

# Turning Shopper Signals into Action

A New Playbook for Merchants

*A joint presentation by:*

NielsenIQ

+



# Meet Today's Session Leaders



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NIQ



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# Today's Agenda

1

Today's World is Changing at Exponential Rates

2

NIQ Supports Assortment Decisions with Data Driven Insights

3

Whole Foods Market Use Case

4

Your Questions for the Team

# The past five years permanently reset consumer expectations

## 2020-2021 *Pandemic*

Restrictions, Out of stocks, Forced trial, channel shifting, and brand shifting

## 2022-2023 *Inflation*

Continued channel and brand shifting, increase of private label

## 2024-2025 *Volatility*

Tariffs, economic downturn, geopolitical tensions, benefit cuts

## 2026+

Expectations have changed *permanently* – NOT temporarily

## It's a harder world out there for many

**73%**

of consumers feel worse off vs.  
last year due to rising cost of  
living

**3.4%**

CPI, driven by an almost 16%  
increase in Energy CPI vs year  
ago

**\$37.41**

Average hourly wage is rising,  
but not outpacing food inflation

Source: NIQ 2026 Global Consumer Outlook; BLS CPI August '26; Consumer Confidence Board

## Shoppers are being now intentional with how they shop

**88%**

of US consumers actively changing how they shop  
to save money

**1 in 4**

now shopping more often at value/discount stores

**75%**

decide what to buy BEFORE they enter the store

**31%**

stock up or buy in bulk when items go on sale

Source: NIQ 2026 Global Consumer Outlook; NIQ BASES Quick Question Survey, Sept '25

## Loyalty has been replaced by constant re-evaluation

9%

of Boomers proclaim loyalty

- **46%** changed primary grocery store in past 12-24 months
- **68%** shop 2-3 retailers per week

**What wins trips today: Proximity + Price + Convenience + Relevant Assortment. Not history. Not habit.**



**The implication: every retailer must earn the trip, every week, through a combination of value signals and frictionless experience.**

# Amazon and Online are ready to supplement



**Amazon** is at  
**18.7** of CPG \$ share;  
**up 1.4pp** YOY



**Online** grew  
**10.3%**  
**in store** grew  
**1.1%** overall

Source: NIQ Omnishopper US Full View, 52 WE 12/27/25

## Additional challenge to balance, given the K-Economy and AI shopping implications



# Shopper expectations aren't shifting; they're stacking



## GLP-1

Amplifies broader H&W shift toward “food as function”, with consumers re-optimizing toward smaller portions and cleaner, purpose-driven nutrition.



## High Protein, High Fiber

Protein & fiber mainstream wellness priorities

60% of consumers actively increasing protein intake

GLP-1 users are 44% more likely to increase fiber intake



## Private Label

From value to parity

70%+ see PL as a true alternative

49% buying more than ever

37% willing to spend more or the same



## Affordability

Spending continues, but it is increasingly selective and uneven. Price has preserved dollars, but it has not protected volume or share..



*With so many competing,  
sometimes overlapping, priorities...*

*how do you know what to carry to  
meet your shoppers' multi-  
dimensional needs??*

How do you accurately and efficiently address all the changing consumer behavior to capture the sale?

Retailers have *6 seconds* to make a sale in-store



# Now more than ever, it is critical to have answers to the right questions

## Retailer:

Are we shaping and curating correctly the shelf?

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 Which SKUs truly drive incrementality, not just presence?

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 Which characteristics deserve space; which should be cut?

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 Where can private label win or credibility, not just price?

## Manufacturers:

Are we earning the right to have shelf space?

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 Which benefits claims and attribute ingredients are moving units and fulfilling a unique need?

