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NUMERATOR SHARE OF STOMACH: BRANDS

# How to Win Your Share of Stomach

## Maximize growth opportunities with a clear understanding of consumer preferences and purchase behavior.

During a period of rising prices and reduced volumes, consumer preferences across food choices, cooking habits, and dining preferences are evolving. Win distribution, attract new customers, and successfully launch new products through deep consumer understanding.

### 1 Innovate with fun, approachable global flavors to meet changing consumer food preferences.

Consumers across all income groups increasingly find scratch cooking more affordable than buying processed goods. Shoppers are shifting away from savory ingredients and processed sugars towards fresh fruits, 'creamy' flavors like avocado, and Asian ingredients and flavors, offering opportunities for new item launches and partnerships with emerging Asian brands.

Continue to innovate by bringing fresh, fruity flavors like lychee and dragon fruit in your product lineup. Allocate resources to research and development efforts aimed at discovering appealing and accessible global flavors.

### 2 Develop partnerships with limited service restaurants to capitalize on fast food's perceived value.

Amid rising inflation and increased mobility, consumers see dining out as offering more value, posing a challenge for brands. Gen Z is most likely to consider dining out the most affordable option.

To adapt, brands should forge partnerships with restaurants to capitalize on consumption opportunities as consumers progressively return to dining out. Successful examples include the Doritos Locos Taco and alternative meat brands' partnerships with leading LSRs.

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## 3 Partner with key retailers to uncover untapped potential in their food courts, bakeries and deli counters.

Consumers are shopping the traditional bakery and deli less, but growing multicultural cohorts want to try new prepared food formats, from tea & coffee shops to a sit-down restaurant experience.

Consider partnering with retailers to identify a 'hero item' that will help drive traffic, like the Costco hot dog or Casey's pizza. Invest in global flavors to appeal to multicultural consumers.

## 4 Make strategic investments in emerging brands in the increasingly important better-for-you space.

Better-for-you (BFY) continues to be a trend that resonates across the entire eating journey. Within no/low cook foods, BFY brands continually rank as some of the only brands driving unit volume growth across core departments.

Insulate your business from volume declines by looking into potential M&A targets within emerging brands. Identify the emerging BFY brands that overperform with your existing customers and target customers, and gain feedback on your own innovation strategy from your own verified buyers in Numerator's Test Panel.

## 5 Adapt to private label trends and define your brands' unique shopper appeal for retail partners.

Consumers are shifting towards private label for no or low-cook foods, frozen foods, and shelf-stable meals, especially within mainstream Mass stores and Trader Joe's, and private label brands are driving the resiliency of the snacking category.

Stay tuned-in to private label trends to forecast your growth properly and determine the right angle to take when meeting with retail buyers, from better-for-you to performance with a specific shopper cohort or a competitive entry level price point.

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