

DATA SNAPSHOT

Strategy for Growth in the Perimeter

October 2023



NIQ

Executive Summary

Inflation may be subsiding, but impact is here to stay

Growth and demand differ by fresh department

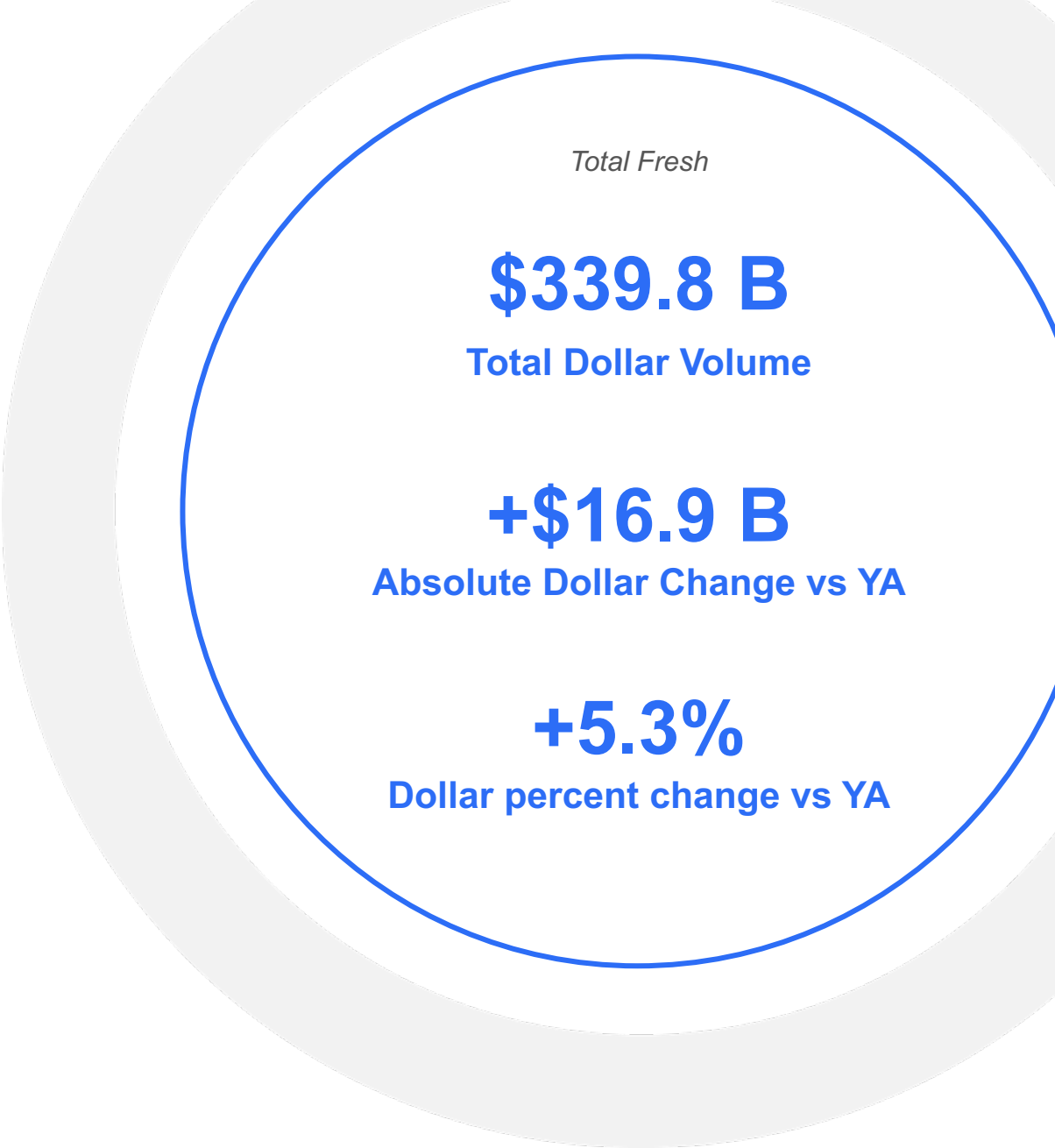
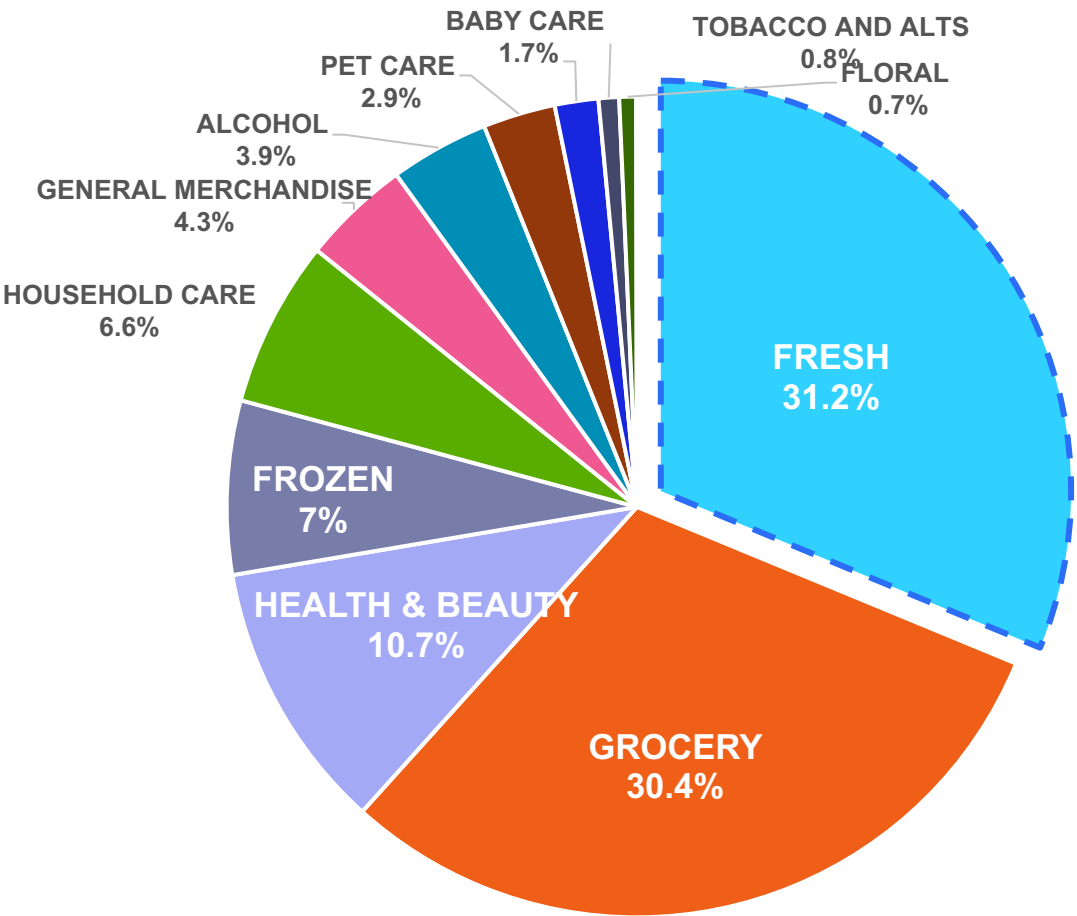
Value-seeking behavior impacts departments in the perimeter

