



Consumer Outlook

Africa & Middle East

Guide to 2027

NIQ

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Guide to 2027: Your strategic roadmap through disruption

Building roots in uncharted territory

Consumers are no longer responding to disruption as a ‘temporary’ condition.

The next 12-18 months could see **a global lift in the prolonged holding pattern** many households have found themselves in after consecutive periods of disruption.

NIQ’s *Consumer Outlook: Guide to 2027* will explore this anticipated **shift from experimentation to adaptive commitment in consumer decisioning**. Marrying rich analytical purchase insights with global consumer sentiment data, we will highlight the new driving forces of consumer behavior—influenced by **digital acceleration, value-seeking, flexible living, and AI-assisted decision-making.**

In the year ahead, volatility will not disappear—it becomes embedded into consumers’ real-time optimizations: intentionality, trading breadth for focus, and calibrating to minimize excess.



Decode the past



Lead the present



Create the future



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Perpetual volatility sparks permanent change

Decision horizons have shortened, as consumers adapt to a seemingly constant state of socio-economic disruption.



Consumption at extremes

Systemic polarization of global consumer spending drives a stark divide into two spending mindsets: constraint vs. upgrade.



A new world of worth

Value is increasingly linked to a clear justification of purchase decisions. Price is now weighed against a prioritized set of situational factors.



Self-directed wellness

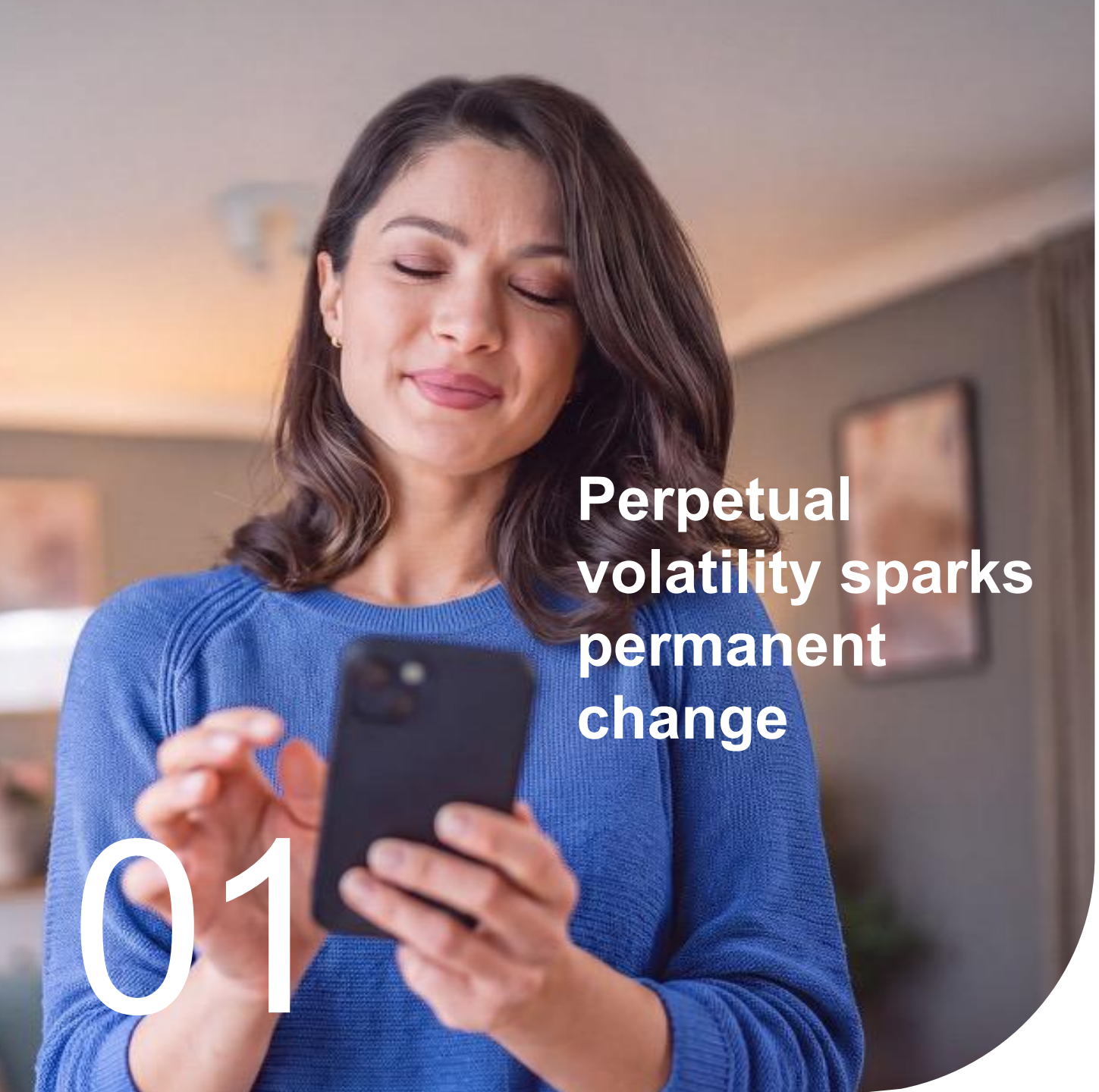
Pragmatic, function-focused consumers are taking the reins when it comes to active and individualized management of their health & wellness needs.



Agent-led discovery

Consumers are being fed AI-directed options, limiting and redefining the ways that brands must compete for share of mind and wallets.

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Perpetual volatility sparks permanent change

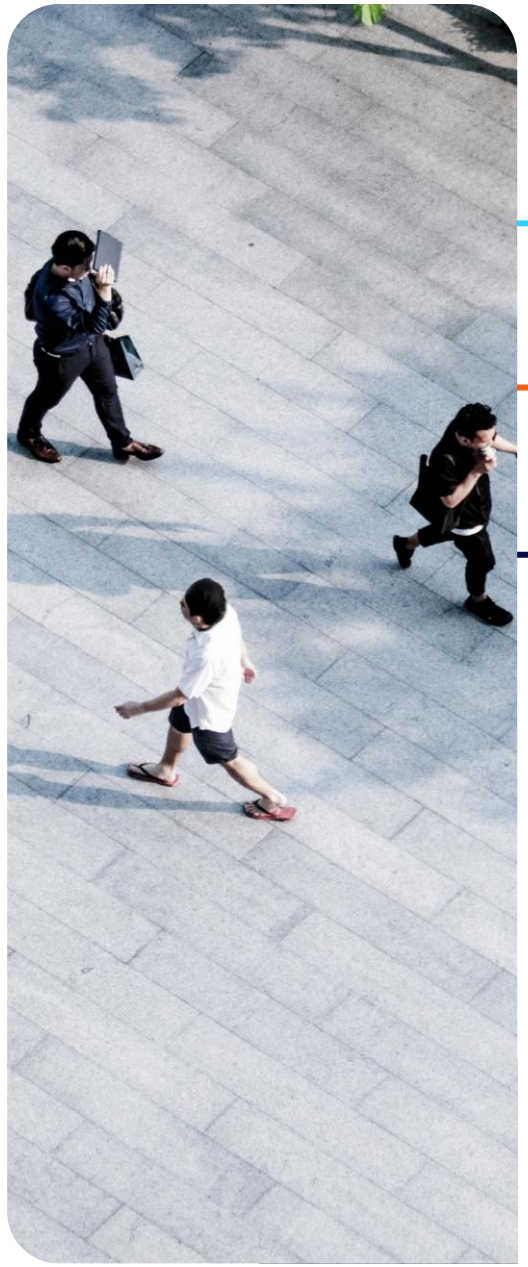
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Key Insights

- **Financial optimism is high** with **42%** feeling better off (down nearly -0.3 pts vs. year-ago)
- **CPG price growth has moderated from recent peaks, but cost impacts continue to compound** with AME CPG price growth; **$100** in 2024 purchases **would cost $126** in 2026
- **Increased food prices tops list of consumer concerns** with **27%** of AME consumers worried about this the most

As affordability pressures persist, **consumers are adapting their lifestyles**, spending habits, and long-term aspirations **to a fundamentally different reality**.

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Heading into 2027

The global state of consumers is **recalibrating**.

craving **Clarity**

seeking **Simplicity**

prioritizing **Purpose**

> **Consumers are reaching a tipping point** after years of socioeconomic and technological disruption.
>
> Consumers are no longer responding to disruption as a 'temporary' condition. In the next 12-18 months, we could see **a global lift in the prolonged holding pattern** many households have found themselves in."



Laura McCullough
President,
Global Customer Organization

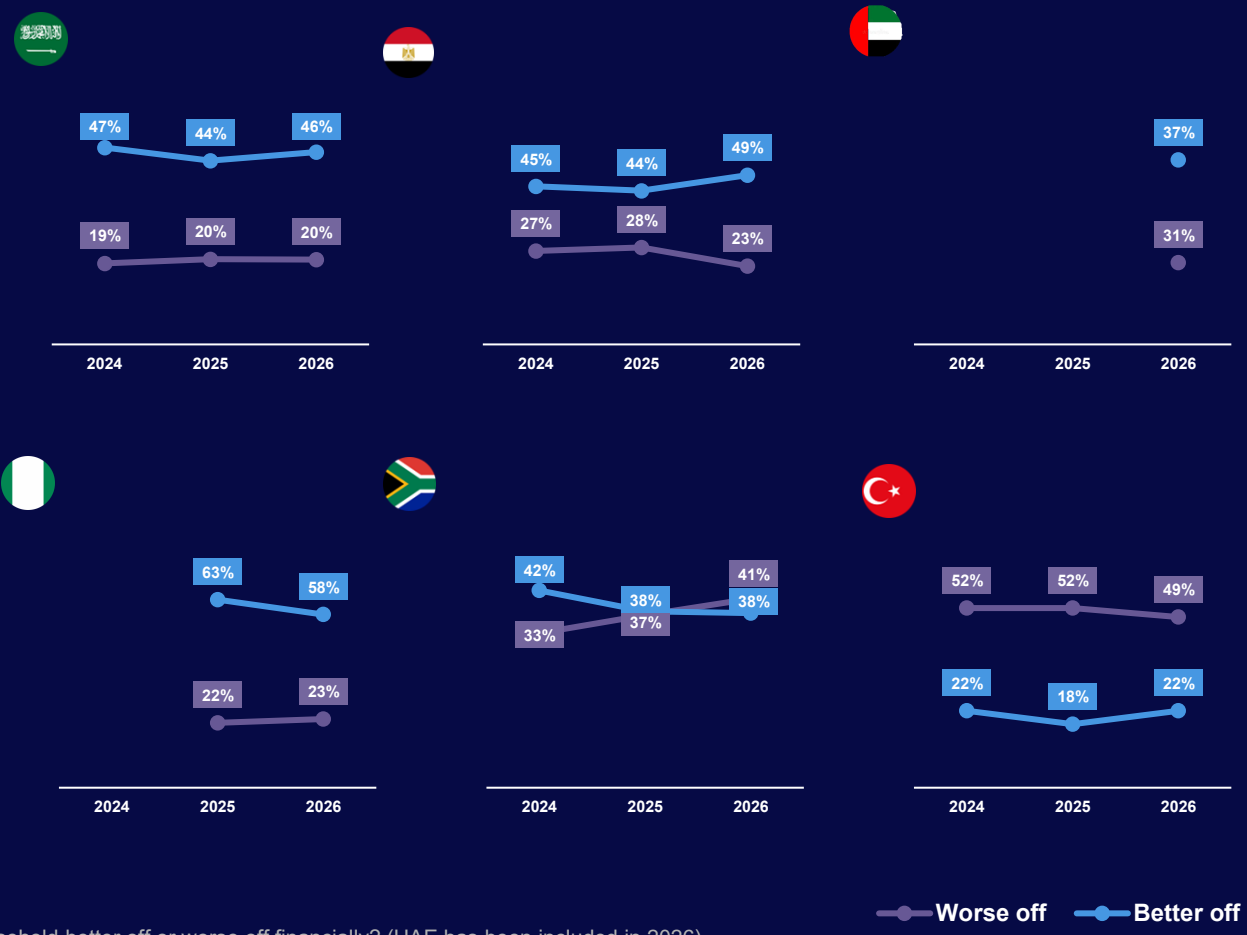
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Financial optimism is high, however consumer sentiments remain polarized



Financial confidence continues to be tested

Global consumer sentiment year over year (% respondents)



Source: NIQ 2026 Consumer Outlook, Global, vs. previous studies. Q: Compared to a year ago, is your household better off or worse off financially? (UAE has been included in 2026)

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Costs of living remains a limiting factor for most consumers

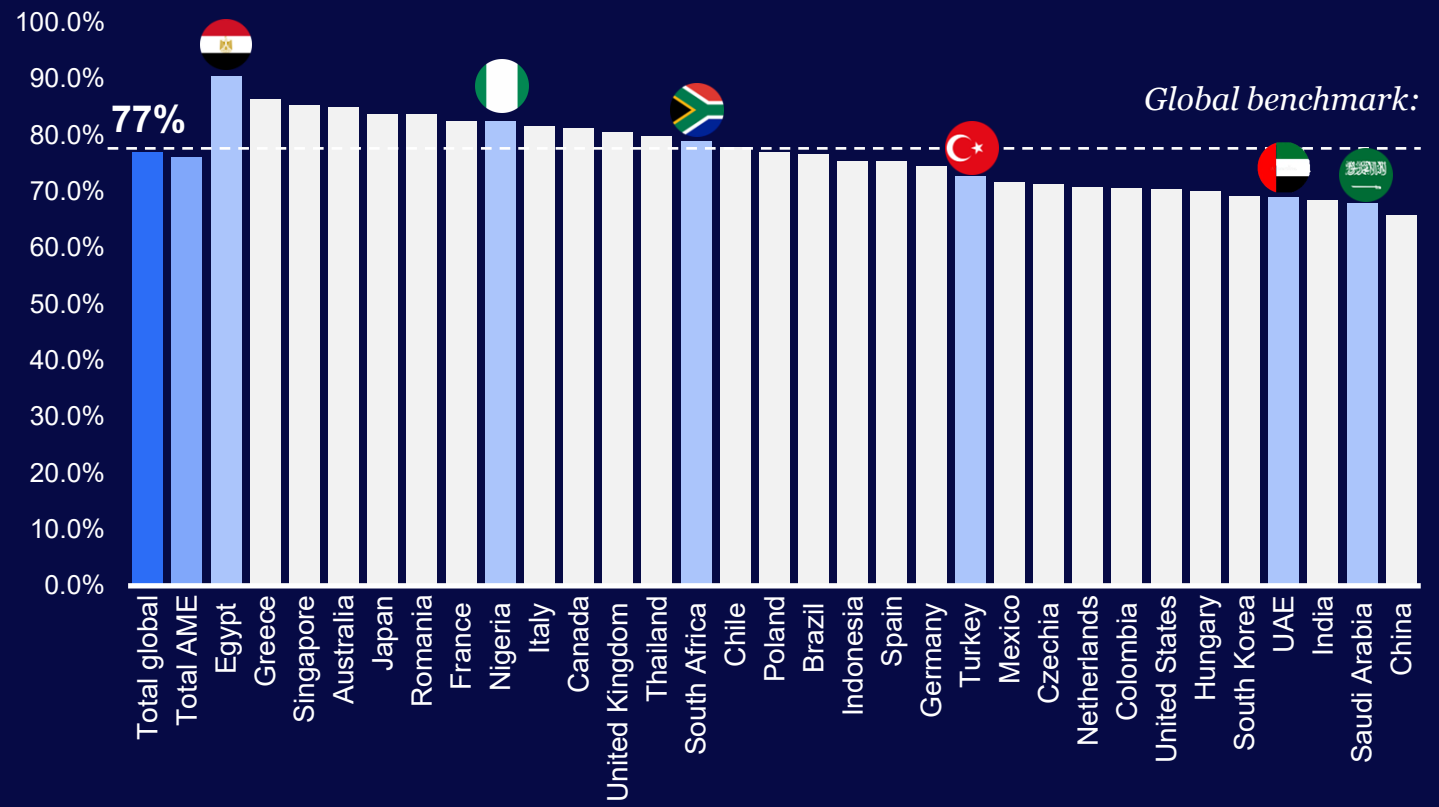
Increased costs of living
77%
vs. 73% in 2025

Economic slowdown
42%
vs. 39% in 2025

Job insecurity / loss
33%
vs. 30% in 2025

Increased costs of living as the source for financial hardship

Global consumer sentiment across markets (% respondents)



Source: NIQ 2026 Consumer Outlook, Global, vs. previous study

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A recalibration is underway across how AME consumers live, build wealth and develop skills







The Rise of Flexible Work & Entrepreneurship

- Consumers are increasingly pursuing side hustles, freelancing, and entrepreneurial ventures to supplement income. Younger generations are prioritizing flexibility and purpose alongside career progression.
- Multiple income streams are becoming a key component of financial security across many markets.

