



Launch Fast, Learn Faster

Are you reading the early signals –
before your product launch falls behind?

Part 3 – Incrementality

NIQ Consumer Panel Services, October 2026



Innovation success is becoming harder to **achieve** and more important to **predict**

*The
innovation
bar is rising...*

Only 33%
of launches in 2025 reach
1% of penetration

Only 17%
of launches achieve both
strong trial & repeat

Less than 50%
of claimed repurchase intent
translates into actual repeat
purchase

What separates the winners?

**Brands that manage to win
the innovation game:**

1. Find the right **white spaces**
2. Track **early signals**
3. **Act** before it is too late

And ultimately...

***Drive incremental
growth***

Source: NIQ Consumer Panel data for calendar year 2025, NIQ New Product Alert studies over 15 years

New products refer to new brands or sub-brands per category, as per NIQ syndicated category definition and coding that appeared in 2025 and were active during the last 3 months of 2025

Understanding adoption is not the same as understanding growth

Successful innovations must do more than recruit and retain consumers; they must create incremental value

Only a minority of innovations successfully recruit and retain consumers.

But even those that do, face one final test: proving they are creating growth

In a world of abundant innovation and limited shelf space, retailers reward launches that expand the category rather than simply redistribute existing demand.

The final question is no longer "Did consumers buy it?" but "***Did it grow the business?***"

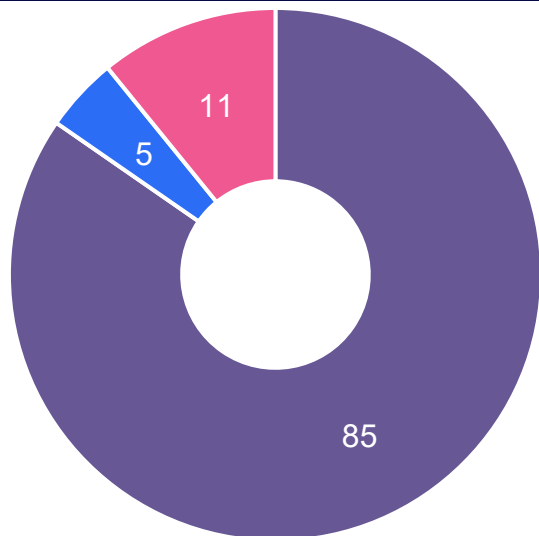
NIQ Sourcerer analysis measures the **true impact of a new product's introduction into the marketplace**, purified from market or consumer behavior changes due to other reasons.

Sourcerer improves the accuracy of a new product's source of sales, by **adjusting for underlying sales trends** that already existed before the product launch.

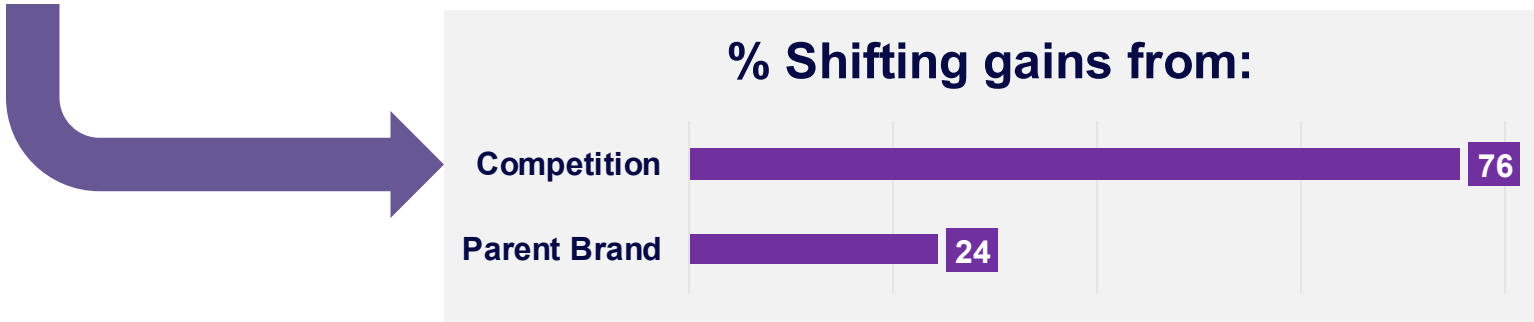
The source of growth matters as much as the sales

Evaluating growth requires understanding not only of how much was sold, but also where those sales came from

Example: % Source of Value after 52w of launch



- New category buyers:** % of new product's sales coming from new category buyers that enter the category by purchasing the new product
- Category expansion:** % of new product's sales coming from existing category buyers that increase their spend on the category via purchasing the new product
- Shifting:** % of new product's sales coming from consumers shifting from another brand (competitive or parent)



Reporting *the true impact of a new product's introduction*, pure from underlying sales trends that existed pre-launch

From consumer adoption to business value

91 innovations that outperformed on Trial & Repeat, evaluated
through the lens of incrementality

Not all innovation sales create the same *value*

Understanding where volume comes from helps reveal the true value created by innovation

- In the first part of our analyses, we focused on identifying the norms of trial and repeat across countries and categories, based on *more than 3.000 launches* that took place in 2025 within the big 5 European countries
- This enabled us to isolate those that *over-performed* in terms of reaching and retaining buyers during their early launch phase
- With this publication, we are taking a step further, assessing and sizing the *source each innovation's sales* within its first year of launch

All launches analyzed have already proven their ability to ***recruit and retain*** consumers

The question now is whether they created ***additional value*** for their category and business

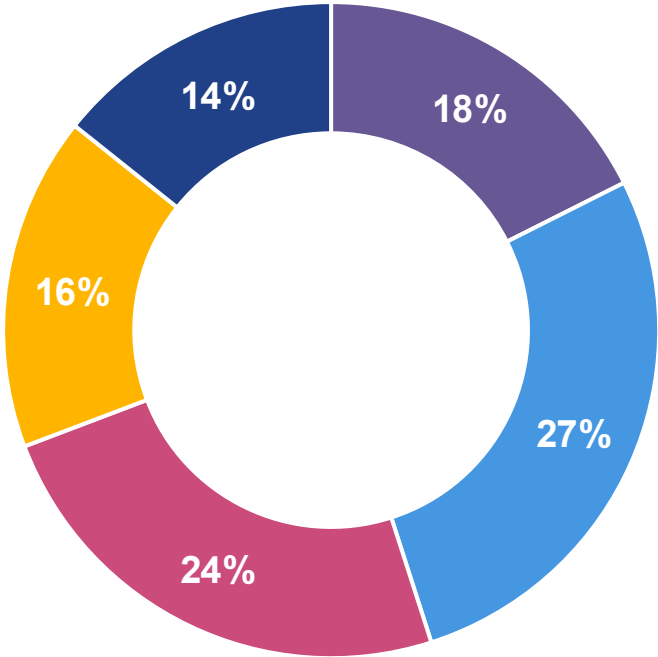
91 new brands and sub-brands launched in 2025 across the EU5

Focusing on those generating above average trial & repeat rates within their respective country and category

Sourcerer analyses structure per country

% of EU 5:

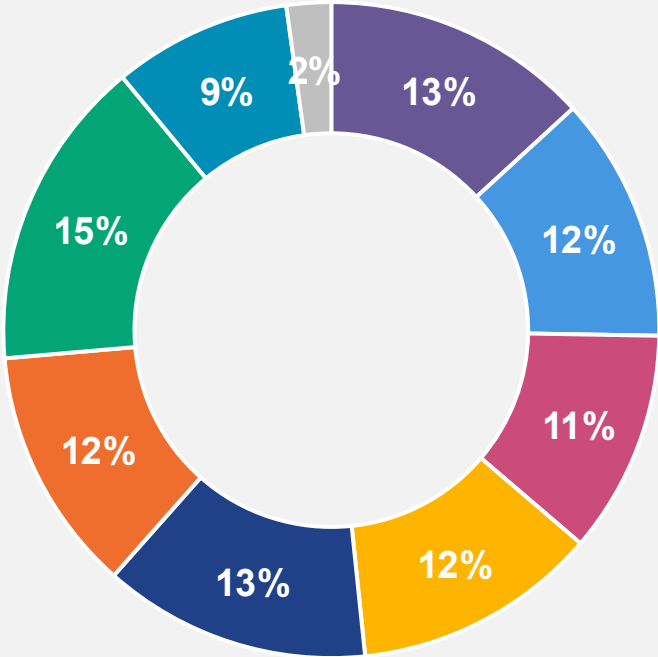
- Germany
- France
- Great Britain
- Italy
- Spain



