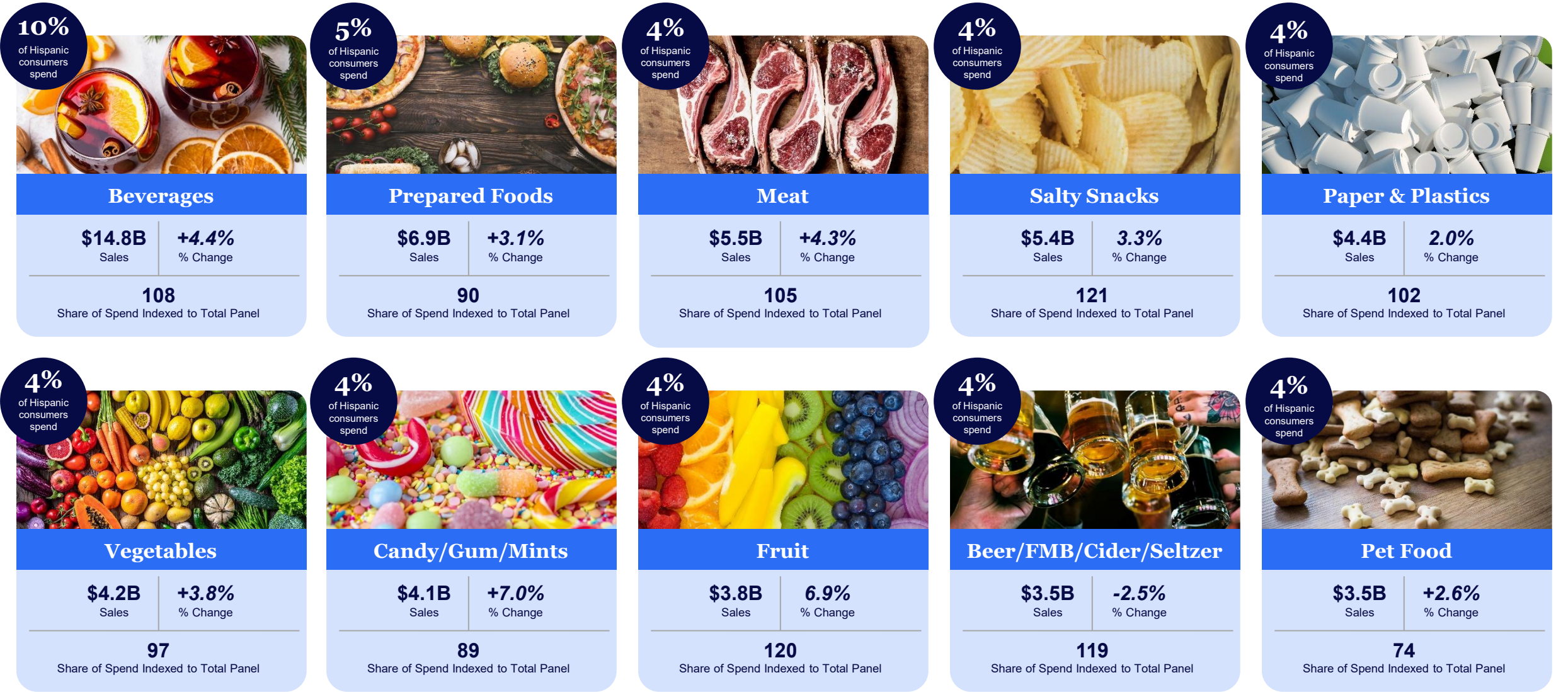
Hispanic spend per buyer began outpacing Non-Hispanic growth in early 2025

Hispanic vs Non-Hispanic Total Store \$ / Buyer % Chg vs YA



Source: NielsenIQ Panel On Demand Omnishopper | Latest 52 Wks – w/e 07/11/26

Beverages are a priority in Hispanic FMCG spending



Source: NIQ Target Track US xAOC during Latest 52 Wks - w/e 07/11/2026; *Will not include Liquor Channel purchases; Index is from NIQ Spectra | Report Builder Report | Homescan Product Library| September 25. Demand Index above 100 means the Hispanic consumers are more likely to purchase the product than the average US consumer

Hispanic households over-index on culturally relevant meal ingredients and fresh foods

Assortment relevance should go beyond broad “Hispanic” labels and reflect real cooking occasions, fresh meal prep, and heritage-specific staples

High Spend Categories: Top Over-indexing Categories for Hispanic Consumers



Meal-Building Staples

Pigeon peas — **548 index**
Pink beans — **510 index**
Corn husks — **476 index**
Tortilla shells — **396 index**

Core ingredients point to strong relevance of traditional meal preparation.