Brands need to differentiate to grow

The Strategy for Growth in the Perimeter Data Snapshot is an excerpt of a 30+ slide presentation. If you are interested in accessing the full deck, get in touch with our perishables team leaders: [Colleen McGinnis](#) or [Monica Burton](#)

Total Fresh departments make up 31.2% of total CPG dollars and outpace the rest of the store, with dollar gains exceeding 5%

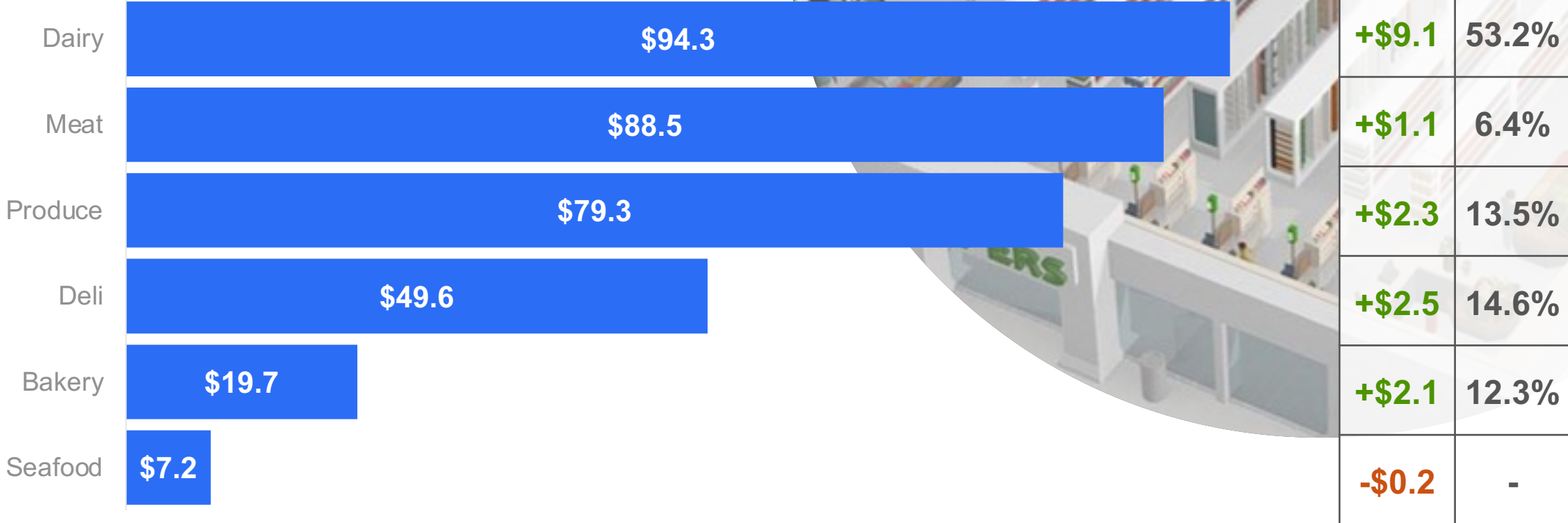
Share of Department sales in Total US xAOC



Source: NIQ Discover; US NIQ Total Store Inc Fresh -444- (Synd), Total US xAOC, L52 W/E 08/12//2023

Dairy department over indexes in terms of growth contribution, driving over 50% of all perimeter dollar gains vs YA