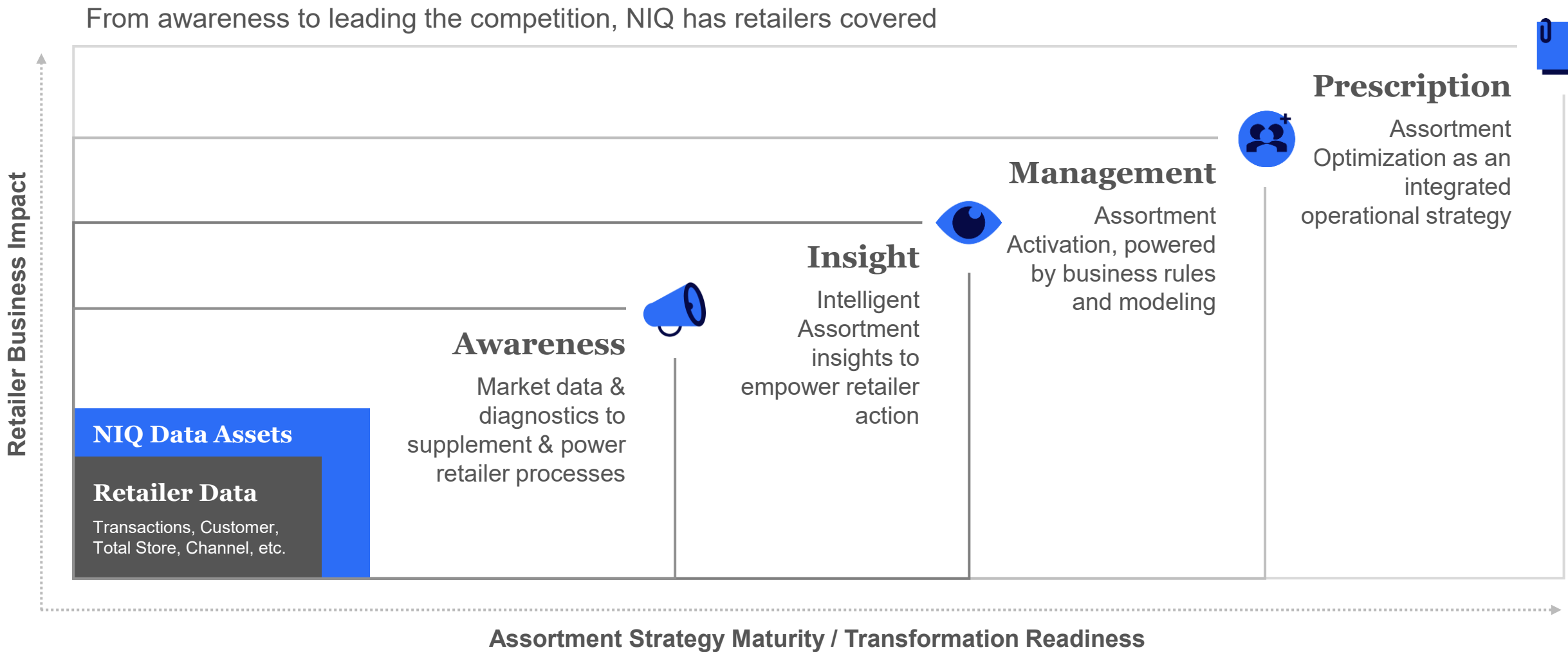
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 Which competitive innovations are scaling; which are burning out?