Financial Resilience Takes Priority

- Rising costs are driving greater focus on affordability and value. Consumers are balancing current spending needs with long-term financial security.
- Financial resilience is becoming more important than pursuing growth at all costs.

The AI Shift: From credentials to capabilities

- AI is creating a need for continuous learning, shifting traditional curriculum and higher education pathways
- AI is accelerating the shift from “collecting qualifications” to continuously “building skills”

Sources: HSBC, The Rise of Multi-Retirements (2025); World Economic Forum, Future of Jobs Report 2025; PwC, Global Workforce Hopes & Fears Survey 2026; World Bank, Global Economic Prospects; OECD, Economic Outlook.

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Consumers are building financial resilience

People are taking on more, to afford their lifestyles and actively seeking additional streams of income



Surge in side hustles

More people are actively seeking additional income streams than year ago.



More job hopping

People are more likely to switch jobs to avoid potential layoff.



Open to taking on debt

Consumers are more likely to take on debt to maintain their current lifestyles. It's a sign of the times, people are opting for financial support.

% of respondents who are likely to do the following

AME consumer sentiment vs. year ago

75% *vs 64% in 2025* — say their likely to **actively seek additional income streams** beyond their primary job

46% *vs 42% in 2025* — say they're likely to **switch employment** to avoid **layoff or job elimination**

27% *vs 26% in 2025* — say their likely to **increase their personal debt level** to afford their current lifestyle

54%	80%	89%	74%	77%	75%
34%	47%	55%	48%	56%	35%
28%	24%	20%	31%	32%	25%

Source: NIQ 2026 Consumer Outlook, Global, vs. previous studies (UAE has been included in 2026)

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Top concerns setting the spending tone for 2027

		July 2026	% point change vs. year ago						
1	Increasing food prices (remains top priority)	27%	-0.6	30%	30%	24%	21%	24%	34%
2	Economic downturn (was #3 in 2025)	21%	-1.5	41%	20%	23%	13%	12%	16%
3	Global conflict / Escalation of crisis/ War	20%	-6.0	15%	28%	14%	22%	31%	10%
4	Increasing fuel/ transport prices	17%	5.6	8%	26%	14%	17%	15%	22%
5	Increasing utility bills (for example: electricity, gas, heating)	16%	0.3	6%	25%	10%	21%	11%	23%
6	Political unrest	13%	2.6	23%	10%	16%	8%	8%	11%
7	Increased housing costs (for example: rental rates, housing shortages, etc.)	13%	2.3	9%	9%	13%	14%	23%	9%
8	Ability to provide basics (food/shelter) for myself/family	12%	0.1	10%	11%	24%	9%	4%	13%
9	Job security	11%	2.9	3%	5%	13%	14%	19%	14%
10	Self / Family welfare / happiness	10%	0.1	13%	3%	15%	10%	9%	7%

Source: NIQ 2026 Consumer Outlook, Global, vs. previous study (UAE has been included in 2026)

>>> Food costs remain a persistent household concern

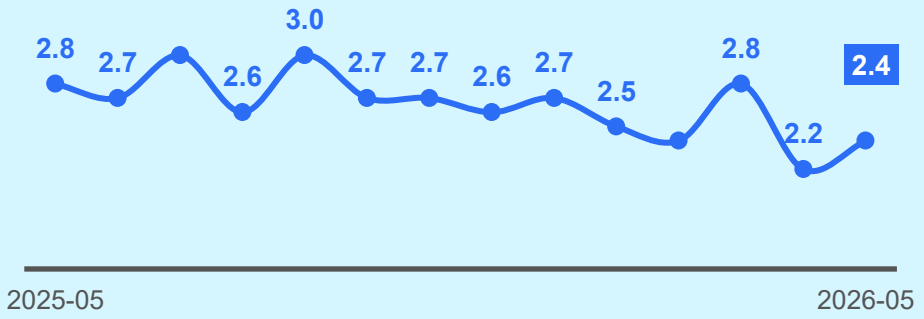


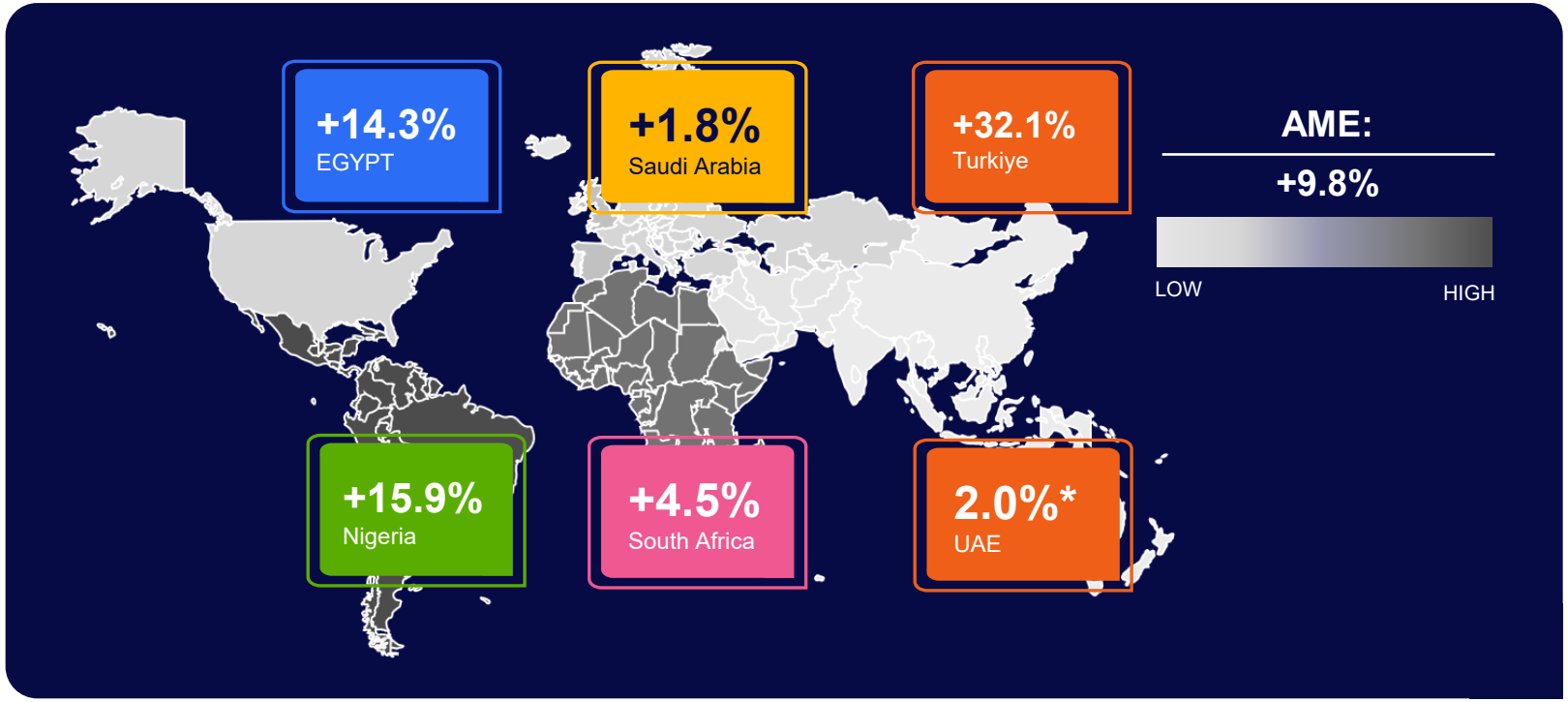
*The global narrative is shifting **from inflation anxiety to affordability anxiety**. While price increases have cooled, consumers are still waiting for purchasing power to fully catch up with the higher price levels established during the inflation surge of late.*

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Global CPG price growth remains moderate, *but years of compounding impact continue to shape consumer mindsets*

Global % change in average CPG price:





Source: NIQ Global Inflation Tracker, Trading Economics Jun'26 | *UAE CPI based on latest available data for Dec'2025

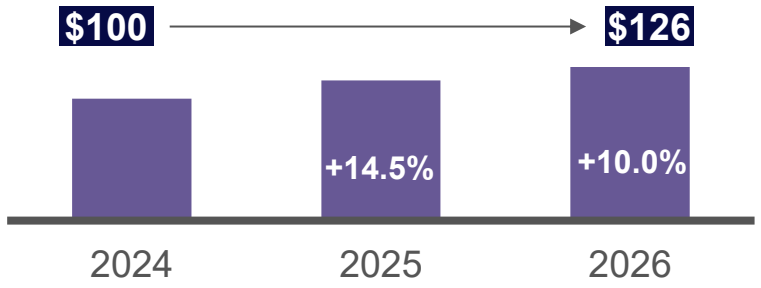
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Inflation’s lingering legacy

The compounding cost of higher prices continues to squeeze consumers



Annual AME % price increase (in USD)



The AME Compounding Effect

Consumers are still spending 26% more vs. 2024

100

from 2024, **would currently equate to…**

135
EGYPT

175
NIGERIA

99
SAUDI ARABIA

103
SOUTH AFRICA

199
TURKIYE

103
UNITED ARAB EMIRATES

Source: NIQ Global Retail Measurement, AME markets, Price % Change, Latest MAT ended Jun 2026, vs. previous periods. Reflected in US dollars for AME & Local currency for the respective markets

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Consumption at extremes

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Key Insights

The AME market is becoming increasingly polarized rather than uniformly constrained. While the Cautious segment remains the largest consumer group at 32%, the share of Thrivers remains steady at 16%, highlighting the coexistence of both financial opportunity and financial pressure.

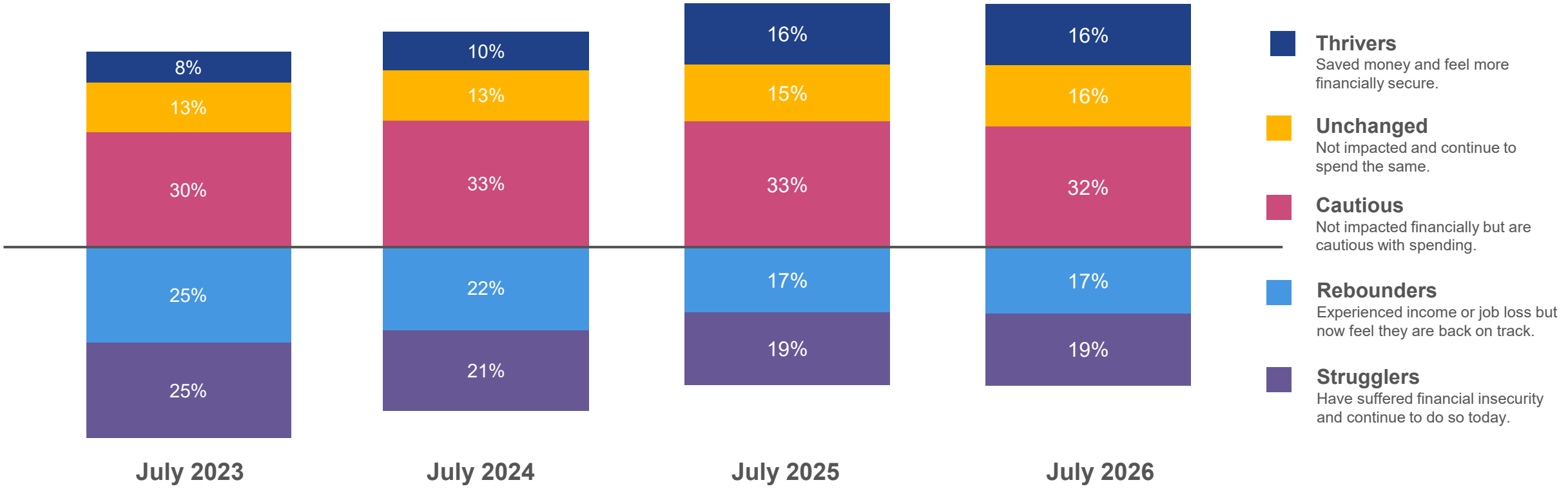
The **economic divide** continues to widen, **pushing growth toward the value and premium** ends of the market.

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The 2026 Economic Divide

The largest AME segment remains "Cautious" consumers (32%), while Thrivers remain resilient at 16%, creating clear market polarization

AME

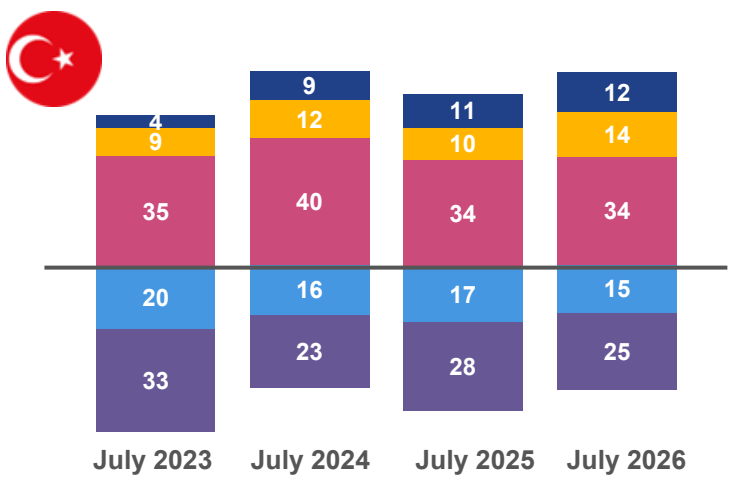


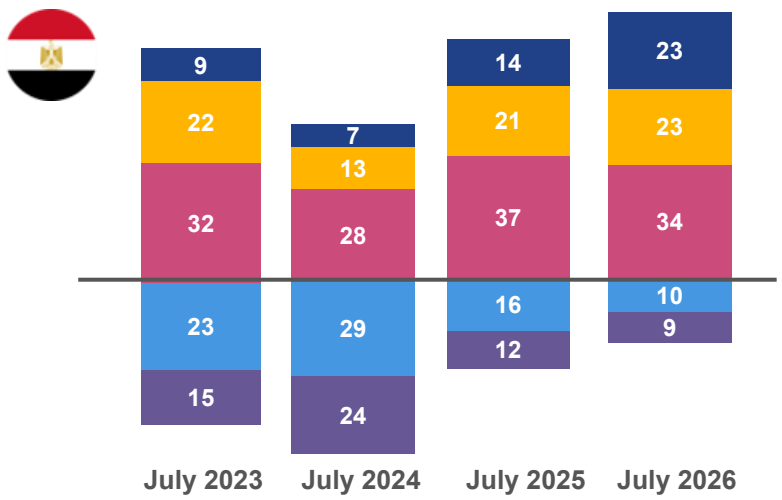
Source: NIQ 2026 Consumer Outlook, Global, vs. previous studies, excludes China. Q: Which of the following best describes how current events* of the last few years have impacted your overall household financial situation?
*Note: Question phrased more specifically to COVID-19 impact in 2022.

