The Future of Retail

Natural Products EXPO WEST®

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The Future of Retail

Brandon Galindo
Senior VP of Sales – Product Insights
NielsenIQ

Kenneth Juskowiak
Managing Director, Emerging Brands Portfolio
NielsenIQ

Krystal Dawson
North America SMB Team Leader VP, Account Development
NielsenIQ

The Future of Retail

Expo West 2024

March 2024

Today's Speakers

Kenny Juskowiak

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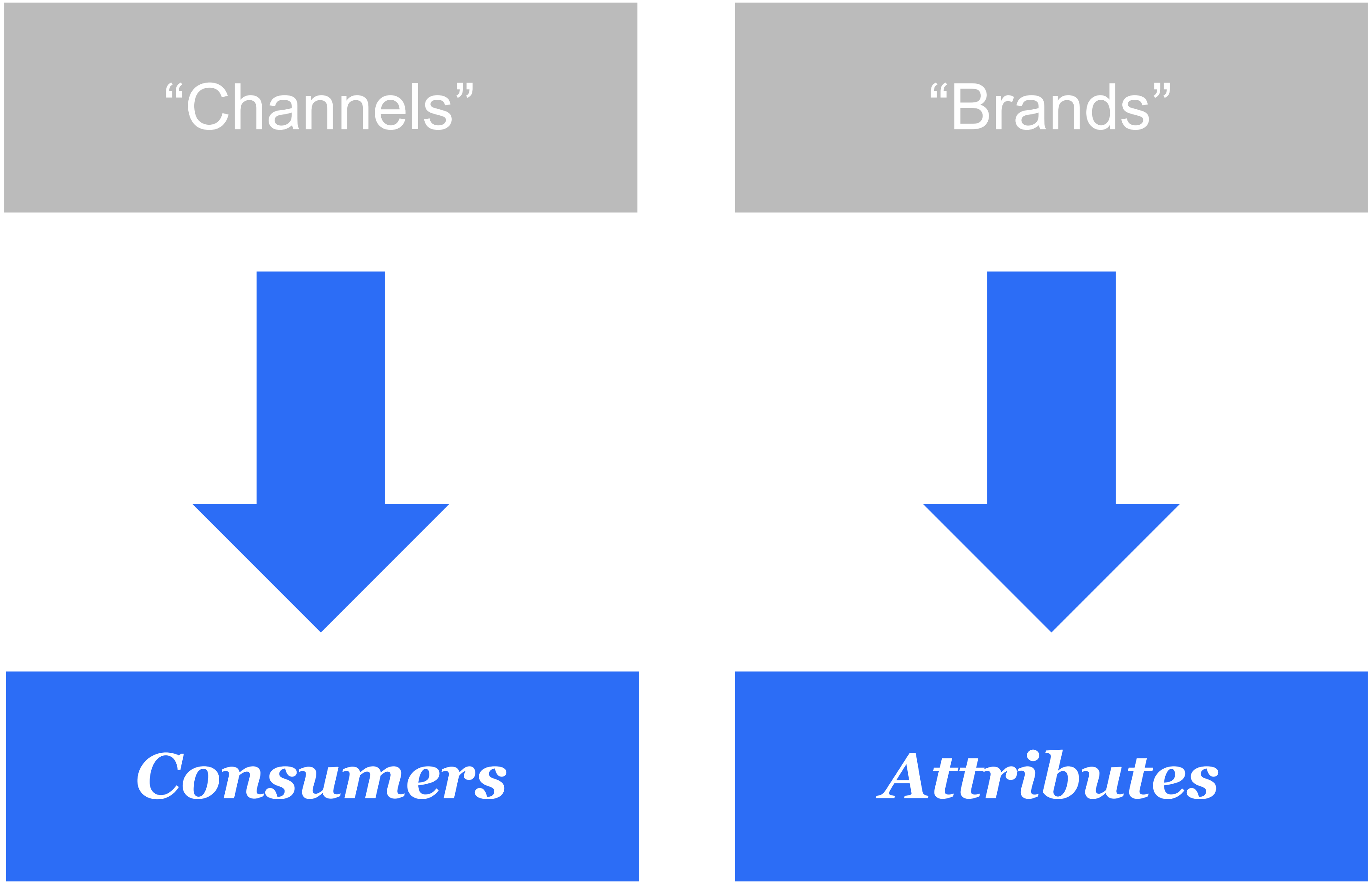
VP, Account Development

It’s a new world of retail

Traditional modes of thinking about how commerce occurs are diminishing in relevance



NIQ

If consumers don’t think in terms of “channels” *…why do we?*

How many ***channels*** does the average consumer shop in?

1 + 3 + 4

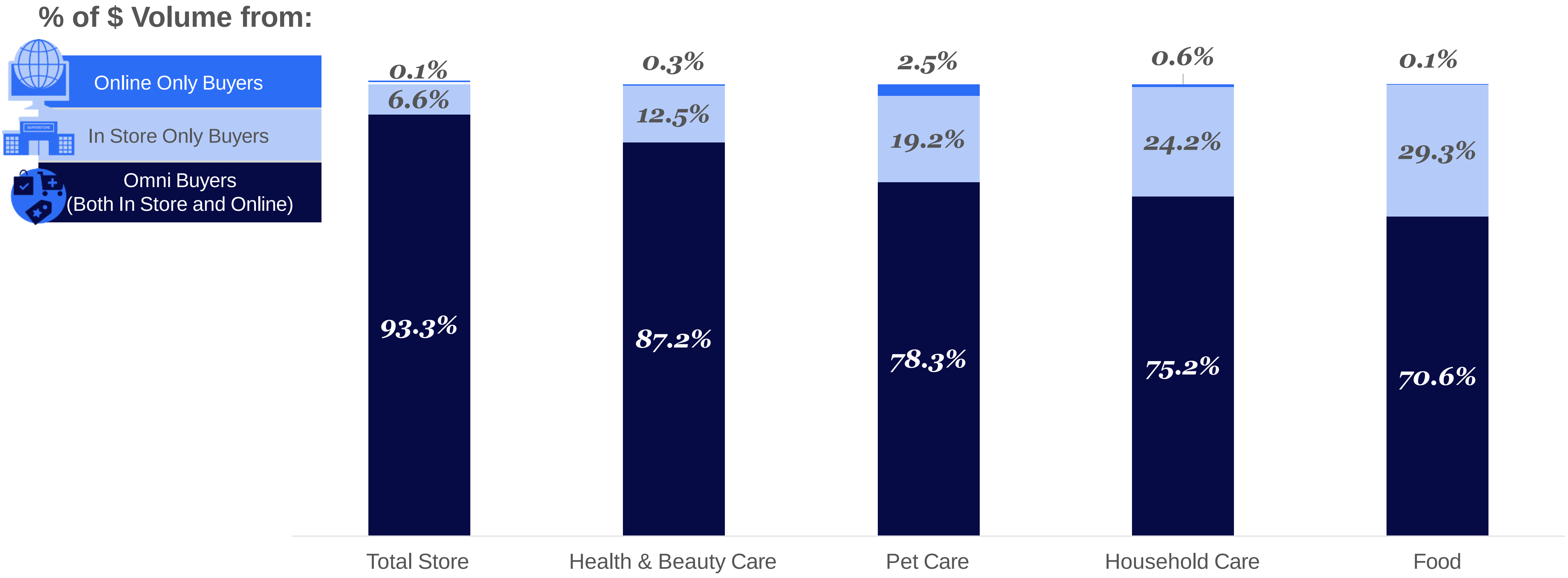
8

To grow in a challenged market, we need to *reach consumers where they are.*

Source: NielsenIQ Omnishopper Panel, 52WE 1/27/24, Total US

NIQ

The shopper is becoming truly “Omni”, with lots of headroom across departments



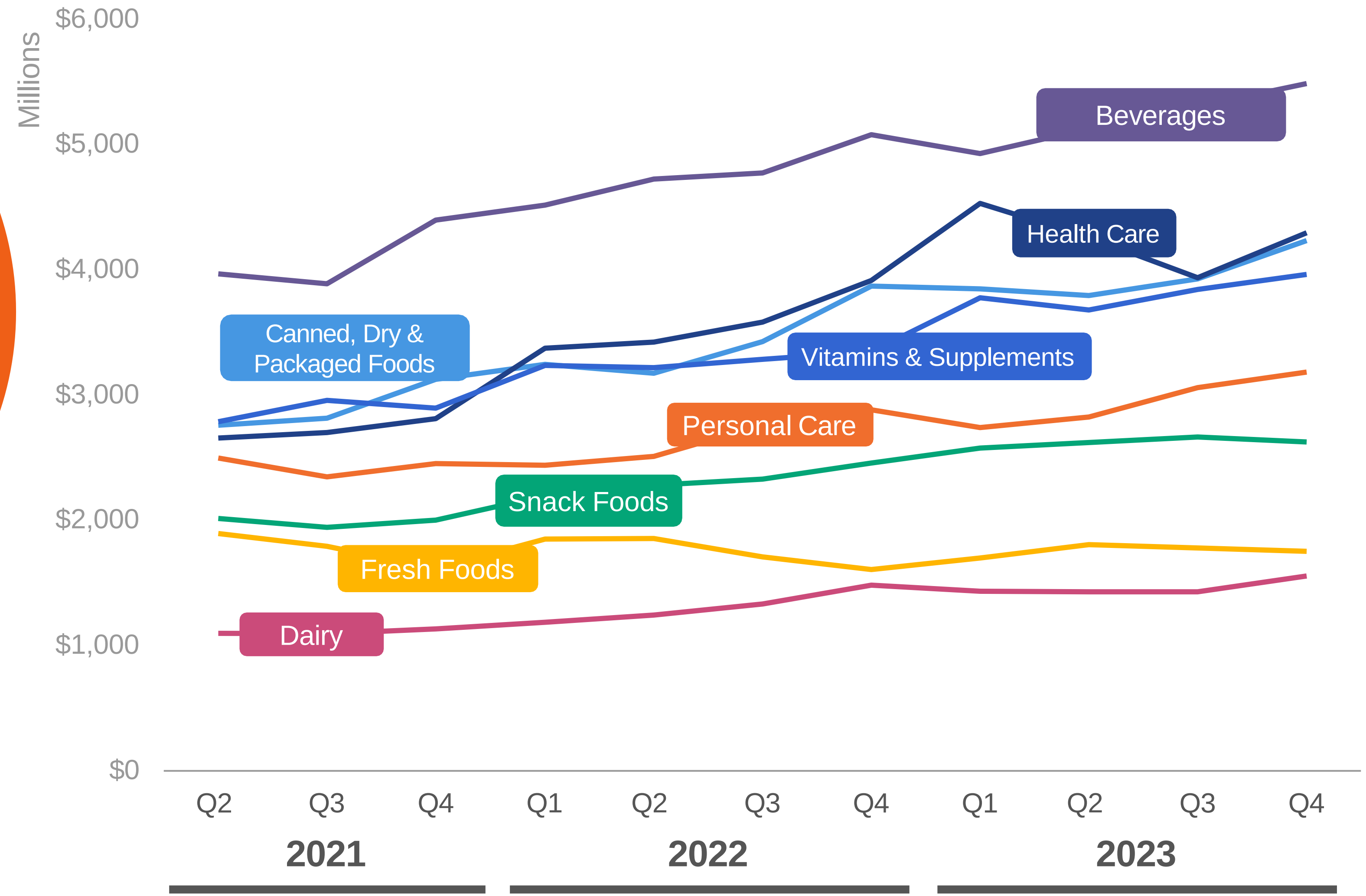
Online Share of Wallet among *Omni* shoppers:	Total Store	Health & Beauty Care	Pet Care	Household Care	Food
	30.2% | +1.5pts	41.3% | +3.0pts	45.6% | +1.6pts	31.4% | +3.2pts	16.1% | +1.1pts

Source: NielsenIQ Omnishopper, Total Outlets, L52WE 1.27.24 vs PY. *FOOD includes total edibles (food and beverage), Total Store = Alcohol, Baby Care, Health & Beauty Care, General Merchandise, Household Care, Food, Pet Care, Departments

