Grocery Sentiment Index

Act on what shoppers *do*

October 2025

Confidential and Proprietary

What shoppers ***say***

VS

What they ***do***

Study parameters

64mn
households

627mn
transactions

6B
units

Time window
2022
Q3 2025

Traditional grocery retailers
USA
Europe & Asia

SymphonyAI created the Grocery Sentiment Index (GSI)

Emerging trends | Top Sales Drivers | Prediction for Next Quarter | Key Factors Influencing Future Performance

Grocery Sentiment Index

Very Poor	Poor	Neutral	Good	Very Good
0 to 20	20 to 40	40 to 60	60 to 80	80 to 100

Customer-first insights leveraging loyalty card data

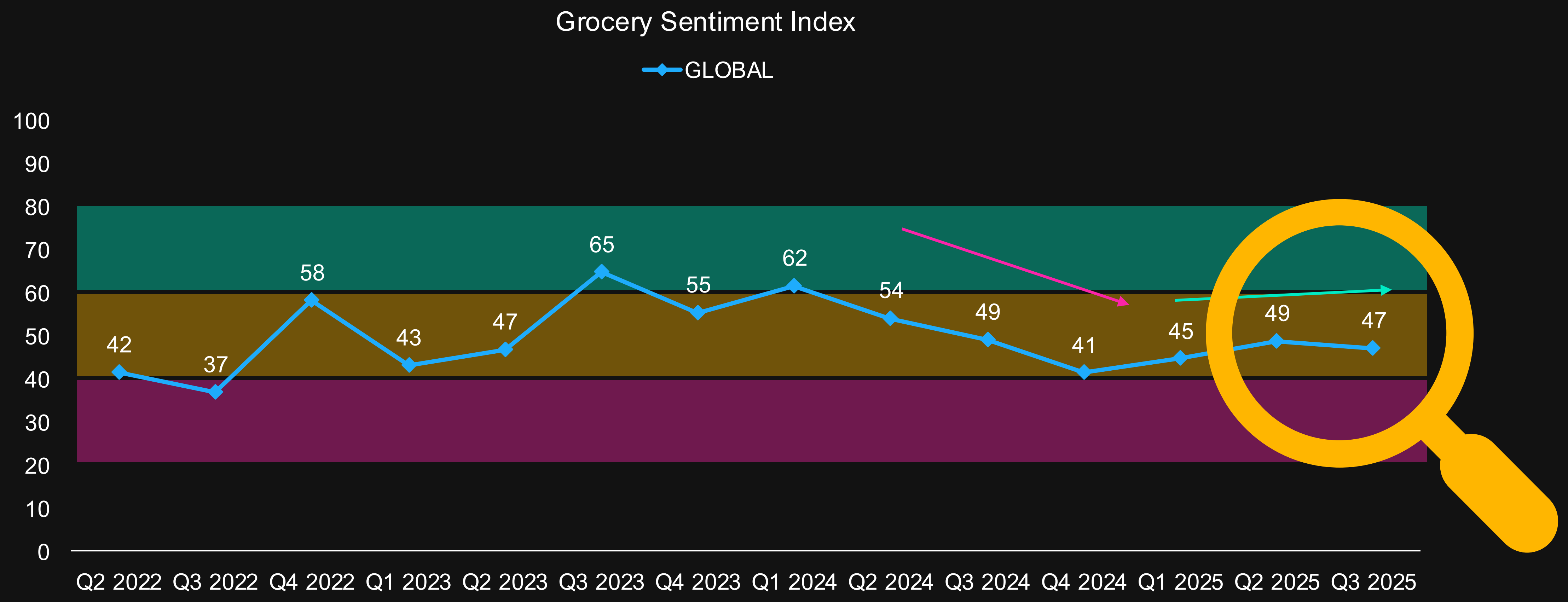
Real purchase behavior of 64 million households

Proprietary research methodology powered by SymphonyAI **predictive AI models**

Grocery Sentiment Index reveals converging trends: Europe & Asia vs. United States