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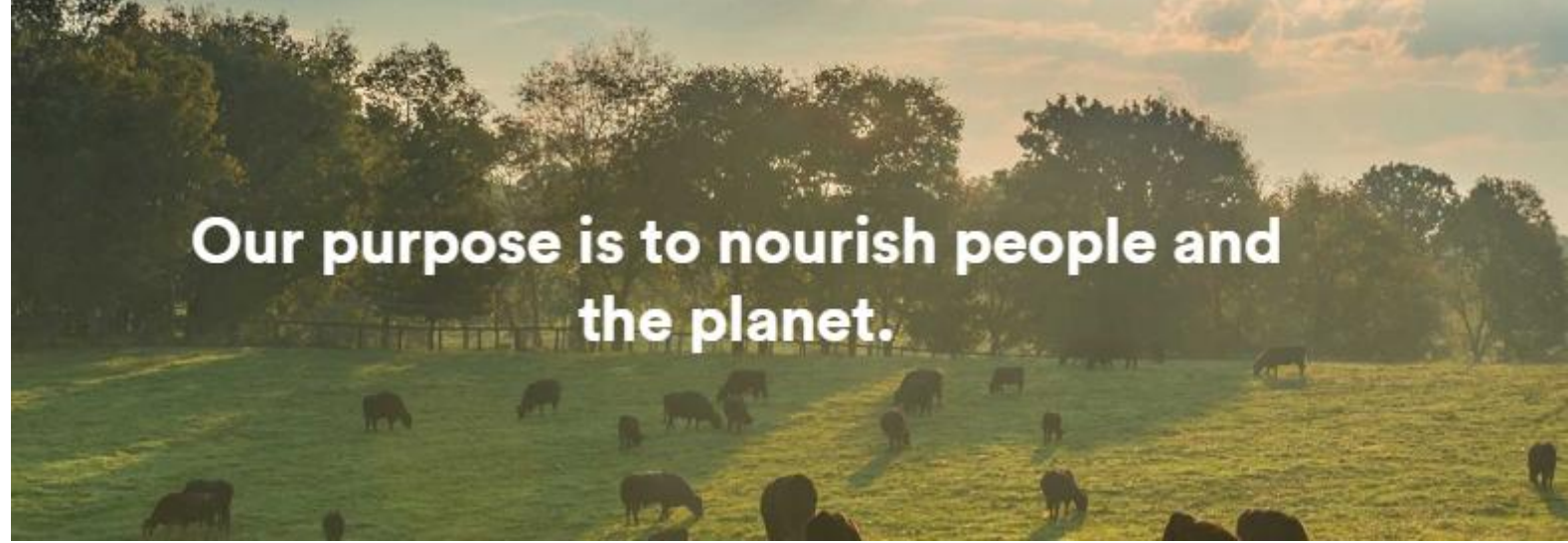
 Where should we launch first, and where does functionality & health claims really scale?

# NIQ Assortment Solutions are designed to grow with a retailer





## Our Core Values



**We Sell the Highest Quality  
Natural and Organic Foods**

**We promote team member  
growth and happiness**

**We create profits and prosperity**

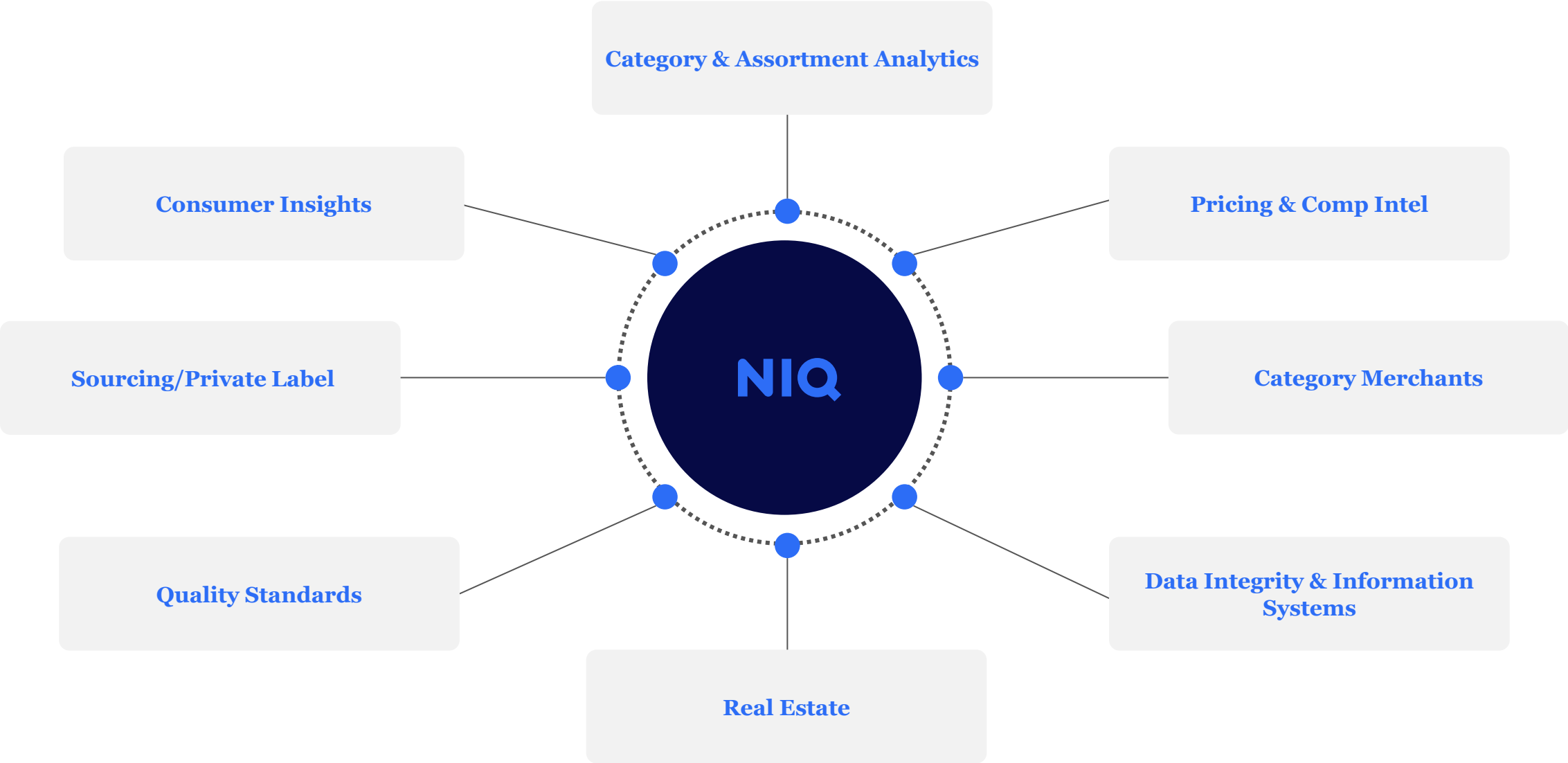
**We satisfy and delight our  
customers**