3.3%

DTC share of total food down from **4.9%** last year

Direct-to-consumer shifting

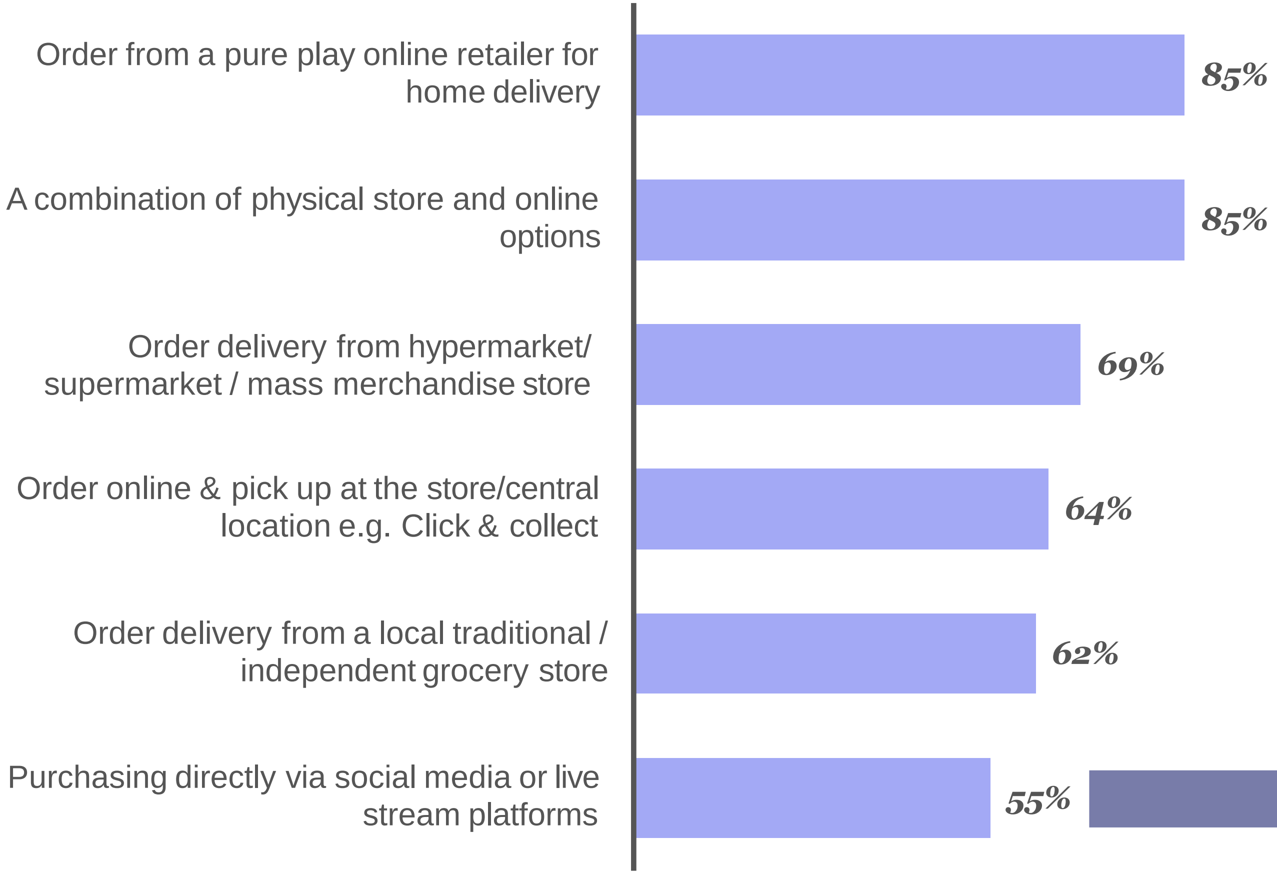


Source: NIQ eCommerce Panel Data, Total Personal Care, Latest 3 years ending December 2023

NIQ

Social shopping is emerging to challenge traditional retailers

Where do you normally shop for grocery & household items?
% respondents who shop at this channel – U.S.



81% *of TikTok dollar sales are from health and beauty*

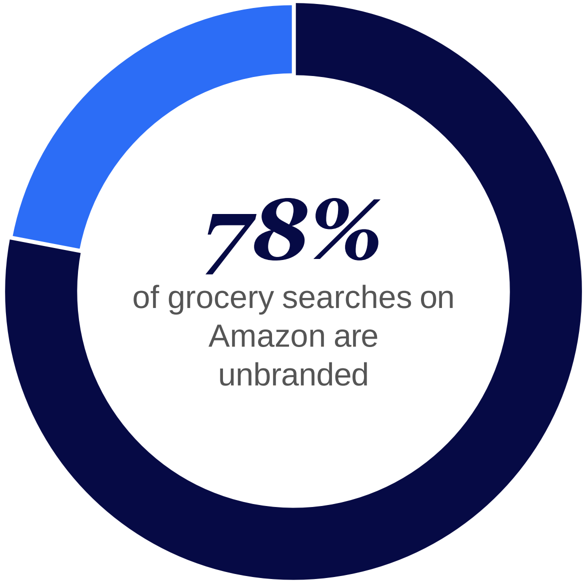
#14 ***TikTok Shop is already the Health and Beauty ecommerce retailer since it's launch in September 2023***

#30 ***Food retailer***

Source: NIQ 2024 Consumer Outlook, U.S.
TikTok Shop sales

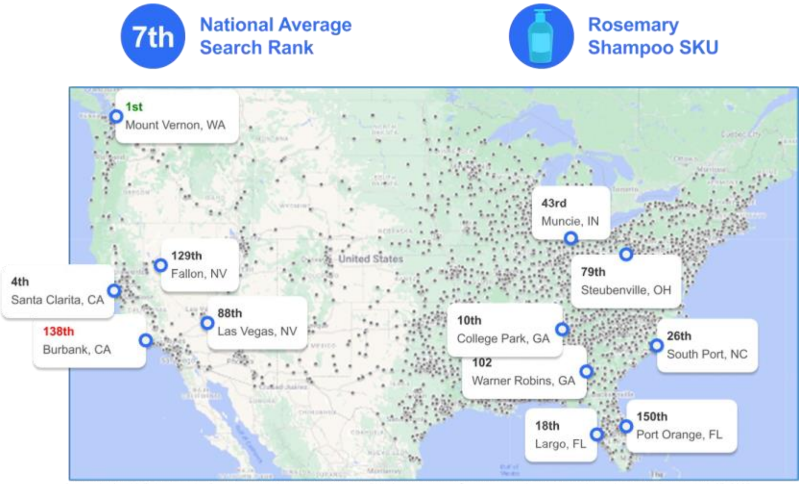
A great brand, by itself, isn't enough anymore

Brands aren't top of mind



You need to offer relevant benefits beyond the identity

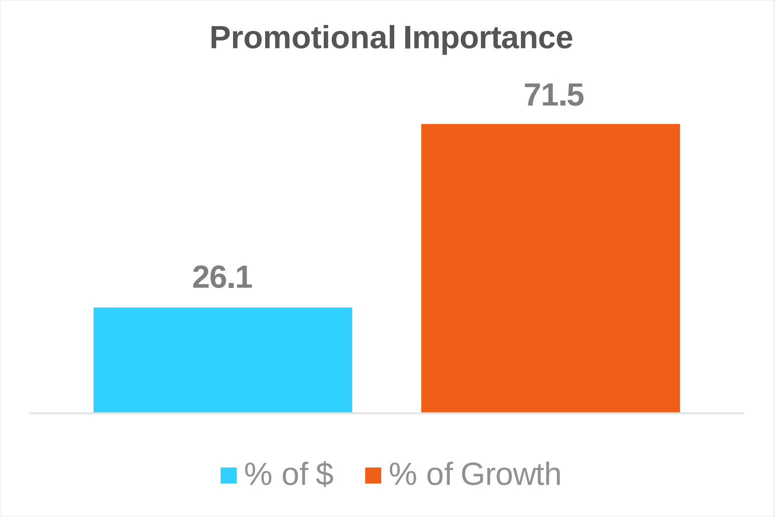
Availability is paramount



Source: NielsenIQ,Data Impact – Search ranking for a select shampoo SKU for the keyword "color shampoo" at select Walmart pickup locations. Week 45, 2022
Grey dots represent individual WM pickup locations

You need to be present where AND when the purchase is considered

Promotions drive decisions



You need to hit the right value proposition to make the consideration

Source: NIQ Brandbank search data | NIQ Data Impact search ranking for a select Shampoo SKU at WM | NIQ RMS xAOC Latest 52 weeks December 30, 2023

Media personalities are converting audiences into consumers

These products are more than just a “brand”, instead connected to an overarching lifestyle and fandom

Estimated Growth Rates vs 2022 *(Ranked by 2023 Dollar Sales)*

+700%

+15%

+10%

+100%

+10%

+750%

+50%

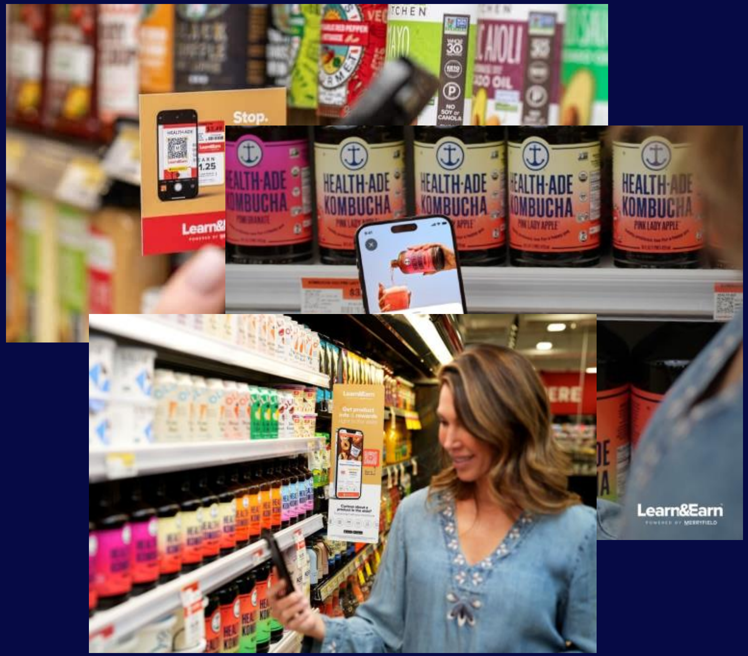
+40%

Source: NIQ Omnisales | Syndicated Omnisales+ | Total Client Dataset – Manufacturers, xAOC Calendar year 2023 vs 2022

NIQ

Technology is empowering new modes of commerce focused beyond brands

Nutrition Centric Retail Media



Merryfield and Earth Fare partnering to "gamify" nutrition labels across the store

Hyper-Personalization

EARTH FARE EST 1975 HEALTHY FOOD FOR EVERYONE

genopalate® Eat For Your Genes

Earth Fare and GenoPalate create genetically personalized nutrition grocery shopping

− A +

17 Jan 2024 --- Personalized nutrition pioneer GenoPalate has joined forces with Earth Fare, the clean grocery store, to spearhead a wellness movement in supermarkets that incorporates biomarkers, proprietary algorithms and databases to optimize nutrition for consumers.

"This collaboration enables us to provide customers with dietary choices tailored to their genetic makeup, integrating GenoPalate's insights with our quality ingredients for a unique wellness journey, enhancing wellness through informed food choices," says Henry Kugler, COO of Earth Fare.

Earth Fare and GenoPalate partnering to link nutrition to your genetic makeup

Artificial Intelligence

HUNGRYROOT

"Most customers trust the company to select the majority of their weekly groceries for them, and **72% of all items purchased are chosen by the algorithm**."

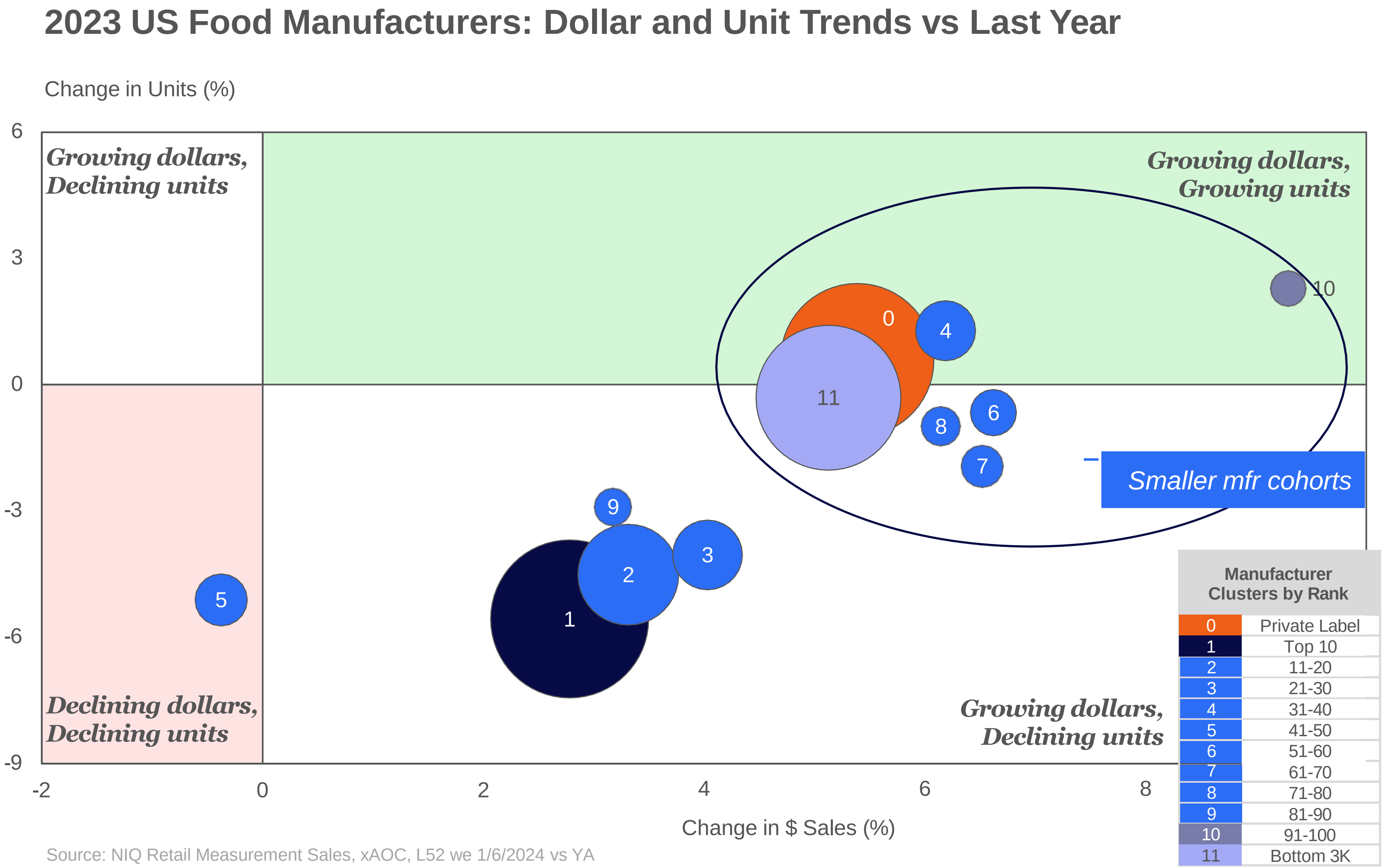
The emergence of algorithmic purchasing is immanent and requires a new strategic approach

Ulta Beauty at Target Launches in August — Get *All* the Gorgeous Details
Hungryroot's AI-Powered Personalized Grocery Service Reaches $750M Valuation (forbes.com)

Earth Fare and GenoPalate create genetically personalized nutrition grocery shopping (nutritioninsight.com

Can a small brand even win **in such a complex environment?**

Of course! Small brands are already outgrowing large ones



Source: NIQ Retail Measurement Sales, xAOC, L52 we 1/6/2024 vs YA

NIQ

Growth will come from *relentless consumer centricity*

 12

How Generations' Economic Participation and Values Shape the Future

Boomers
(1946 – 1964)

- Most are retired
- Healthcare expenses increasing
- Caring for aging parents

Formative Events

Character Traits

Financial stability ◆ brand loyalty ◆ American Dream ◆ less influenced by peer pressure

Gen X
(1965 – 1980)

- Peak earning years
- Span teenagers to empty nesters
- Education expenses

Formative Events

Character Traits

Self reliant ◆ big picture ◆ independent ◆ values flexibility ◆ skeptical

Millennial
(1981 – 1996)

- Parents of school aged kids
- Career growth
- Causes

Formative Events

Character Traits

Experiences ◆ innovative ◆ likes change ◆ social causes ◆ multi-taskers

Gen Z
(1997 – 2012)

- ½ not working age (N= approx. 34 mil)
- High disposable spending power
- Digital natives
- Is the planet going to survive?