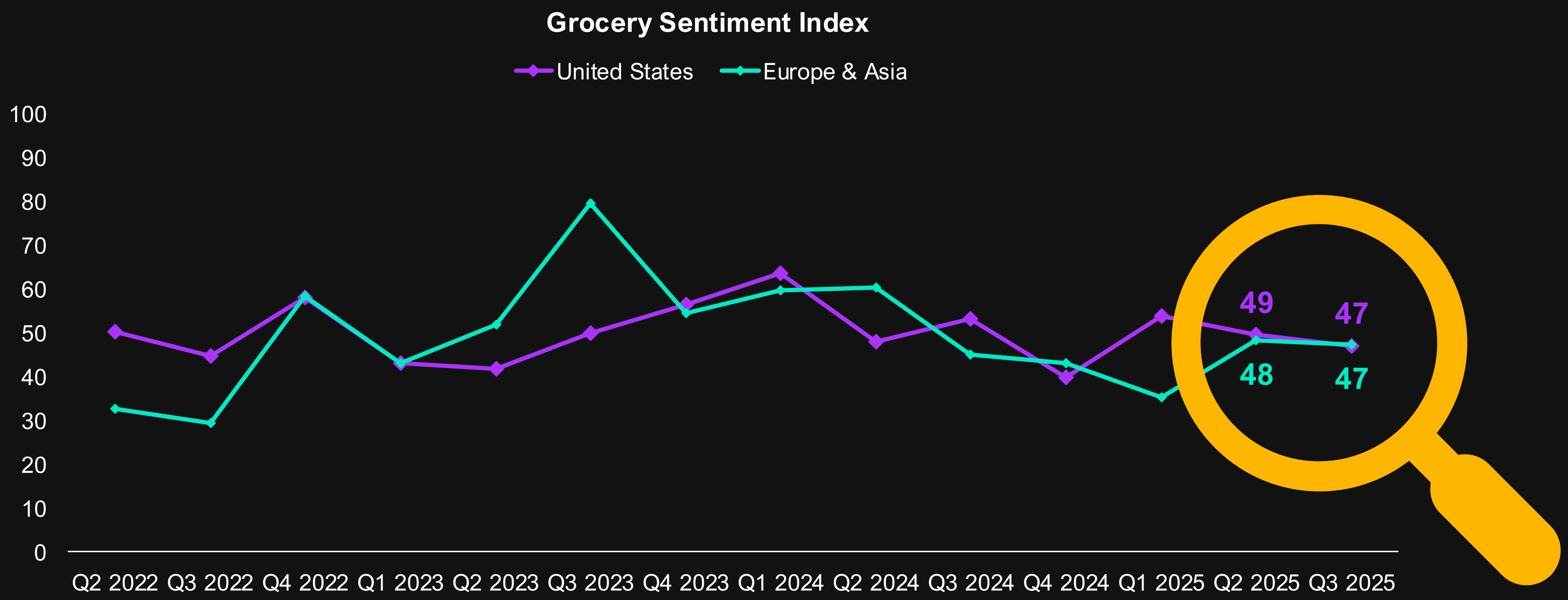
The Global GSI has been stable in Q3 2025

After a period of decline in 2024, we have seen a period of general stability in the last 2-3 quarters globally



The GSI for United States and Europe & Asia are at the same level 2 2 consecutive quarters

While the regions typically diverge from one another quarter to quarter, they are very tightly connected right now



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A decline in loyalty brings the Europe & Asia Grocery Sentiment Index to 47

47 –

NEUTRAL

BEHAVIORAL DRIVERS

- Grocery Sentiment Index in Europe and Asia is stable at 47 in Q3 2025 in Neutral range
- There is a decline in the number of loyal customers, while retailers gain more traffic in store

DRIVER AND DRAGGER CATEGORIES

DRIVERS	DRAGGERS
BAKERY	ALCOHOL
MEAT & POULTRY	ICECREAM
COFFEE, TEA & COCOA	FRUIT & VEGETABLE
COOKING INGREDIENTS	READY TO EAT
SNACKS	BEVERAGES