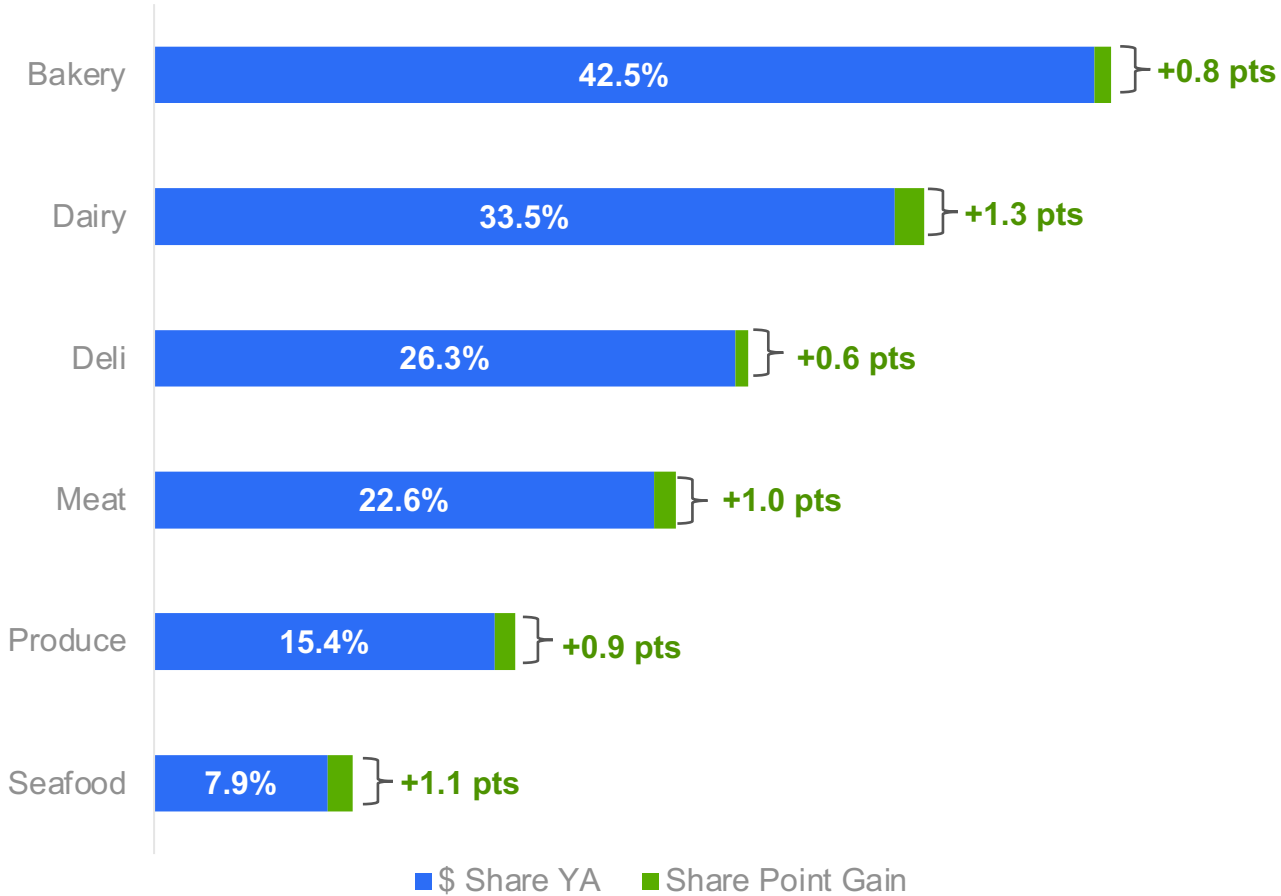
Fresh Departments (\$B and Chg vs YA)
Total US xAOC



Source: NIQ Discover; US NIQ Total Store Inc Fresh -444- (Synd), Total US xAOC, L52 W/E 08/12//2023

National brands ceded the most share in Dairy, Meat and Seafood, where Private Label gained at least one full share point