Formative Events

Character Traits

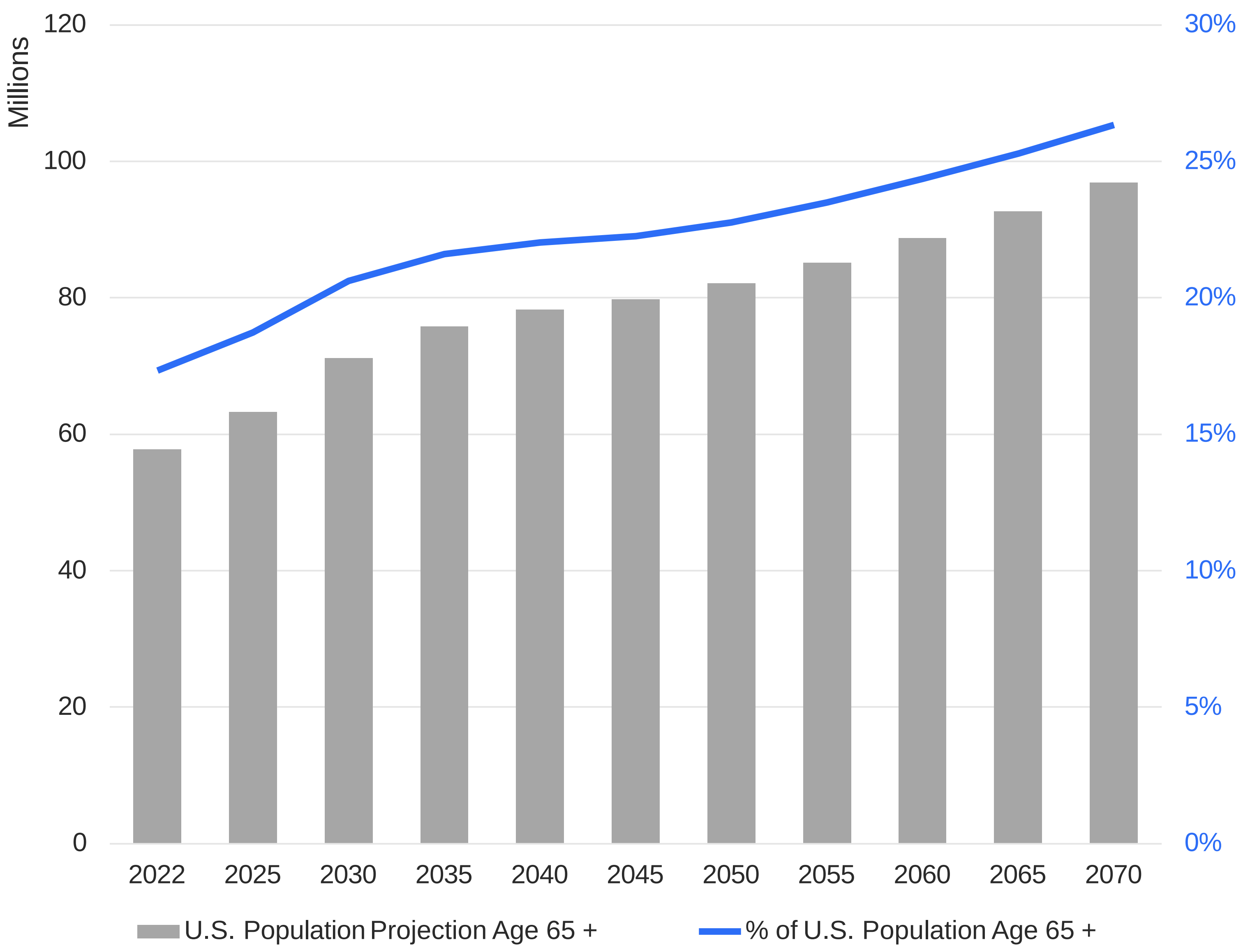
Social activism ◆ side-hustle ◆ immediate satisfaction ◆ ethnic diversity ◆ less trusting

NIQ

As a nation we're getting *older*

Households >55 will ***grow 6%*** by 2028 where households <55 will ***shrink by 1%***

Source: NIQ population forecast based on US Census data

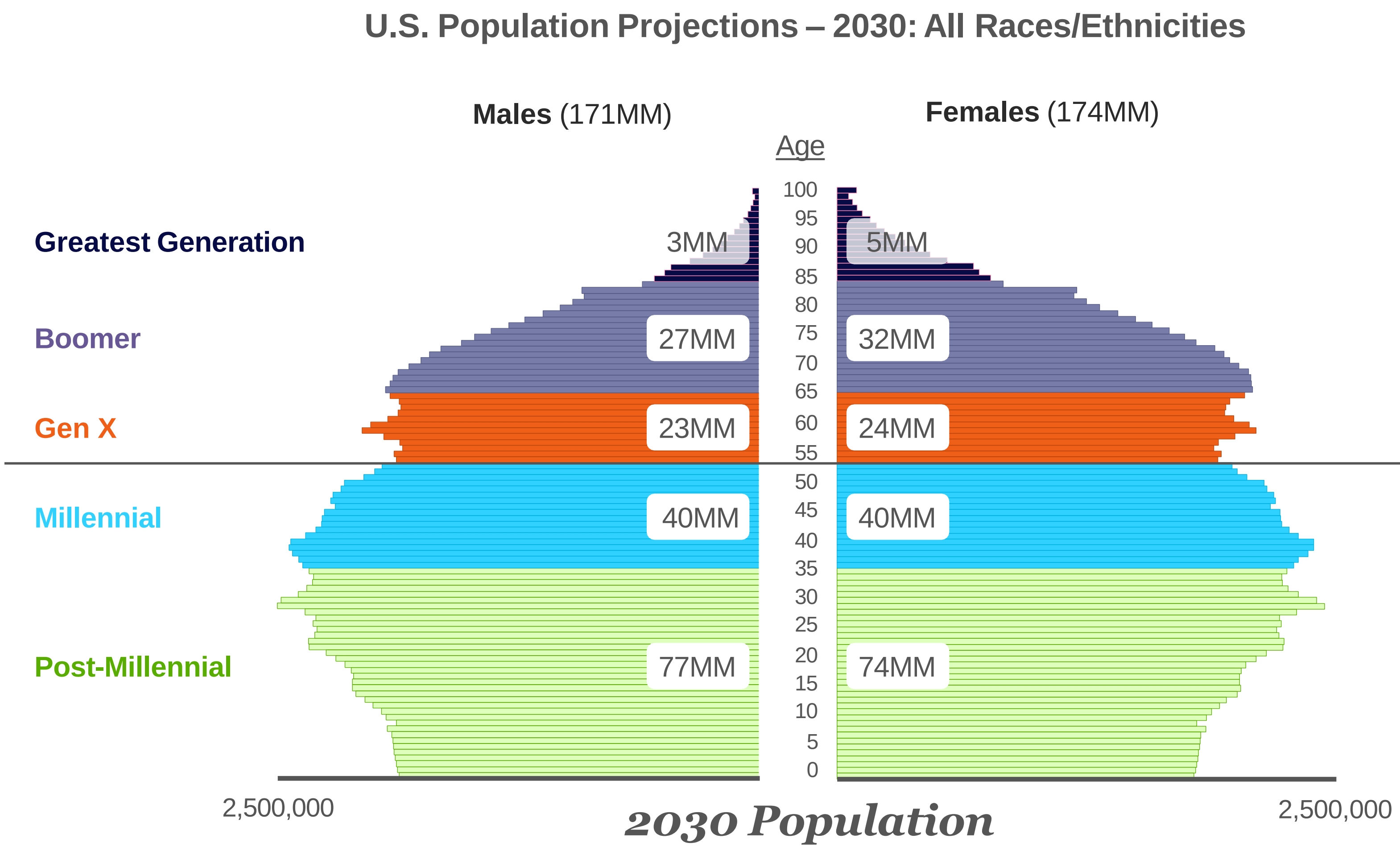


Source: U.S. Census Bureau, 2023 National Population Projections. This projections series uses the official estimates of the resident population on July 1, 2022, as the base for projecting the U.S. population from 2023 to 2100. The series uses the cohort-component method and historical trends in births, deaths, and international migration to project the future size and composition of the national population.

NIQ

But the generations comprising “older” age brackets will look different

By 2030, the vast majority of Gen X will be over 55



In 2030, ***114 million*** older consumers with spending power!

In 2030, ***67%*** of the U.S. population will be Millennials or younger, up from 59% in 2022

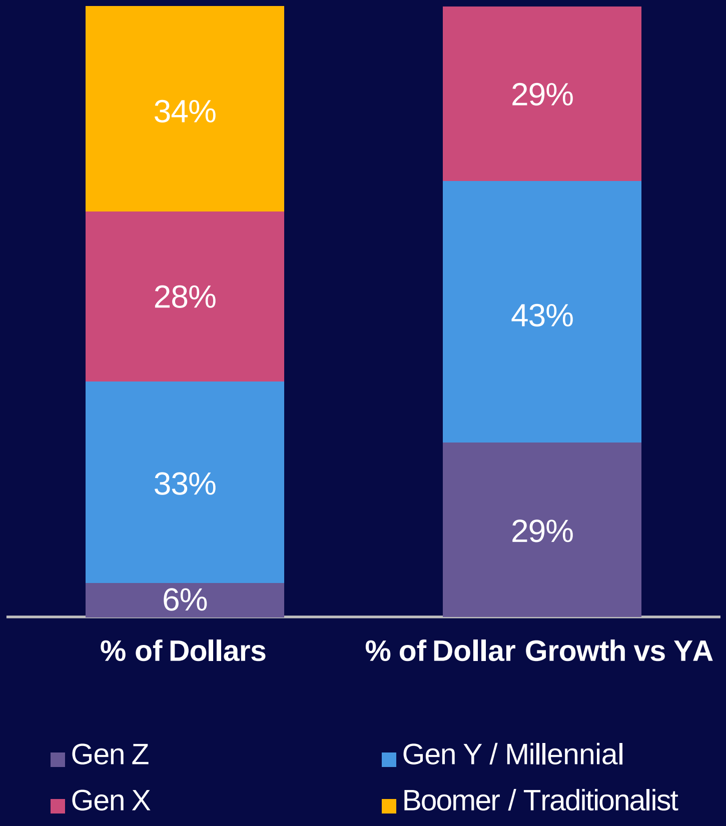
Source: U.S. Census Bureau (2023 National Population Projections); MM = million