Sourcerer analyses structure per category

% of EU 5:

- Conf. & Snacks
- Food Ambient
- Food Frozen
- Food Perishable
- H&B
- Homecare
- Non Alc. Beverages
- Alc. Beverages
- Pet Food



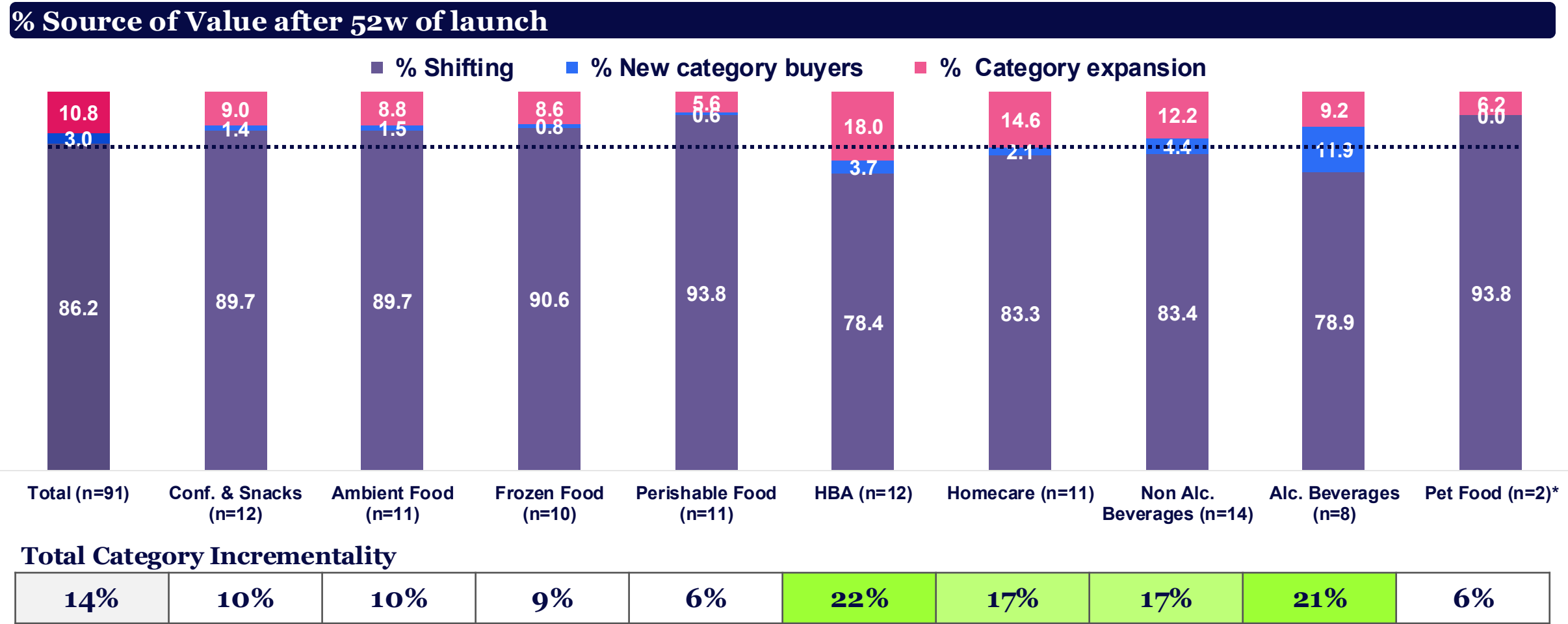
Source: NielsenIQ Consumer Panel Sourcerer analysis, after 52weeks as of launch
Sample: 91 launches of new brands and sub-brands across the UK, Germany, France, Italy and Spain that took place during 2025, that over-performed in terms of % Trial and % Repeat in their first 36 weeks of launch

The sources of innovation's growth

91 innovations throughout 2025 in EU 5

Even for high recruiting innovations primarily source via shifting demand

The extent to which a launch expands its overarching category spending or recruits new buyers can vary by sector



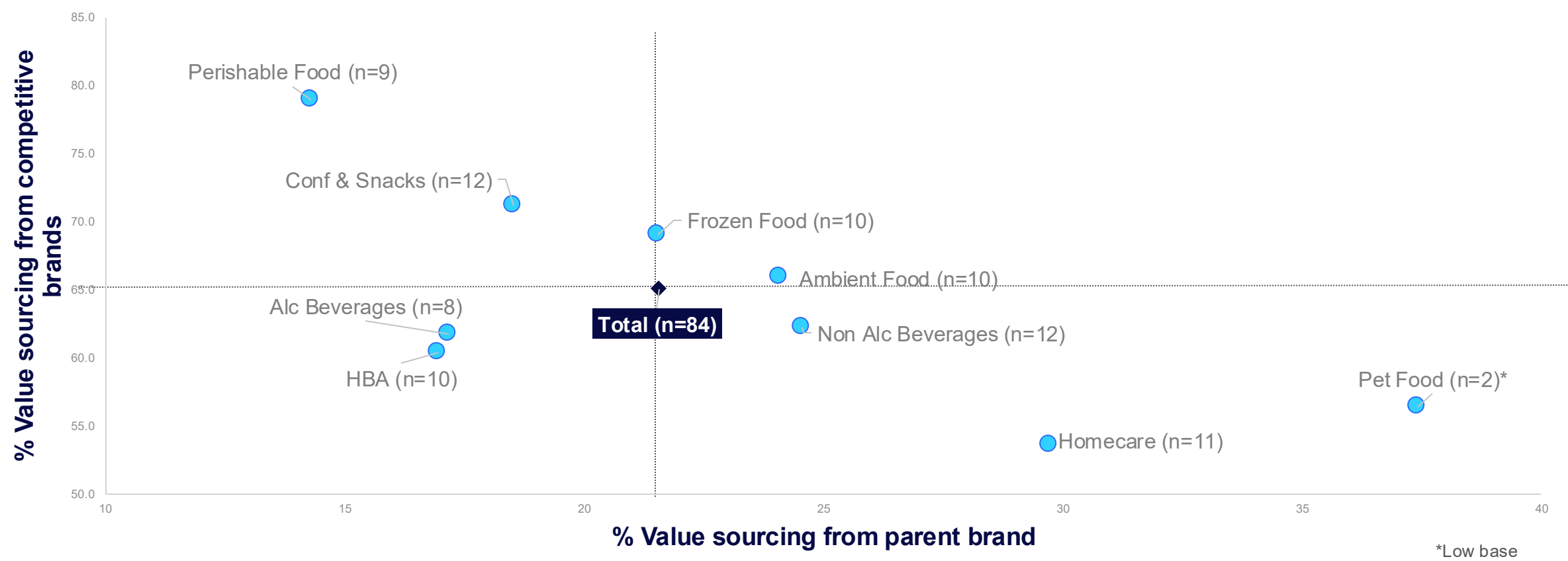
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*Low base

Shifting is universal, but its source matters

Not all shifting creates the same growth story: some innovations win from competitors, while others rely more heavily on existing franchise strength.

Average % Value sourcing from Parent Brand vs. Competition



Source: NielsenIQ Consumer Panel Sourcerer analysis, after 52weeks as of launch
Sample: 84 launches of new sub-brands across the UK, Germany, France, Italy and Spain that took place during 2025, that over-performed in terms of % Trial and % Repeat in their first 36 weeks of launch

How much cannibalization is too much?

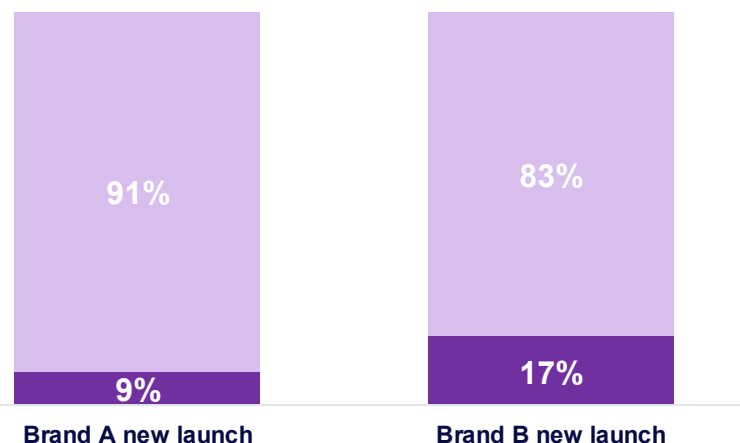
Expected overlap can vary by franchise

One country – One category – Two different launches

Brand B's new launch is **sourcing twice as much** from its parent brand vs. Brand A...