Private Label Share of Department with Share Gain vs. YA



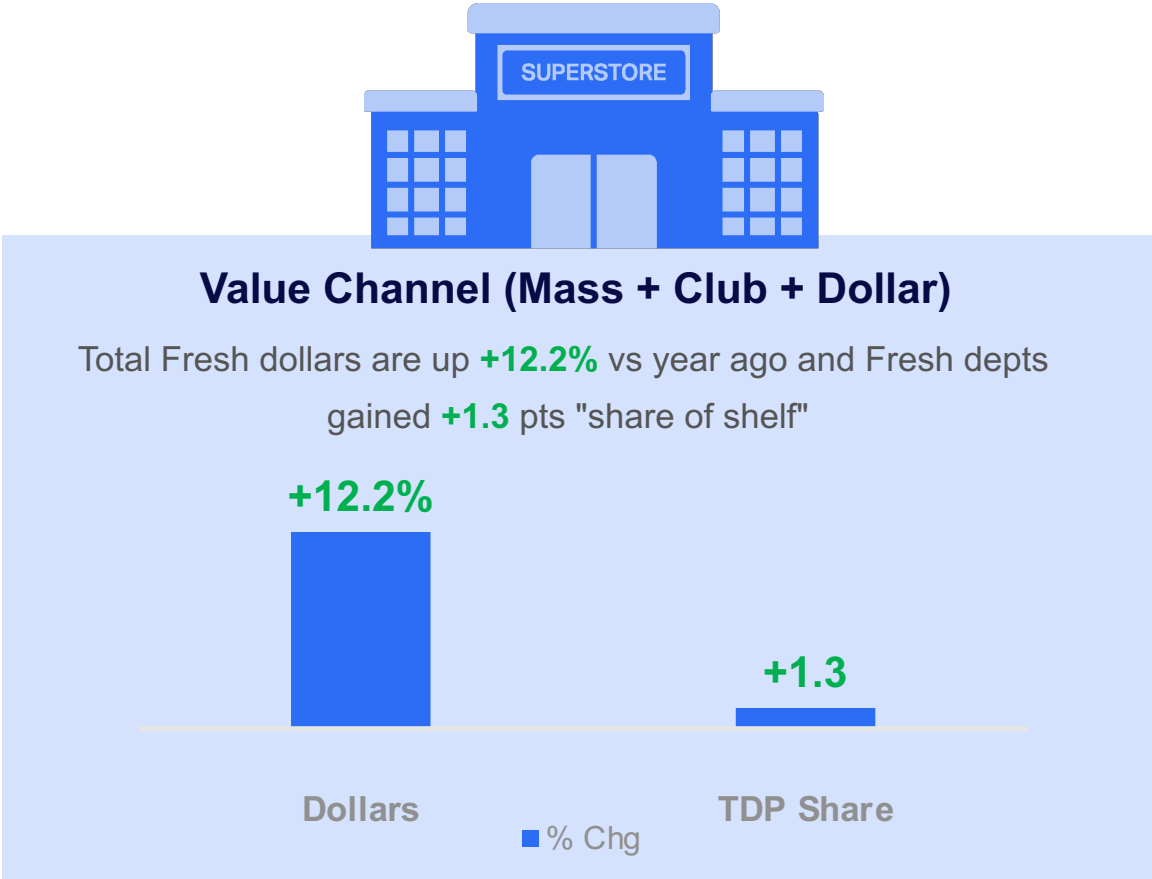
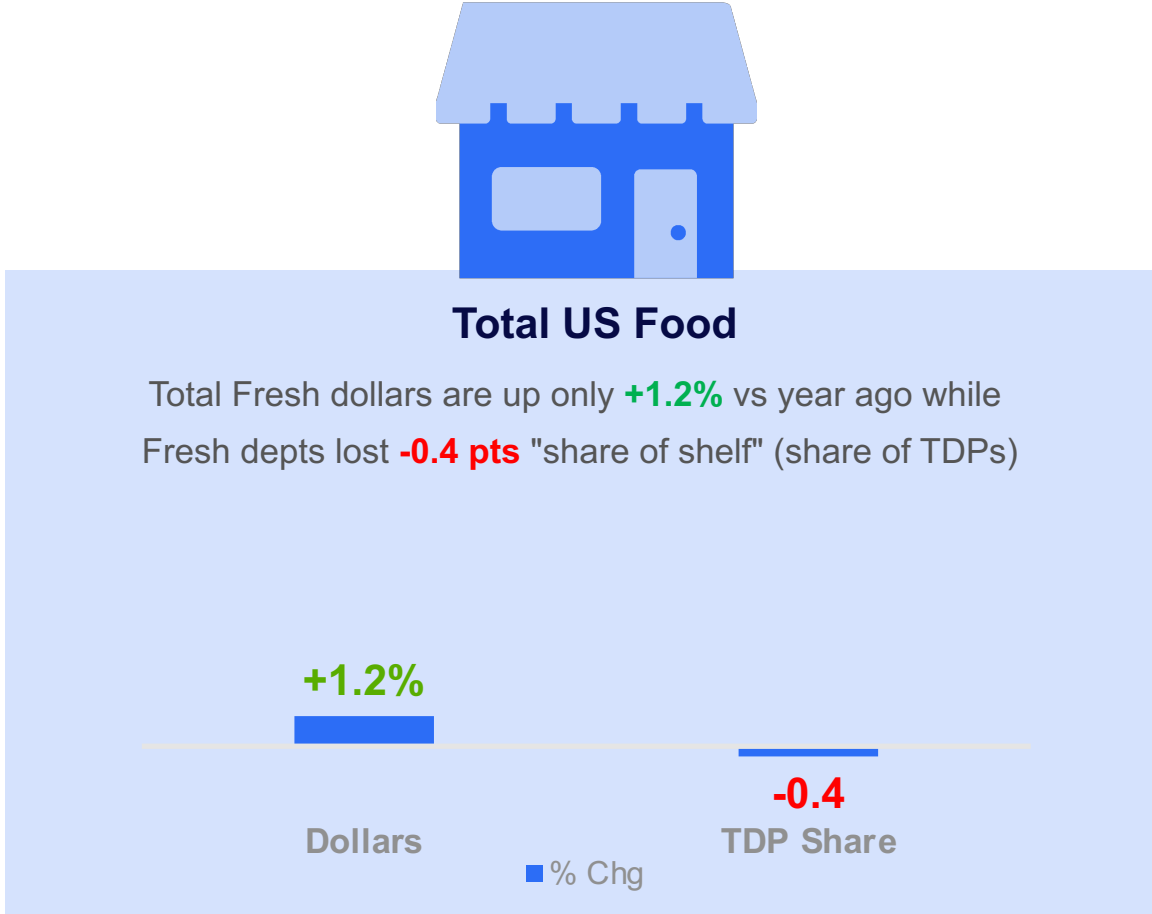
23.6%
of Fresh dollars are from Private Label