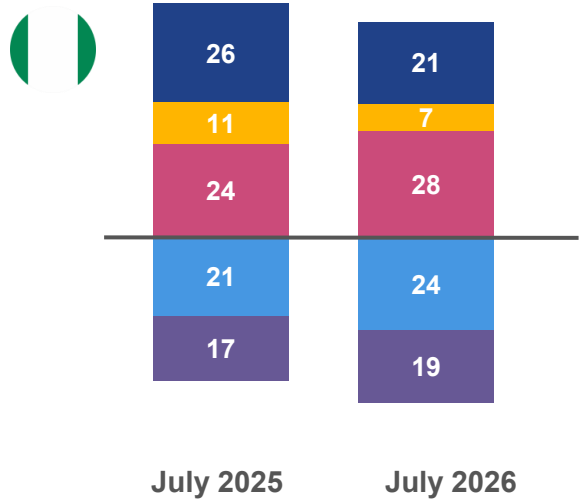
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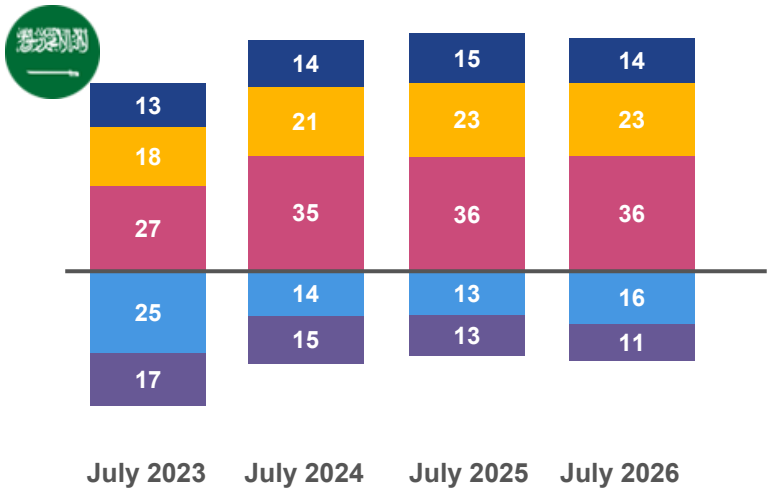
Country-Level Economic Divide

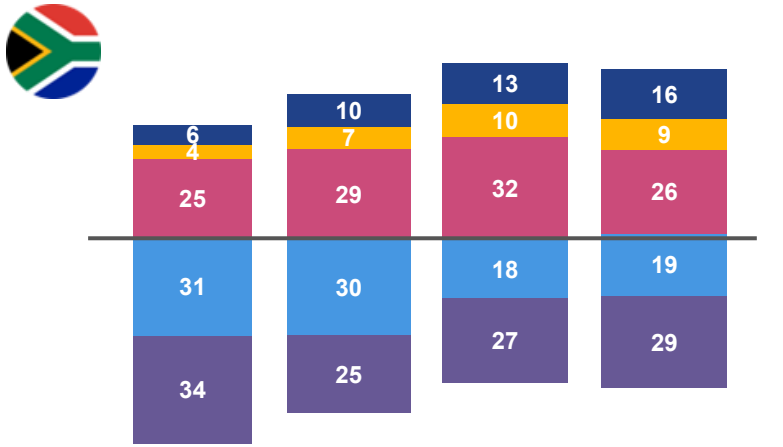
Economic polarization differs significantly between AME markets, with some markets showing strong Thriver populations while others maintain elevated Struggler segments











Thrivers
Saved money and feel more financially secure.

Unchanged
Not impacted and continue to spend the same.

Cautious
Not impacted financially but are cautious with spending.

Rebounders
Experienced income or job loss but now feel they are back on track.

Strugglers
Have suffered financial insecurity and continue to do so today.

Source: NIQ 2026 Consumer Outlook, Global, vs. previous studies, excludes China. Q: Which of the following best describes how current events* of the last few years have impacted your overall household financial situation?
*Note: Question phrased more specifically to COVID-19 impact in 2022.

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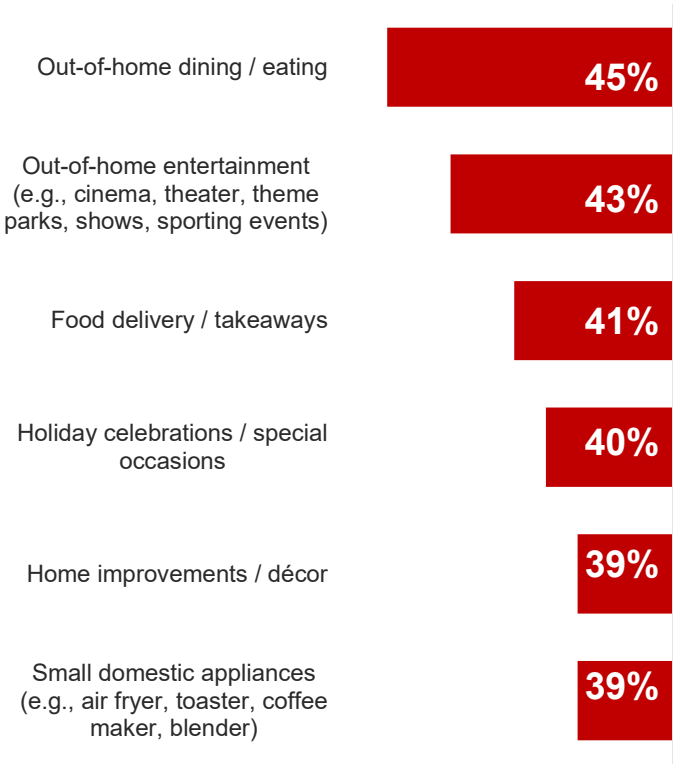
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AME consumers plan to protect essentials while reducing discretionary spending

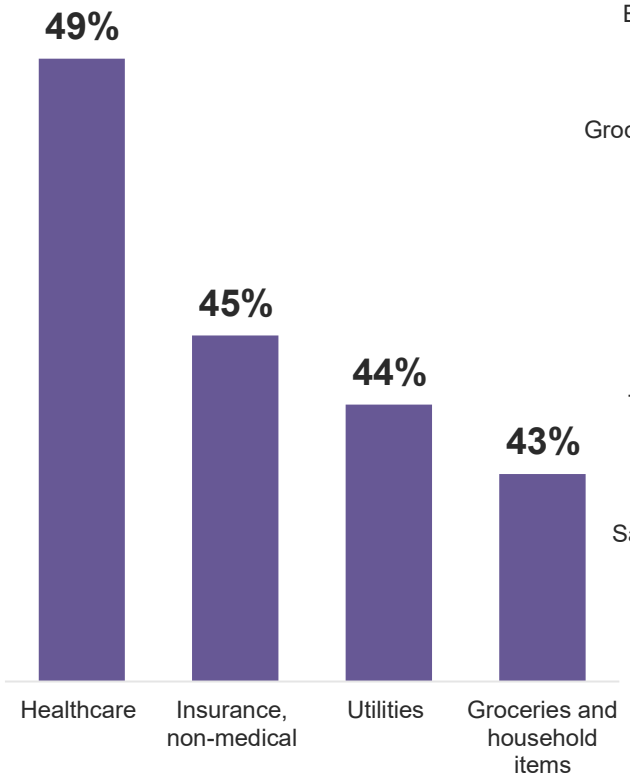
Spending intentions for the next 12 months

AME

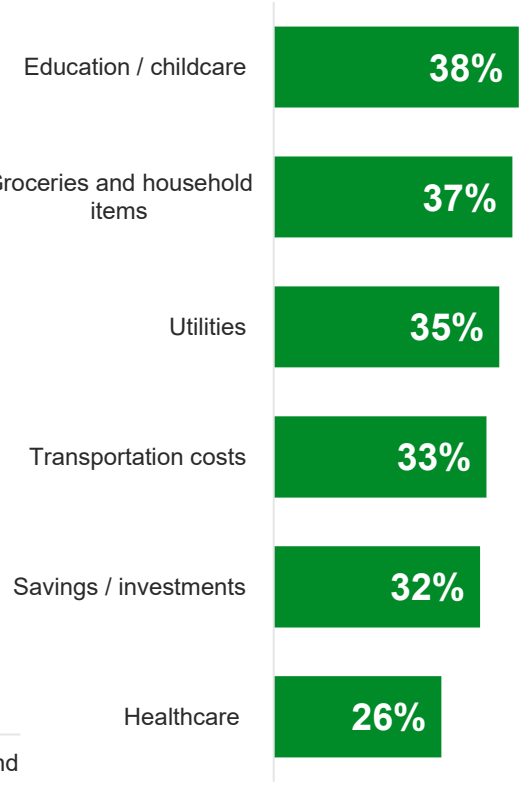
Spending less



Same as before



Spending more





Source: NIQ 2026 Consumer Outlook, Global

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How financial security is shaping the *2027 spending agenda*

Financial circumstances are emerging as one of the strongest determinants of future spending priorities

	Thrivers	*Strugglers*
% who plan to Spend more:	51% Savings / Investments 49% Education / Childcare 48% Groceries & household items	32% Utilities 31% Education / Childcare 30% Groceries & household items
% who plan to Spend same as before:	49% Insurance 46% Healthcare 46% In home entertainment	40% Grocery 40% Utilities 37% Healthcare
% who plan to Spend less:	29% Small domestic appliances 28% Out of home entertainment 28% Holidays - international	53% Clothing 51% Out of home dining 50% Out of home entertainment



Source: NIQ 2026 Consumer Outlook, Global

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How financial security is shaping the *2027 spending agenda*

Consumer priorities vary significantly by market, but financial security consistently drives spending differences

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Thrivers		Strugglers	
% who plan to Spend more:	37% Savings / investment	% who plan to Spend more:	23% Paying off debt
	33% Clothing / apparel		23% Utilities
	29% Electronics / technology		21% Rent / mortgage
% who plan to Spend same as before:	63% Holiday celebrations / special occasions	% who plan to Spend same as before:	45% Grocery & household items
	59% Healthcare		40% Utilities
	57% Utilities		39% Healthcare
% who plan to Spend less:	33% Out of home dining / eating	% who plan to Spend less:	68% Out of home entertainment
	30% Holidays international		67% Clothing / apparel
	30% Small domestic appliances		64% Out of home dining / eating



Thrivers		Strugglers	
% who plan to Spend more:	65% Education	% who plan to Spend more:	39% Utilities
	62% Groceries & household items		38% Healthcare
	59% Utilities		29% Transportation
% who plan to Spend same as before:	48% Insurance	% who plan to Spend same as before:	46% Grocery & household items
	46% Healthcare		46% Utilities
	46% Salon beauty / grooming		38% Transportation
% who plan to Spend less:	24% Home Improvements/ decor	% who plan to Spend less:	52% Clothing / apparel
	22% Holiday celebrations / special occasions		50% Socializing
	22% Small domestic appliances		46% Hoilday celebrations / special occasions



Thrivers		Strugglers	
% who plan to Spend more:	72% Savings / Investment	% who plan to Spend more:	49% Education / childcare
	70% Education / Childcare		46% Savings / investments
	66% Groceries & household items		43% Groceries & Household items
% who plan to Spend same as before:	48% In – home entertainment	% who plan to Spend same as before:	38% Utilities
	44% Holidays domestic		35% Grocery & household items
	43% Salon beauty / grooming		34% Electronics / technology
% who plan to Spend less:	33% Paying off debt	% who plan to Spend less:	63% In-home entertainment
	31% Small domestic appliances		57% Hoilday celebrations / special occasions
	30% Out of home dining / eating		56% Out of home entertainment

Source: NIQ 2026 Consumer Outlook, Global

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How financial security is shaping the *2027 spending agenda*

Both Thrivers and Strugglers exhibit very different spending agendas, creating multiple growth opportunities within the same market

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Thrivers	Strugglers
44% Savings / investments	30% Education / childcare
44% Clothing / apparel	29% Healthcare
43% Grocery / hosehold items	26% Utilities
56% Transportation	49% Grocery & household items
50% Insurance	47% Utilities
49% Utilities	44% Transportation
29% Holidays international	44% Salon beauty / grooming
29% Salon beauty / grooming	44% Clothing / apparel
28% Large and small domestic appliances	44% Holidays international



Thrivers	Strugglers
46% Savings / investments	33% Education / childcare
45% Groceries & household items	29% Transportation
45% Healthcare	28% Groceries & Household items
58% Utilities	45% Healthcare
55% Insurance	42% Paying off debt
53% Transportation	41% Insurance
33% Home Improvements/ decor	54% Clothing / apparel
26% Salon beauty / grooming	51% Holidays domestic
26% Small domestic appliances	51% Salon beauty / grooming



Thrivers	Strugglers
55% Savings / investments	46% Utilities
52% Groceries & Household items	41% Transportation
50% Utilities	37% Groceries & Household items
53% Insurance	34% Rent / mortgage
52% Socializing	32% Groceries & household items
51% Healthcare	29% Insurance and paying off debt
40% Food delivery / takeaways	60% Socializing
40% Holidays international	59% Food delivery / takeaways
37% Small domestic appliances	58% Out of home dining / eating

% who plan to Spend more:

% who plan to Spend same as before:

% who plan to Spend less:

Source: NIQ 2026 Consumer Outlook, Global

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Consumers want a clear reason to spend

Highlighting why ‘the middle’ is losing its relevance

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“Constraint” mindset

70% of surveyed AME consumers say that **if a product isn’t clearly better, they would rather save money**

vs.

“Upgrade” mindset

66% of surveyed AME consumers say that **if they’re going to spend more, they’d prefer to choose something that’s clearly a premium offering**

Middle ground

62% of surveyed global consumers say that mid-range options need a clear reason for them to be chosen over cheaper or premium alternatives

Source: NIQ 2026 Consumer Outlook, Global

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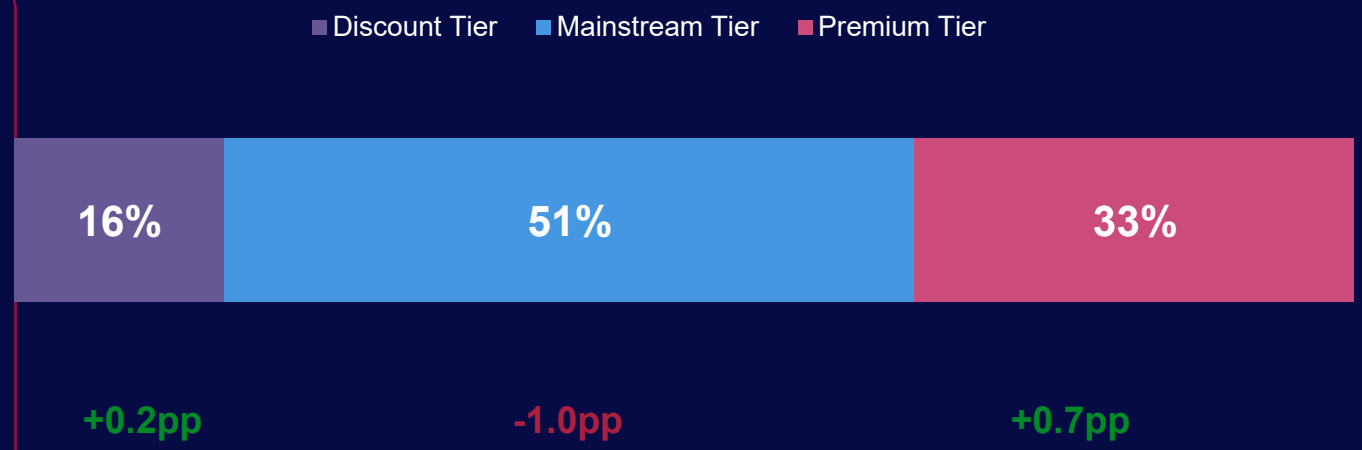
Share gains at both ends of the market are hollowing out 'the middle'

As consumer polarization deepens, growth is increasingly concentrated at the value and premium product tiers

$98.6B

Total AME CPG value
(for 6 countries)

AME CPG value share by price tier and change vs. year ago



Consumers are choosing the extremes

Discount and premium offerings are outperforming as mainstream tier shrinks in overall importance. Brands that sit in the middle face growing pressure to prove their value.

Source: NIQ Global Retail Measurement, 6 markets; Total CPG/FMCG. Latest 52 weeks ended Jun. 2026 vs. previous year, (Nigeria and Egypt ending Sep 2026) Reflected in U.S. dollars.

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Emerging framework

NIQ's spectrum of recalibrated spending extremes

6 different manifestations of the same global evolution

6 Global market archetypes		State of spending
Premiumization markets	↑ Premium	Consumers are increasingly trading up, with premium products driving disproportionate growth.
Polarized markets	↓↓ Mainstream	**Today's prevailing global trend:** mainstream is hollowing out while both value and premium gain share.
Early polarization markets	↓ Mainstream	The middle is beginning to weaken as consumers gradually shift toward value and/or premium.
Stable structure markets	≈ Flat	Limited meaningful change in the relative roles of value, mainstream, and premium.
Mainstream momentum markets	↑ Mainstream	The middle tier remains relevant and continues to gain share.
Value-led markets	↑ Discount	Discount propositions are driving growth and taking share from both mainstream and premium.