**We practice win-win partnerships  
with our suppliers**

**We Care About our Community  
and the Environment**

# Whole Foods Market + NielsenIQ Partnership

Supported by NielsenIQ's network of practice area experts



# WFM Category Insight Process



*Ideally, Manufacturers bring NIQ insights*

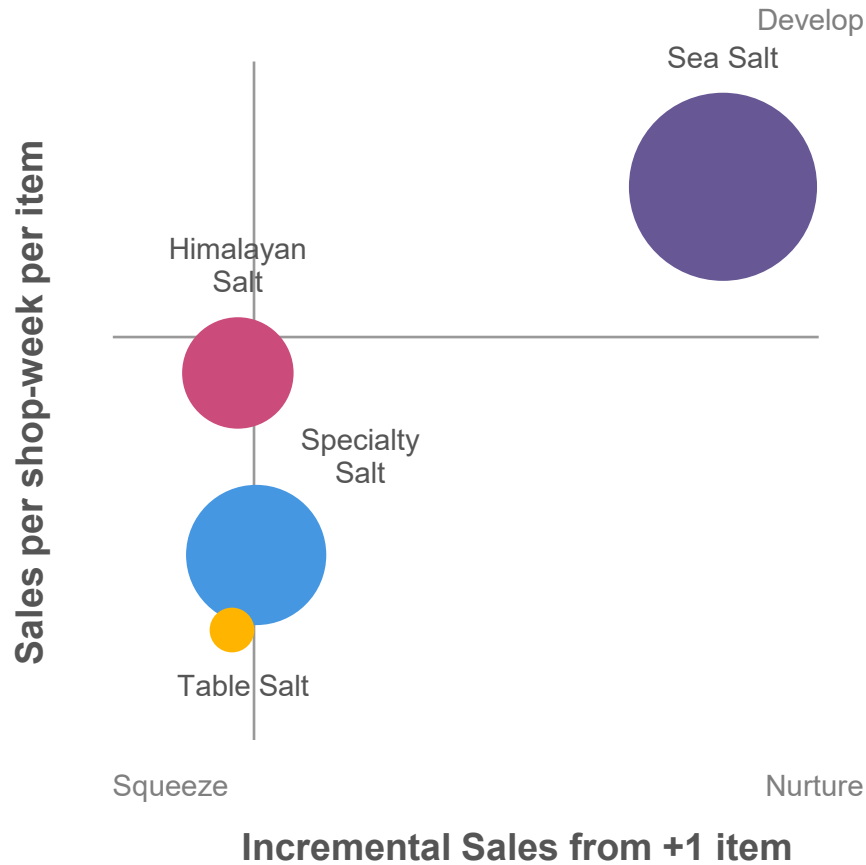
## Types of Insight Provided

- What's driving the biggest growth/decline in my current assortment? In the market?
- What subcategories deserve more/less space?
- What attributes are growing based on total market? For WFM? (i.e.: Organic, Regenerative, ABF free, Global Animal Partnership, etc.)
- Where do I have assortment voids vs the market?
- Where do I have more assortment than it warrants?
- Which items should I delist with minimal impact to sales?
- How do shoppers shop my category? What are the most important criteria? Do I have a balanced assortment?
- How does my pricing compare to RM xAOC? Which items are price sensitive? What are Key Value Items that drive consumer perception?