Fresh & Produce

Root veggies — **558 index**
Papayas — **322 index**
Limes — **312 index**

Fresh produce remains an important part of culturally relevant meal occasions.



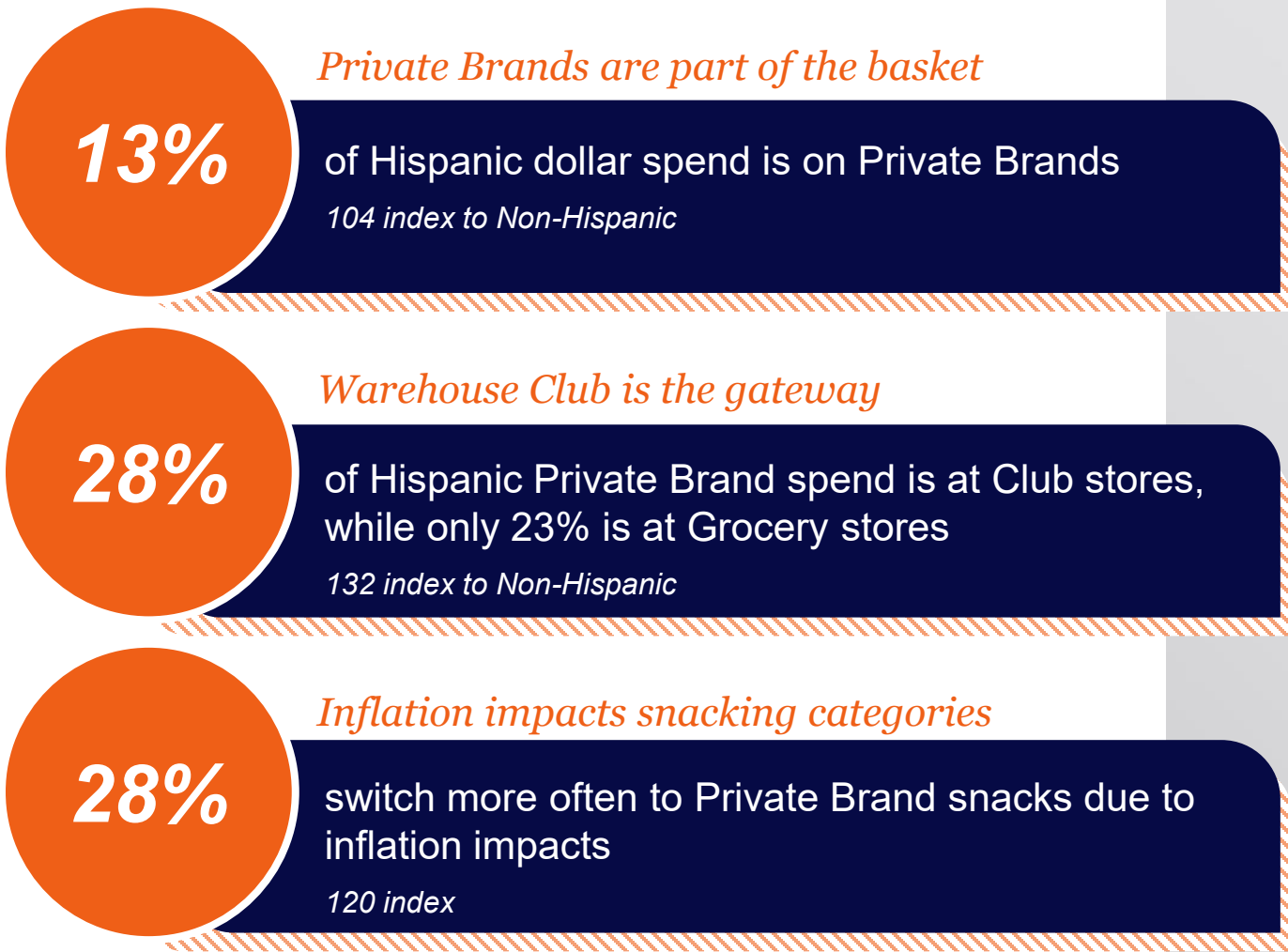
Proteins & Dairy

Octopus/squid — **464 index**
Latin crema — **459 index**
Pollock — **381 index**

Seafood and culturally specific dairy products further differentiate the basket.