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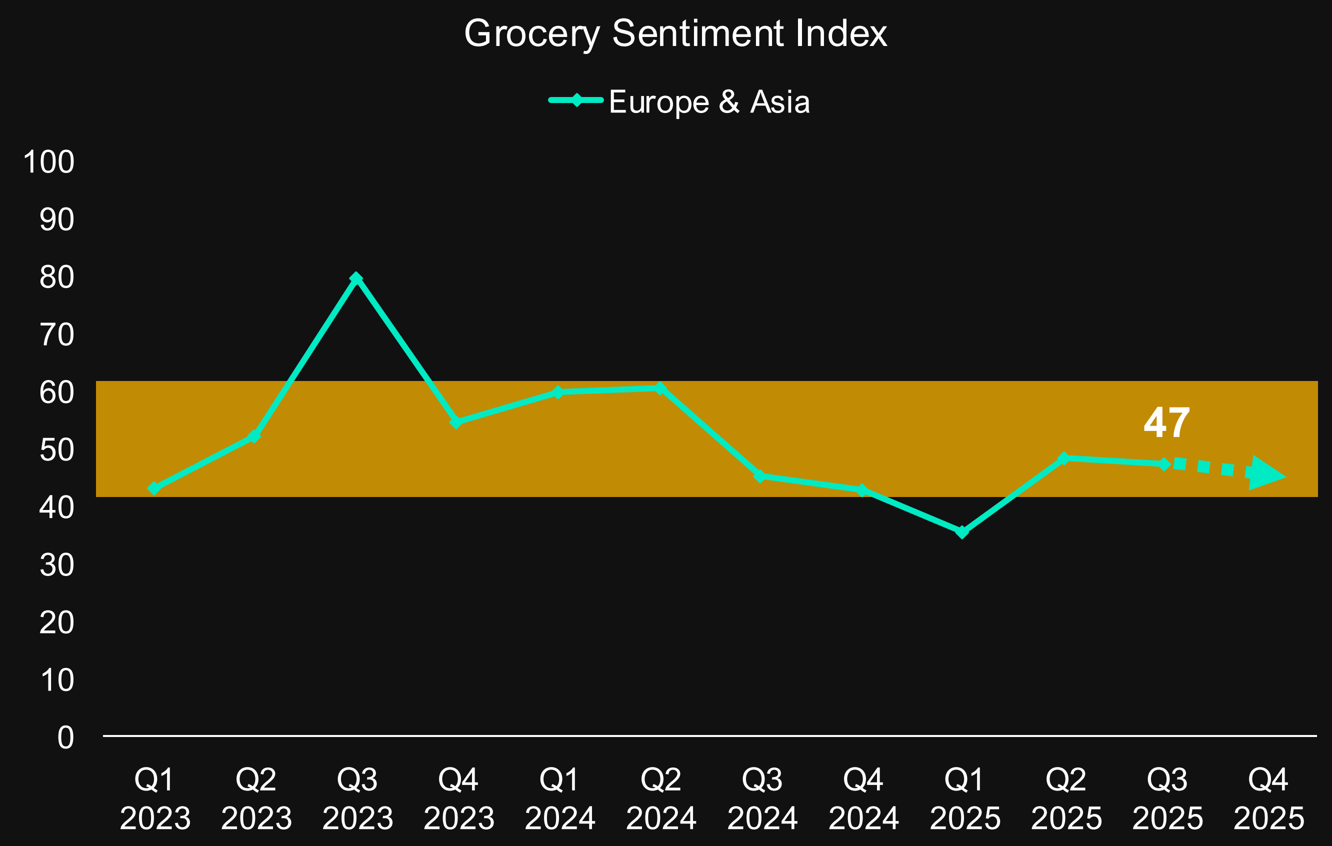
The Europe & Asia Grocery Sentiment Index is forecasted to slightly decline in Q4 2025

AI predictions indicate a continued **decline in the number of loyal customers** and **less traffic**, which could result in a decrease in the overall index

AI PREDICTIVE TREND IN THE UPCOMING QUARTER



EU/Asia Region Summary

What consumers ***say*** and what they ***do*** are not always aligned, making true behavioral insights so valuable

Key takeaways

- GSI remained stable in the **Neutral** zone in Q3 at 47, and is forecast to **slightly decline in Q4**
- Currently, the **decline in loyal customers** is being offset by an increase in store traffic, but both are expected to fall in Q4
- **Some everyday essentials** continue to drive positive sentiment and should be maintained while categories such as **Alcohol, Fruit & Veg, Beverages** require attention to improve

Recommendations

- Focus on **loyalty retention**
  - Identify at-risk loyal shoppers early
  - Re-engage with **personalized offers**
  - Reinforce price, convenience and unique value
- **Leverage AI**: detect early warning signals & guide actions before churn
- **Boost declining categories**: targeted promotions & stronger value communication