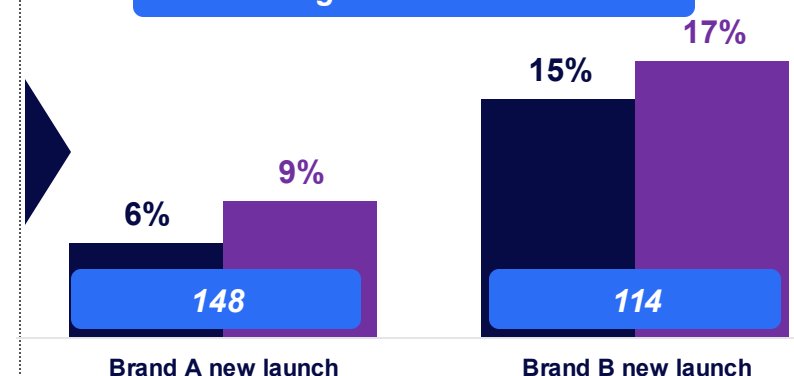
... but this is **48% more** than Brand A's total share

■ % Shifting from Parent Brand ■ % Shifting from Competition



■ Parent Brand Value Share pre-launch
■ % Shifting from Parent Brand

Sourcing index vs. fair share



The same level of parent-brand sourcing can mean very different things depending on franchise size.

Benchmarking the internal sourcing against fair share (interaction index) puts **internal interaction into the right context**

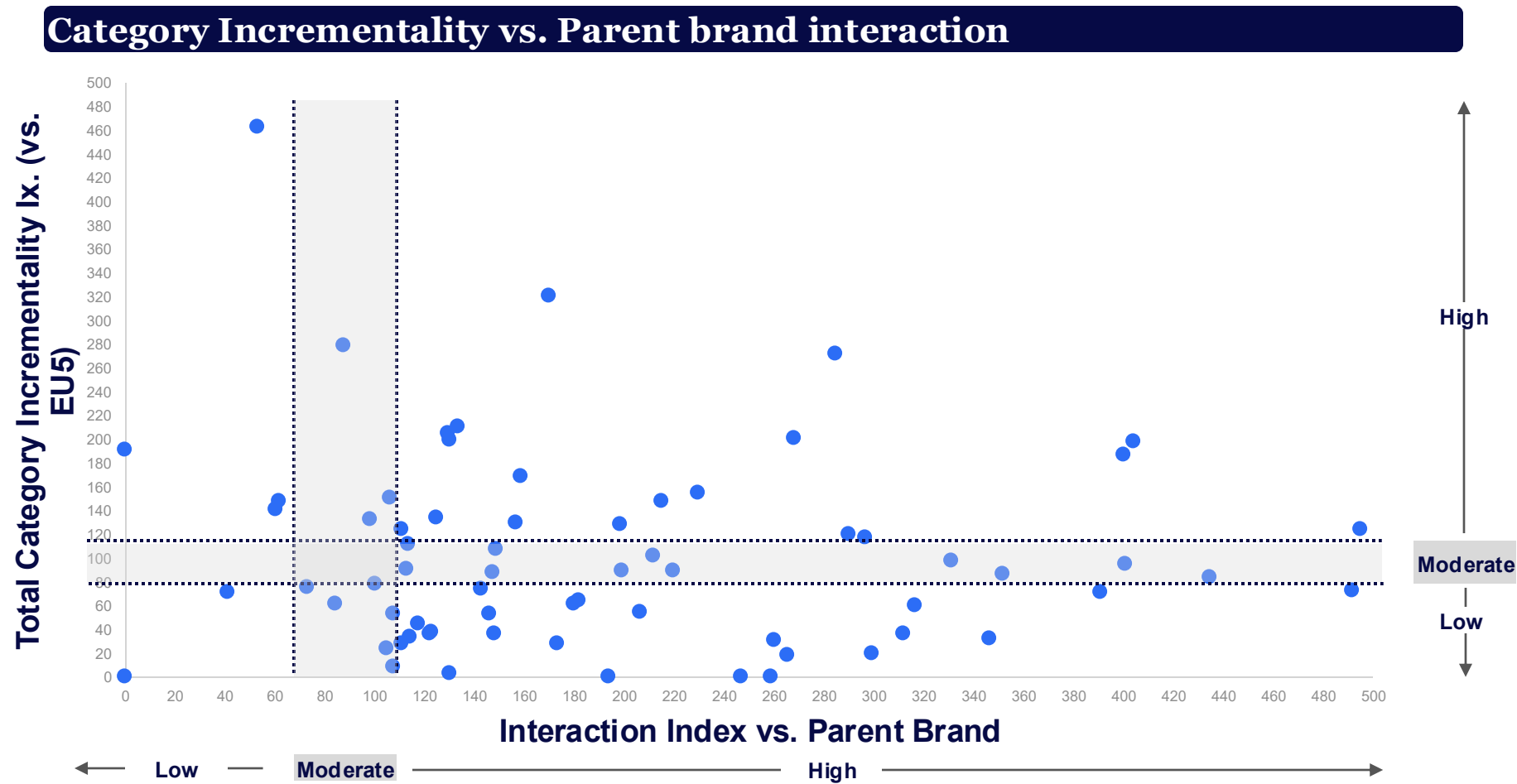
Interaction Index:

- <80: lower than expected
- 80-120: as expected
- >120: higher than expected

Source: NielsenIQ Consumer Panel Sourcerer analysis, after 52 weeks as of launch
Sample: 2 launches under Sweet Bakery Snacks product category by two different brands in 2025

Winning consumers does not guarantee the same growth outcome

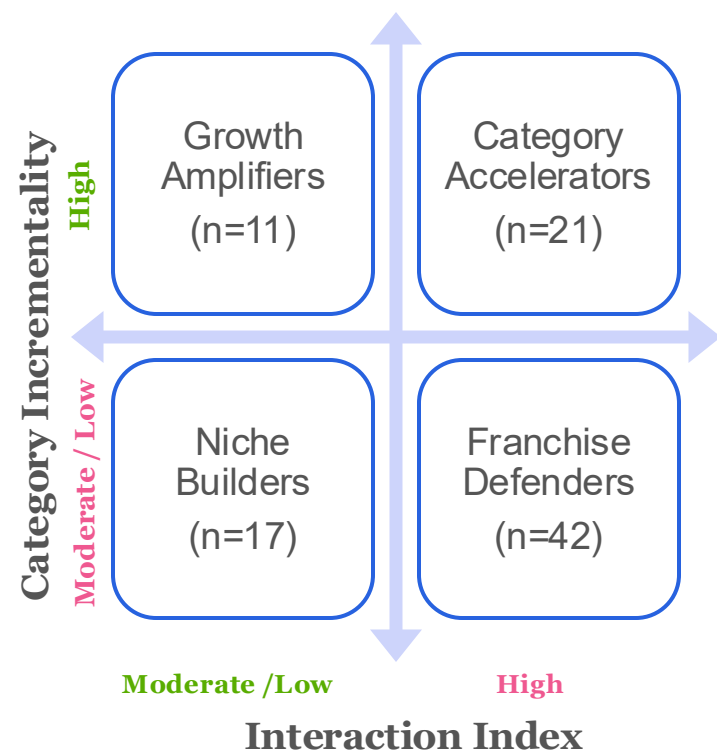
Among innovations that successfully drove Trial and Repeat, category incrementality ranged from highly expansionary to largely franchise-led growth.



Source: NielsenIQ Consumer Panel Sourcerer analysis, after 52weeks as of launch
Sample: 84 launches of new sub-brands across the UK, Germany, France, Italy and Spain that took place during 2025, that over-performed in terms of % Trial and % Repeat in their first 36 weeks of launch

Not all successful innovations create value in the same way

Their contribution ranges from creating incremental demand, to defending and strengthening existing franchises.



Growth Amplifiers:

Generate **above-average category growth** with limited reliance on the parent franchise

Category Accelerators:

Deliver **strong category growth** while leveraging the strength and equity of their parent franchise.