PL sales grew +10.6% and gained +1.3 share pts vs YA

Source: NIQ Discover; US NIQ Total Store Inc Fresh -444- (Synd), Total US xAOC, L52 W/E 08/12//2023

The Value channel* outpaces Food in both dollars and depth of distribution in L52 weeks

Given inflationary pressures, Mass, Club and Dollar retailers are capturing more and more share of wallet in fresh categories

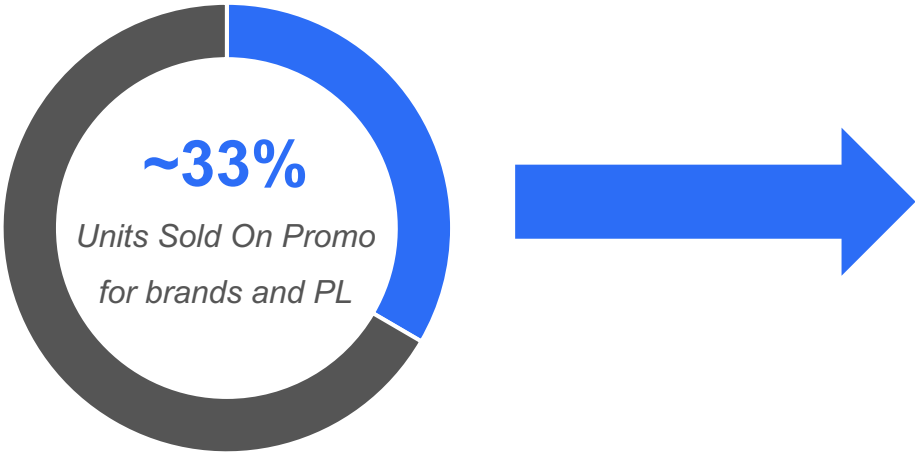


Source: NIQ Discover; US NIQ Total Store Inc Fresh -444- (Synd), Total US Food and *Value (Mass + Club + Dollar retailers), L52 W/E 08/12//2023