NIQ

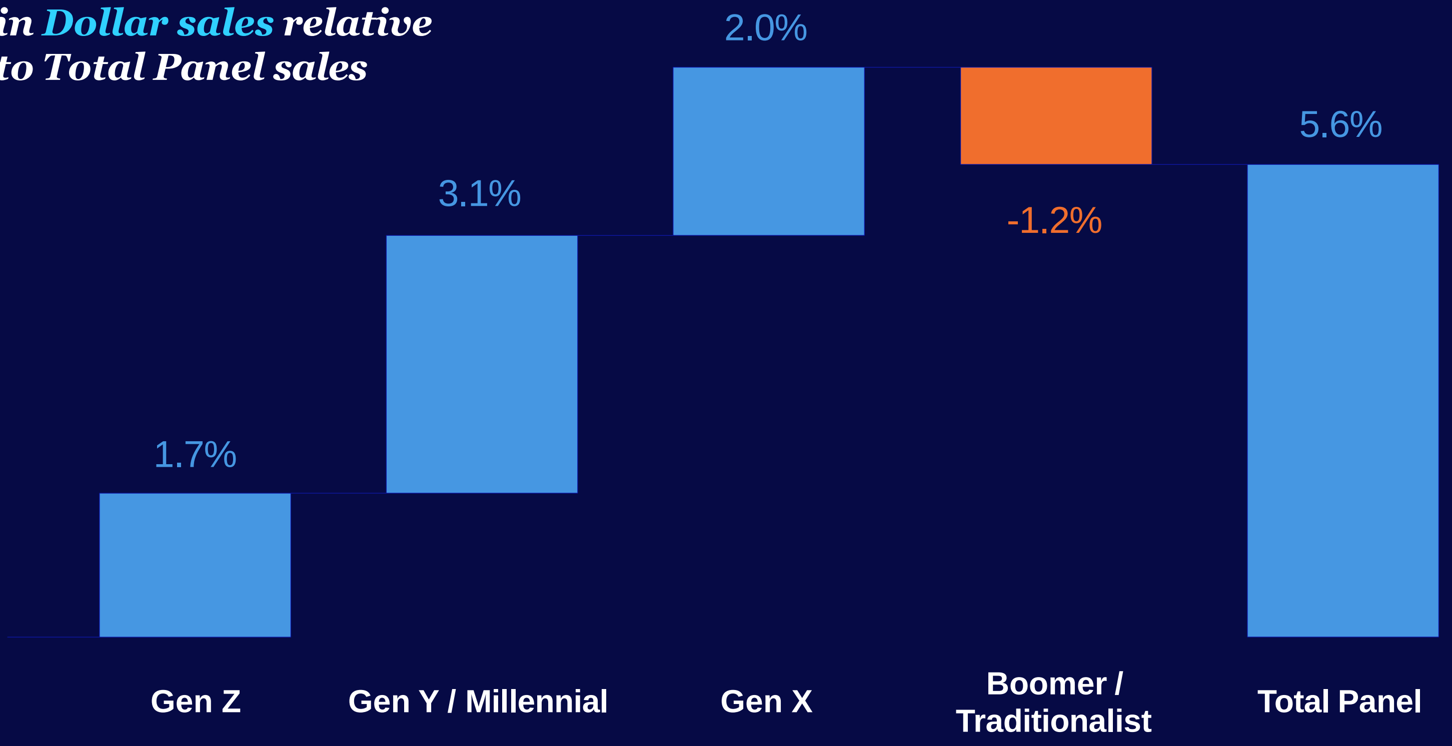
Boomers declining and Gen Z ascending in the makeup of market growth

Off-setting declines of baby boomers

Share of ***Total Store*** by Generational Cohort



Contribution to growth in Dollar sales relative to Total Panel sales



Source: NIQ Omnishopper Panel; Total US; Total Store; Buyer and $ share of growth distribution; 52 weeks ending December 30, 2023

Younger generations are more diverse and experience food in a different way than previous generations.

White Alone Non-Hispanic % of Population

47.3%
Under 18

60.8%
18 & Over

57.8%
Total Pop

*Diffusion Score**

13.8%
Under 18

10.7%
18 & Over

11.4%
Total Pop

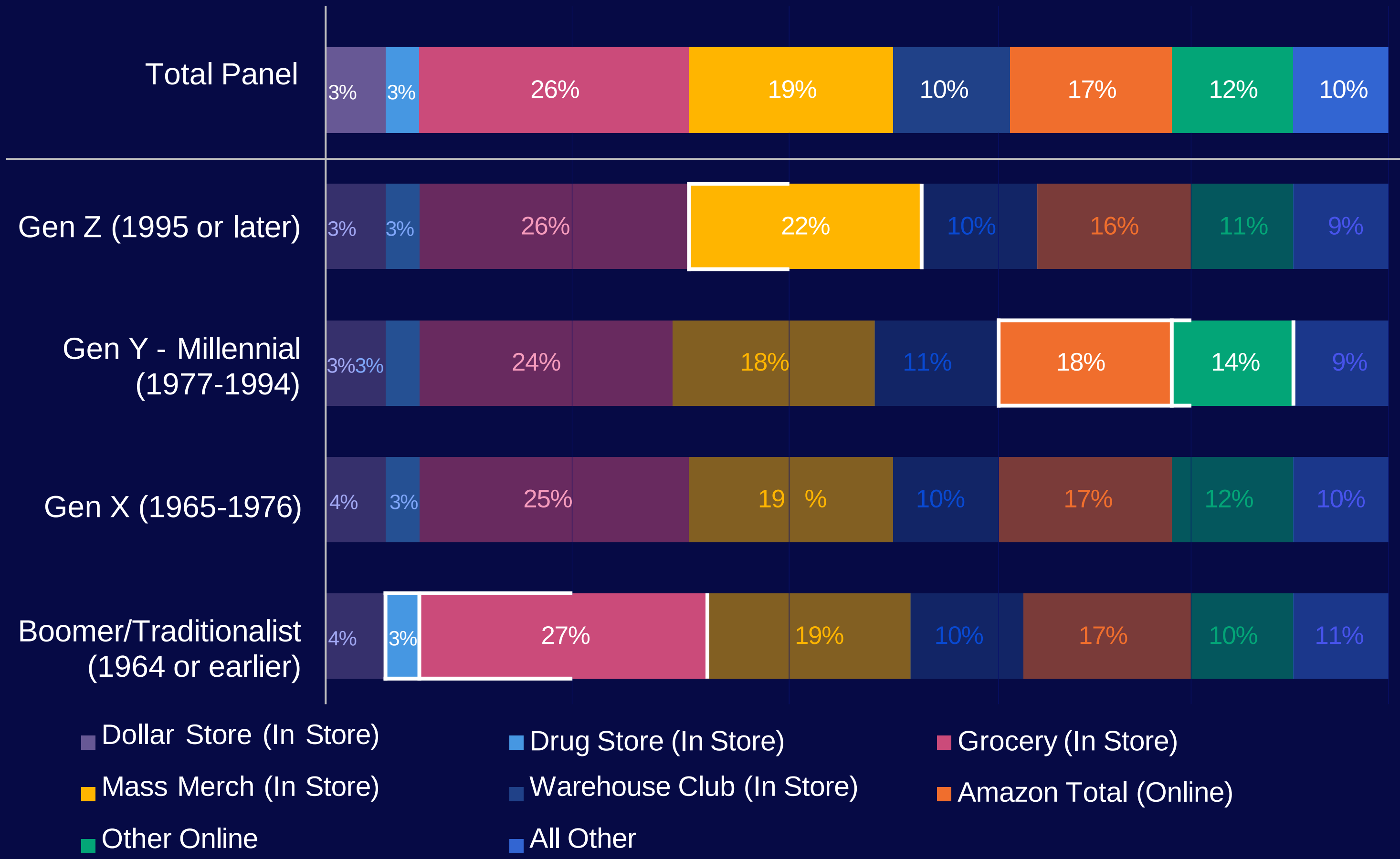
Social media like Tik Tok and Instagram has become a major vehicle for food exploration, particularly among younger generations.

Many content creators like Puerto Rican – Moroccan food personality lahb co (Nasim Lahbichi) draw on their heritage & culture for inspiration and introduce their followers to different global cuisines and dishes.

Source: US Census 2020, *Diffusion Score = calculated by combining percentages of remaining racial & ethnic groups, the higher the diffusion score the less concentrated the population in the three largest racial & ethnic groups

But *Millennials* index highest for online

Share of Dollars



Total Online Sales

$5.8B

GenZ higher share in mass merch (instore) — *$318MM*

GenY higher share in all online — ***$2.1B***

$1.6B

Older generations higher share in grocery and drug — *$1.8B*

Source: NIQ Omnishopper, Total FMCG Depts= Food, Baby Care, Health & Beauty Care, Household Care, Pet Care, Gen Merch; 52 weeks ending January 27, 2024

Each generation demonstrates their own behavioral preferences when shopping

Over indexing →

- G = Grocery (online)
- M = Mass (online)
- D = Drug (online)
- C = Club (online)

Gen Z

D

Prefers access to products and services
- (i.e. streaming services, subscriptions, etc.)

Consumption is a means of self-expression
- Need for more personalized products

Invested in company ethics and sustainability

Online & offline boundaries do not exist
- Need for omnichannel offerings

Gen Y / Millennials

G D C M

60% state loyalty to brands if given customer-centric experience

More likely to pay a premium for personalized products
- Similar to Gen Z

Social media is major influencer
- Beauty & fashion products often purchased via Instagram

Spends the most on a daily average

Gen X

Known for "consuming status"
- Also juggling more debt

Extreme brand loyalty
- Love coupons

Equally comfortable with forms of digital & traditional marketing
- Facebook is preferred social media website

Appreciate practicality and value in a brand's marketing

Boomers

Now fastest growing e-commerce shoppers

Enjoy rewards through loyalty programs
- Place high value in program simplicity

Simple return policies are key

Facebook is social media website of choice
- But often feel their demographic is not represented

Source: NIQ Homescan Panel; Total US; Generational cohort demographics; NIQ Product Insight powered by Label Insight; $ share index; 52 weeks ending January 27, 2024

Leveraging *health, wellness and sustainability* **priorities to find growth**

Brandon Galindo

NIQ *Better For™* = Better For *You*, Better For the *Environment*, Better For *Society*

NIQ *Better For™*

such as

- Healthier - Organic and Natural
- Trending Diets
- Plant Based
- *Plus many more…*

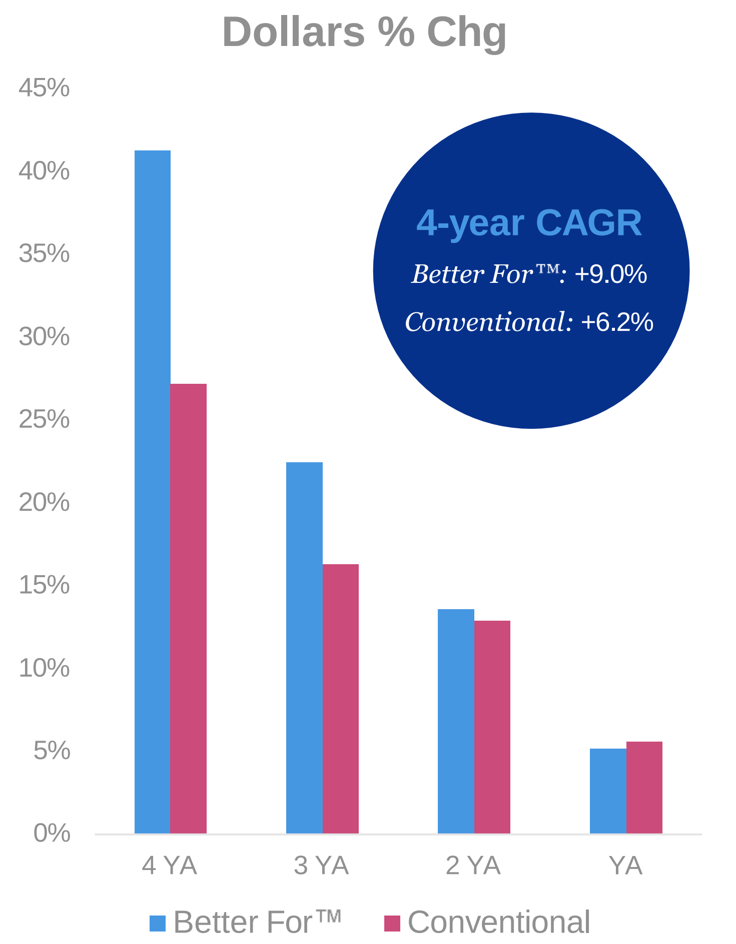
such as

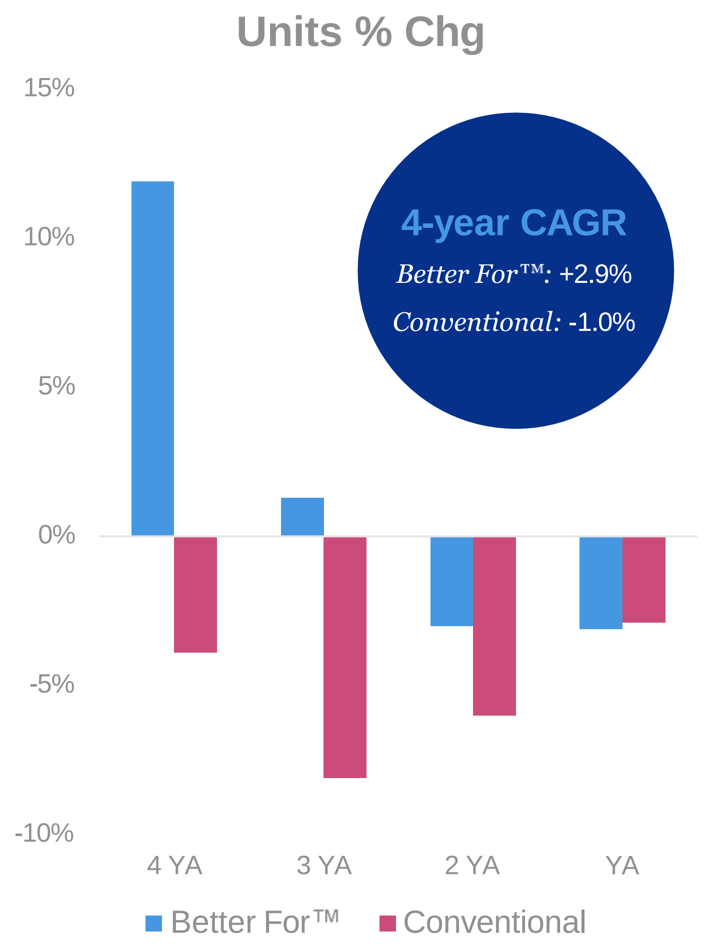
- Eco friendly
- Bio-based
- Regenerative Agriculture
- *Plus many more…*