Niche Builders:

Address specific consumer needs or occasions, delivering **focused impact**

Franchise Defenders:

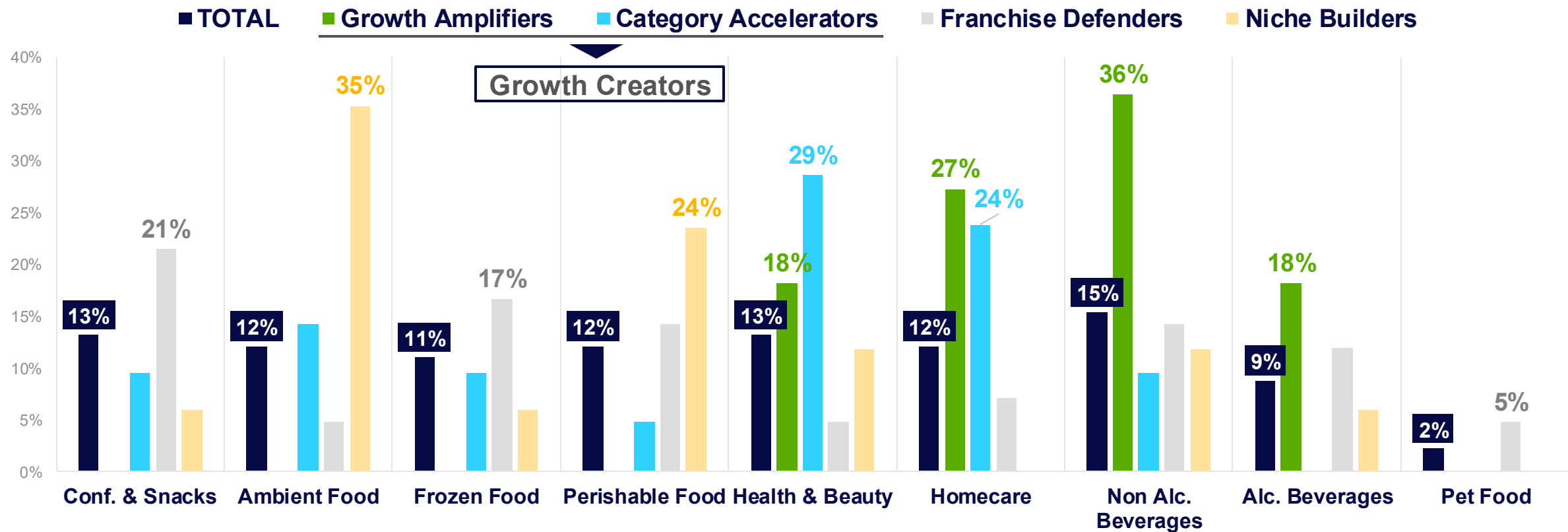
Help reinforce **franchise relevance** and **retain value** within the portfolio

Source: NielsenIQ Consumer Panel Sourcerer analysis, after 52weeks as of launch
Sample: 91 launches across the UK, Germany, France, Italy and Spain that took place during 2025, that over-performed in terms of % Trial and % Repeat in their first 36 weeks of launch

Different categories reward different innovation strategies

While some categories naturally favour certain innovation roles, exceptional launches can break these norms and generate meaningful category growth

Category representation within each archetype

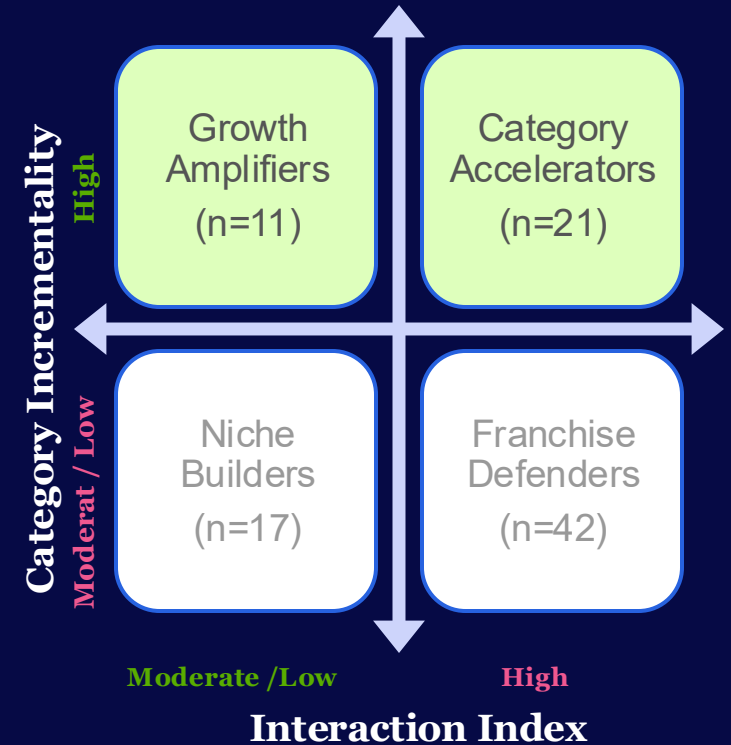


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The growth creators

32 out of 91 2025 innovations examined in EU5

Only **one-third** of successful innovations generate above-average **category growth**. What makes them different?



What do growth creators have in common?

Removing *barriers*

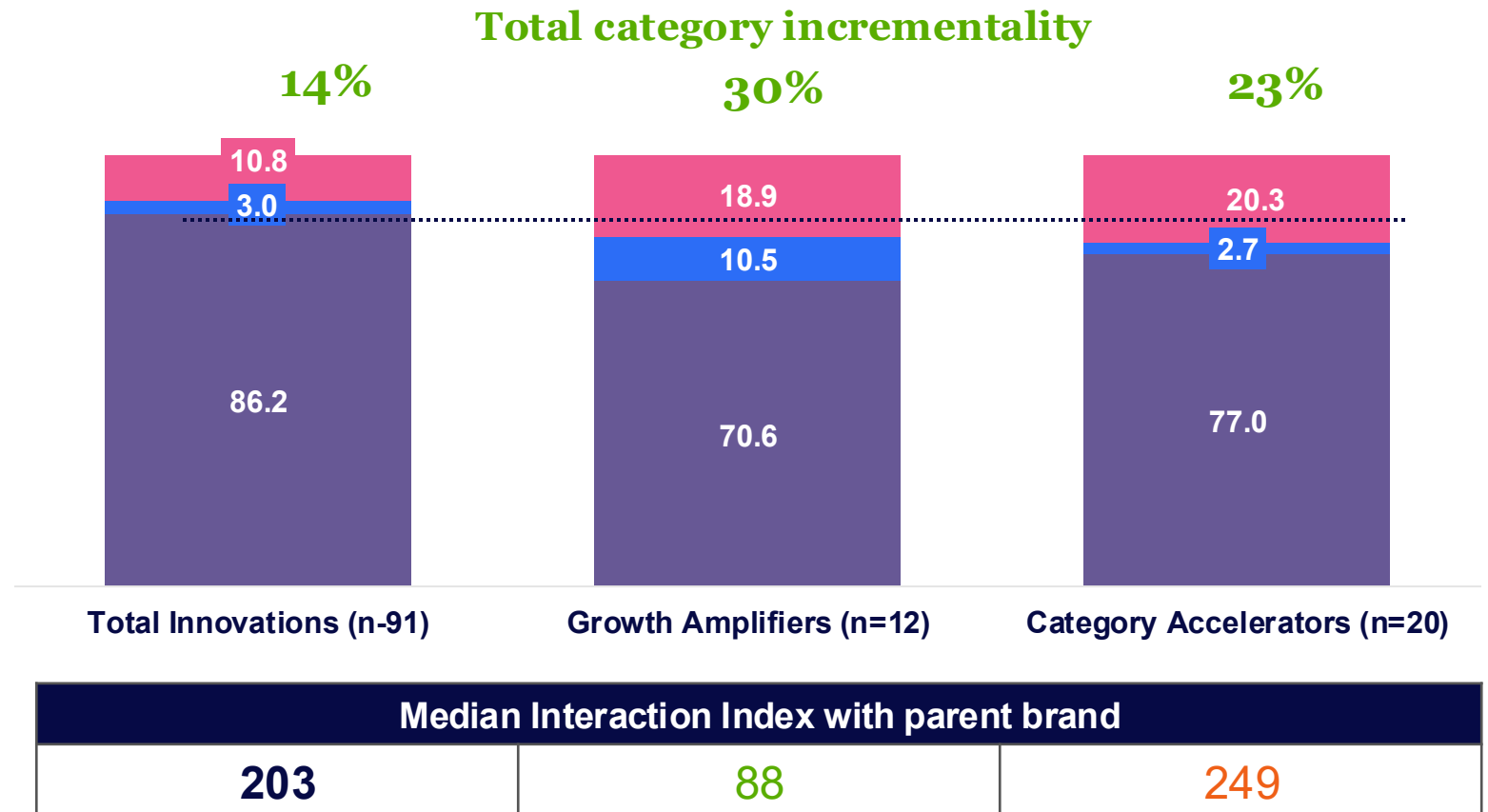
Expanding category *relevance*

Solving consumer *tensions*

Refreshing consumer *engagement*

Average % Source of Value *Growth Creators (Growth Amplifiers & Accelerators) vs. Total*