Source: Spectra Data: 2026 Census Households US

Private brands win with Hispanic shoppers when value aligns



The strongest opportunity is mission-led.

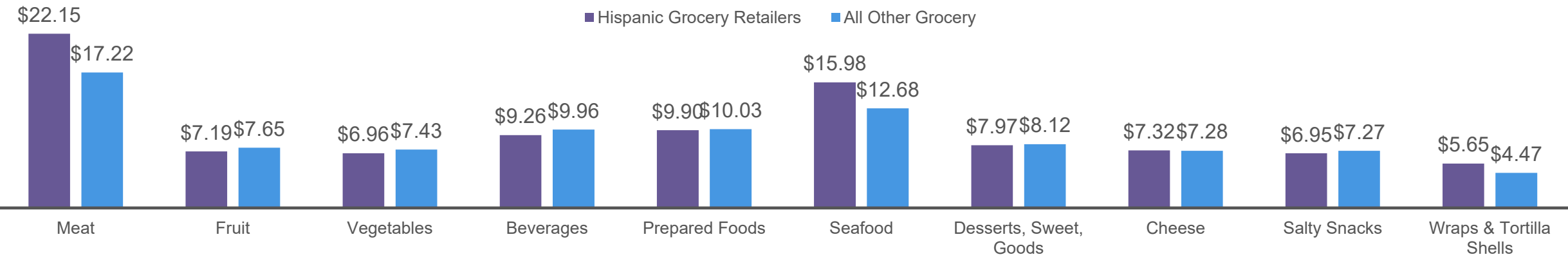
Win beyond price by leading with trust, quality, convenient formats, and family relevance in Club and snack occasions.

Source: NielsenIQ Panel On Demand Expanded Omnishopper | US EXP OSH - NDH Synd Full View - 444 5-yr; L52 weeks ending 07/11/2026; Omnibus Survey Recurring- June 2026

Hispanics represent 55% of shoppers but account for 72% of dollars at Hispanic grocers

Hispanic contribution reflects emphasis on fresh and culturally relevant staples, including meat, produce, seafood and tortillas

\$ Spend Per Trip – Total Panel



Share of Retailer \$ Food Department Sales by Super Category, *green indicates over-indexing categories*

	Meat	Fruit	Vegetables	Beverages	Prepared Foods	Seafood	Desserts, Sweet Goods	Cheese	Salty Snacks	Wraps & Tortilla Shells
Hispanic Retailers	22%	10%	10%	8%	5%	4%	4%	3%	3%	3%
A/O Grocery	17%	8%	8%	10%	7%	3%	4%	4%	4%	1%

Source: NielsenIQ Panel On Demand Expanded Omnishopper | US EXP OSH - NDH Synd Full View - 444 5-yr; L52 weeks ending 07/11/2026; Hispanic Retailers = SUM of 6 Hispanic-targeted Banners

Latin American ingredients are gaining momentum in functional food and beverage innovation

NIQ Product Insider Label Trends – Top Growing Grocery Dept Ingredients with Latin influence
3-Year \$ CAGR; NPI “Qualified” Attributes



Several ingredients have native ranges spanning multiple countries.

Other notable *qualified* attributes include Agave, Guava, Quinoa, Tamarind, Passion Fruit, Hibiscus, Amaranth Protein, and Yerba Mate

Source: NielsenIQ NPI Full View Total US Latest 52 Weeks Ending 7/11/2026. Grocery Department



Hispanic consumers are redefining healthy eating around satiety and balance

of Hispanic consumers who made a New Year's resolution...