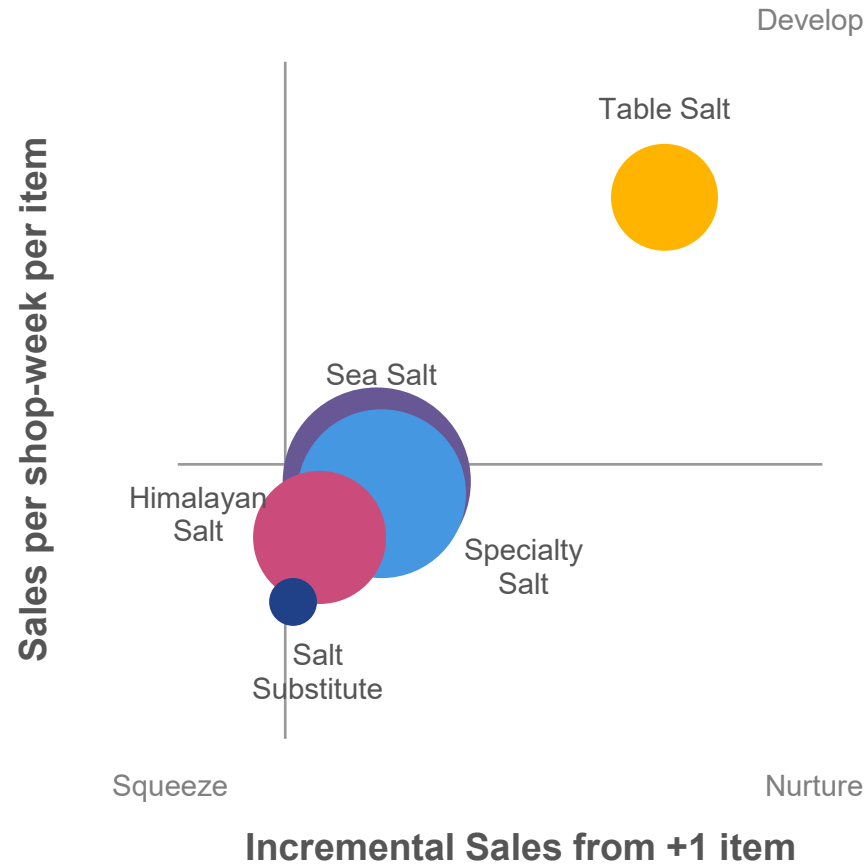
# By understanding where growth opportunities are for WFM vs the market, we can make smarter assortment decisions

NIQ Assortment tool provides incremental impact of SALT compared to Remaining Market