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Leading examples of consumption at extremes

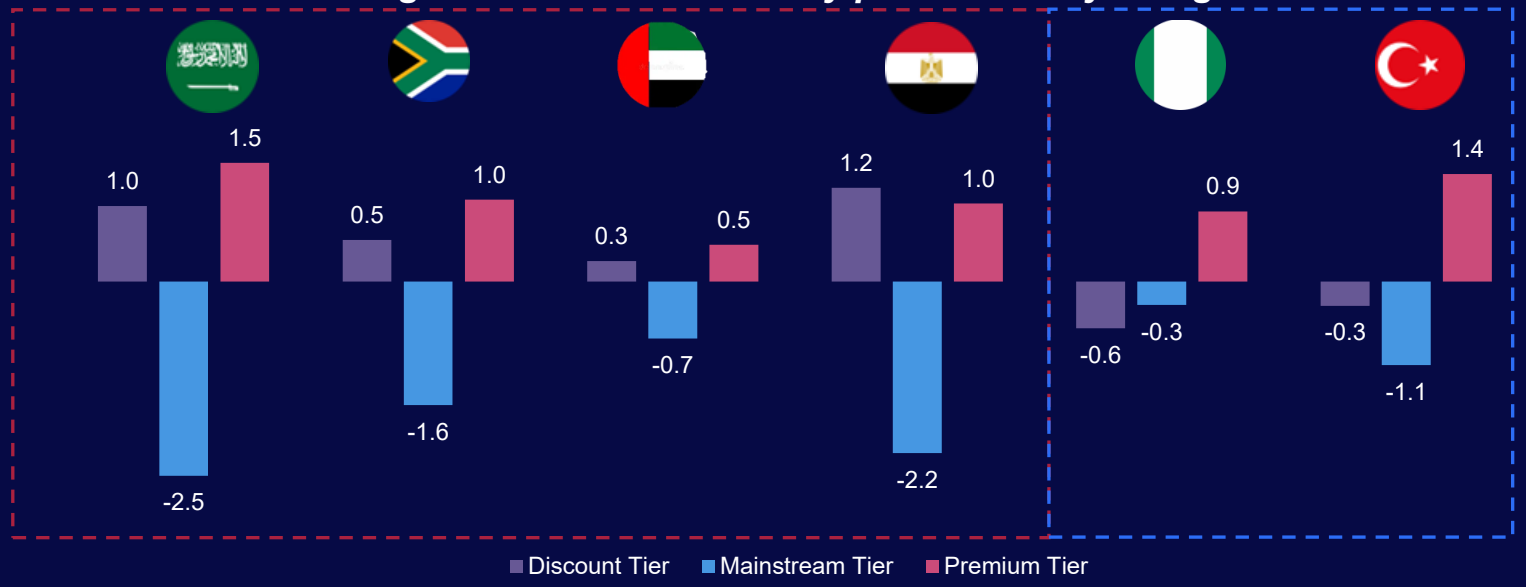
The “Barbell Effect” in Action

Key markets that demonstrate the growing shift towards trading down or trading up, leaving the middle squeezed

6 Global market archetypes

- *Premiumization markets* — ↑↑ Premium, ↓↓ Value & Mainstream — **Turkey and Nigeria reflect** premiumization, where both the discount and mainstream tier lose share while premium tier gains
- *Polarized markets* — ↓↓ Mainstream — **Today’s prevailing global trend: Saudi Arabia, South Africa, UAE and Egypt reflect** mainstream is hollowing out while both value and premium gain share.
- *Early polarization markets*
- *Stable structure markets*
- *Mainstream momentum markets*
- *Value-led markets*

Change in CPG value share by price tier vs. year ago



Source: NIQ Global Retail Measurement; Total CPG/FMCG. Latest 52 weeks ended Jun. 2026 vs. previous year, Nigeria and Egypt ended Sep 2026. Reflected in U.S. dollars.

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Strategic playbook

Acting on NIQ's spectrum of recalibrated spending extremes

So, what? Now, what?

6 Global market archetypes	Key action	What this means
● *Premiumization markets*	Accelerate trade-up	Prioritize innovation, superiority, and trade-up opportunities to maximize premium growth.
● *Polarized markets*	Play both ends	**Capture growth at the extremes by actively managing premium and value portfolios while rationalizing mainstream exposure.**
● *Early polarization markets*	Prepare for polarization	Begin strengthening both value and premium offerings as the middle starts to soften.
● *Stable structure markets*	Defend the core	Protect share across tiers while monitoring for early signs of market migration.
● *Mainstream momentum markets*	Accelerate mainstream	Invest in core brands and propositions where meeting consumers within the middle of their list of demands remains the growth engine.
● *Value-led markets*	Lead with value	Win on affordability, pack-price architecture, and value credentials.

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A new world of worth

03



Key Insights

- **The shift from cost to worth:** Quality & performance now outrank affordability as the leading driver of purchase value (37% VS 30%)
- **The rise of value engineering:** Nearly every saving strategy is gaining traction as consumers stack savings, working harder stretch budgets
- **Erosion of demand: From losing pace, to losing potential**, some markets (e.g. South Africa) see consumers spending less, whereas others (e.g. Nigeria) see more consumers opting out of categories altogether

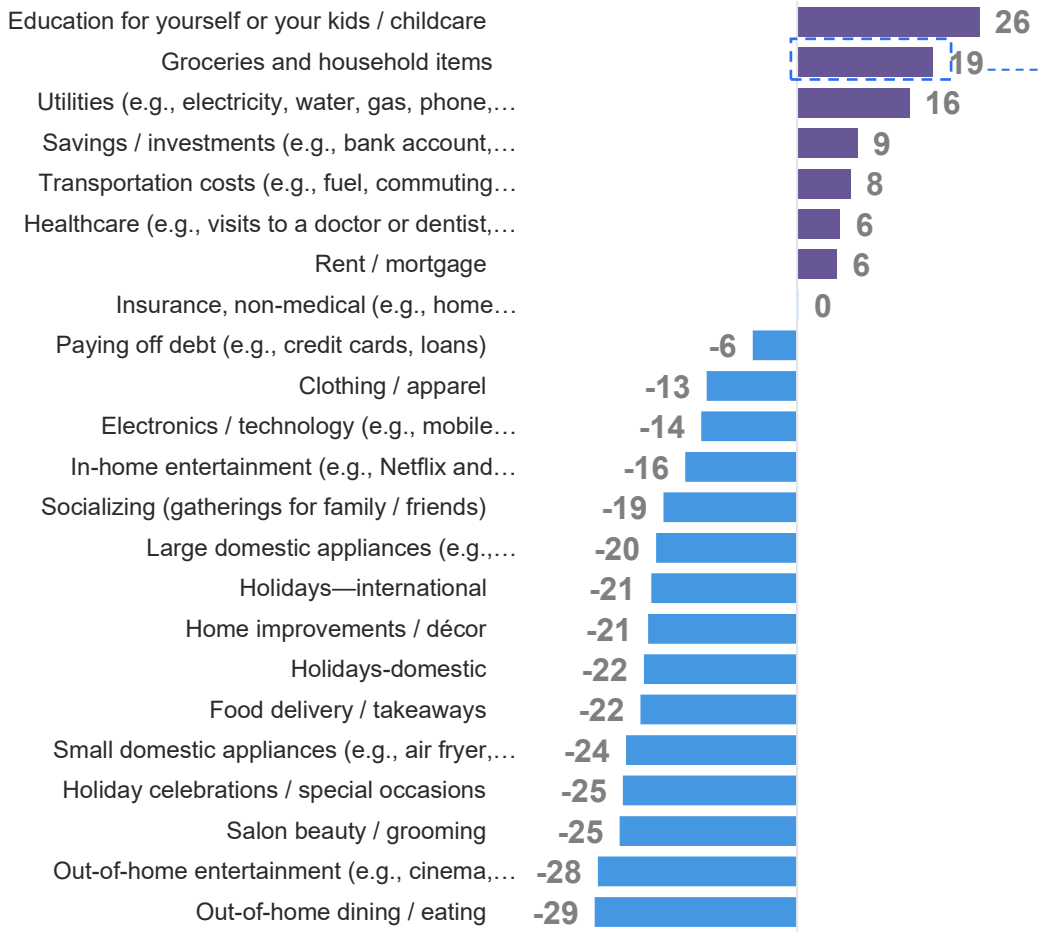
A **new world of worth** is emerging: consumers are prioritizing **quality** over price, engineering greater value from every dollar, and **walking away from purchases that fail to justify** their place

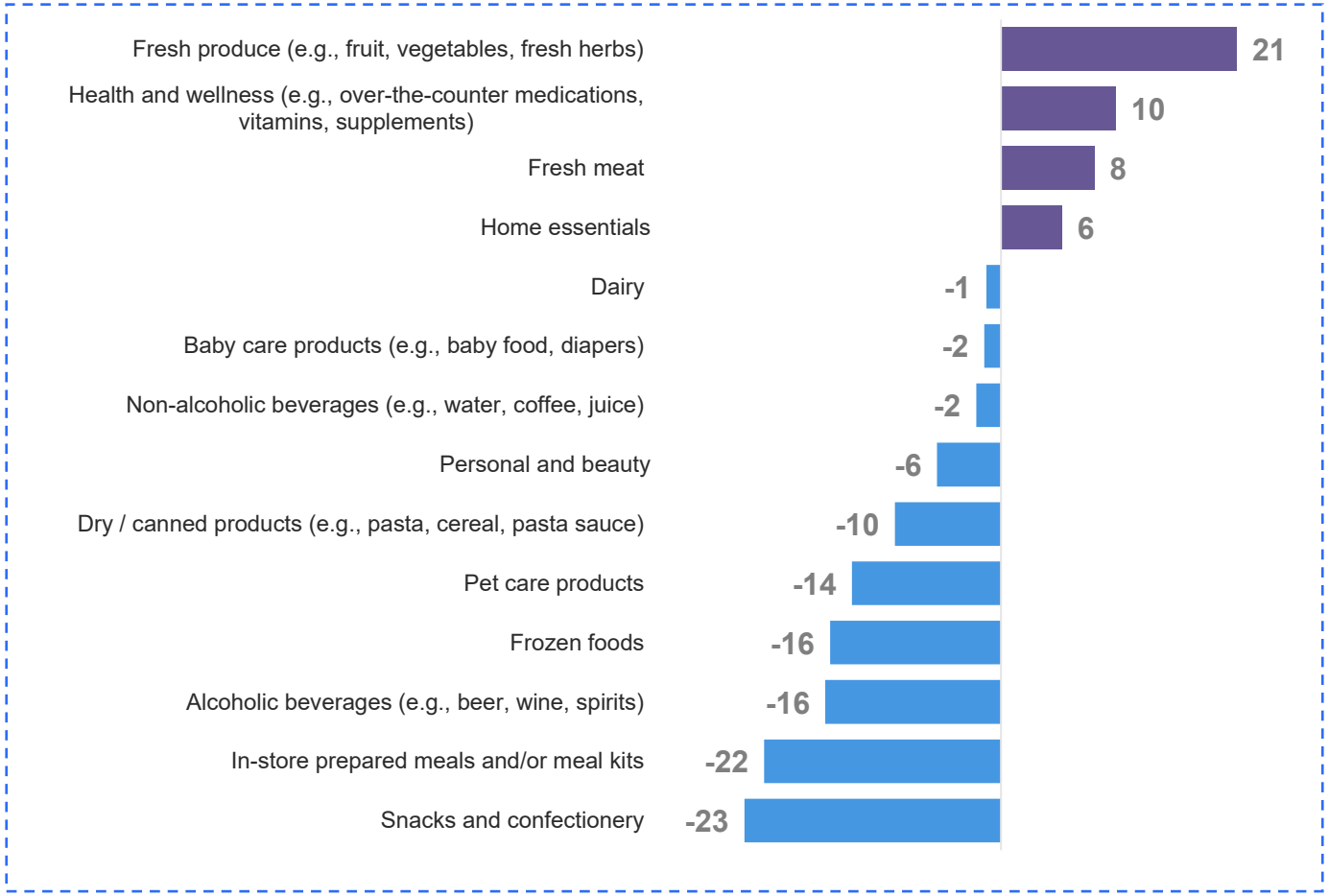
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Expect a new world of worth in 2027: consumers protect essentials, increasingly selective elsewhere

AME

AME consumers prioritize education, groceries, utilities and healthcare while becoming more selective across discretionary categories





Source: NIQ 2026 Consumer Outlook, Global. Change in spending calculated by subtracting % of respondents who are spending less from % of respondents who are spending more.

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Many consumers feel they do not need to spend as much to be happy

In South Africa 48% consumers feel that ***"less is more",*** over 40% of consumers in Nigeria and South Africa stopped buying certain things to ***"focus on essentials"***

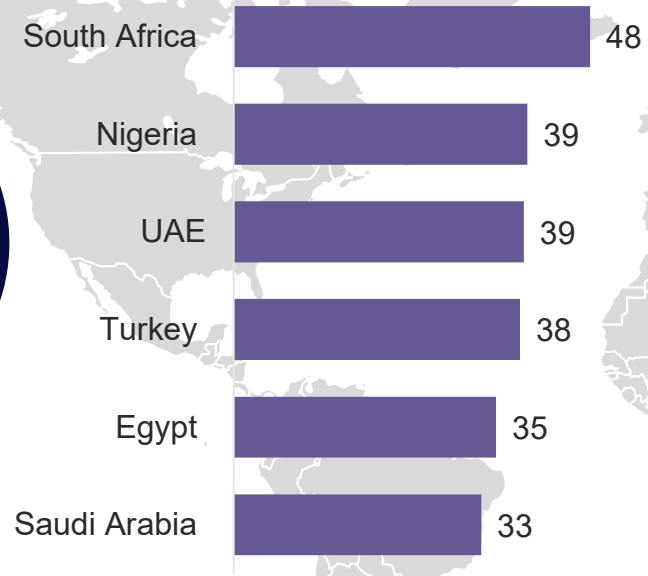
Losing Pace: Market signal of potential category de-prioritization

% of consumers who feels their values and habits are shifting towards spending less

39%

(+4pts vs. year ago)

of AME consumers say that ***"less is more"***; that they don't need as much to be happy



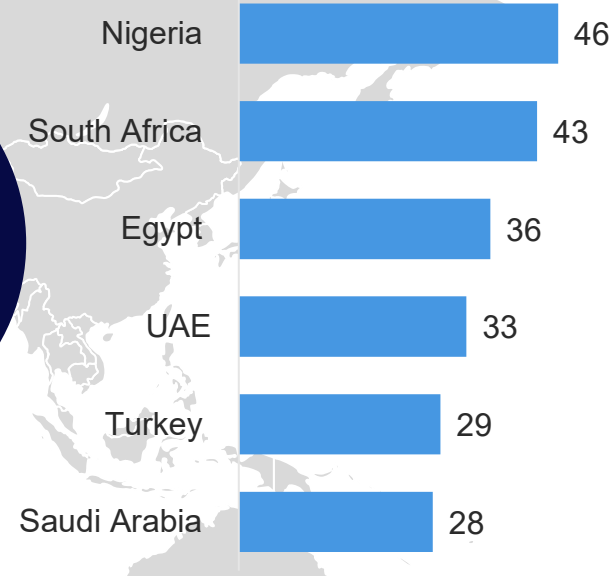
Losing Potential: Market signal of potential category abandonment

% of consumers who focus on essentials to manage expenses

36%

(+3pts vs. year ago)

of AME consumers say they've **stopped buying** certain things this year to just **focus on essentials**



Source: NIQ Global Shopper Panel & NIQ Omnishopper Panel, 52 weeks ended Jun. 13, 2026, Purchase rate drop = variation below -1%, NIQ 2026 Consumer Outlook, Global.

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Spending *by exception.*

Consumers are no longer buying by default. They buy when a compelling reason exists.

Purchases are no longer evaluated on cost alone, but on the balance between price, quality, performance and personal relevance.

>>> In a world of considered trade-offs, strive to be the exception.