61%

said “reduce **sugar** intake” is part of eating healthier, vs 52% for TUS; 117 index

55%

said “eat more **protein**” is part of eating healthier, vs 44% for TUS; 125 index

48%

said “eat more **fiber**” is part of eating healthier, vs 36% for TUS; 135 index

24.8% of Hispanic HHs are GLP-1 users, compared with 24.3% of total HHs, 102 index

Source for Protein insights: Omnibus Survey Recurring 2026—Protein focused questions; GLP-1 source: NIQ Omnishopper | GLP-1 Survey—Fielded March 2026

Warehouse Club over-indexes with Hispanic shoppers because it delivers value, assortment and family-size utility

Channel	\$ Sales	\$ Share
Total Online	\$104.1B	30%
Grocery Store	\$81.7B	24%
Mass Merch	\$62.1B	18%
Warehouse Club	\$41.5B	12%
Dollar Store	\$10.2B	3%
Convenience/Gas	\$9.2B	3%
Drug Store	\$7.7B	2%
Home Improvement	\$6.6B	2%
Beauty Supply	\$4.4B	1%
Department Store	\$4.1B	1%
Pet Store	\$2.2B	1%

134 index vs
Total Panel

8% of Hispanics state that the Club channel is best for purchasing food, slightly above the 7% of non-Hispanic shoppers²

TikTok videos and trends show off the diverse assortment of Costco's Hispanic and Latino products, particularly in highly Hispanic-populated areas



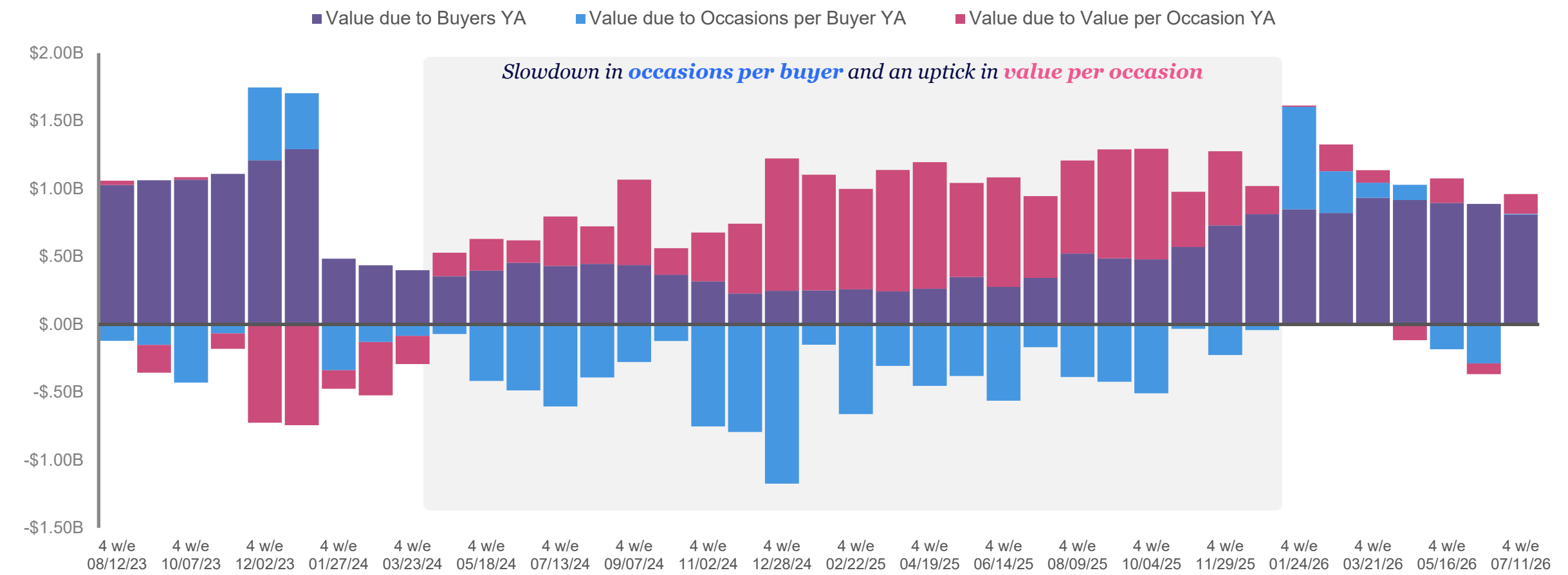
**Channels represent In-Store sales only*