## Whole Foods



## Remaining Market

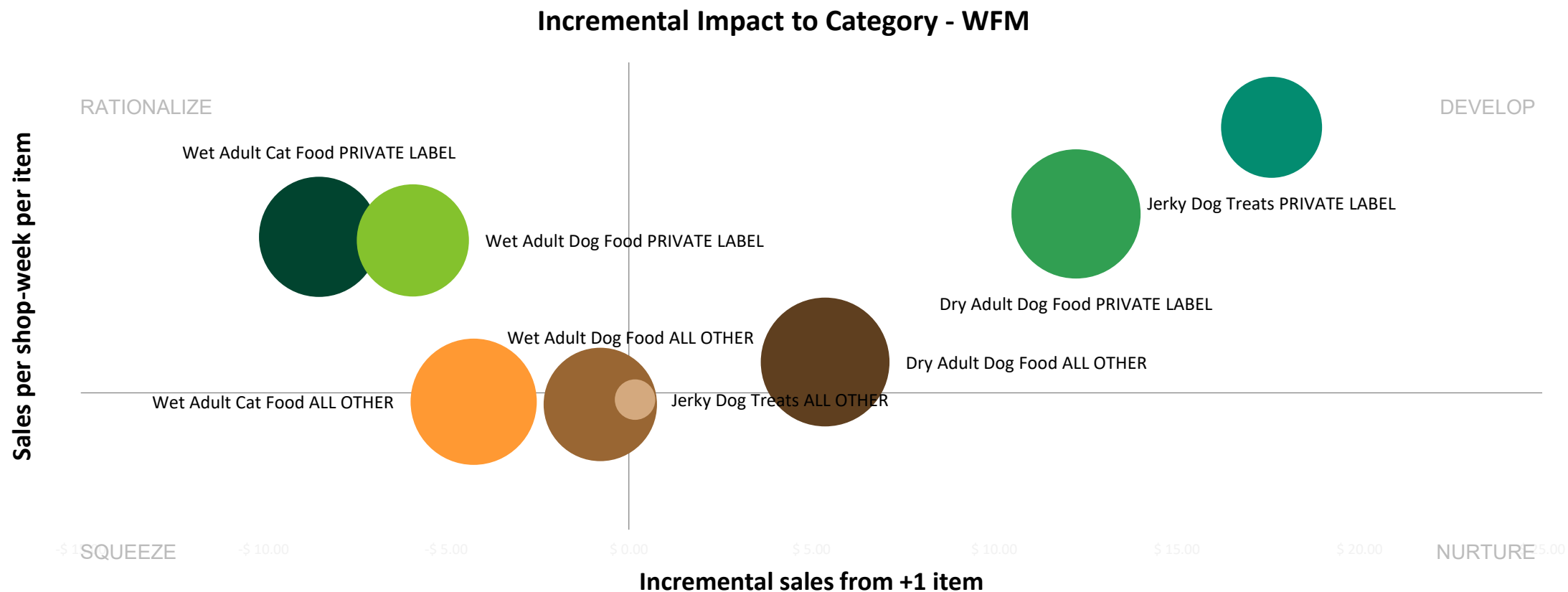


- Develop **Sea Salt** as the class is the top performing for WFM and is leading compared to REM
- REM is leading for **Specialty Salt** compared to WFM in regard to incrementality, driven by Lawry's and Morton brands
- **Salt Substitute** is an additional class in REM not featured in WFM, including Morton, No Salt, and Nusalt Seasoning Salt Substitute products

# NielsenIQ Assortment Incrementality: Branded vs Private Label



There are opportunities to rationalize Private Label in favor of Branded in Wet Adult Food, and Wet Adult Cat Food; however, the opportunities are more at a class level rather than a brand as Private Label is rarely uniquely saturated or detrimental, and in classes like Jerky Dog Treats and Dry Adult Dog Food, Private Label is recommended to develop based on incrementality to the category.



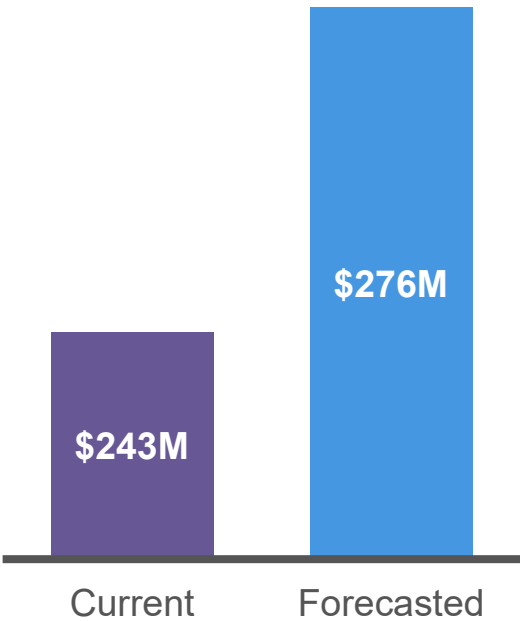
# WFM runs scenarios to understand category impact of optimizing the assortment and/or adding or removing certain brands or items