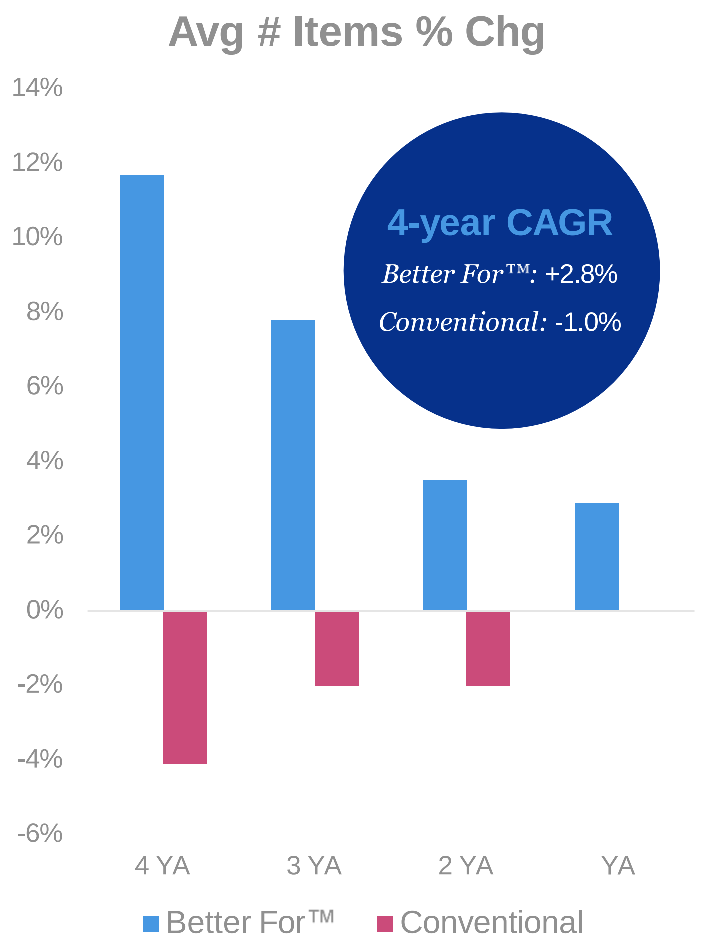
such as

- Fair Trade
- Fair Wages
- Animal Welfare
- *Plus many more…*

Better For™ products are historically growing faster than conventional products





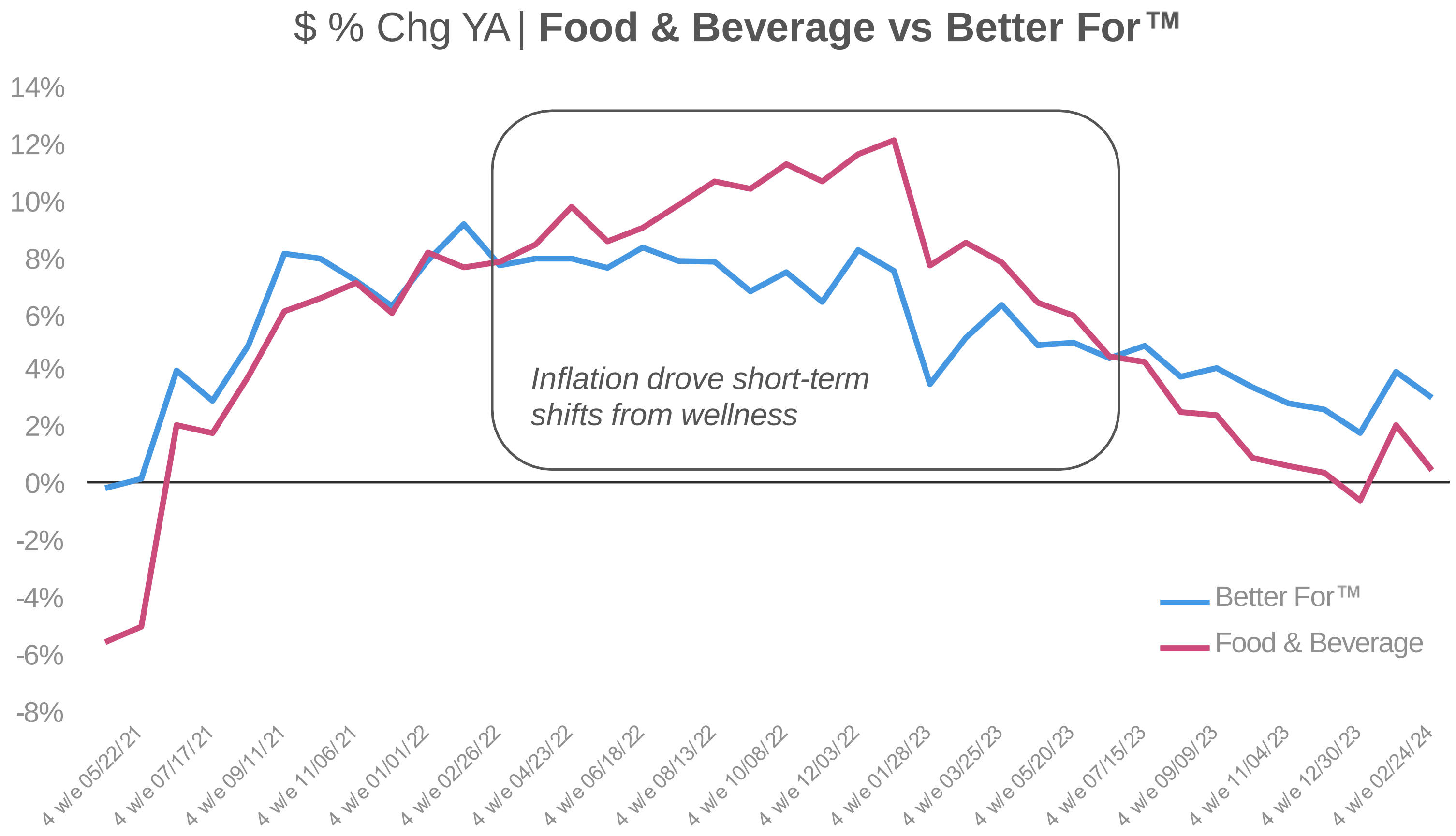


Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage (including Fresh) vs Better For Segment™; % change vs previous year; Last 4 years ending September 9, 2023

NIQ

NIQ *Better For™…*

‘22/2023 suggested Better For™ growth may be behind us…



Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage vs Better For Segment™; $ % Change vs year ago; 4-week trended through week ending February 24, 2024

Accelerate *Better For*™ growth within the Omni Channel

NIQ *Better For*™

62%

of growth driven by **small brands**

16%

Share of omni **beverages** versus 8% traditional trade

14%

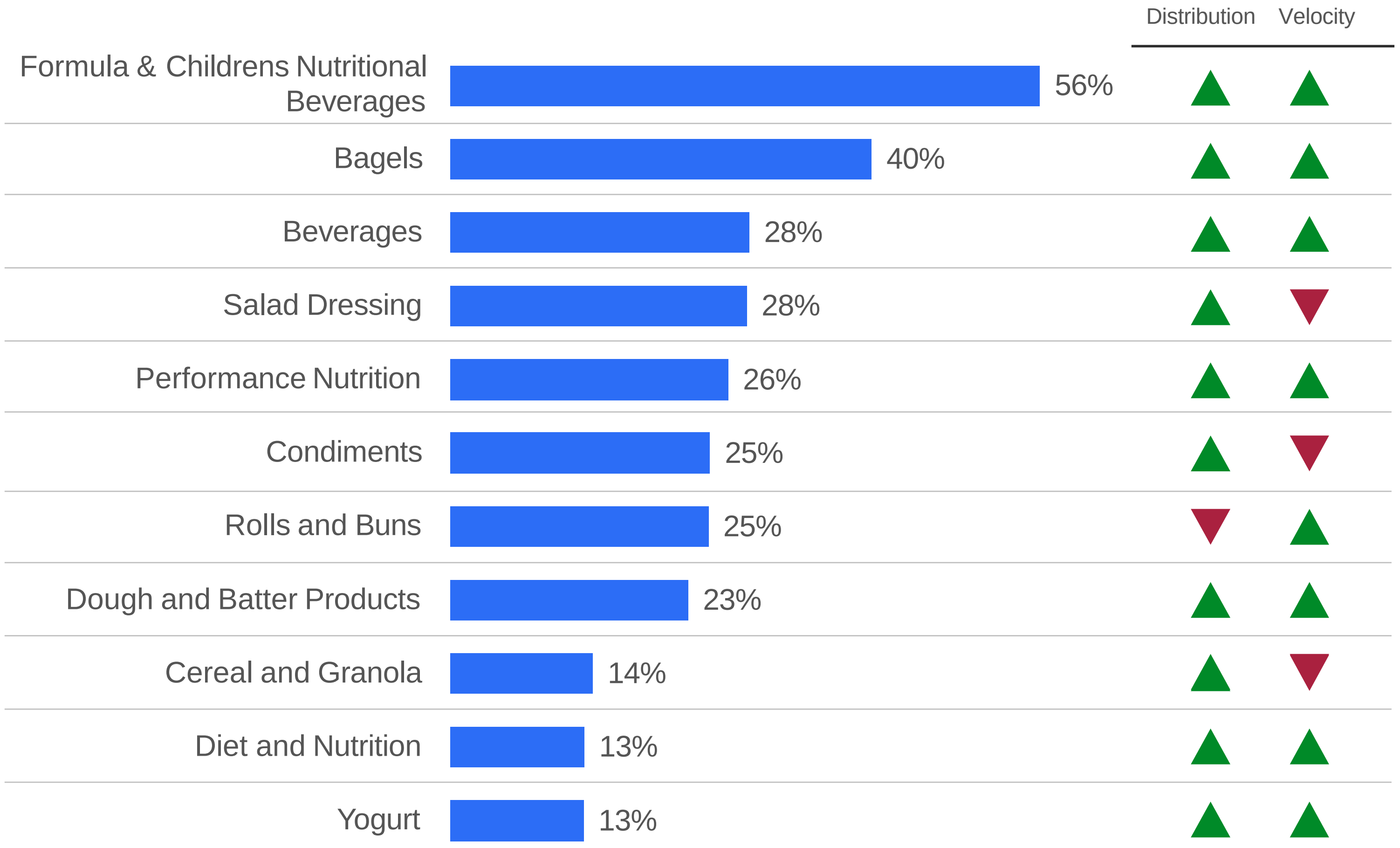
Share of omni **salty snacks** versus 8% traditional trade

NIQ

Fastest Growing ***Better For™*** Categories

Better For™ Index to Total Food & Beverage

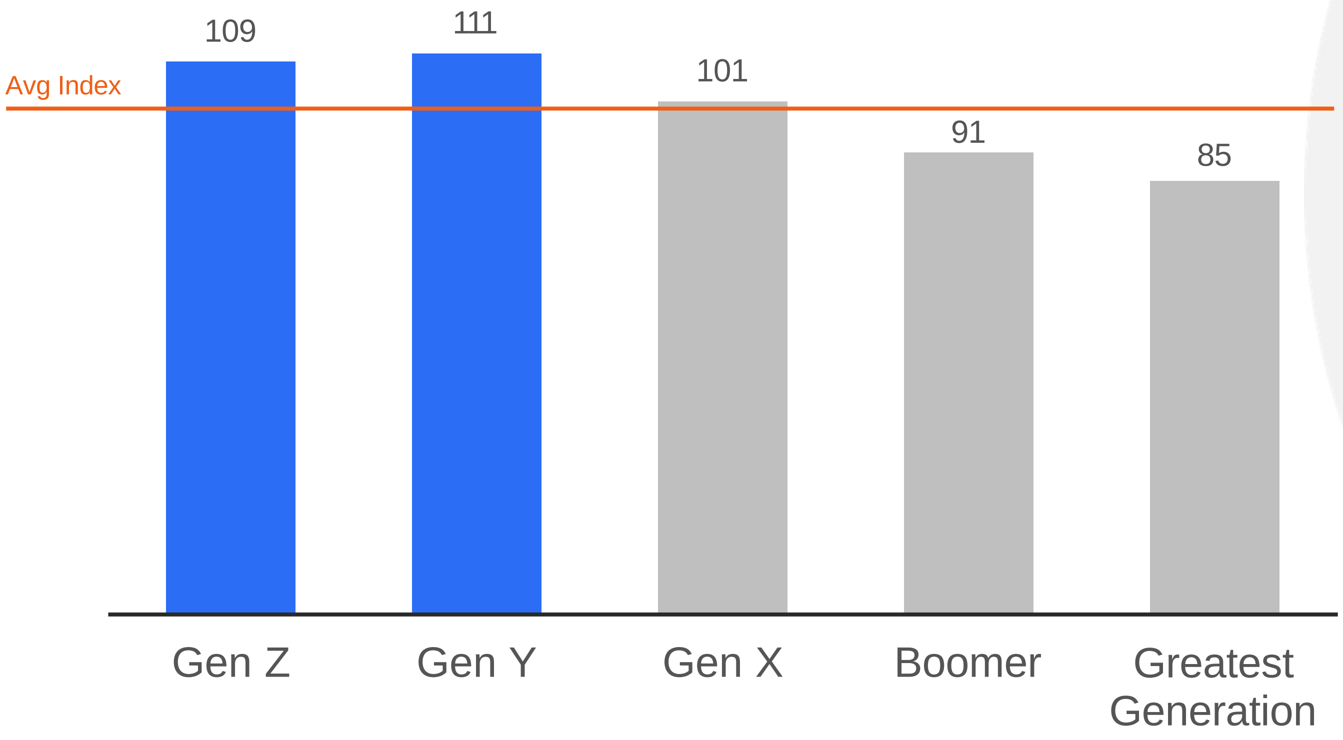
$ % change vs year ago; >$50M Categories



Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage vs Better For Segment™; $ % Change vs year ago; 52 weeks ending March 2, 2024; Better For you Categories with +$5)m in Annual Sales

Younger consumers driving growth; suggesting long term growth potential for Better For™ brands

$/Buyer | **Better For™ Index to Total Food & Beverage**

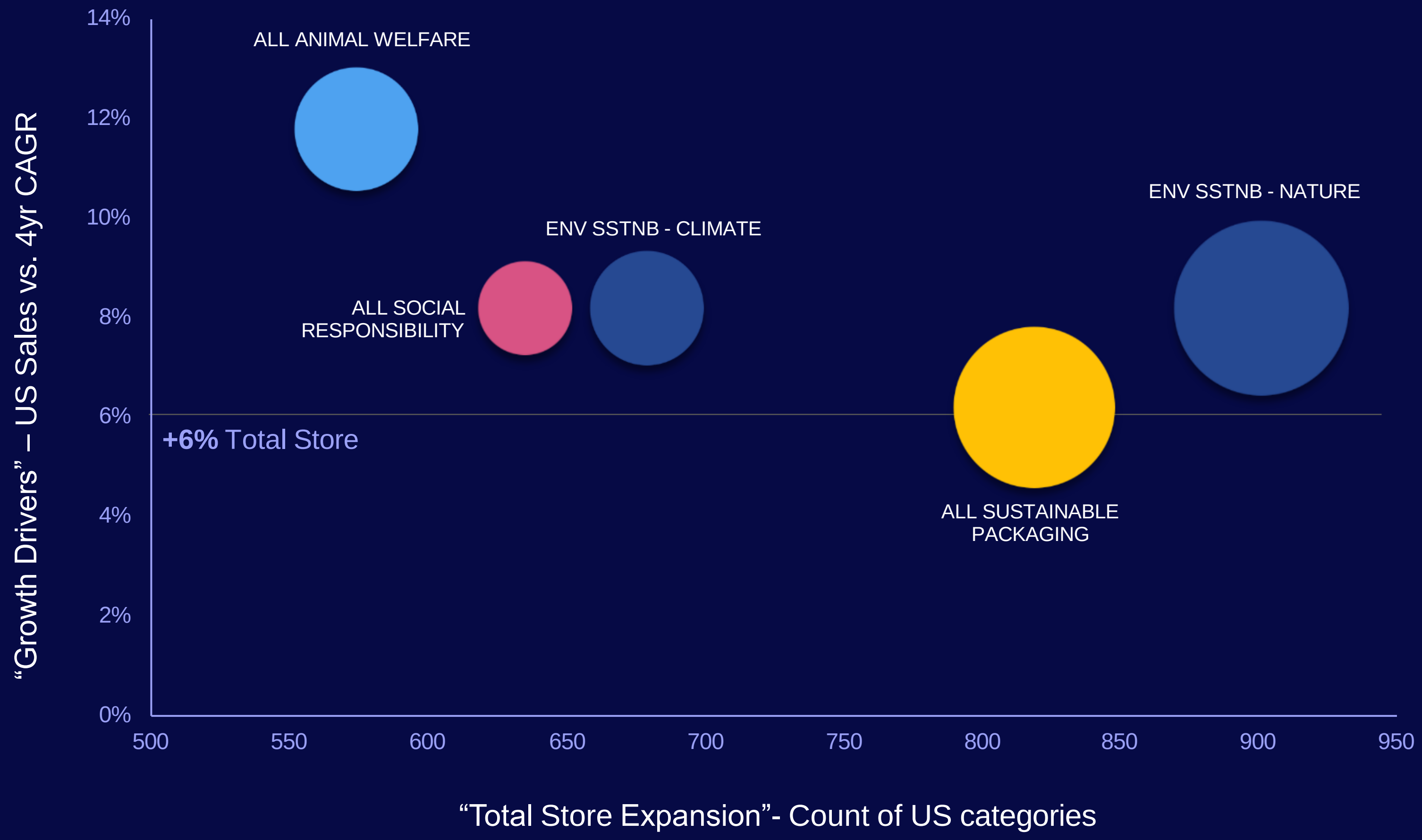


+7%

Gen Z households are *increasing their spend* on Better For™ products faster than Total Panel (+1%)

Source> NIQ Homescan Panel; Total US Panel; All Outlets; Total Food & Beverage; NIQ Better For Segment™; $/Buyer % change vs year ago, $/Buyer Index to Total Panel; 52 weeks ending January 27, 2024

Sustainability outpacing store growth



+248

basis points

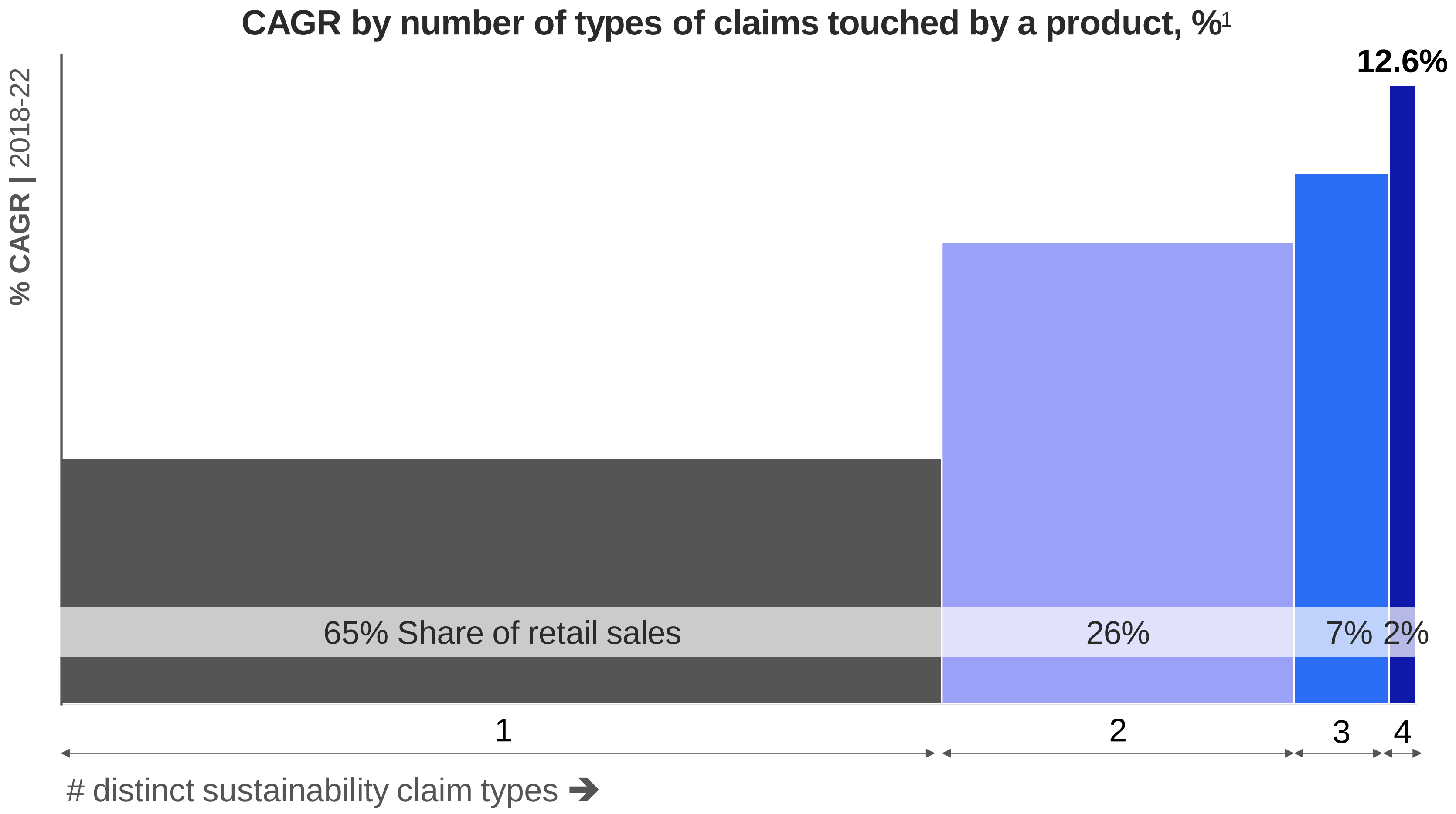
More growth in products with claims on ***environmental***, ***sustainable packaging***, ***animal welfare***, ***social responsibility*** than on products without over the last four years

Bubble size denotes total sales in L52 week All attributes represent claims STATED on package unless indicated by an * symbol
Source: NIQ, Retail Measurement Services, NIQ Product Insight, powered by Label Insight, Total US xAOC; Total Store; # of Categories selling, 4-yr CAGR ($); 52 weeks ending December 30, 2023

NIQ

Products with more types of claims grow ~2x faster than those with only one type of claim

Few products move beyond one claim



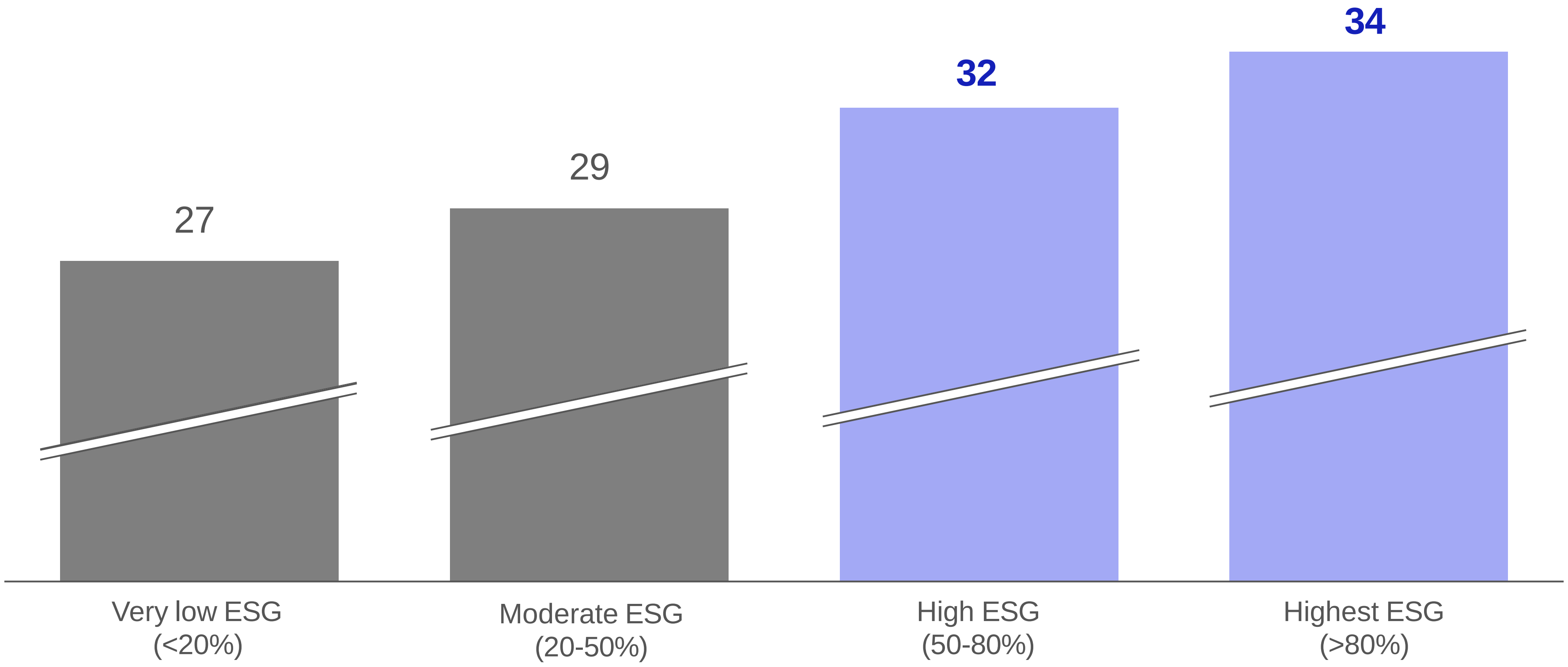
Stacking claims across pillars is associated with faster growth

- Animal welfare
- Environmental sustainability
- Social responsibility
- Sustainable packaging

1. 6 types of claims exist - 4, 5, and 6 type scenarios not included due to low sample size
2. Source: NIQ-McKinsey Sustainability Report, Jan 2023

Products (branded and private label) with a higher degree of sustainability-related claims enjoy higher loyalty

Brand repeat rate[1] by sustainability-brand groups, % of households buying 3+ times