■ % Shifting ■ % New category buyers ■ % Category expansion



Source: NielsenIQ Consumer Panel Sourcerer analysis, after 52 weeks as of launch

Sample: 91 launches across the UK, Germany, France, Italy and Spain that took place during 2025, that over-performed in terms of % Trial and % Repeat in their first 36 weeks of launch

Removing barriers to category participation

By making categories more compatible with evolving consumer needs and expectations, these innovations unlock demand that may not have existed otherwise.

Launches addressing emerging consumer needs and unlocking demand



The first alcohol-free cider with no sugar and no calories,

Somersby Zero

69% incrementality to Total Cider
53 interaction ix. with parent brand



"The pasta taste you love + a push of protein."

Barilla Protein+

incrementality to Total Dry Pasta **18%** **21%**
interaction index with parent brand **157** **230**

Tropicana Fresh & Light

20% incrementality to Fresh Juices
62 interaction ix. with parent brand

"The fresh taste of Tropicana, now naturally lighter."



Vittel Fruite

23% incrementality to Total Mineral Water
1.3k interaction ix. with parent brand

Combines natural mineral water with a dual-fruit juice blend for a low-calorie, refreshing treat.



Officially launched by popular French YouTuber Squeezie,, offering low-sugar, low-calorie and probiotic-rich alternative to traditional sodas



Ciao Kombucha

33% incrementality to Total Still Soft Drinks
5% via bringing new buyers in the category



25g of protein in a fat-free, no-added-sugar milkshake, with an indulgent taste

Pro Milk

15% incrementality to Total Milk
6.8k interaction index with parent brand

Creating new consumption occasions

By broadening who uses the category, how they use it or the role it plays in consumers' routines

Launches created and positioned to expand when and how consumers use the category



Creating indulgent dairy moments for adults



Pascual Lateado

40% incrementality to Total Milk
100% of it by increasing existing **HHs'** spent

Rotkäppchen Secconade

27% incrementality to Total Alc. Pre-Mixes
100% of it by bringing **new category buyers**



A traditional sparkling wine brand extending to Mixes



Answering the growing trend of cold coffee consumption among young consumers

Nescafe Espresso Concentrate

18% incrementality to Coffee
98 interaction ix. with parent brand



72-hour aluminum-free odor protection and anti-friction care for the entire body, utilizing a skin-friendly, vitamin-infused formula

Dove Whole Body

incrementality to Deodorants
interaction index with parent brand



44%
170



38%
285

Odour Adapt technology, safely formulated without aluminum for sensitive areas from head to toe

Sure Whole Body Deo

23% incrementality to Deodorants
159 interaction index with parent brand



Solving consumer tensions, by making life easier

By removing friction from existing routines, these innovations make everyday tasks easier, faster and more effective

Launches that address tension points consumers had learned to accept



Eliminating the messy kitchen clutter, allowing consumers to reclaim their time and maintain a tidy home without waiting.

Fairy Skip the Soak / Poder 3 in 1

incrementality to Hand Dish
interaction index with parent brand



21% 29%

107 134



Lifts stubborn, 7-day dried-on stains in a single wash, dissolving rapidly to deliver deep cleaning power even in cold cycles

Ariel Platinum+ Poder Quitamanchas

17% incrementality to Laundry Detergents

290 interaction ix. with parent brand

Directly addressing consumers who let their dishwashers fill up over a few days before running a cycle

Sun 4 in 1 Pro Expert

17% incrementality to Auto Dish Det.

111 interaction ix. with parent brand



“Experience the short-wash magic with Coral Magic Wash: Clean clothes in 15 minutes.”

Coral Magic Wash

14% incrementality to Laundry Detergents

212 interaction ix. with parent brand



Solving consumer tensions, by eliminating trade-offs

Innovations that successfully combine benefits which consumers previously believed required compromise.

Launches that address tension points by eliminating trade-offs



Addressing both a clinical) and cosmetic need, resolving the fear of whitening toothpastes exacerbate tooth sensitivity

Sensodyne Clinical Repair Active White
39% incrementality to Total Toothpastes
88 interaction ix. with parent brand



Designed to treat dermatological concerns directly during the cleansing process

Sanex Derma Therapie
27% incrementality to Total Bath & Shower
405 interaction ix. with parent brand

A, live-bacteria formula designed to naturally maintaining a micro-clean barrier for up 3 days, keeping children and pet safe

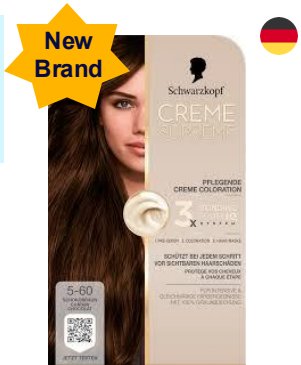
Cif Infinite +
incrementality to HH Cleaners
interaction index with parent brand

	
19%	28%
61	130



Providing a salon-quality for at-home coloring experience that delivers 100% grey coverage alongside professional-grade hair repair

Crème Supreme
25% incrementality to Hair Colorants
Attracting both **higher spend** of existing consumers and **new consumers** in the category



Refreshing consumer engagement

In categories where novelty is expected, most launches sustain engagement. These examples stand out because they converted engagement into category growth.

Innovations that make familiar categories feel new again



A sugar-free snacking experience, twice the size of the original Tic Tac

Tic Tac Two

31% incrementality to Total Candies
130 interaction ix. with parent brand



Expanding beyond freshness mints towards freshness, flavour and enjoyment

Frisk Sours

28% incrementality to Total Candies
268 interaction ix. with parent brand

Magnum Utopia

16% incrementality to Total Ice Creams
297 Interaction ix. with parent brand

Introducing a multi-sensorial marbled, multi-layer architecture



Snickers Gold

19% incrementality to Total Ice Creams
125 Interaction ix. with parent brand

Transforming a confectionery proposition into a more premium, elevated indulgence



Turning an energy drink into a cultural & lifestyle experience, inspired by Rio Carnival

Monster Rio Punch

18% incrementality to Total Energy Drinks
199 Interaction ix. with parent brand

Same *innovation* – different *outcomes*

The proposition may remain unchanged, but market context can significantly influence innovation outcomes.

- If innovation principles are universal, why can outcomes differ?
- The same launch can become a Growth Creator in one country and a Franchise Defender in another.
- While support and execution matter, market context often determines how strongly a proposition resonates. Some of these determining factors, include:
 - *Franchise strength*
 - *Category maturity*
 - *Competitive context*
 - *Consumer readiness*
- Understanding these differences is critical to setting realistic expectations and identifying the true role of innovation