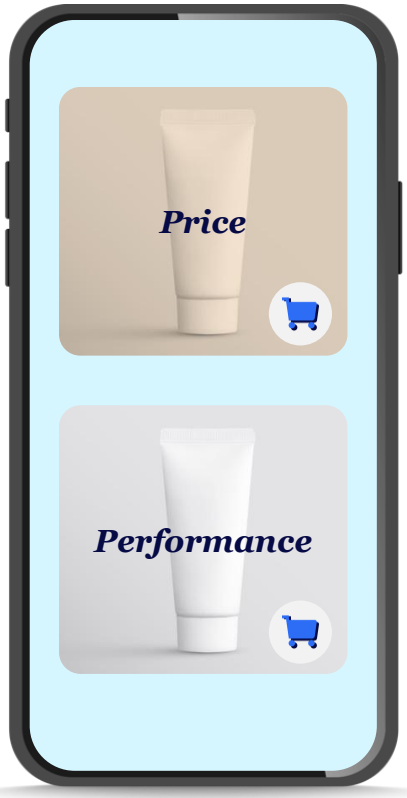


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The shift from “cost” to “worth”

Consumers are redefining value beyond affordability alone

Which ranks supreme in the eyes of consumers? >>>



30%
of surveyed AME consumers say that ***affordable pricing is most important*** to determining if a household or grocery **purchase is worth it**

37%
of surveyed AME consumers say that ***quality / performance is most important*** to determining if a household or grocery **purchase is worth it**

Price	28	29	25	29	28	39
Performance	41	39	34	43	36	26

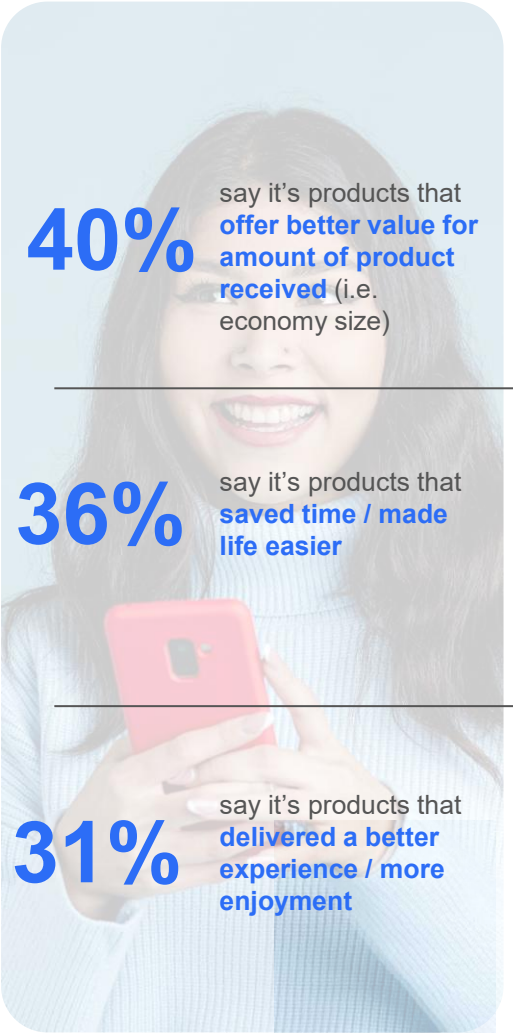
Source: NIQ 2026 Consumer Outlook, Global



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What feels “worth” paying more for?

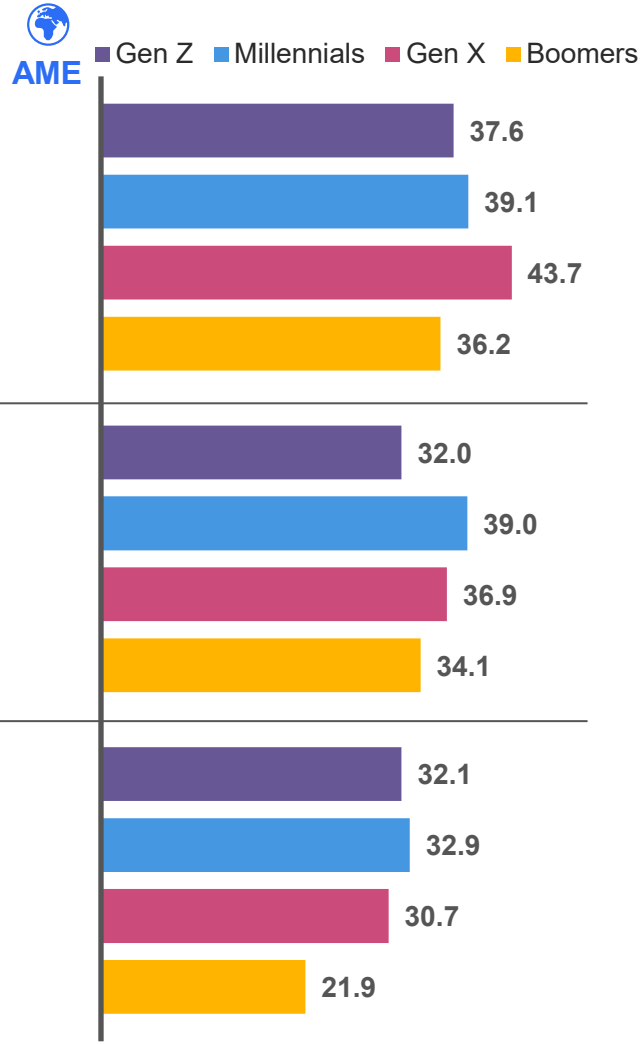
While some factors feel consistently “worth it” across generations, others have a definite skews towards key cohorts

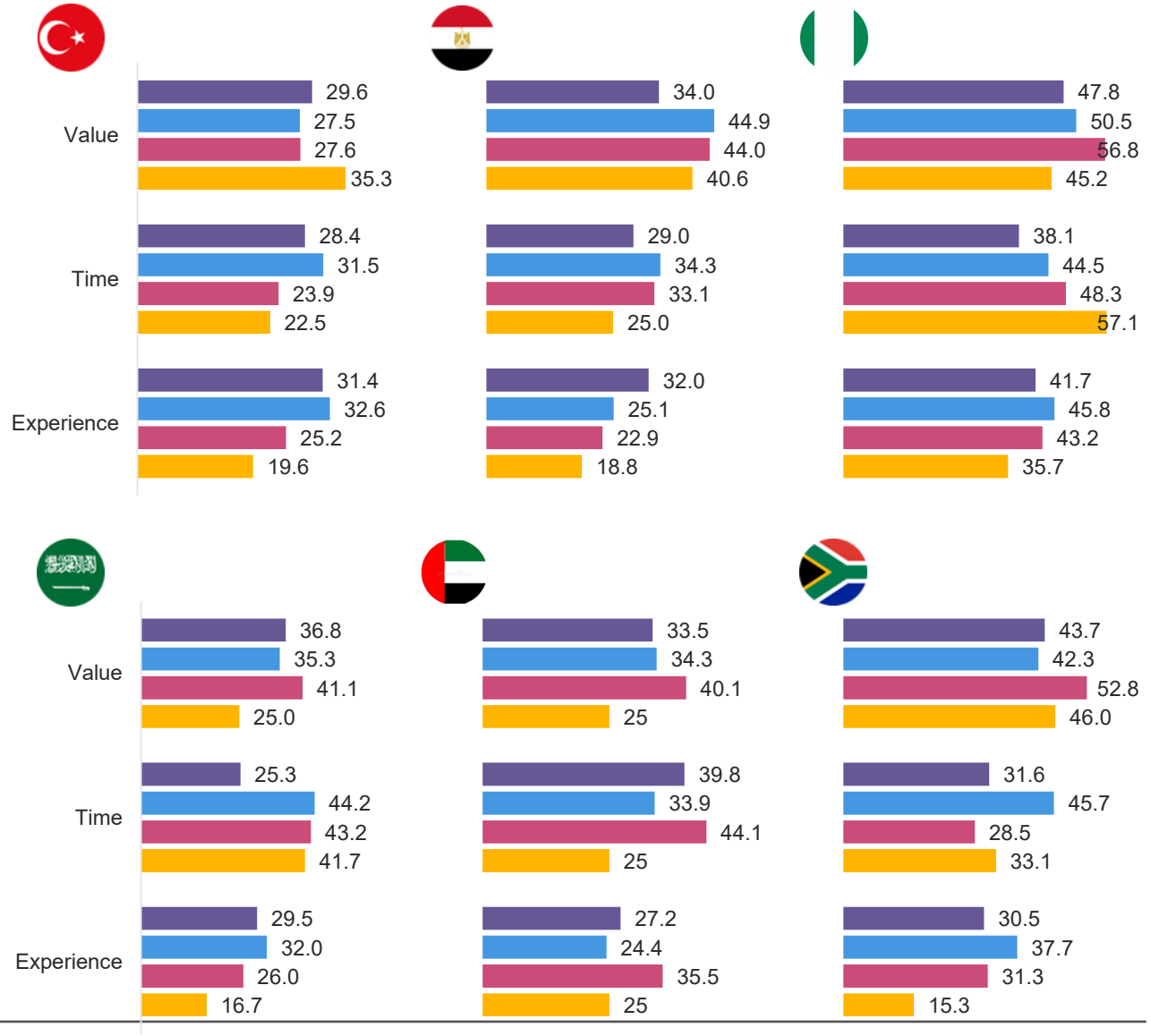


40% say it’s products that **offer better value for amount of product received** (i.e. economy size)

36% say it’s products that **saved time / made life easier**

31% say it’s products that **delivered a better experience / more enjoyment**



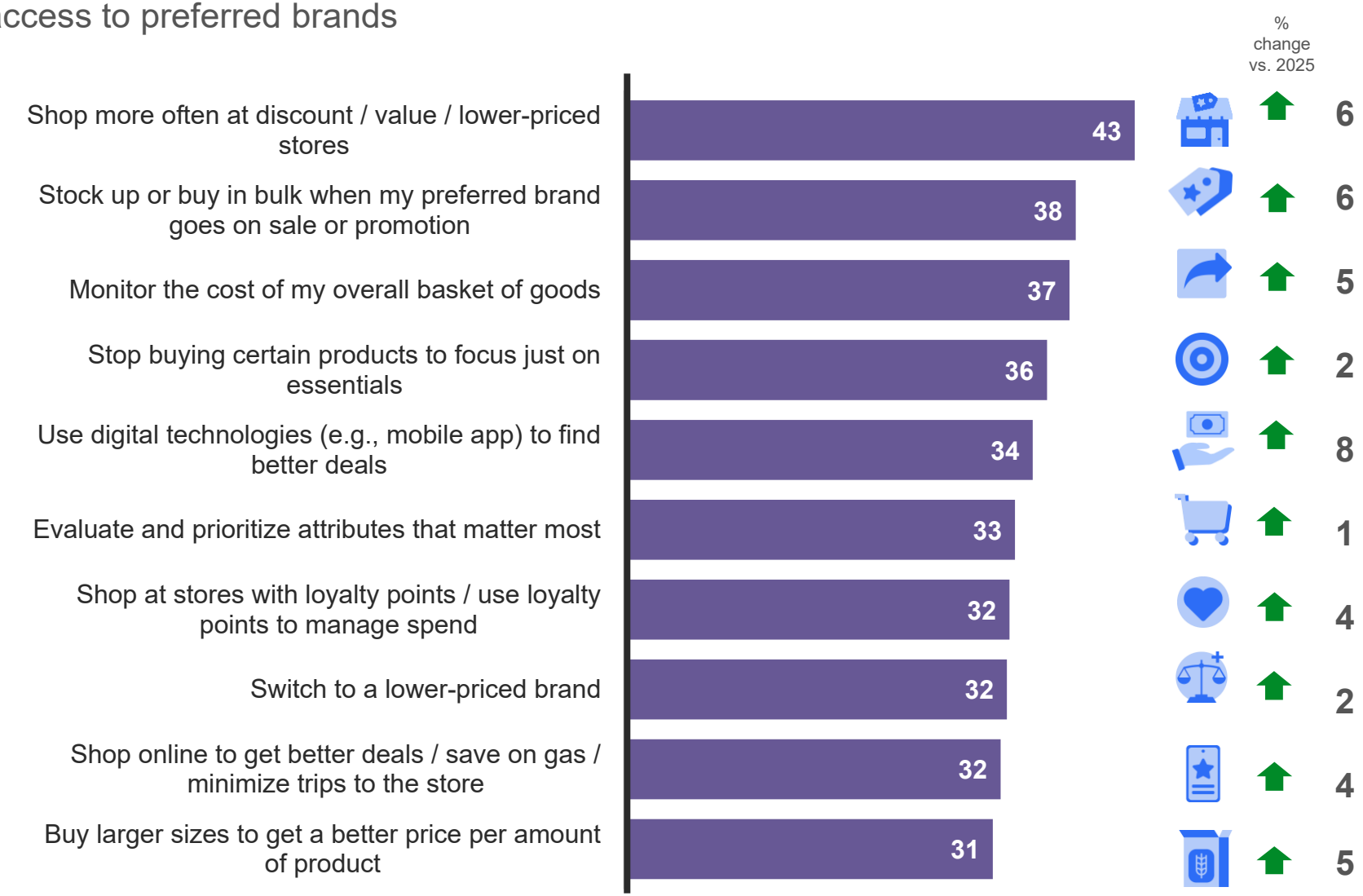


Source: NIQ 2026 Consumer Outlook, Global

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AME Consumers Are Engineering Value, Not Just Finding It

Consumers are combining discounts, loyalty rewards, bulk buying and digital tools to maximize purchasing power while protecting access to preferred brands



Top 10 consumer saving strategies for CPG in AME

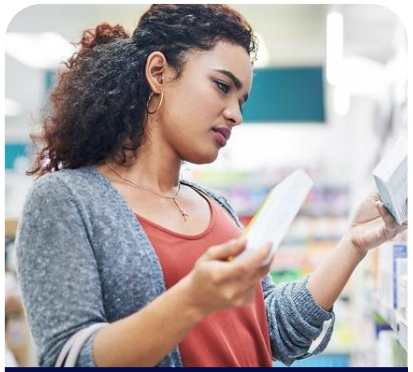
Source: NIQ 2026 Consumer Outlook, Global, vs. previous study.

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AME Consumers Are Rewriting the Rules of Value

Consumers across AME are becoming more deliberate in how they spend, combining savings strategies, prioritizing purchases more carefully, and demanding stronger justification for every expenditure

*Layering value to **unlock** worthwhile spending*



Net price over advertised price.

Consumers are likely to judge 'value' based upon the final price paid after every possible savings method has been applied.



Loyalty unlocks preferential pricing.

Membership exclusive pricing and personalized offers are becoming like currencies relied upon to secure highly valued purchases.



Payment methods shape purchase price.

The path to value is increasingly shaped around how consumers choose to transact.



Value is 'engineered', not found.

Consumers aren't just using savings to buy cheaper products; they're using savings to afford better ones.