% of a brand sales coming from products with sustainability-related claims

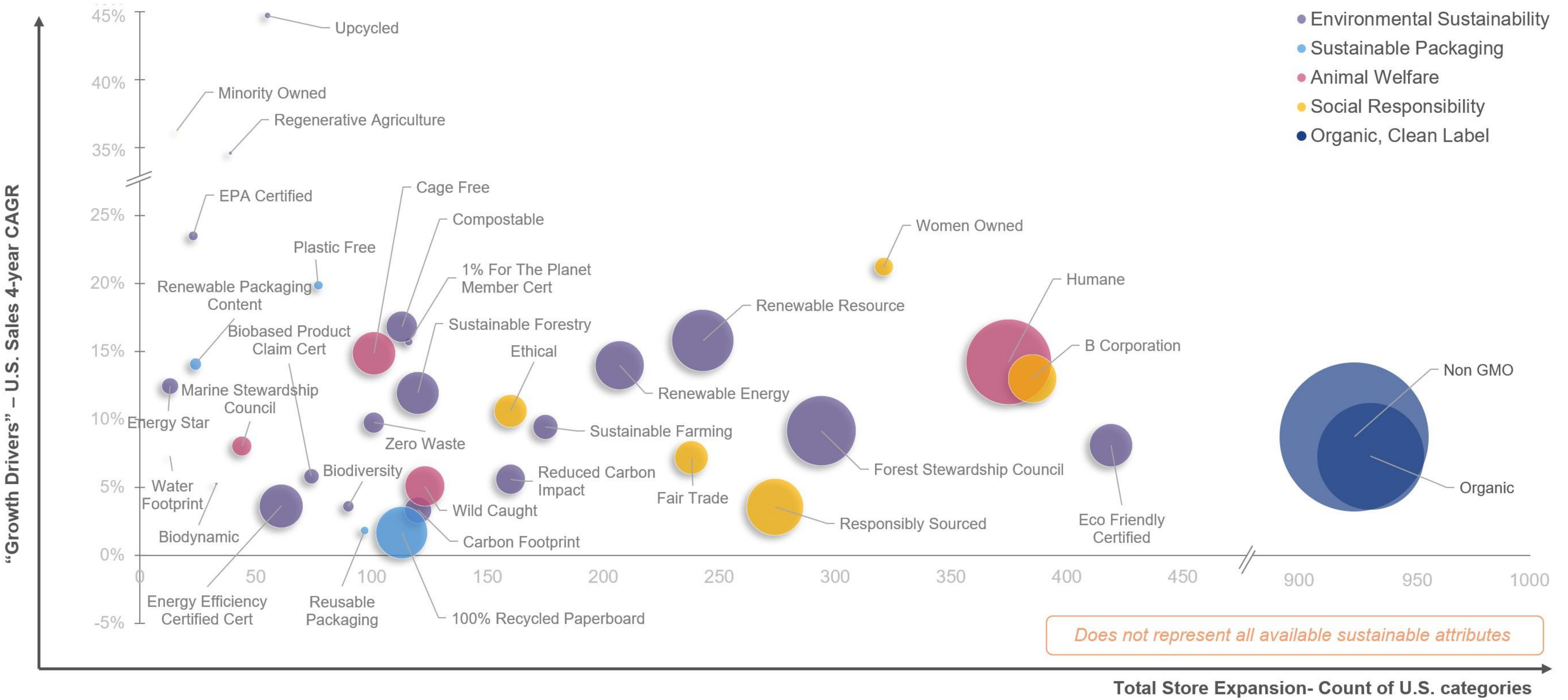
Brands with >50% of sales from products with sustainability-related claims achieve repeat rates of up to 34%

"Sustainability" includes environmental, social, packaging, animal welfare claims, organic and plant-based

+2% differential CAGR for products with 40%+ prevalence over those without claims, +5% for products with 10-40% prevalence); Brands with a higher % of sales from products with claims enjoy greater loyalty (higher repeat rates)

NIQ McKinsey & Company

Attribute growth can be found at a lower level including Organic/Clean label



Bubble size denotes total sales in L52 week All attributes represent claims STATED on package unless indicated by an * symbol

Source: NIQ Retail Measurement Services, NIQ Product Insight—powered by Label Insight, Total US xAOC ; Total Store; Count of categories, 4-year $ CAGR; 52 weeks ending January 27, 2024

NIQ

Unique and sometimes overlapping health and wellness priorities across generations

Gen Z

Animal welfare-related
- Cruelty Free, Humane

Social responsibility
- Ethical, B-Corp, fair trade

Clean label
- Free from aluminum, parabens, artificial fragrance
- Natural ingredients

Health needs
- Brain & eye health, hair/skin/nails, mood & stress
- Immune system health, microbiome

Gen Y / Millennials

All of Gen Z but to lesser degree

Highest indexing group for
- "Provides energy"
- Pregnancy and lactation support
- Reusable packaging

Highest indexing group for
- Consuming ***Better For™*** foods and organic overall

Gen X

Boomers

Sustainable packaging
- Less packaging
- Sustainable packaging

Health & need states
- Cellular function
- Cardiovascular health
- Joint health
- Heart health

Greatest

Environmental sustainability
- Low emissions
- Reduced carbon impact

Health & need states

(Even greater degree than Boomers)
- Cellular function
- Cardiovascular health
- Joint health
- Heart health

Innovate with Purpose through the lens of a Generation’s interest in categories and attributes

Categories

Attributes

Innovate with Purpose

NIQ

The role of *innovation* in the future of retail

Krystal Dawson

Why does innovation matter?

Impact of innovation on overall growth

4.2x
Home Care

2.9x
Personal Care

1.8x
Confectionery & Snacks

1.5x
Food

1.6x
Non-alcoholic Beverages

Manufacturers growing innovation sales in 2022 were

1.8x

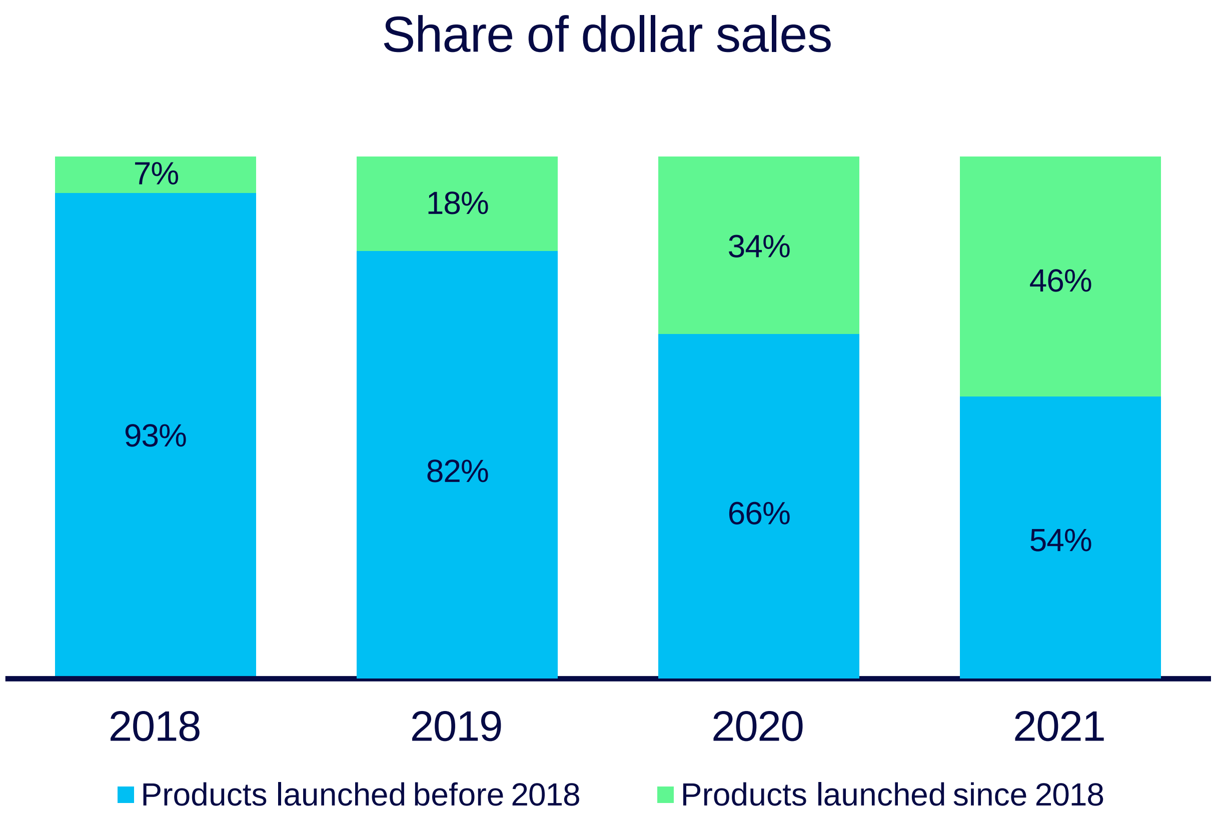
more likely to grow overall sales than those with stagnant or declining innovation sales

Source: NIQ BASES Innovation Measurement. Impact is calculated as a ratio of percentages of manufacturers growing total sales among those growing innovation sales vs. those with no growth in innovation sales.

Year over year, strong innovations become your core

As core products can start losing buyers, new and improved products can:

- Attract new buyers
- Create new usage occasions
- Justify a price premium
- Keep your brand top of mind



Source: NIQ BASES Innovation Measurement
Based on a sample of Food, Home Care & Personal Care categories for Total US xAOC+Convenience

NIQ

Great innovations start with a *job to be done*

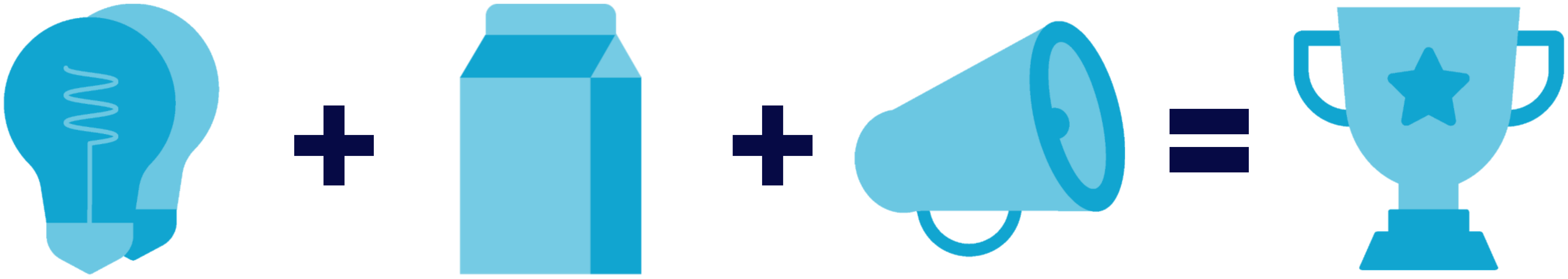
Innovators should center not on consumer demographics, product attributes, or trends…but rather on the

circumstance-specific job to be done

Look to common ***marketplace gaps*** to identify unmet jobs to be done that align with key ***brand strengths***

Breakthrough winners find success by getting the innovation equation right

While consumer wants and needs have evolved over time by generation, the equation for innovation success hasn't changed.



Good Idea — Address a broad need

Good Product — Ensure experience meets expectations

Good Activation — Tailor marketing & retail activation

Success

Better-for-you beverage winners meet consumers' desire for healthier options, without sacrificing cost-of-entry benefits

0 sugar
No artificial colors

Low calorie
Less sugar
No artificial flavors or sweeteners

<15 calories
0 sugar

25 calories
0 added sugar

The cost-of-entry benefits for the beverage category include:

- **Refreshing / Thirst-quenching**
- **Easy to drink / Portability**
- **Right level of sweetness**

Based on BASES Architect learnings across beverage categories

Health & sustainability benefits also fuel the growing interest in natural personal & home care products

Clean ingredients

Free of sulfates, parabens, silicone, dye

Vegan & cruelty-free

Reducing environmental impact

Free of dyes, artificial sweeteners/flavors, parabens, triclosan, microbeads, & gluten

Vegan & cruelty-free

Responsibly sourced ingredients & materials

Natural ingredients

No harsh chemicals

Safe around family & pets

61%

of consumers say 'Natural' is more important to them now than it was five years ago

Source: Internal BASES R&D Survey conducted in July 2020.