The United States GSI has declined for the second consecutive quarter; with Q3 results due primarily to lower units purchased

47 ↓

NEUTRAL

BEHAVIORAL DRIVERS

- The U.S. Grocery Sentiment Index has slightly declined from 49 to 47 in Q3 2025, remaining squarely in the Neutral range
- A higher than anticipated average item price increase has led to fewer units being purchased by all customers. However, there are more loyal customers and traffic in the store

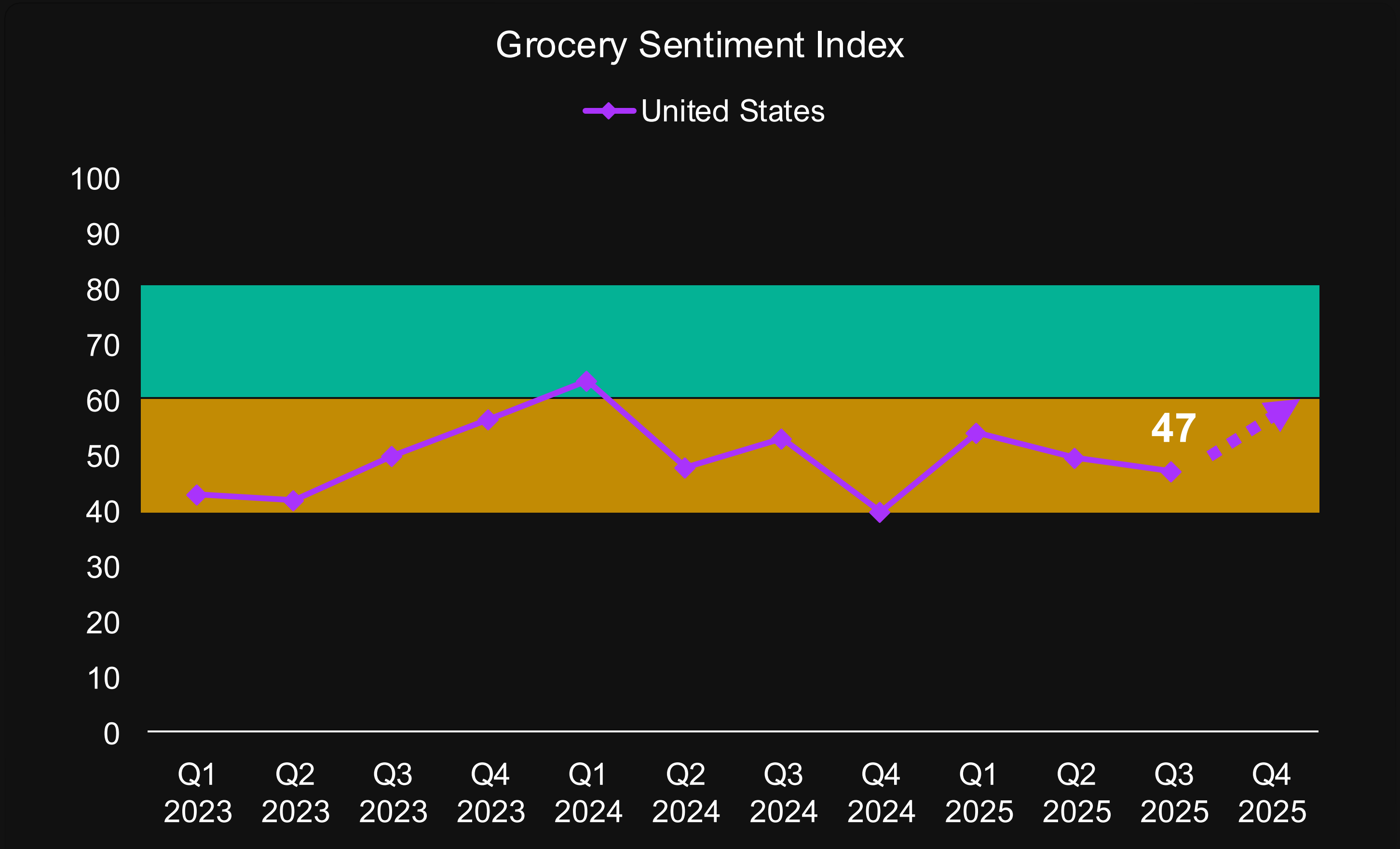
DRIVER AND DRAGGER CATEGORIES

DRIVERS	DRAGGERS
MEAT & POULTRY	FROZEN FOOD
ALCOHOL	SNACK
ICE CREAM	INSTANT FOOD
READY TO EAT	COOKING INGREDIENTS
BAKING INGREDIENT	CANNED PRODUCTS