Source: NielsenIQ Panel On Demand Expanded Omnishopper | US EXP OSH - NDH Synd Full View - 444 5-yr; L52 weeks ending 07/11/2026; 2. NIQ Category Shopping Fundamentals Fall 2025 Wave (Channel Preference)

Hispanic growth is being driven more by buyer expansion as trip frequency remains pressured

Larger baskets once offset fewer trips; today, buyer growth is doing more of the work

Hispanic Household Purchase Drivers – 4 Weeks Trended

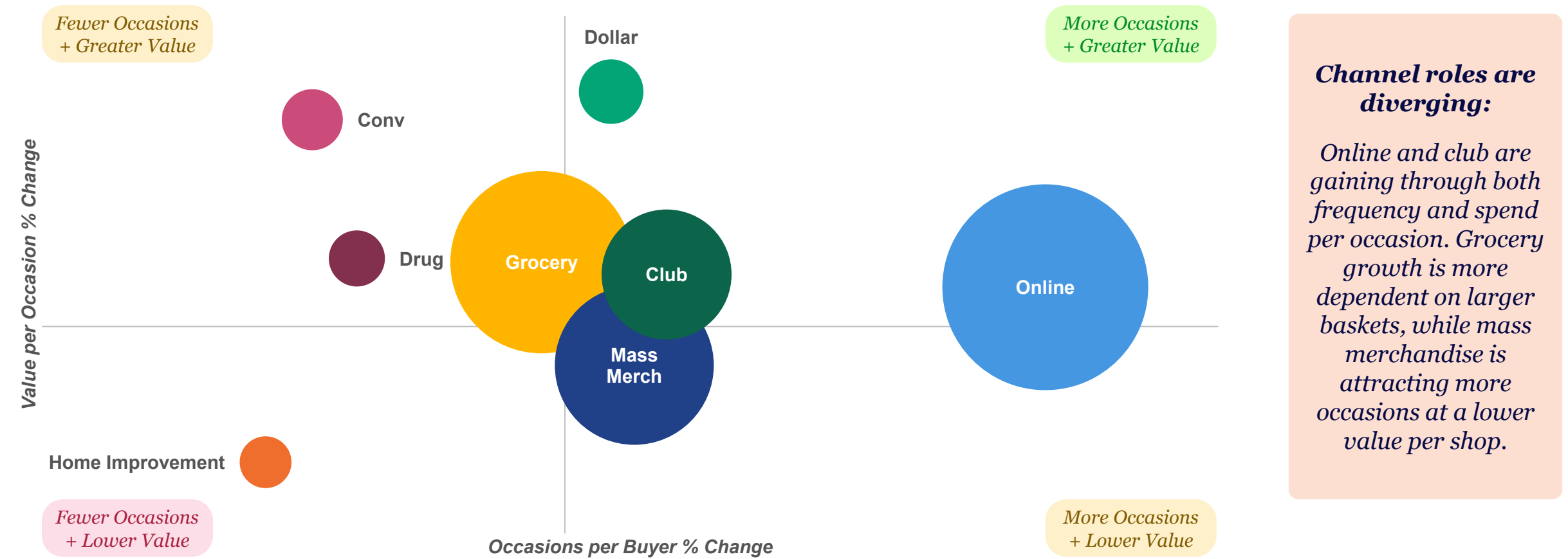


Source: NielsenIQ Panel On Demand Omnishopper | Latest 4 Wks – w/e 07/11/26 trended back three years

Online and Club are the strongest Hispanic growth channels, gaining trips and spend per trip

Among the largest channels, Online, Club, and Dollar are positioned in the growth quadrant resulting in overall dollar growth

Total FMCG – In Store Channels vs Online
Hispanic Households



Source: NielsenIQ Panel On Demand Expanded Omnishopper | US EXP OSH - NDH Synd Full View - 444 5-yr; L52 weeks ending 07/11/2026

Size of the bubble represents magnitude of value sales

How to connect with the Hispanic consumer

Hispanic cultural influence is increasingly shaping mainstream music, entertainment, and sports

Cultural relevance is not niche marketing; it increasingly intersects with mainstream culture

Bad Bunny wins album of the year at the 2026 Grammy Awards, a first for a Spanish-language album



A New Karol G Documentary Goes Behind the Scenes with La Bichota Herself

Follow the Colombian superstar as she embarks on a whirlwind, record-breaking world tour.