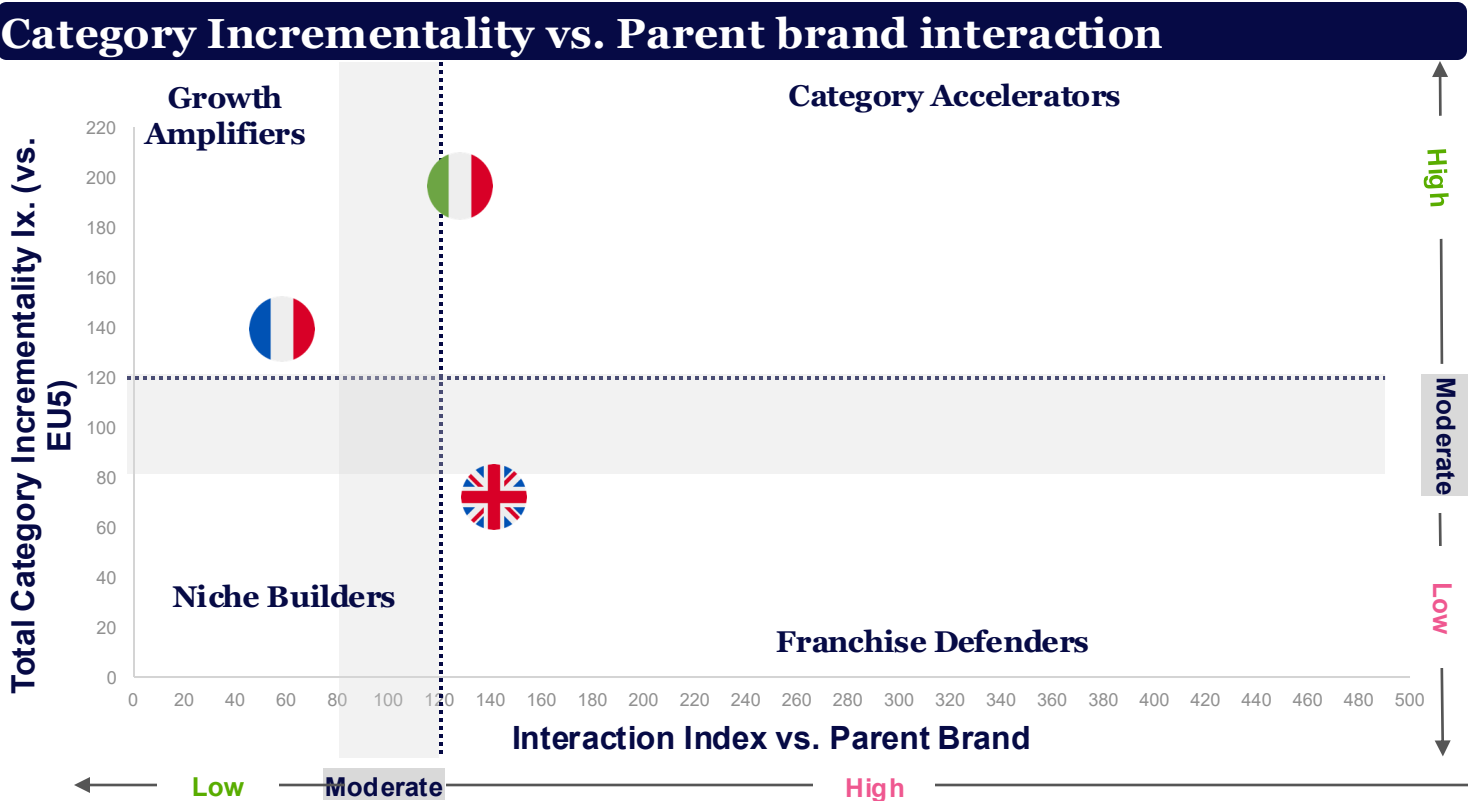
Let's explore how the same innovation can create different growth outcomes across markets.

Cif Infinite Plus – redefining what “clean” means

Despite comparable franchise strength across markets, the proposition generated very different growth outcomes. Local category dynamics can influence how innovation translates into growth.



“A unique technology with natural probiotics that continues to act after you have finished cleaning”
A, live-bacteria formula designed to naturally maintaining a micro-clean barrier for up 3 days, keeping children and pet safe



Source: NielsenIQ Consumer Panel Sourcerer analysis, after 52weeks as of launch
Sample: 91 launches across the UK, Germany, France, Italy and Spain that took place during 2025, that over-performed in terms of % Trial and % Repeat in their first 36 weeks of launch

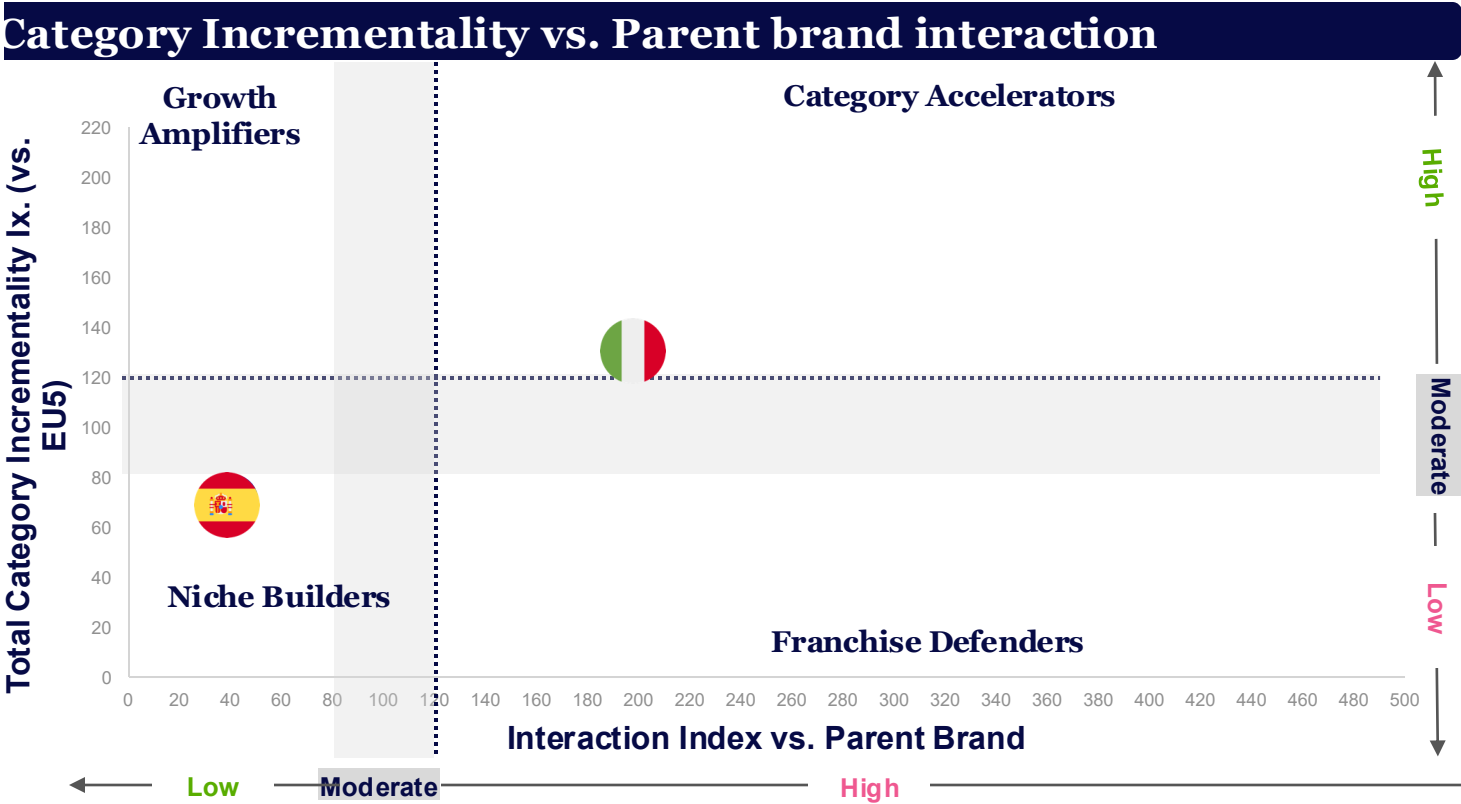
Category role		
High Incrementality Low Interaction	High Incrementality High Interaction	Low Incrementality High Interaction
Category Penetration		
93.5	92.5	87.6
Category annual purchase frequency		
8.6	9.8	7.8
Avg. # of items in HH repertoire		
5.9	7.2	4.8