AI prediction shows a positive recovery of the United States Grocery Sentiment Index into Q4 2025

Predictive models forecast that a continued increase **in loyal customer traffic** will contribute to an uptick, the volume per HH will also return

AI PREDICTIVE TREND IN THE UPCOMING QUARTER



US Region Summary

What consumers ***say*** and what they ***do*** are not always aligned, making true behavioral insights so valuable

Key takeaways

- GSI **remains in the Neutral** range at 47. However, it is **predicted to rise** nearing the Good range in Q4
- Although store traffic has increased, the index has seen a slight decline due to **higher prices and a decrease in units purchased**
- Customer appear to be **pulling back** from longer code life and supply line categories, as they are having a negative impact on the index

Recommendations

- **Consider the mix:** review feature, display, digital support) for **Fresh products** versus those that are traditionally value focused; consumers will likely be looking to make up for **less meal occasions away from home**
- **Monitor loyal customer conversion:** review long shelf life categories (inflation impact) to avoid missing out on traffic in Q4
- Consider tactics to capture "**one more item**" as Units per HH recovers

What customers say and what they do will not always align.

Understanding this, and taking action in the face of that conflict, can deliver value and success for your organization.

Thank you

info@symphonyai.com

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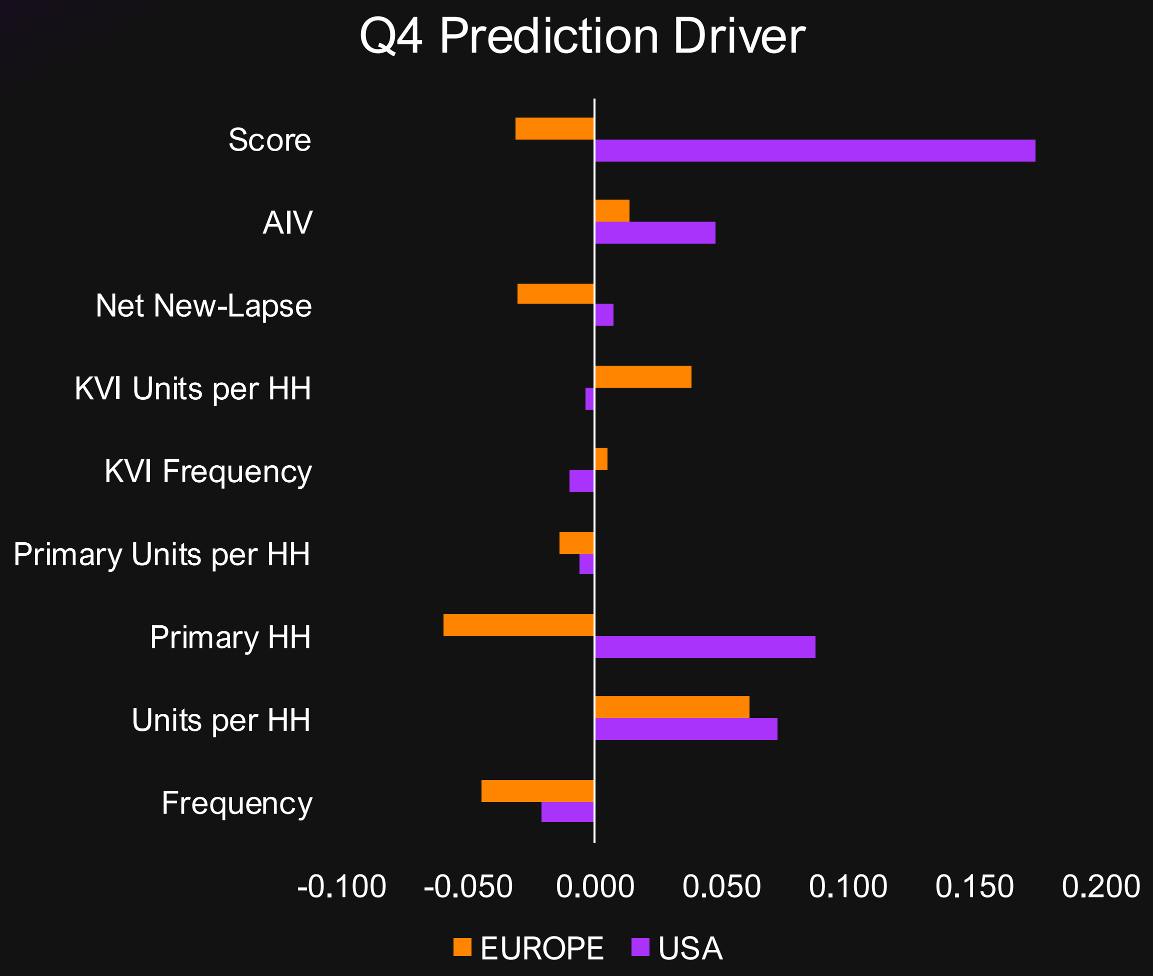
AI that knows retail