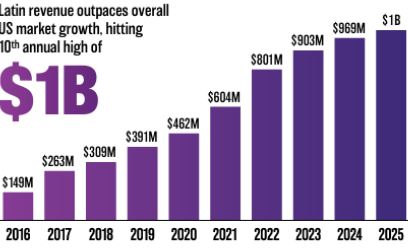
Zoe Saldña's Oscar reminds Dominicans of the first time they won Miss Universe



RIAA YEAR-END RECORDED MUSIC



US LATIN REVENUE REPORT



LATIN REVENUE SHARE

Latin music made up **8.8%** of total US revenue



Shakira returned to the Bay Area for the first time in nearly seven years to reclaim her territory, but the She Wolf ended the night doing far more than that.



Food engagement and media habits point to discovery-led Hispanic activation

Pair culturally relevant assortment with discovery, wellness, and occasion-based messaging across social video, entertainment, gaming and Spanish-language environments

What Resonates: Food Attitudes

Top **Completely Agree** Food Attitudes with the highest Hispanic penetration index



“My purchase decisions are influenced by the **latest health food trends**” *146 index*



“I only **buy snack foods for gatherings or events**” *142 index*



“I am usually the first among my friends to try **new food products**” *133 index*



“I try to **eat gourmet food** whenever I can” *139 index*



“I only buy food items that are **name-brand**, not generic brands” *137 index*

Where to Reach: Media Usage

Spanish-language News



CNN en Español **396 index**

Gaming, Entertainment, & Sports



WWE **164 index**



Disney.com **152 index**



YouTube Gaming **150 index**

On Social



Tik Tok **174 index**



Instagram **125 index**

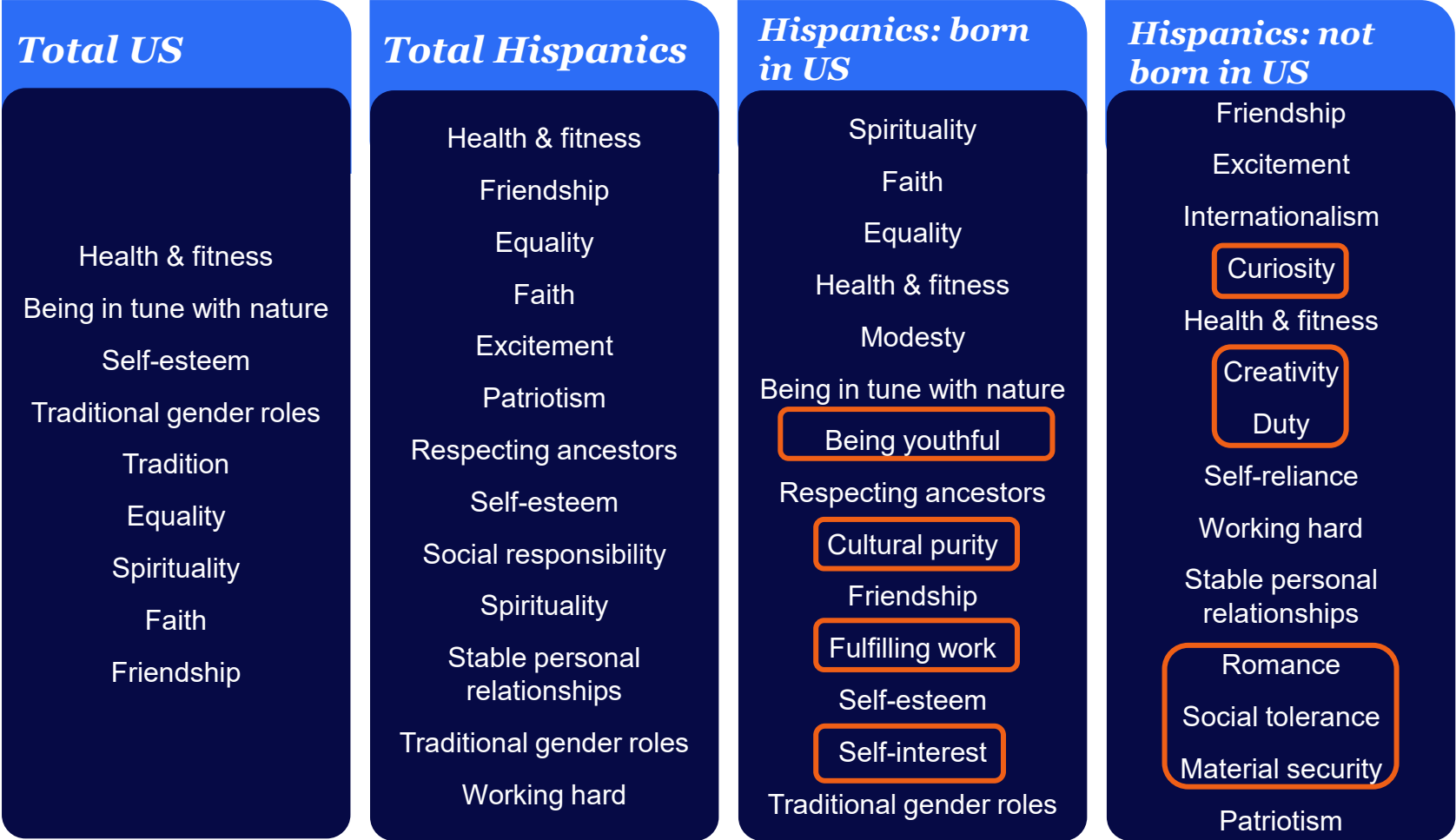


Twitch **141 index**

Source: Spectra Data: 2026 Census Households US

Hispanics' evolving values diverge from average due to nuances beyond standard demographics

Fastest-rising personal values, 2018-2026 (based on values ranks from a list of 57)



Source: NielsenIQ Consumer Life 2018-2026, % of respondents who agree that each value is a guiding principle in their lives (top-2 box agreement on a 7 point scale, total of 57 values are rated)

Outliers vs. other Hispanic groups



Hispanic consumers: *What to know*

- **A growing force in U.S. spending:** Hispanics represent 19.5% of the population but 22% of consumer spending, and buyer expansion continues to support growth even as shopping trips remain pressured
- **There is no single Hispanic consumer:** Country of origin, generation, language, geography, and immigration history create distinct needs that national averages can obscure