Monster Rio Punch – turning an energy drink into an experience

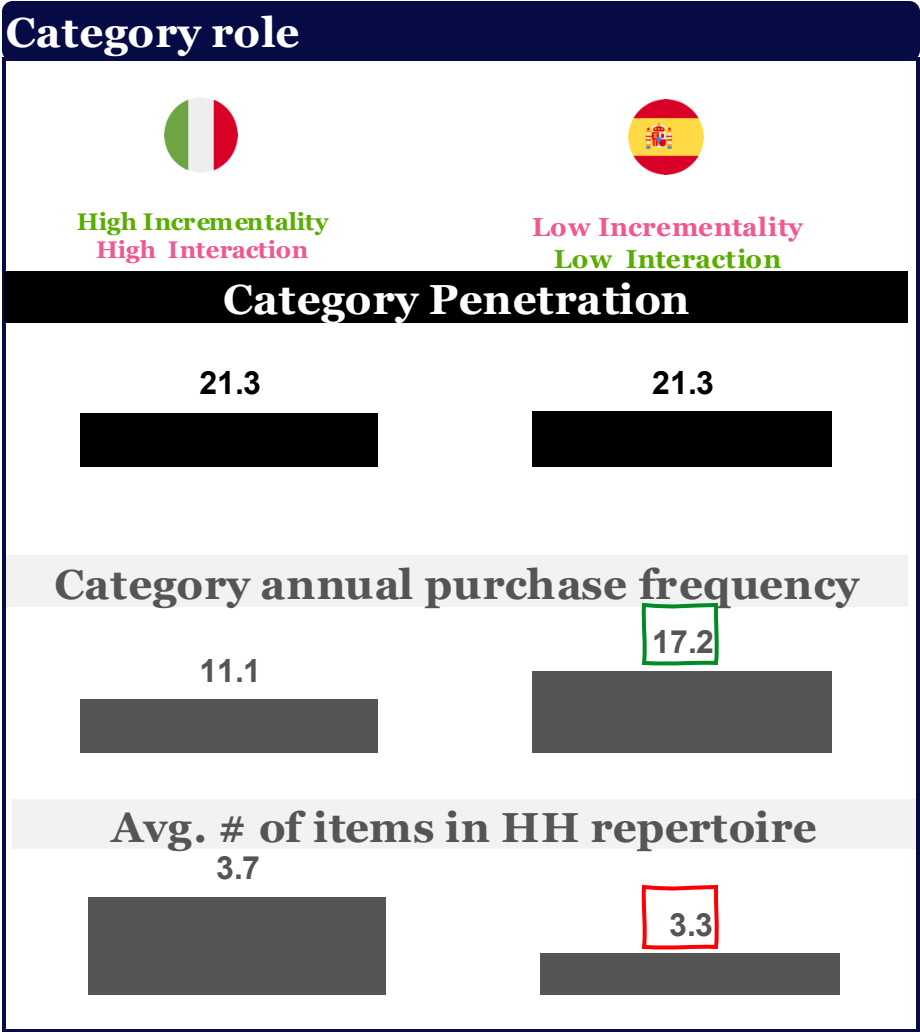
The country-category context influences how innovation creates value, shifting the balance between category recruitment and franchise reinforcement



“Exotic rhythm, pure energy.”
Turning an energy drink into a cultural & lifestyle experience, inspired by Rio Carnival



Source: NielsenIQ Consumer Panel Sourcerer analysis, after 52weeks as of launch
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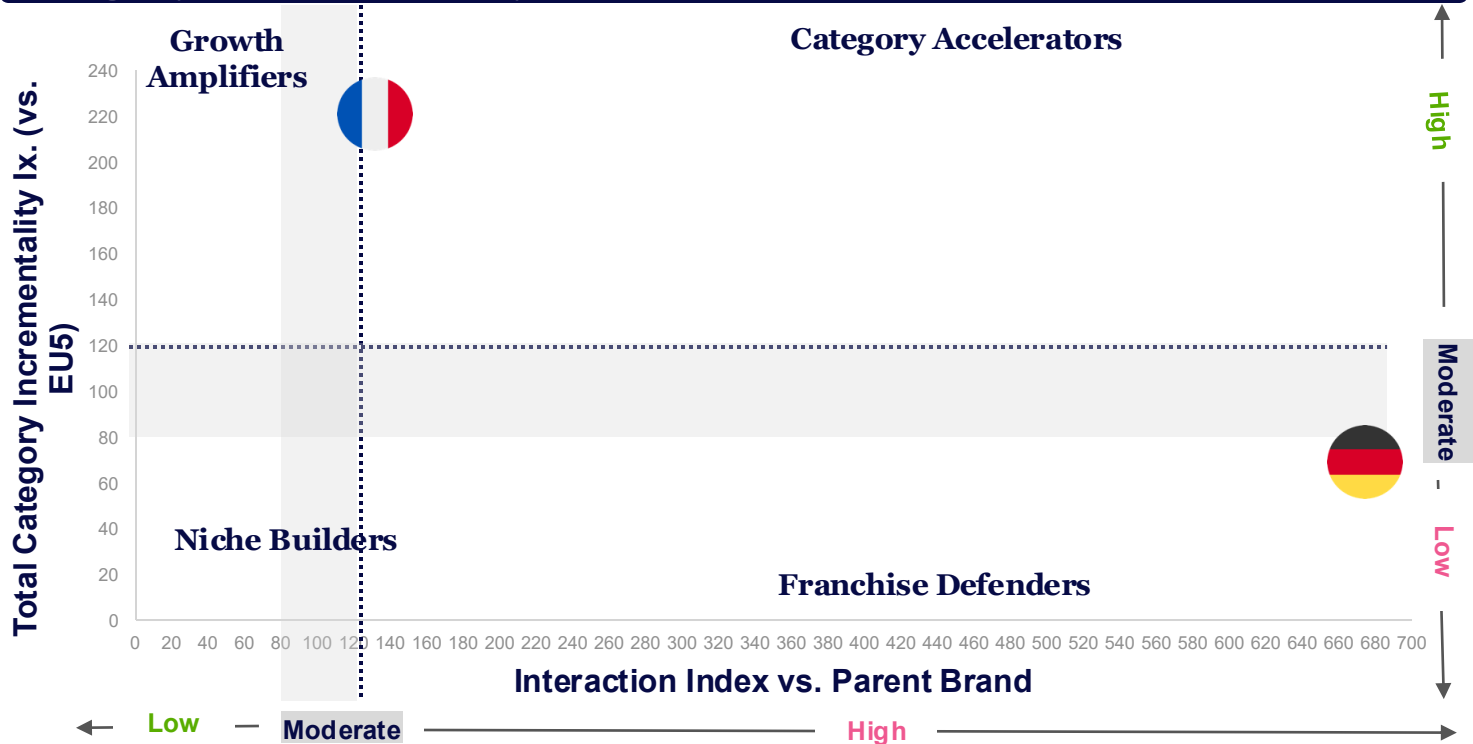
Tic Tac Two – a sugar-free snacking experience, twice the size of the original Tic Tac

Differences in category engagement can lead the same innovation to create value through different growth mechanisms.



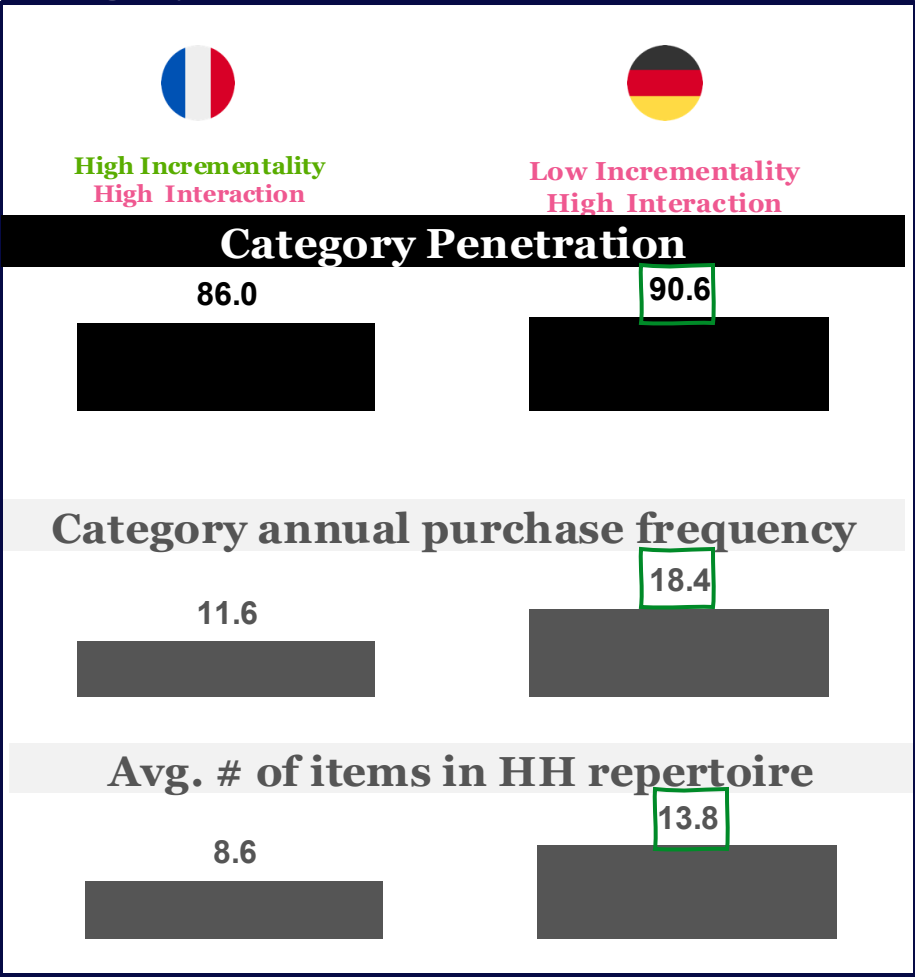
Two layers, two tastes, for twice the fun.”
A sugar-free snacking experience, twice the size of the original Tic Tac. Each piece blends two contrasting flavours, while serving as an on-the-go breath freshener

Category Incrementality vs. Parent brand interaction



Source: NielsenIQ Consumer Panel Sourcerer analysis, after 52weeks as of launch
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Category role



Schwarzkopf Crème Supreme – bringing professional care at home

Not every market offers the same opportunity to translate an innovation’s success into category growth



New Brand

New brand introduction

“The color you desire with the care you deserve.”