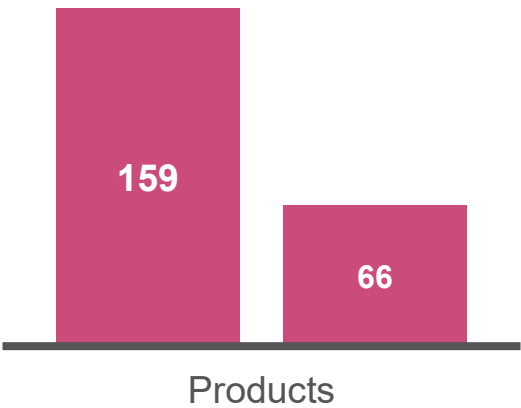
In the optimal scenario, WFM can expect to grow category sales by 13.5%

## Category Sales

13.5% ▲

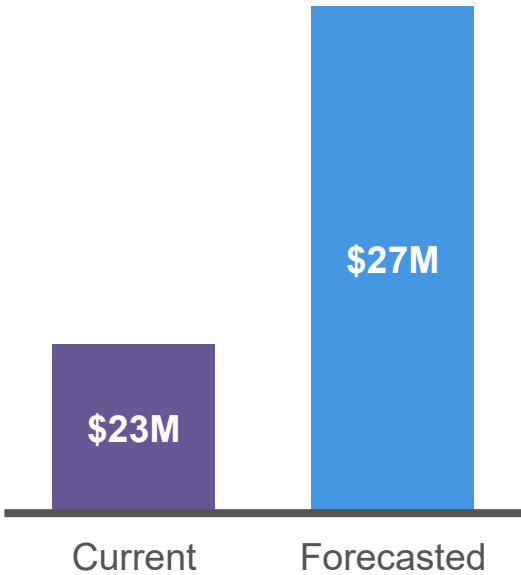


Added: 18 products  
Forecasted: \$62M  
Dropped: 111 products  
Current: \$70M

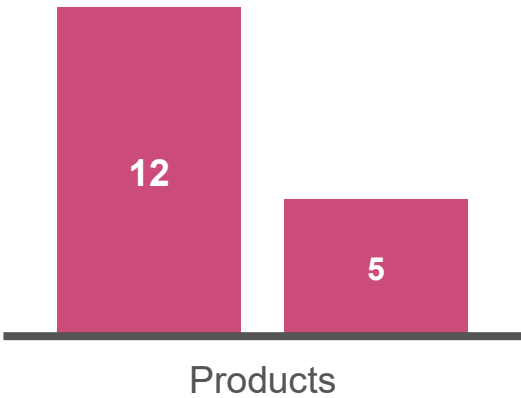


## Brand X Sales

15.9% ▲



Added: 0 products  
Forecasted: \$0  
Dropped: 7 products  
Current: \$4M



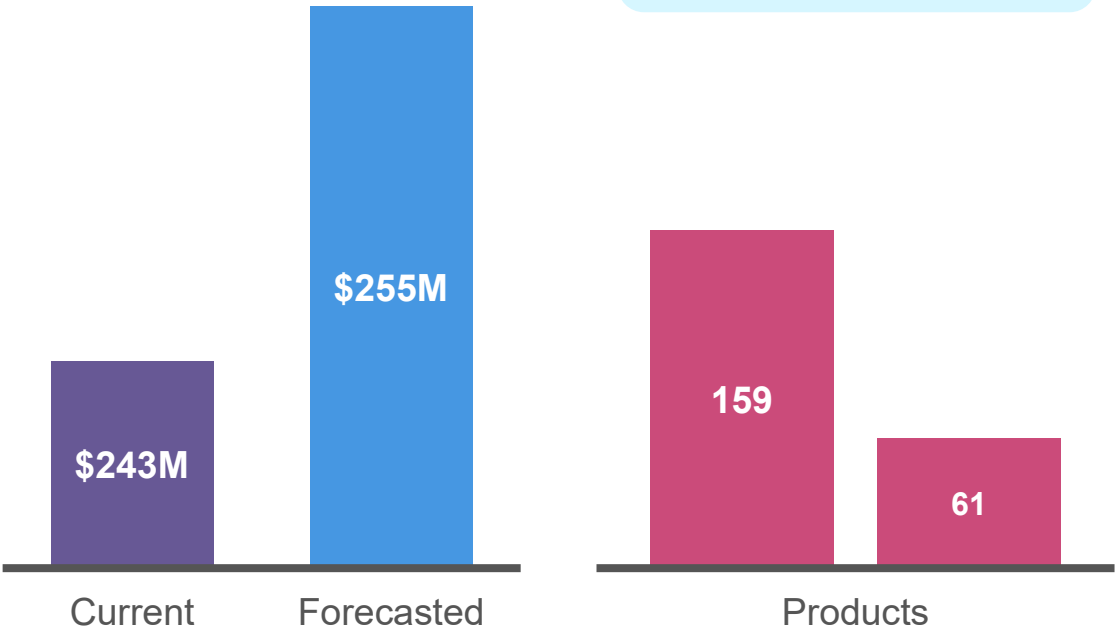
# WFM runs scenarios to understand category impact of optimizing the assortment and/or adding or removing certain brands or items