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Self-directed wellness

04



Key Insights

- **Rising health-first value equation:** A near-equal percentage (~9%) of global consumers ranked **“healthy / natural” and “affordability / price” as top priorities**
- **Growing health divide:** Many consumers are demonstrating a willingness to pay more (62%) for products they perceive as healthier and more trustworthy.
- **New care pathways open doors to GLP-1 users:** Thrivers are as likely as Strugglers to be using GLP-1s **(17% of Strugglers vs. 15% of Thrivers)**

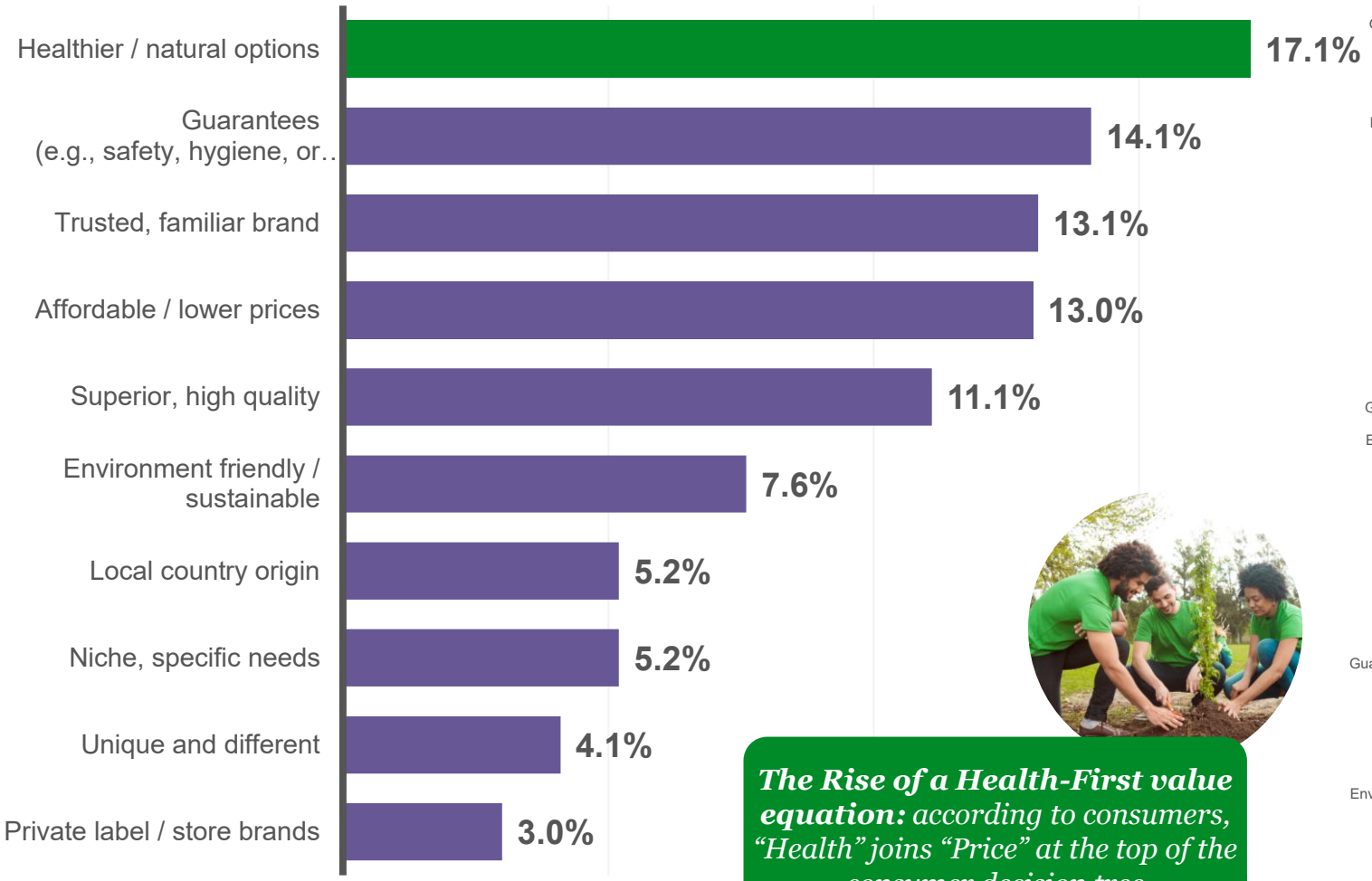
*Health is now a **core driver of consumer choice**, but the future of wellness will be shaped by who can **access, afford, and leverage** the next generation of **health innovation and technology**.*

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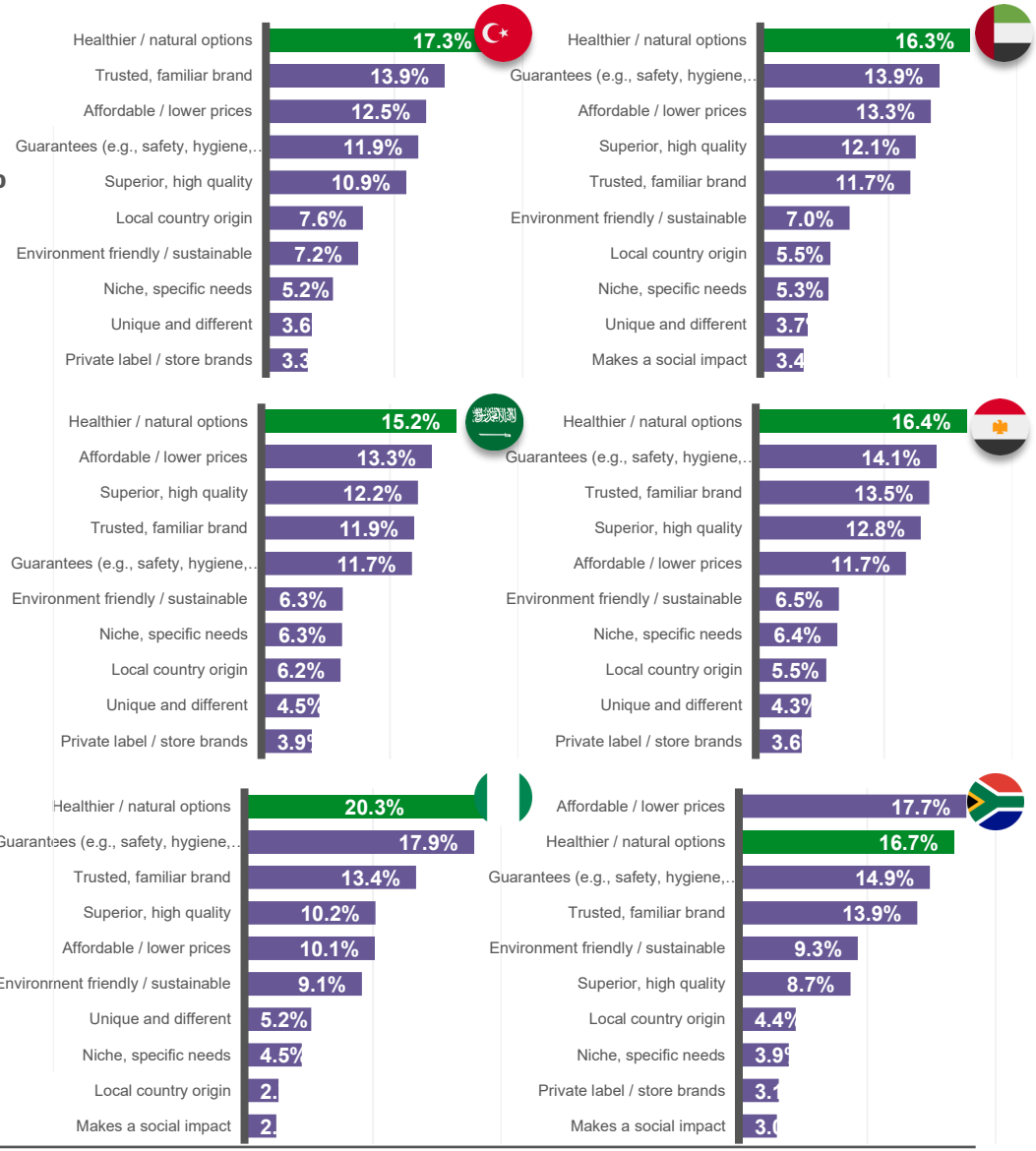
Health is no longer a “trade off”; wellbeing won’t be compromised in the year ahead

Ranking factors of ‘most importance’ when choosing what to buy

AME consumer sentiment, % respondents who said each factor was “most important”



The Rise of a Health-First value equation: *according to consumers, “Health” joins “Price” at the top of the consumer decision tree*



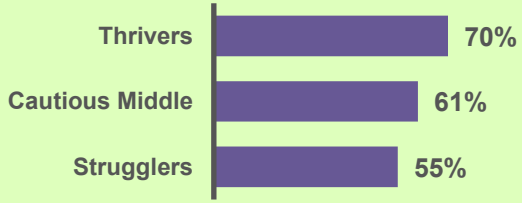
Source: NIQ 2026 Consumer Outlook, AME

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The growing health gap: Health priorities are shared, but spending power on them is not

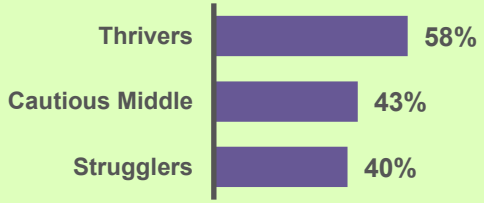
62%
would pay more for **fresh products without preservatives**

Economic Divide: % respondents
Willing to pay more for fresh



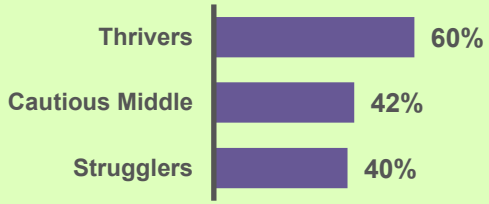
46%
would pay more for **products with ingredient / supply chain transparency**

Economic Divide: % respondents
Willing to pay more for transparency

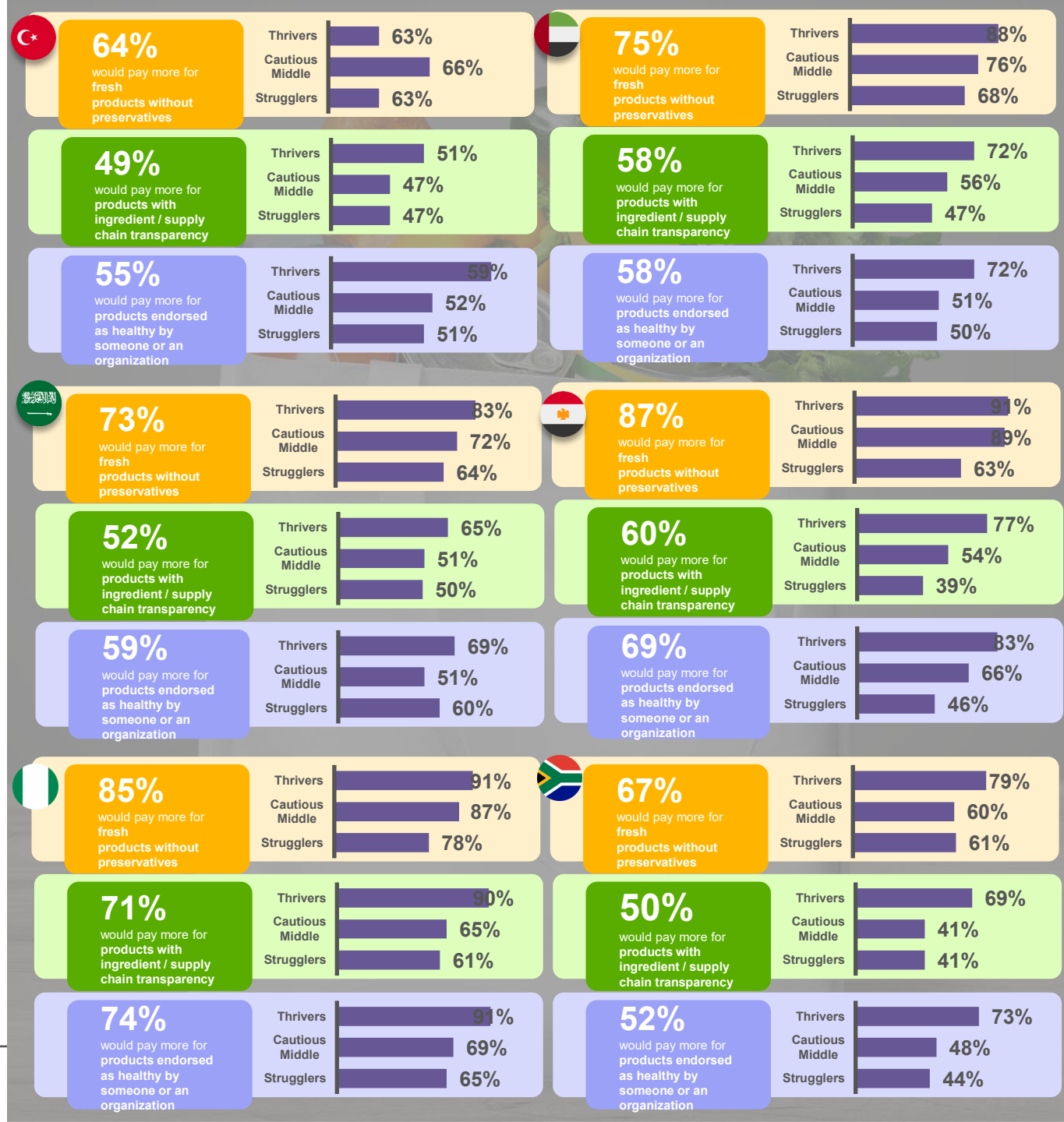


46%
would pay more for **products endorsed as healthy by someone or an organization**

Economic Divide: % respondents
Willing to pay more for healthy endorsement



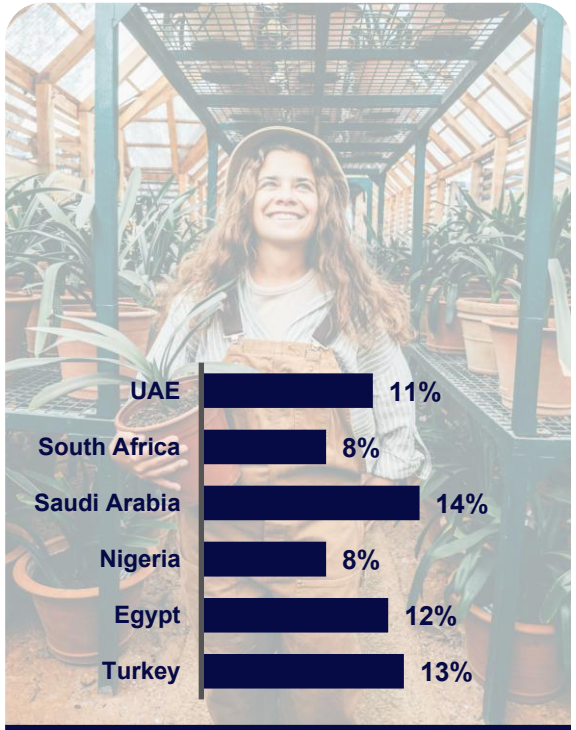
Source: NIQ 2026 Consumer Outlook, AME



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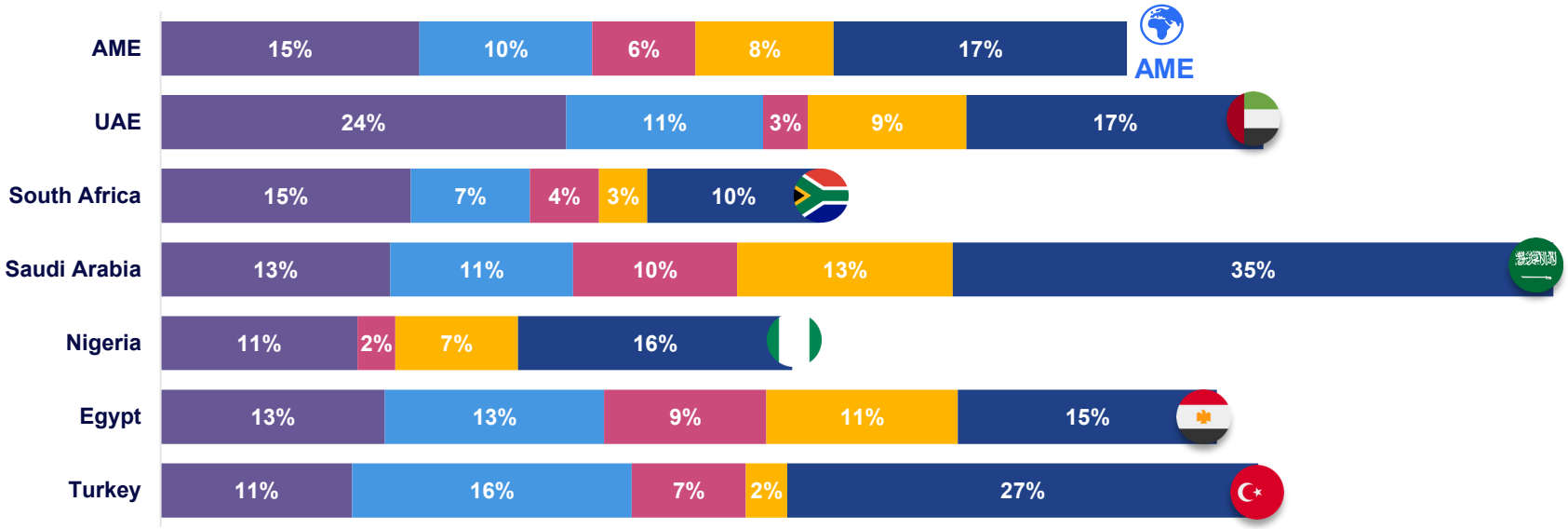
Health divide evolves: GLP-1 access expands beyond affluent consumers

Similar usage rates across Thrivers and Strugglers suggest new care pathways are making treatment more accessible across AME.



12%

of surveyed global consumers say they're currently taking a GLP-1 medication.



Broadening GLP-1 access

Strugglers are just as likely as Thrivers to be using GLP-1s.

Democratizing access 01

Lower-cost GLP-1 alternatives such as (Extensia and Semgot) are helping make treatment more accessible, reducing affordability barriers and expanding access beyond higher-income consumers.

Decentralizing care 02

Integrated healthcare ecosystems are bringing treatment closer to consumers. In the UAE, providers such as Aster are combining consultations, prescription access and medication delivery within a single care journey, extending access beyond specialist clinics and improving convenience.