Providing a salon-quality for at-home coloring experience that delivers 100% grey coverage alongside professional-grade hair repair



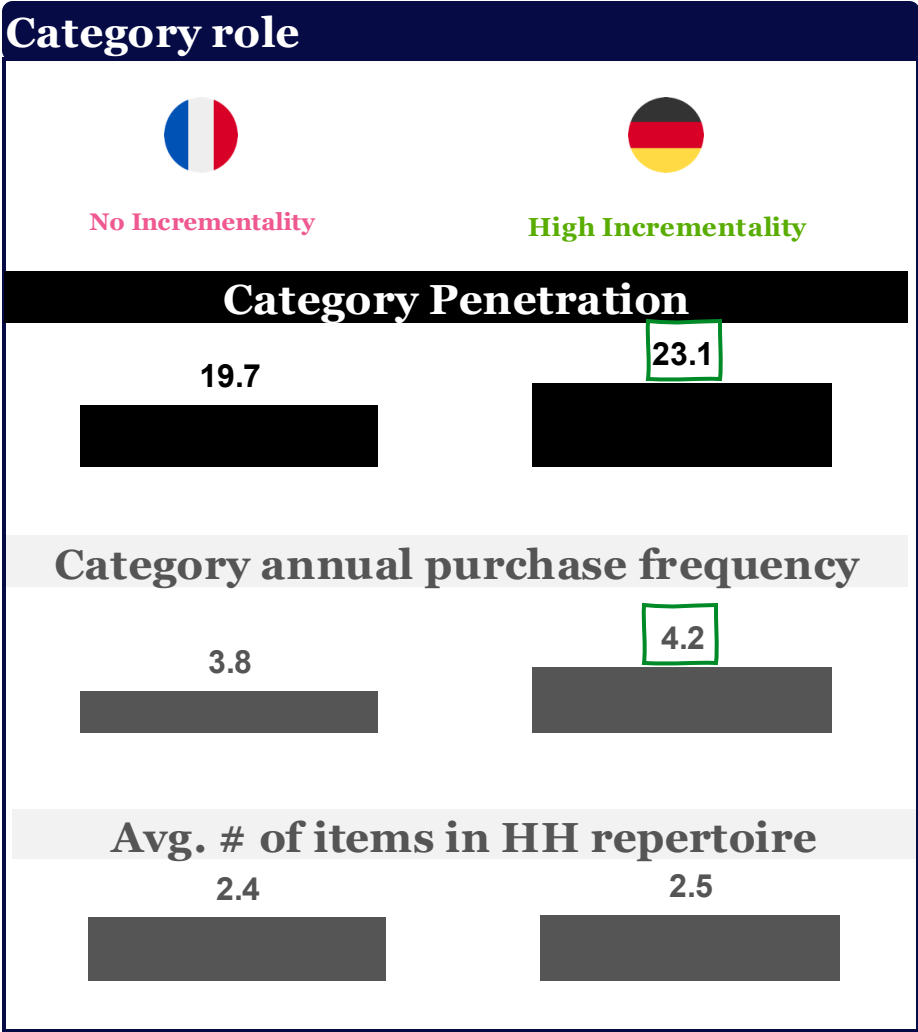
0% incrementality to Total Hair Colorants



25% incrementality to Total Hair Colorants
ix. 181 vs. EU5

- The **Crème Supreme** launch delivered very different outcomes in France and Germany.
- In both markets it successfully recruited and retained consumers, but only in **Germany** did it generate meaningful **category incrementality**
- This does not imply greater or lesser innovation success. Instead, it highlights how **the role of the category within each market** can influence growth outcomes
- Understanding how consumers fulfil their beauty needs, whether within the category or through alternative solutions, helps establish more **realistic innovation expectations**

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What's next?

Turning early signals into sustainable growth

What we've learned across our three publications

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innovation
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Only 33%
of launches in 2025 reach 1% of
penetration

Only 17%
of launches achieve both strong
trial & repeat

Less than 50%
of claimed repurchase intent
translates into actual repeat
purchase

*Even among successful innovations,
over 85% of sales come from existing
demand*

What makes the difference?

The strongest growth creators:

1. Remove **barriers** to participation
2. Expand category **relevance**
3. Solve meaningful consumer **tensions**
4. Create new reasons to **engage**

Are you tracking if your launch is delivering against its intended goal?

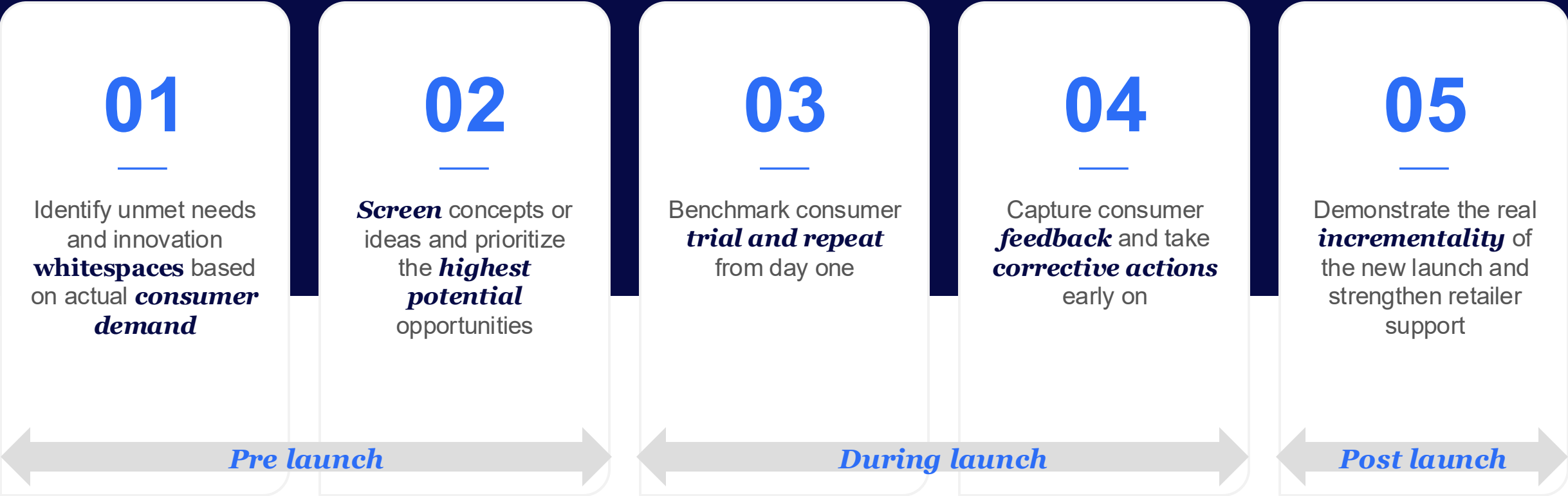
Source: NIQ Consumer Panel data for calendar year 2025

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How NielsenIQ helps turn *innovation* into *growth*

From identifying opportunities to proving incrementality, NielsenIQ helps manufacturers make better innovation decisions at every stage of the launch lifecycle.

The path to successful innovation



Thank you!

Contact your NIQ partner to help you assess your Early Innovation Performance.

NielsenIQ