Breakthrough ideas are brought to life with good product; high levels of risk and reward tied to performance

Risk

1/2

of new launches ***fail because of weak product***

Reward

+30%

Year 1 ***volume upside***, on average, ***for strong products*** relative to their poor performing counterparts

With cross-generational consumers relying on online reviews, strong product performance is more important than ever

4.6 ★★★★☆ 13,569 ratings

Amazon's Choice Overall Pick

10K+ bought in past month

4.5 ★★★★☆ 51,457 ratings

Amazon's Choice

900+ bought in past month

4.3 ★★★★☆ 3,660 ratings

Amazon's Choice Overall Pick

30K+ bought in past month

Amazon.com, October 2023

NIQ Breakthrough Innovation

Breakthrough ideas are brought to life with well-executed activation; the cost of failure is high

Risk	Reward
1/3	**+20%**
of new launches fail because they ***lack sufficient support during year one***[1]	***lift in ad-driven sales*** with optimized creative[2]

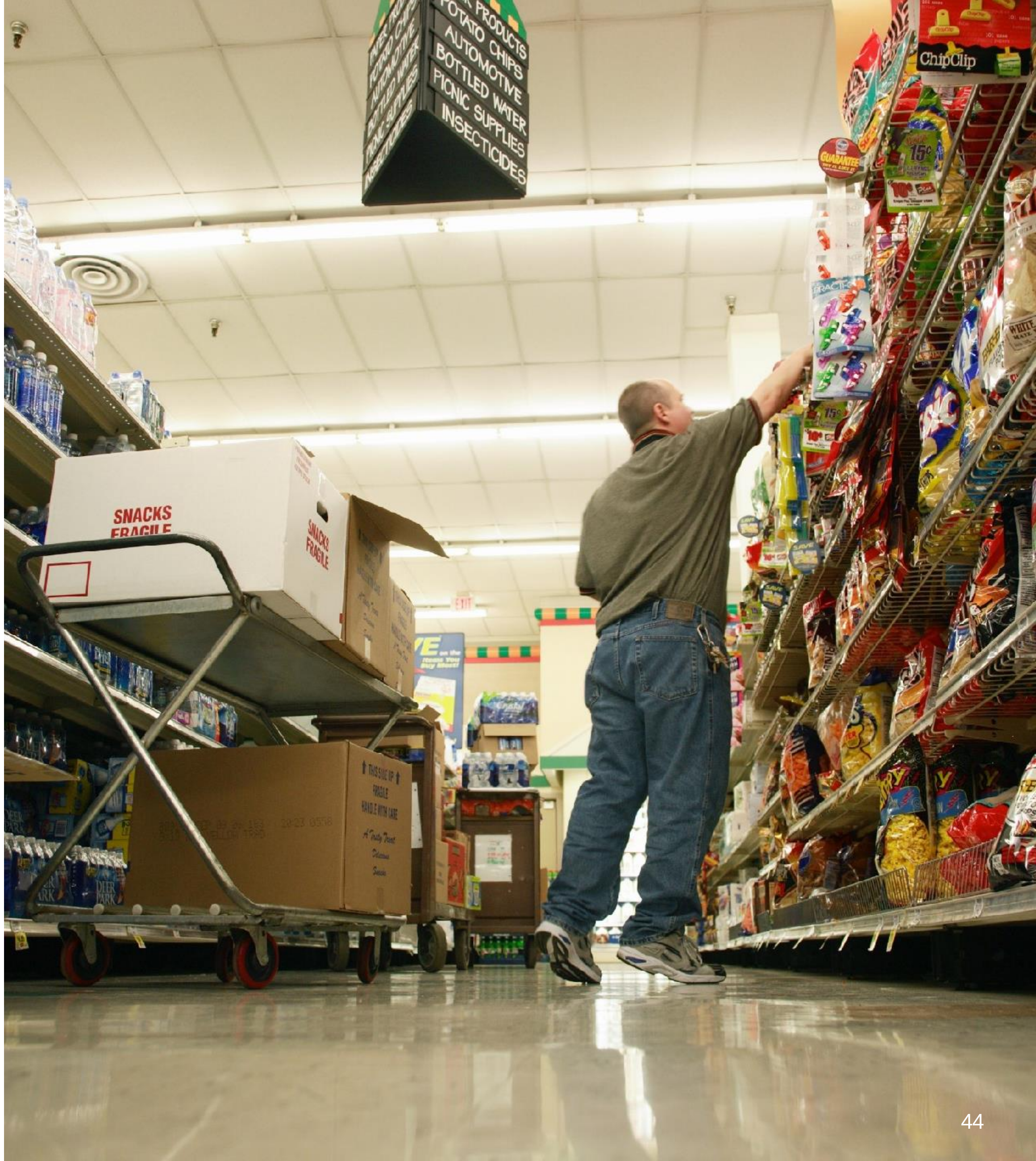
[1]BASES R&D Analysis, 2017
[2]BASES optimized creative drives up to 20% lift in ad-driven sales

Remember: You are innovating for the consumer — *and* the retailer

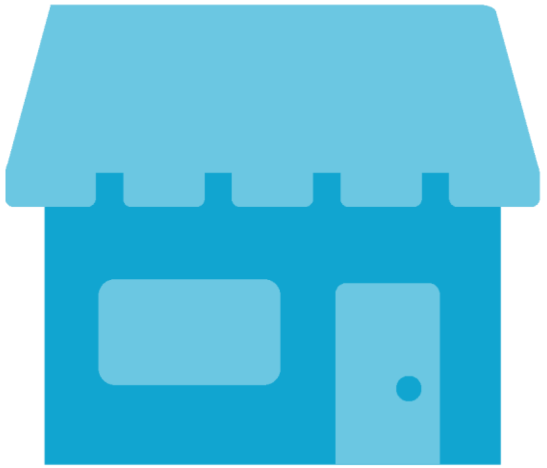
Retailers prioritize products that drive growth

Leverage research and analytics to provide a solid retailer value proposition

- Bring new buyers to the category
- Trade up consumers
- Provide a new usage occasion
- Command a premium price



Expansion from direct-to-consumer to retail continues to drive breakthrough activation success



Important to innovate with eCommerce in mind, but think ahead to ensure omnichannel applicability

In line with other channel expansions (ie: Rx/OTC switches) DTC innovations offer opportunity to expand and grow penetration

NIQ Breakthrough Innovation

Moving from DTC to retail stores requires thoughtful activation

- Leveraged consumer feedback to optimize the packaging & marketing messaging before moving into retail
- Waited for the right time and partnership to minimize cannibalization of the DTC business
- Invested in dress-up kits for end caps to catch consumer attention at shelf
- Ensured the product & package would stand out so consumers could easily understand PrettyLitter's unique advantages

NIQ Founders Pitch Slam finalists capitalized on consumer jobs to be done

Lemongrass Farms

Lil' Gourmets

Root & Splendor

True Made Foods - Winner

Long-term growth and vitality is achieved by getting the innovation equation right

Good Idea

Unlike any other litter, this one keeps tabs on your cat's health by changing color

+

Good Product

Licensing opportunities enabled perfection of flavor delivery

+

Good Activation

Holistic support plan spanning multiple channels that extended beyond year 1

=

Success

NIQ Breakthrough Innovation

Great innovations don't tell consumers what they need. They solve problems consumers agree that they have.

— Ramon Melgarejo

Managing Director, NIQ BASES

NIQ BASES

The future we've been striving for is arriving and competition is heating up

Share of *Better For*™ sales in Total US (share chg.)

Share	Channel	Share chg.	Index to Total Mkt Shr
47%	Conventional Grocery	-0.4 pts	104
18%	Mass Merch w/ Supers	+0.9 pts	80
11%	Warehouse Clubs	-0.4 pts	104
10%	Premier Fresh Grocery*	-0.1 pts	388
6%	Online Shopping	-0.5 pts	128
3%	Value Grocery	+0.0 pts	63
1%	Dollar stores	+0.2 pts	44
1%	Convenience/Gas	+0.1 pts	65
1%	Drug stores	+0.0 pts	78
3%	All Other	+0.0 pts	90

Share of *Organic* sales in Total US (share chg.)

Share	Channel	Share chg.	Index to Total Mkt Shr
37%	Conventional Grocery	+0.1 pts	109
17%	Mass Merch w/ Supers	+0.9 pts	60
19%	Warehouse Clubs	-0.9 pts	186
13%	Premier Fresh Grocery*	+0.2 pts	773
7%	Online Shopping	-0.6 pts	104
3%	Value Grocery	+0.2 pts	89
1%	Dollar stores	+0.2 pts	14
1%	Convenience/Gas	+0.1 pts	38
1%	Drug stores	-0.1 pts	29
1%	All Other	-0.1 pts	37

Source: NIQ Homescan Panel; Total US Panel; Total Food & Beverage, NIQ Better For Segment™; share change vs year ago; Latest 52 weeks ending January 27, 2024

Winning requires a relentless focus on the consumer

1 Understand the Job to Be Done

The population is aging and evolving in the challenges they face. Identify and internalize the underlying emerging needs that you need a solution. These offer a solid footing in a shifting landscape.

2 Give them what they need

Explore new frontiers in health and wellness to match consumer needs with emerging product attributes and benefits. Brand alone is not enough.

3 Find them where they are

Traditional “channels” are dissolving, and we are operating in an omni-world. Explore new platforms of commerce to reach consumers where they are.

NIQ

We are now accepting applications for the 2024 NIQ Founders Pitch Slam

Applications open January 8th – March 24th, 2024

The 2nd annual NIQ Founders Pitch Slam will bring together some of the **most innovative and transformative** emerging CPG brands, challenging an elite set of founders to pitch their companies to industry insiders and business leaders as they vie for a first-place award of more than **$500k** including a **$50,000 cash prize** and in-kind prizes.

Entry criteria

- Have an **annual revenue up to $20 million** in US$ in qualifying departments
- Products must currently be **available for U.S. sale**
- You must be available to participate in the **Virtual Pitch semi-finals on April 23, 2024**
- You must be available to attend the NIQ C360 conference in Phoenix, AZ, for the **Live Pitch session on May 13-16th (all expenses paid)**

Learn more at niq.com/pitchslam

Visit us at *booth #8721*

to take advantage of complimentary product scanning

Visit us at *booth #809*

Byzzer™ demos, 1:1 BASES meetings, and free data

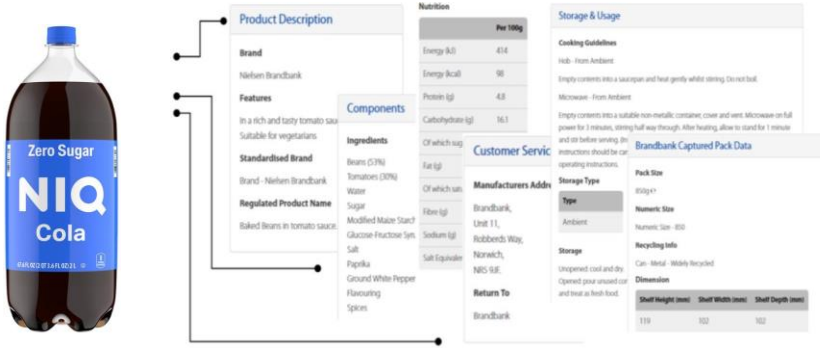
The Opportunity:

Ensure your products are 100% discoverable across key shopper need states, preferences, and passions.

Leverage optimized high-quality product images to drive shopper click-through and engagement.

Empower shoppers with complete content on PDPs including marketing copy, features and benefits, nutrients, ingredients, allergens, and more.

Go beyond and personalize the shopper experience by adding wellness badges and rich-media modules.



Shoppers who interact with wellness badges are 2x as likely to purchase a product

25% of shoppers are more likely to purchase a product with rich media present.

NIQ is Better For™:

Digital Product Content – Finding Growth – Innovation – Emerging and Natural Brands

NIQ

Scan here for a complimentary Byzzer™ account

& receive three free reports!

NIQ.com

We deliver the *Full View*,

the world's most **complete** and **clear** understanding of consumer buying behavior that reveals new pathways to growth.

Retail 2030

Retailer Focus

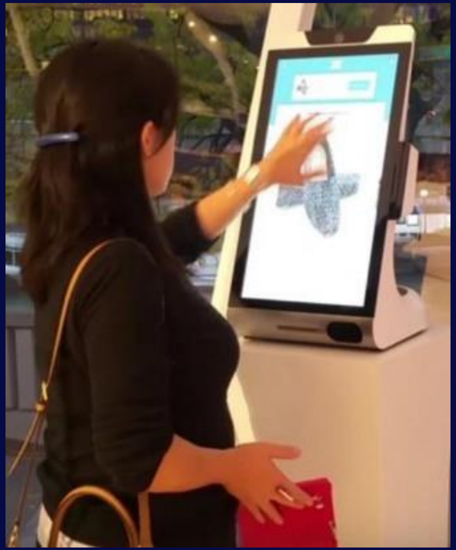
Fulfillment

- Automated centers are shared 3rd party assets; no retailer capex
- 3-hour delivery to shopper is standard

Online

- UX driven by trip mission (convenience / stock up / discover)
- Personalized assortments
- 50% of grocery purchases

Shrink



- Edible products sold loose through refillables
- Reduction of footprint and shelves with customers selecting products on screens

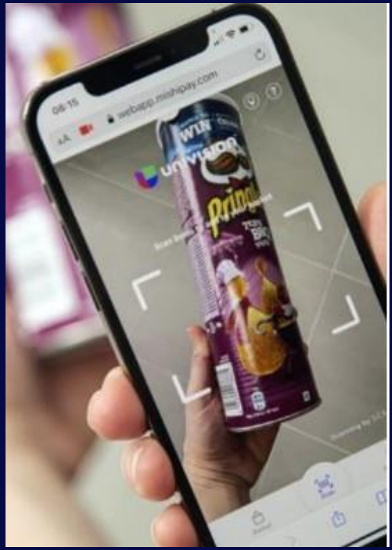
Data

- Realtime processing with AI leading dynamic pricing and promo
- Algorithmic category management
- ROI management

Retail 2030

In-store

Technology

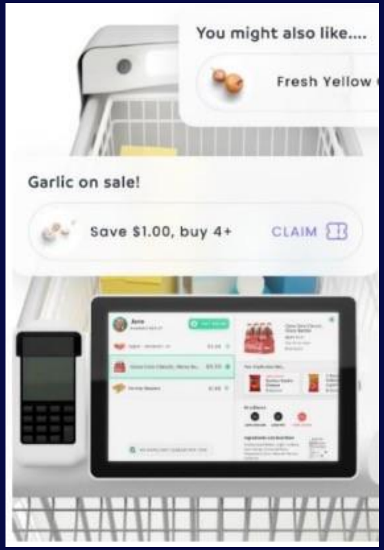


- Scan and go
- Shoppers identified by app/smartphone entering store
- Frictionless Checkout

Intelligence

- Customer tracking and heat mapping
- High traffic aisles monetized with CPG

Personalization



- Personalized promotions while you shop

Experiences

- Experiential brand activations
- Taste / touch / try

Q&A

Natural Products EXPO WEST®

Co-located with Fresh Ideas ORGANIC MARKETPLACE

Product Discovery Powered by Beacon DISCOVERY

New Hope NETWORK

By Informa Markets

Thank you!

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