Digitizing management 03

Digital tools are supporting ongoing treatment management. Teleconsultations, online pharmacy platforms and home-delivery services are helping consumers manage GLP-1 treatment more conveniently, reducing friction throughout the patient journey and supporting long-term engagement with care.

Source: NIQ 2026 Consumer Outlook, Global, U.S. wearables statistic via NIQ Bases Quick Question omnibus survey, fielded in December 2025.
Note: GLP-1 survey insight based on self-reported responses to "I'm currently using these medications." Results may differ from other studies due to differences in respondent universe, methodology and questionnaire design.

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GLP-1 adoption is gaining momentum across global markets

India reports the highest level of GLP-1 usage among markets surveyed

"Currently using GLP-1 medications"

Consumer sentiment across markets (% respondents)

India

reports the highest GLP-1 adoption among markets surveyed (22%), potentially reflecting the combination of high metabolic-health need, expanding treatment access, and growing consumer awareness.

01

Larger underlying need

India has one of the world's largest populations living with diabetes and obesity-related conditions, making it a global focal point for metabolic health needs.

02

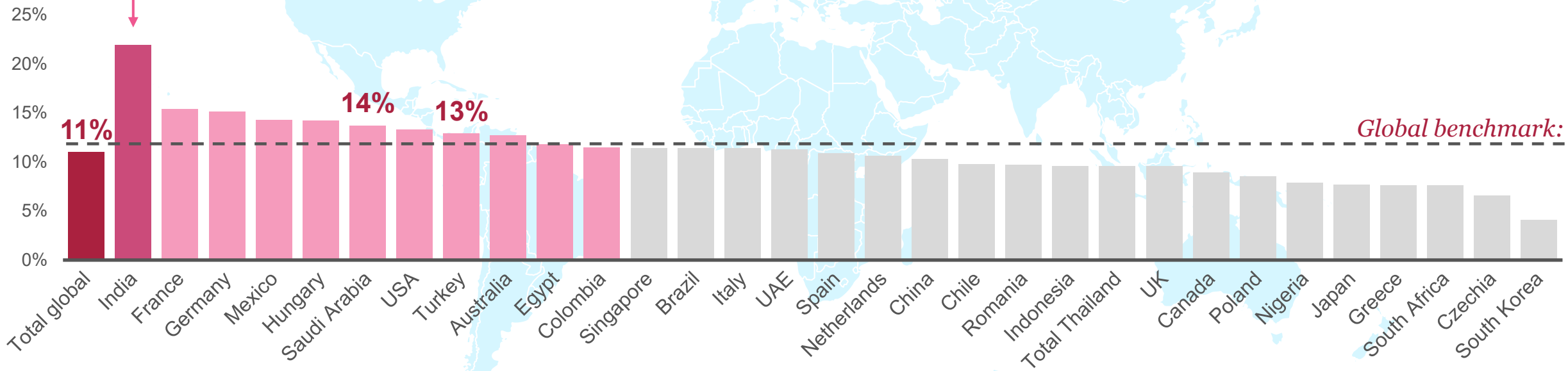
Rapid expansion of access

With the 2026 expiry of Semaglutide patent in India, cost barriers are lifting as generic versions could accelerate market growth and access. Uptake may take time to follow.

03

Strong local awareness

Increased media coverage, weight-management discourse and telehealth expansion are fueling local momentum. Awareness is rising, but in some cases, consumer acceptance remains mixed.



Source: NIQ 2026 Consumer Outlook

Note: GLP-1 survey insight based on self-reported responses to "I'm currently using these medications." Results may differ from other studies due to differences in respondent universe, methodology and questionnaire design.

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The GLP-1 Ripple Effect beyond weight loss: Rewired wellness priorities

Consumers increasingly expect GLP-1 medications to influence future food, beverage and health product choices, reshaping wellness-driven purchasing behaviors.

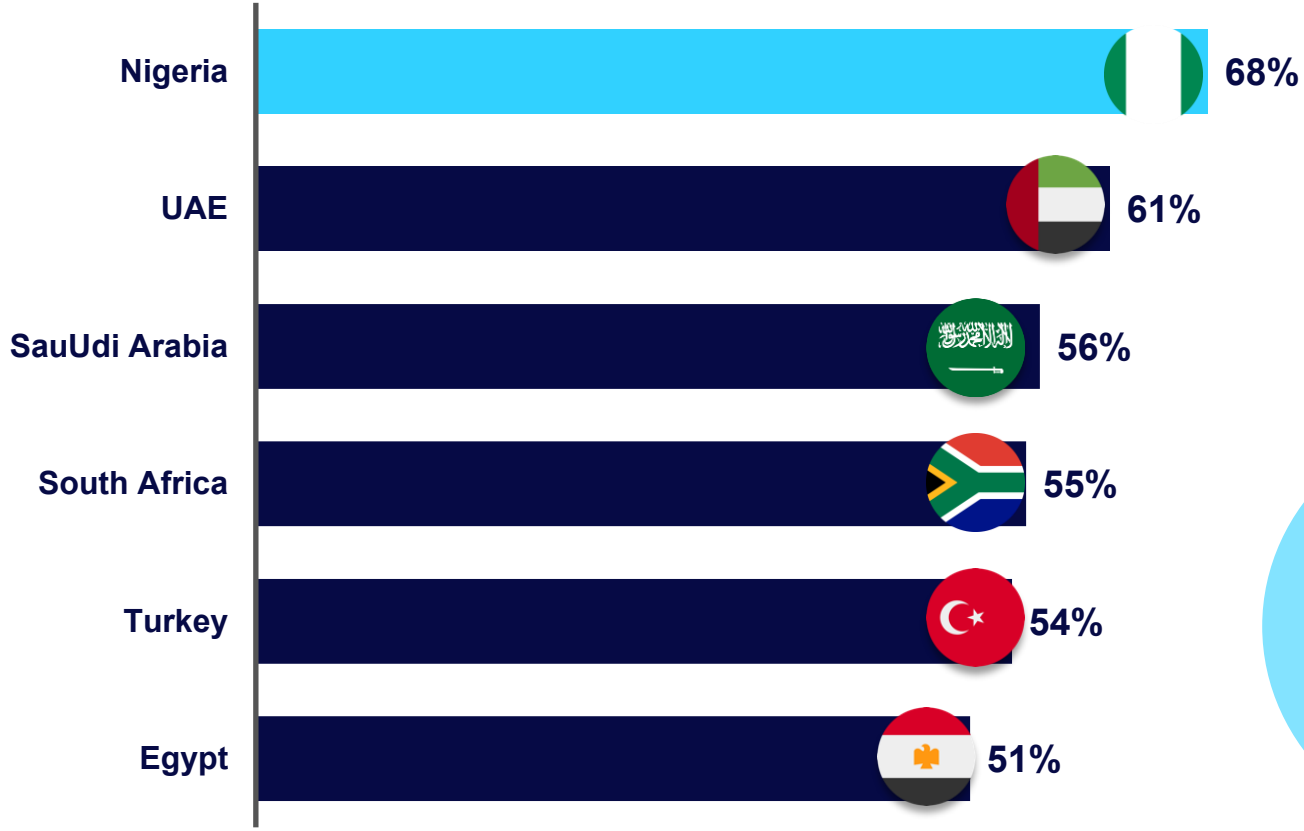


58%

of surveyed AME consumers expect that GLP-1 medications will impact the way they shop for food, beverages & health products

Expected Impact of GLP-1 Medications on Future Food, Beverage & Health Product Purchases

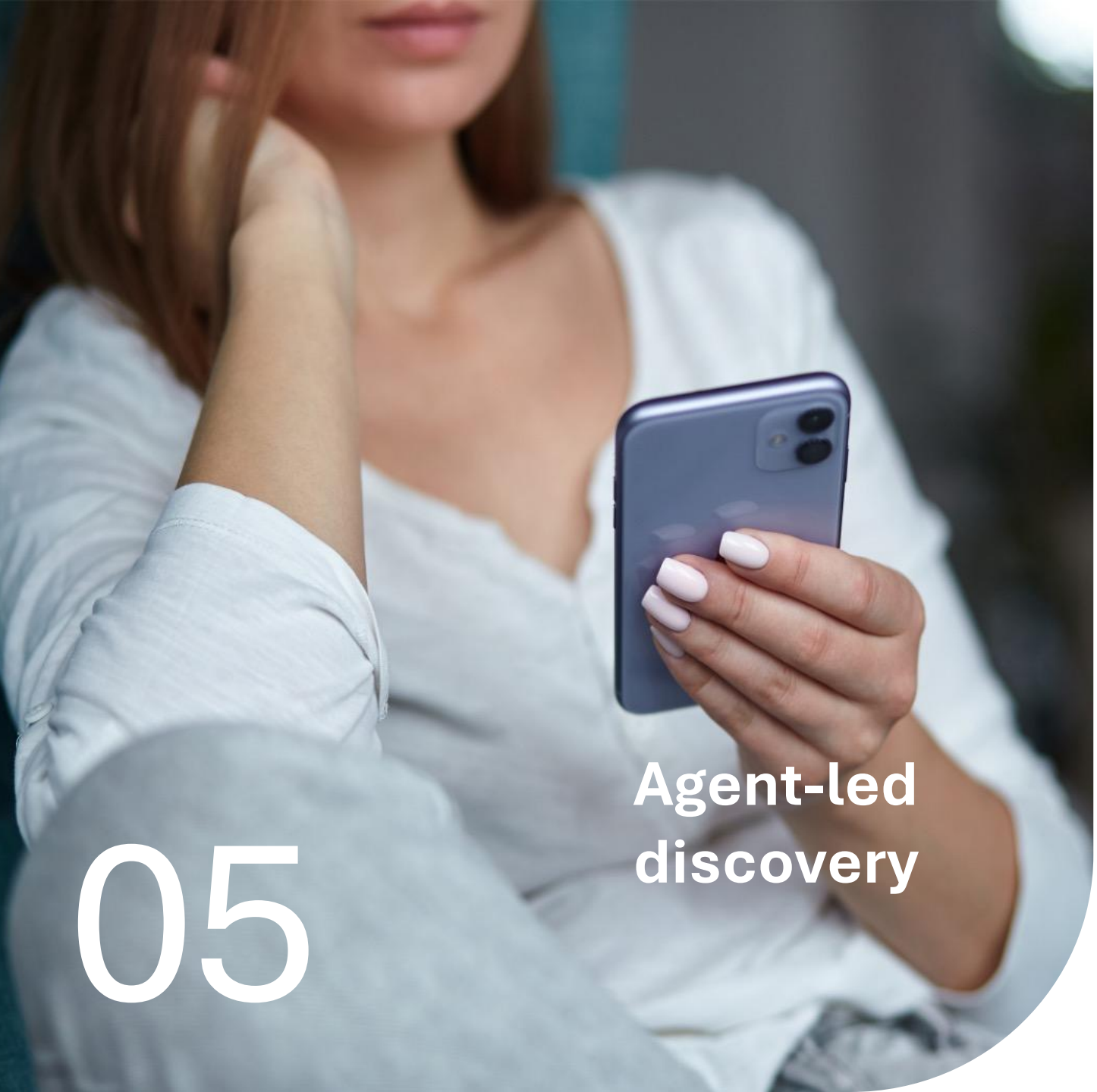
AME consumer sentiment, % respondents who said each factor was "excepted"



...The impact is already visible in purchasing behavior, ***led by Nigeria at 68%,***

Source: NIQ 2026 Consumer Outlook, Global, NIQ Homescan x GLP-1 Panel Survey fielded between Jan. – Feb. 2026, Total US, Total Outlets, Total Food & Beverage, with NIQ Product Insight stated claims on package, Unit % Change, 52 weeks ended Feb. 21, 2026 vs. previous year.

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05 Agent-led discovery

Key Insights

- **AI is becoming a new discovery layer:**
  64% of global consumers have been influenced by AI recommendations for CPG purchases, and 33% say they already use AI to help decide what to buy
- **Products may win or lose consideration before consumers even see them:**
  As commerce evolves from physical stores to AI agents, the number of products considered by shoppers continues to narrow.
- **Agentic commerce is redefining pathways to success:**
  Data used to report who won.
  Now, data *determines* who wins.

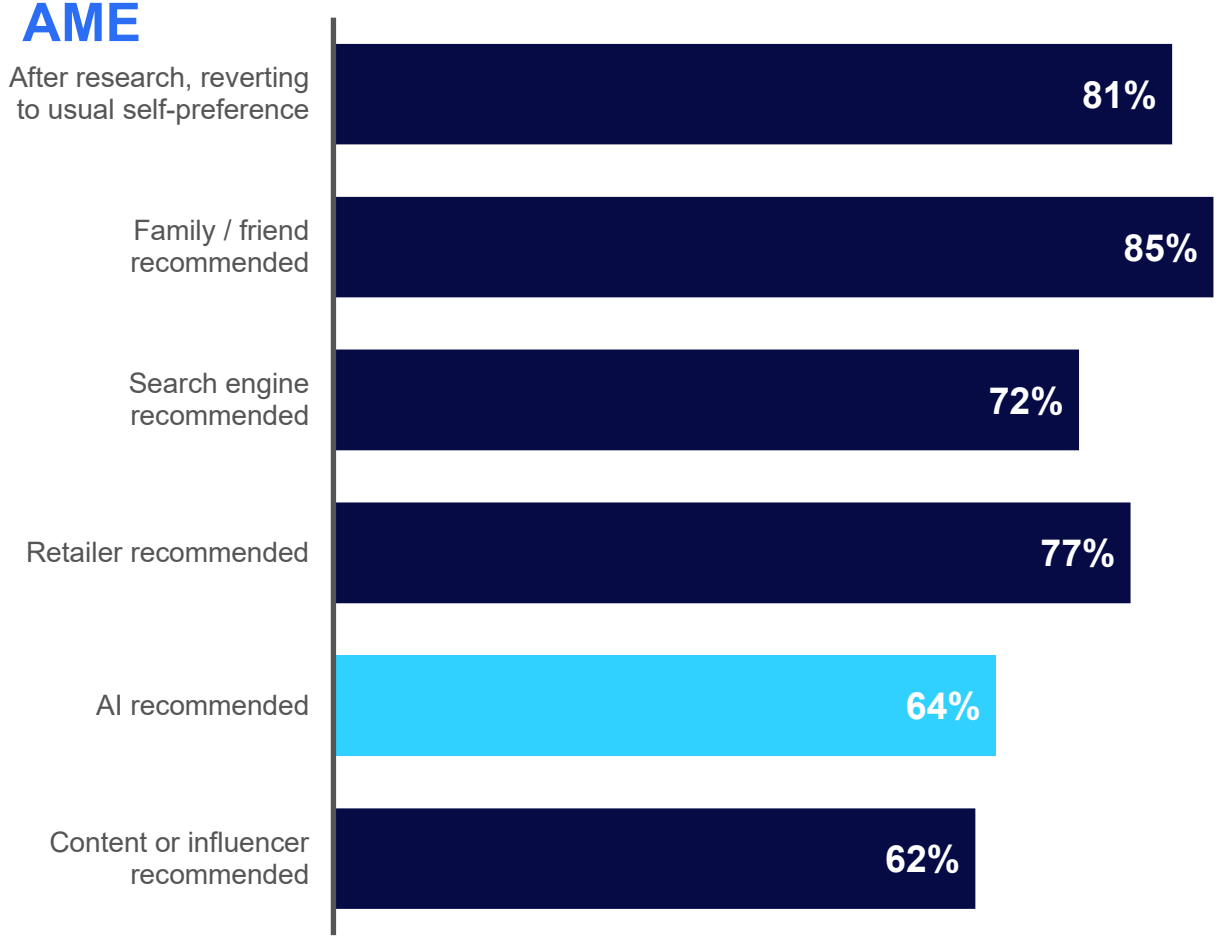
*The competitive battleground is shifting **from influencing shoppers to influencing the AI systems** that increasingly shape what shoppers see, consider, and buy.*