Further modified Shelf Architect's Optimal Scenario, by dropping seven BRAND items.  
 If BRAND is discontinued entirely, WFM can expect % growth.

## Category Sales

5.0% ▲

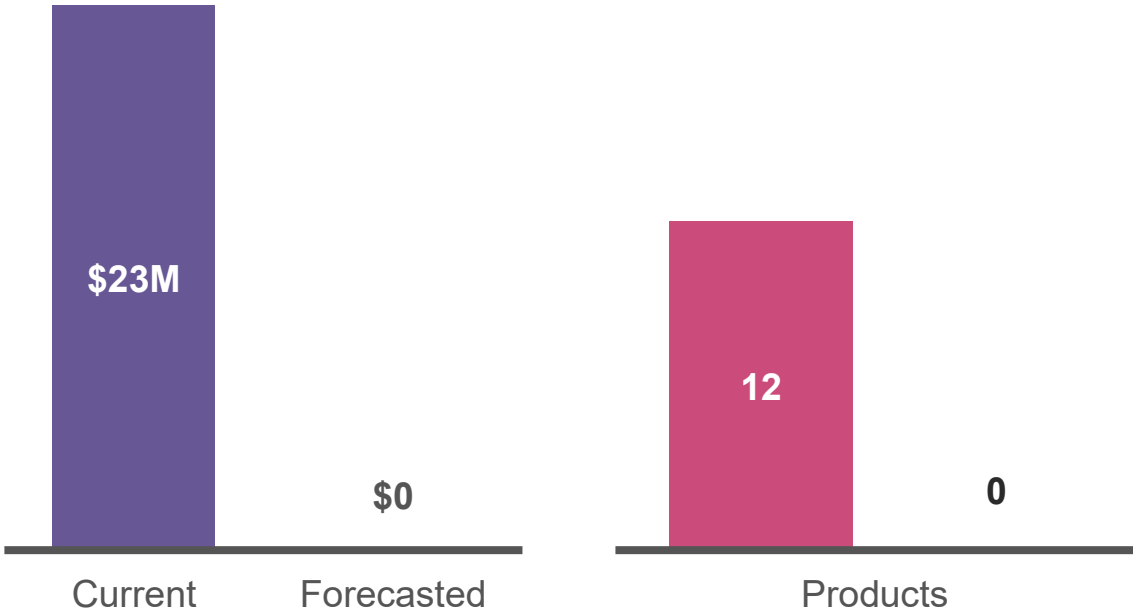
Added: 18 products  
 Forecasted: \$62M  
 Dropped: 116 products  
 Current: \$89M



## Brand X Sales

-100.0% ▼

Added: 0 products  
 Forecasted: \$0  
 Dropped: 12 products  
 Current: \$23M



# Take the risk out of assortment decisions

Key takeaways from today's discussion...

## 1. The purchase decision happens before the door

75% decide before entering; is your shelf fulfilling that decision or still trying to win it?

## 3. One shopper, several contradictory needs

The same basket trades up, trades down, and prioritizes health at once.

## 5. Sometimes less assortment drives more growth

Where could fewer, sharper choices do more?

## 2. Loyalty is now a weekly re-vote...

with shoppers rotating retailers weekly, what earns *this* trip?

## 4. Sales rate isn't the criteria for shelf presence

Which items fulfill a unique need, driving incremental sales for the category?

## Your Questions?

For additional information, reach out to [Wendy.Rigterink@NielsenIQ.com](mailto:Wendy.Rigterink@NielsenIQ.com)





*Thank you for attending...*

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*Additional Questions?*



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