- **Value extends beyond the lowest price:** Hispanic shoppers balance affordability with quality, convenience, family needs and cultural relevance, driving strength across Club, Online, private brands, and culturally important categories

Takeaways for manufacturers and retailers when engaging with Hispanic Consumers:

1. **Build from the local market outward:** Tailor assortment, pack sizes, language and activation to the cultural composition and economic realities of each trade area.
2. **Deliver value for different missions:** Combine accessible price points with bulk options, trusted quality, convenient formats and relevant national- and private-brand choices
3. **Earn cultural relevance year-round:** Go beyond Hispanic Heritage Month with authentic representation, culturally rooted innovation and community-connected marketing tied to meaningful occasions



Questions to unlock growth with Hispanic consumers

NIQ can help brands translate Hispanic consumer insight into market, assortment, and activation decisions. Here are a few questions to explore!

1

Where are the strongest Hispanic consumer growth opportunities by market, channel, and store?

*Identify priority markets, trading areas and locations with **NIQ Target Track & Precision Solutions***

2

Which Hispanic shopper segments offer the greatest opportunity for my category and what matters most to them?

*Understand demographics, behaviors, preferences and acculturation with **NIQ Omnishopper, Precision Solutions, Surveys & Segmentation***

3

Are current assortments meeting Hispanic shoppers' needs across categories, brands, flavors, formats, and price points?

*Reveal assortment gaps and emerging demand with **NIQ Omnishopper & Custom Surveys***

4

How do Hispanic consumers' trips, channels, and occasions shape what and where they purchase?

*Connect shopper behavior across online and in-store environments with **NIQ Omnishopper & Category Shopping Fundamentals***

5

Which cultural and consumer shifts should inform future innovation, merchandising, and engagement strategies?

*Anticipate evolving values and needs with **NIQ Consumer Life & Custom Research***

Thank you!

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The Hispanic Consumer: How Culture, Value and Local Market Dynamics Are Shaping Growth
September 2026

NielsenIQ