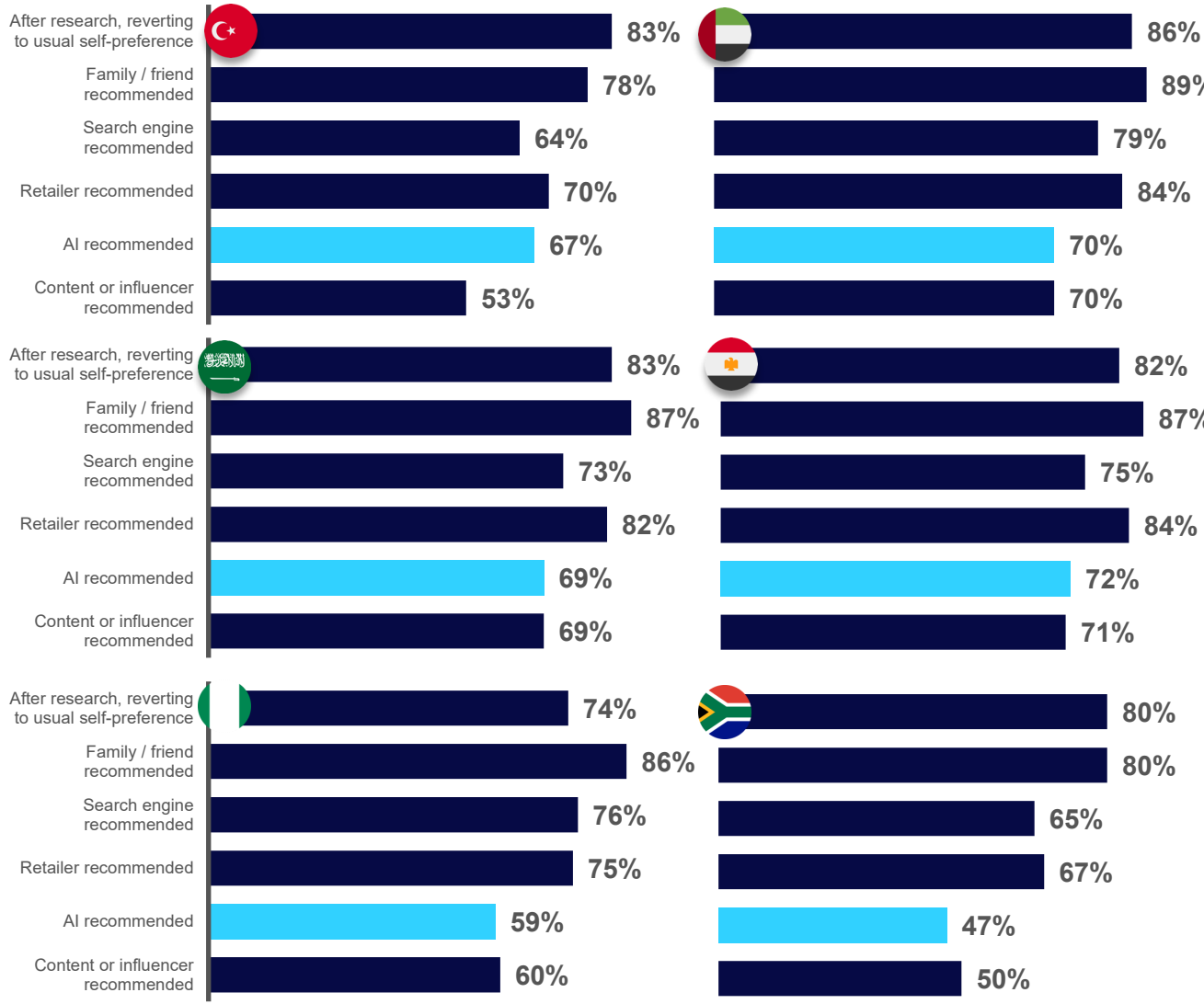
Navigating a rapidly evolving new architecture of “choice” and “influence”

Sources of influence for CPG product discovery

% respondents, Sometimes / Often / Always influenced to purchase by

AME





Source: NIQ 2026 Consumer Outlook, Global, Q. How often do these sources influence your household and grocery purchases?

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The shift ahead

Agentic commerce is reshaping the shopping experience

Today

10 minutes in the aisle

A shopper travels to the snack aisle in-store: they scan labels, compares options, and make choices based on what they recognize, what is promoted, and an overall “gut feel” for what seems worth it to them.

Tomorrow

A voice prompt to an AI agent in 30 seconds

The agent queries structured product data, cross-references household history, checks fulfillment, and recommends three ranked options with reasonings to guide selection. The resulting purchase process: tap, confirm, drive.

SHOPPER JOURNEY BEHIND THE SCENES

Same purchase. Very different infrastructure.

What shoppers experience may look the same. But the intelligence, signals, and decisions powering each interaction are fundamentally transformed.

TODAY 10-min shopper journey	**Drive to store** *stop on the way home*	**Walk the aisle** *scan package labels*	**Pick two** *one that's familiar, one new*	**Pay and leave** *hopeful to enjoy at least one*	**Consumer rejects one** *mental note made, soon forgotten*
Powered by *1 layer · 1 signal*	—	—	—	POS scan, captured weeks later	—
TOMORROW 30-sec shopper journey	**Speak to watch** *by voice prompt*	**See three options** *one which meets all needs*	**Tap to buy** *via a store identified on route*	**Pick up on route** *just 2 min from driving route*	**Shopper rates 5 stars** *noting it's 'delicious' and 'easy to eat'*
Powered by *6 layers · 17+ signals*					
Preference Intelligence	Household profile · Diet protocol	Flavor history · Family calendar			
Product Intelligence		Ingredient metadata · Gluten-free verified	Brand catalog complete		
Availability Intelligence			In-stock confirmed · Route-aligned store	Fulfillment ETA	
Purchase Verification			Item held	SKU confirmed	Transaction verified
Channel Measurement					Agent-driven attribution
Optimization Intelligence					Graph updated · Next query smarter

The experience feels effortless to the shopper. NIQ powers the intelligence behind it.

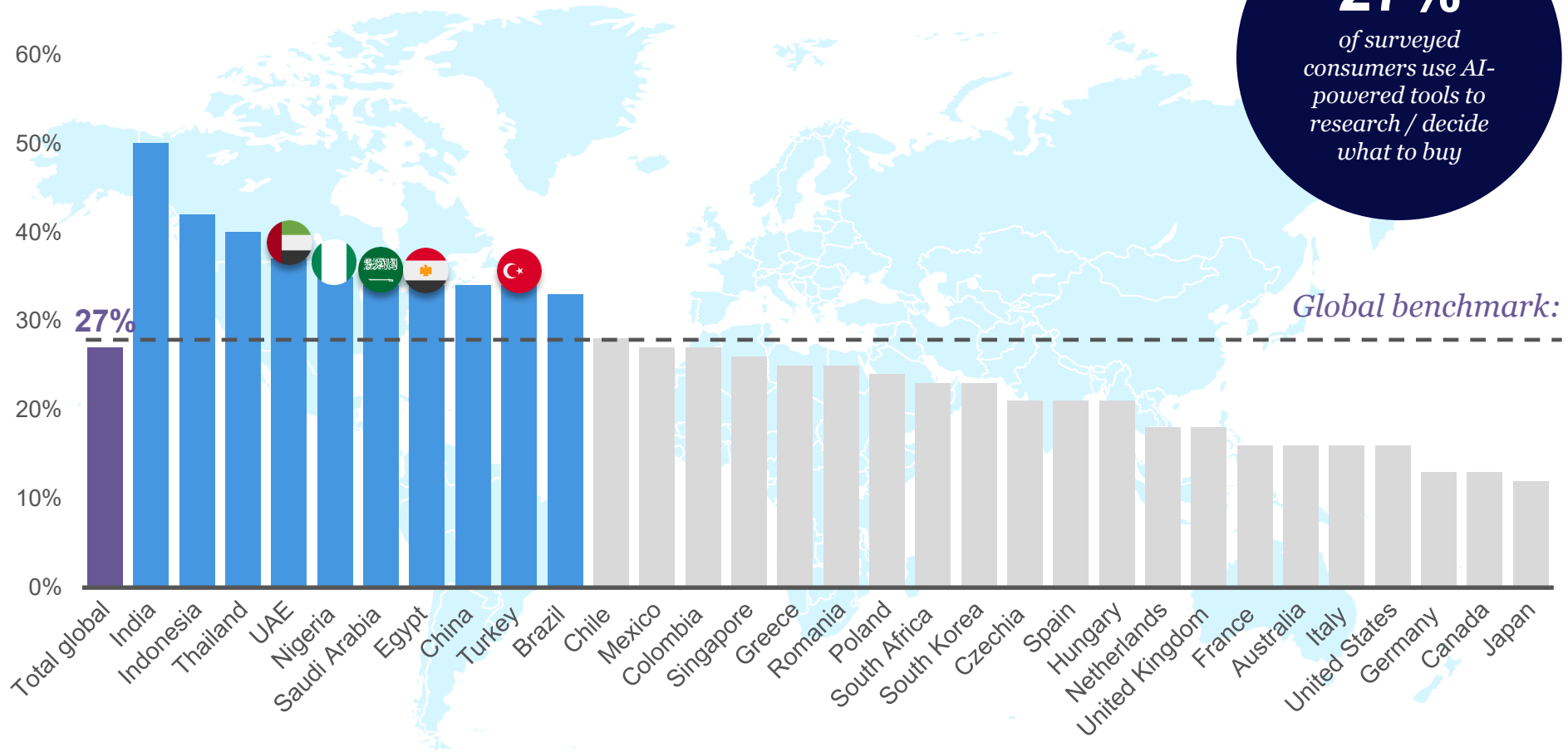
Nearly 3 in 10 consumers globally already use AI-powered tools to help research and decide what to buy

UAE, Nigeria, Saudi Arabia, Egypt and Turkey ranking above the global average in terms of consumer adoption of AI-mediated discovery



Varying levels of AI-influenced research and decision-making among consumers

Consumer sentiment across markets (% respondents)



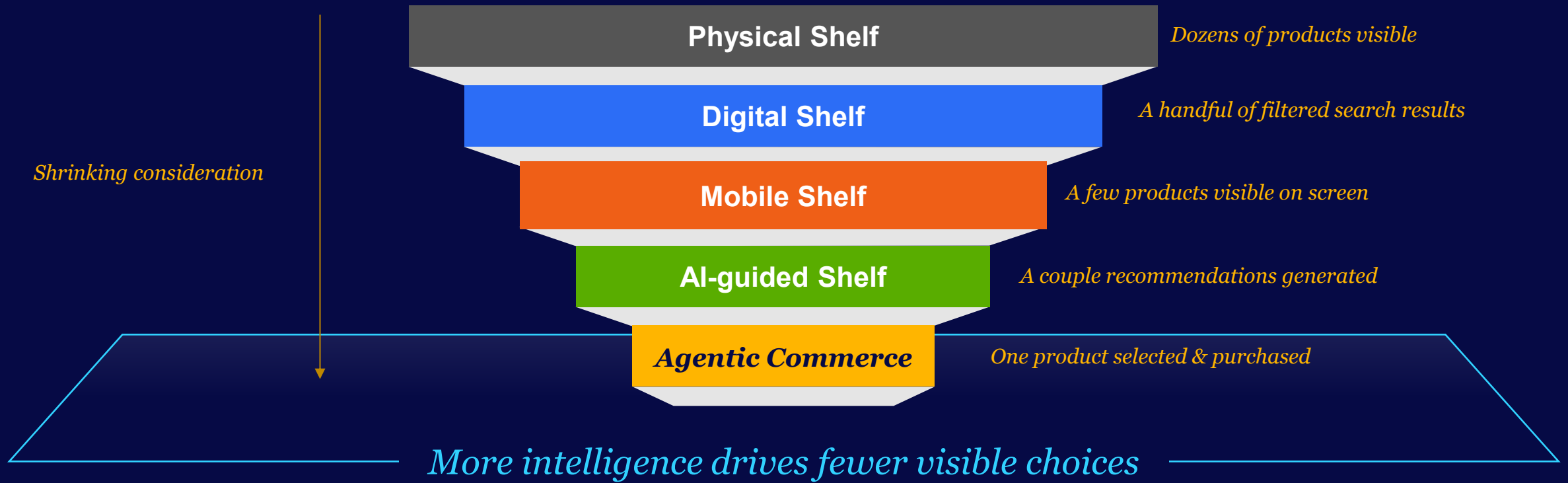
Source: NIQ 2026 Consumer Outlook,

Note: These survey insights reflect self-reported use of AI-powered tools or assistants to help research or decide on what to buy. Estimates may differ from other studies due to differences in respondent universe, methodology and questionnaire design.

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The new digital shelf

Products may win or lose consideration before consumers even see them



More intelligence drives fewer visible choices

As commerce evolves from physical stores to AI agents, the number of products considered by shoppers continues to narrow.

Source: NIQ Digital Shelf

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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

$3-5T

in **global revenue from agentic commerce projected** by 2030 (with up to $1T in US alone).

10-20%

of U.S. e-commerce **market share** could be driven **by agentic shopper spending** by 2030.

4.4x

Higher **conversion of AI search visitors** vs. traditional search, making them **4.4x as valuable.** 25% of referral traffic for some retailers is already being driven by AI.

Source: 1) McKinsey, 2) Morgan Stanley, 3) NIQ NexIQ custom-built language model, 3) Semrush average LLM vs. organic search visitors, Bain x Similarweb

Why data fidelity matters

Even small intelligence advantages can compound into significant market opportunity

Illustrative example showing the impact of decision fidelity over repeated optimization cycles:



Source: NIQ, Illustrative scenario assuming $1M trade investment at NIQ-aligned optimal CPG ROI of 30%, where AI decisions are optimized at 95% vs. 99%

NIQ Enablement

Turning trusted intelligence into competitive advantage

Everyday insights
Right insight, right moment

- Optiq
- Optiq Bridge

Growth Strategy
Accessible, dynamic, engaging

- AI Chat for Segmentation
- Panel Survey Modernization

Brand & Media
Smarter audiences, breakthrough content, faster pivots

- Automated MMM
- Audience & Personalization

Price & Promotion
Sharper pricing, real-time promotion

- Price & Promo Optimizer
- 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 Screener
- AI Product Developer

The question is no longer what's changing.
It's what comes next.



What this means for 2027

Forces shaping the consumer landscape in 2027

Foresight to guide strategic actions in the next 12-18 months

Recalibrating for a new reality

2027 Outlook:
Adaptation becomes the new baseline.

Consumers are no longer waiting for conditions to improve. They are making long-term decisions around a future where volatility remains part of everyday life.

Consumption at extremes

2027 Outlook:
Polarization reshapes the path to growth.

As consumer realities diverge, so do opportunities for growth. Success will increasingly depend on identifying where demand is concentrating and aligning portfolios to win across a more polarized marketplace.

A new world of worth

2027 Outlook:
Every purchase must justify itself.

spending by default. Every purchase must earn its place as households increasingly evaluate purchases based on outcomes, relevance, and personal value.

Self-directed wellness

2027 Outlook:
Health management moves into consumers' hands.

As barriers to information, treatment, and care continue to fall, consumers are taking greater ownership of their wellbeing and influencing demand far beyond traditional health categories.

Agent-led discovery

2027 Outlook:
Visibility becomes the new availability.

Consumers may never see every option. Products that are visible, trusted, and understood by AI systems will have a growing advantage as recommendation-led commerce evolves.

Consumer Outlook *bottom line:*

The organizations that win in 2027 will be those that adapt as quickly as consumers do, responding to growing polarization, rising expectations of worth, more self-directed approaches to health, and increasingly AI-mediated consumer journeys.

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So, what? Now, what?

Your 2027 strategic roadmap



Anticipate

shifting consumer priorities.

Monitor how changing expectations around spending, work, health, and everyday life are reshaping future demand.

How NIQ can help:

>>> Global market measurement solutions



Prioritize

the right growth plays.

Identify where demand is concentrating as consumers shift spending across value, mainstream, and premium segments.

How NIQ can help:

>>> Analytics & activation solutions



Prove

your value proposition.

Demonstrate why products deserve consideration by clearly communicating outcomes, relevance, and worth.

How NIQ can help:

>>> Consumer behavior & insights solutions



Enable

Healthier consumer choices.

Respond to the rise of a health-first value equation, embedding wellbeing into products, services, and everyday experiences.

How NIQ can help:

>>> Product insight & innovation solutions



Optimize

for AI-mediated discovery.

Strengthen product visibility and recommendation readiness as AI increasingly shapes discovery and choice.

How NIQ can help:

>>> AI solutions, insights & strategy

From insight *to action:*



Success in 2027 won't come from reacting to change. It will come from anticipating where consumers are headed, identifying the consumers and categories driving growth, and creating the conditions for brands to remain relevant, discoverable, and indispensable.

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