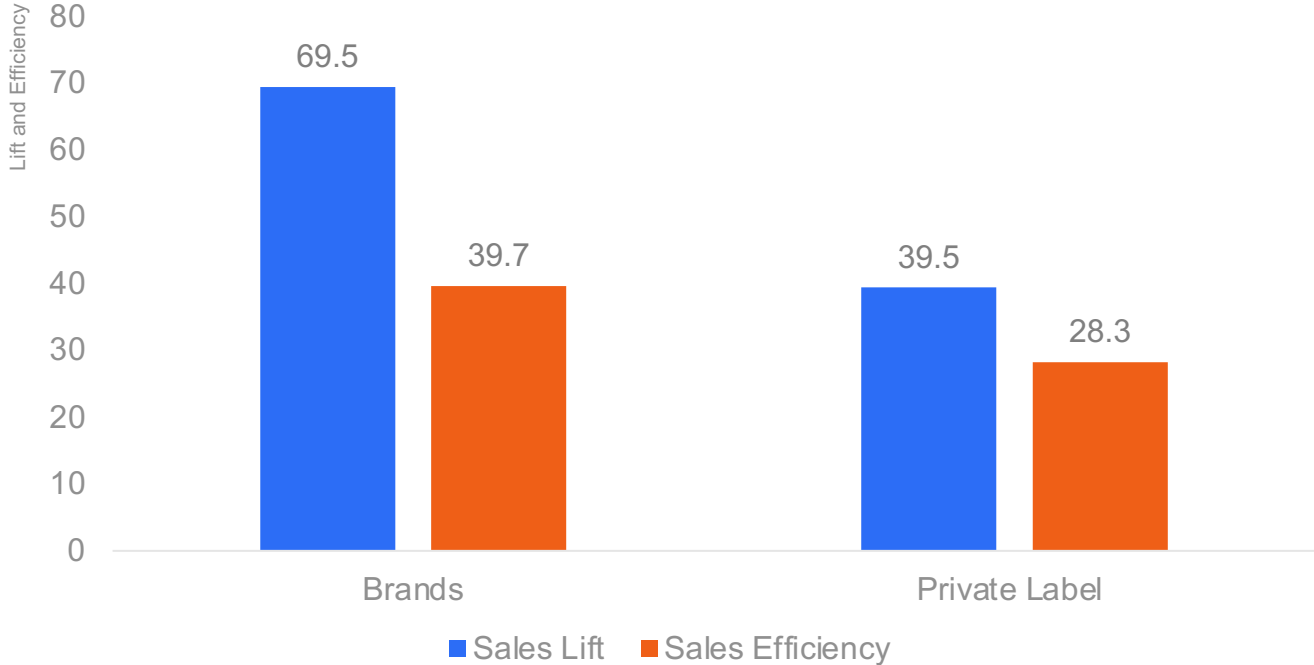
Healthy promotion is a viable growth opportunity for brands, with 40% trade efficiency* overall

With consumers now facing wallet restraints, pricing and promotions are at top of mind. Optimizing promotional strategies will not only meet consumer needs, but also maximize brand margins

Total Fresh – Percent of Units on Promo in L52 Weeks



Promotional Sales Lift and Efficiency for Brands vs. Private label



Source: NIQ Discover; US NIQ Total Store Inc Fresh -444- (Synd), Total US xAOC, L52 W/E 08/12//2023. *Promo Efficiency = % of volume sold on deal that was incremental as a result of the promotion.

No matter your brand size, you deserve the Full View™

Businesses at different stages have diverse needs. Whether you're looking to nail your next retailer pitch, are expanding distribution, or need to defend your turf, we have the data and tools you need to succeed. From personalized subscriptions to ad hoc reporting, you can get the data you need without spending your entire budget.

Connect with one our perishables data specialist for access to the full 30+ slide presentation.



Scan the QR code to get the Full View™ of the Perishables Market with NIQ



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