Q4 Prediction



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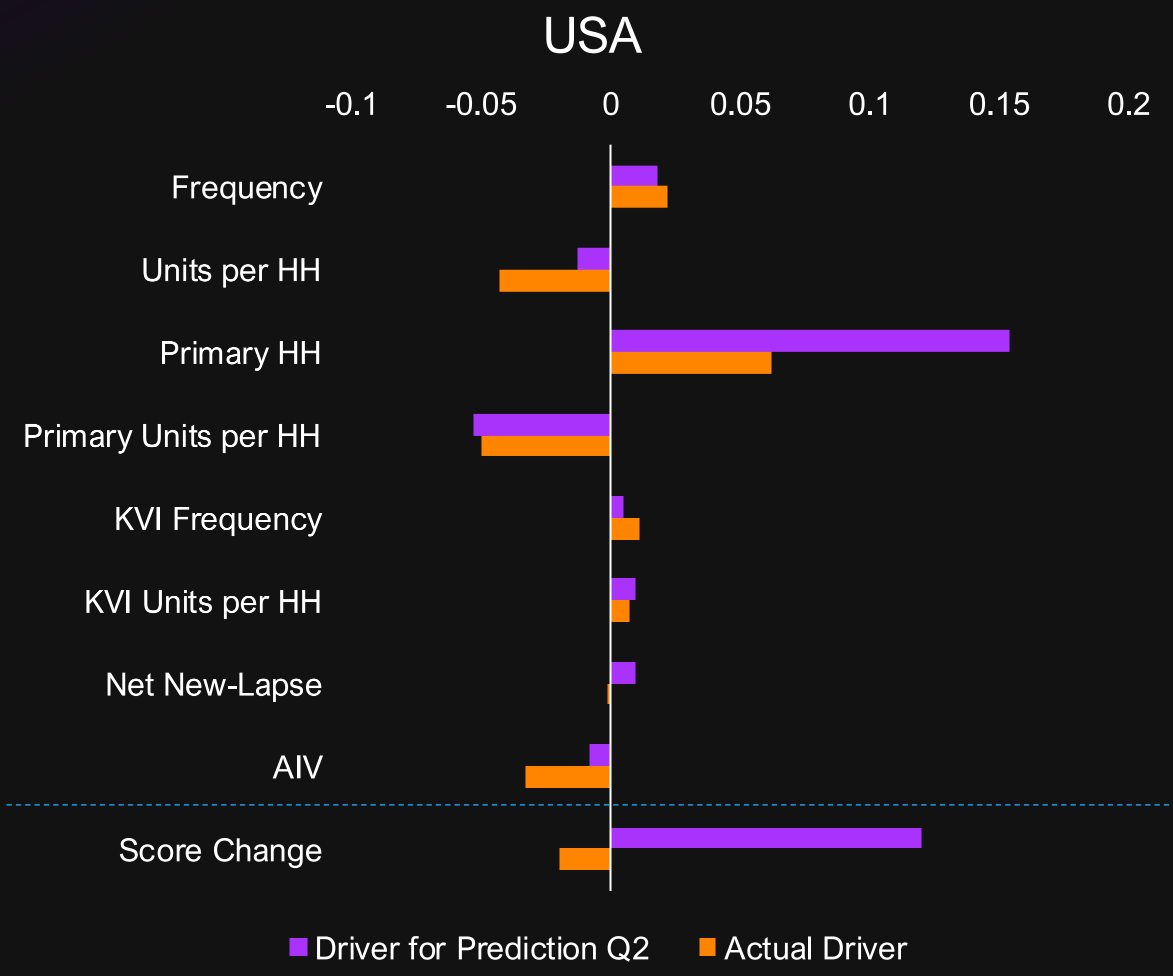
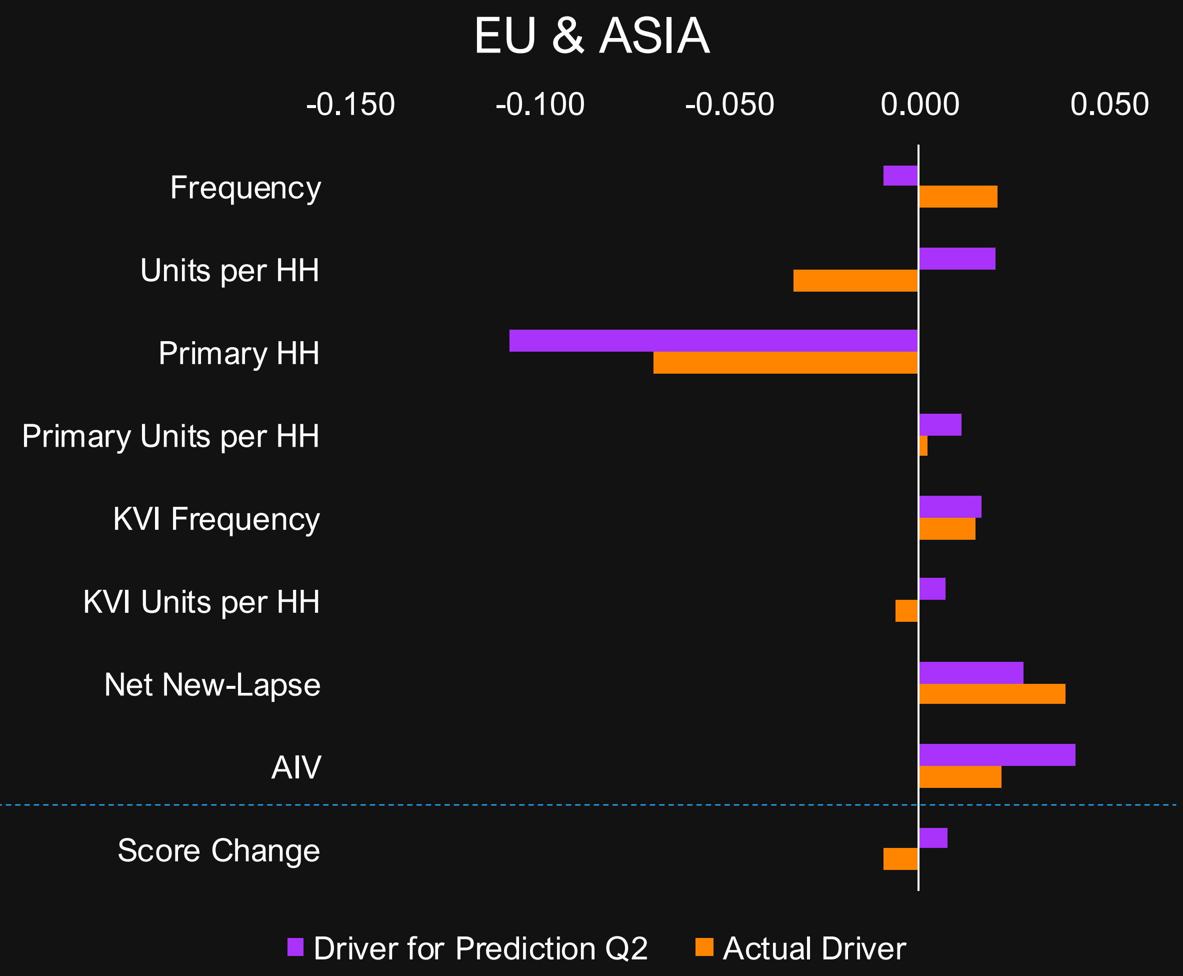
Prediction

What we predicted for Q2 and what actually happened in Q3





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