SymphonyAI

Grocery Sentiment Index

Act on what shoppers *do*

July 2025

Confidential and Proprietary

What shoppers ***say***

VS

What they ***do***

Study parameters

64mn
households

627mn
transactions

6B
units

Time window
2022
Q2 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

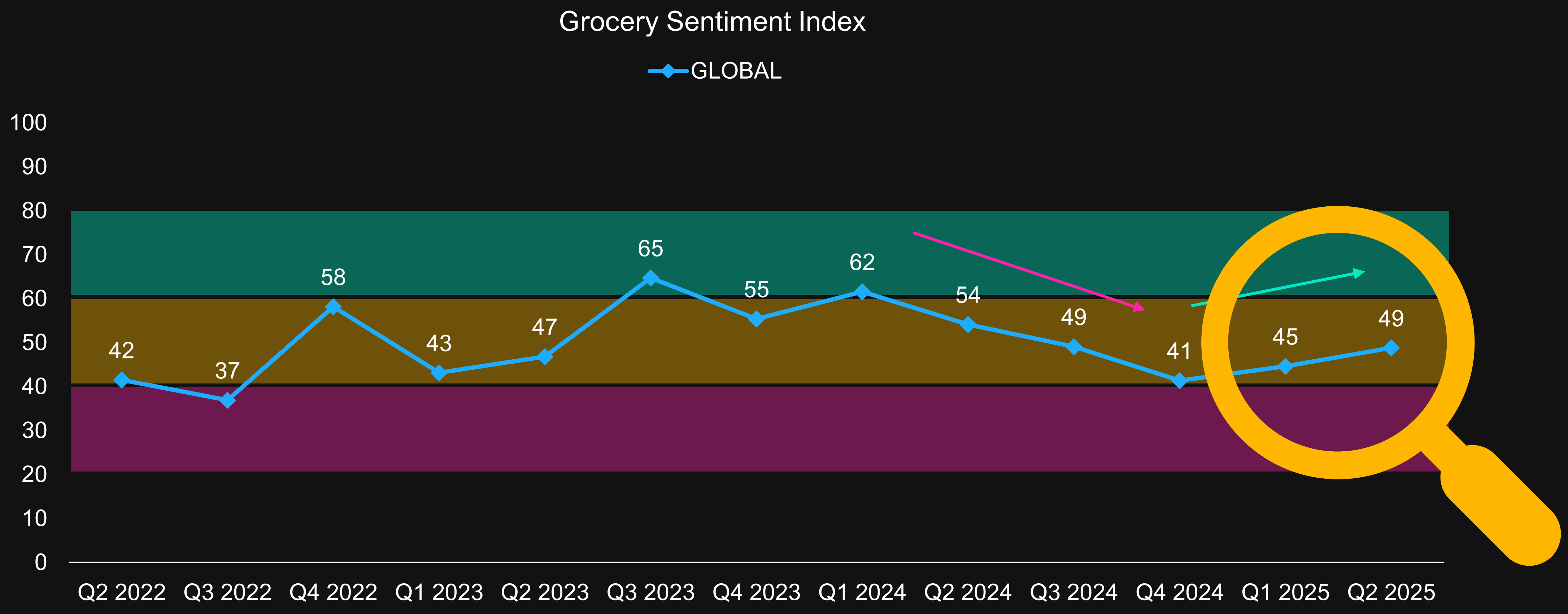
Real purchase behavior of 64 million households

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

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

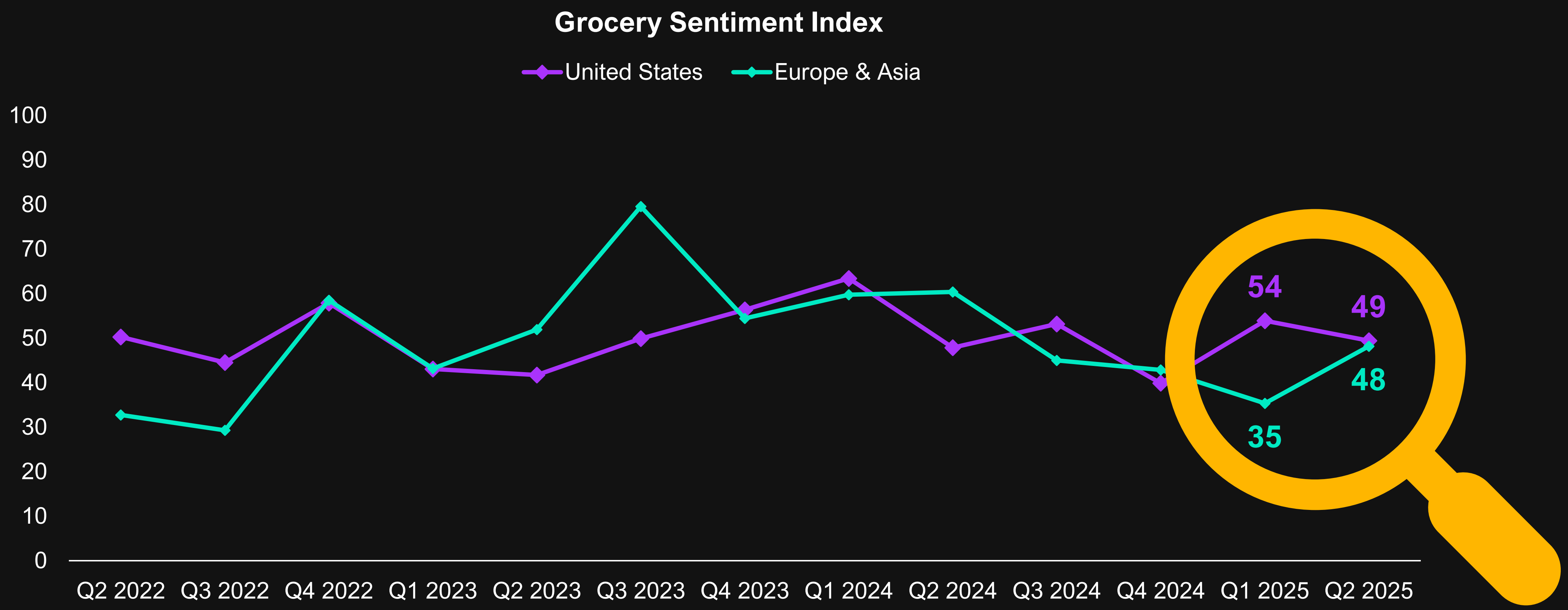
The Global GSI has now shown 2 consecutive quarters of improvement following nearly a year of decline

After being heavily influenced by inflation in 22’ and 23’, other factors are now driving movements in the GSI



The GSI for United States and Europe & Asia are at the same level after diverging from one another significantly in Q1

While the regions diverge from one another quarter to quarter,
you can see the long-term trends follow a similar pattern over time



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A rise in units purchasing drive the Europe & Asia Grocery Sentiment Index to 48

48 ↑

NEUTRAL

BEHAVIORAL DRIVERS

- Grocery Sentiment Index in Europe and Asia increased from 35 to 48 in Q2 2025
- This upward trend is primarily driven by increased unit purchases, particularly among loyal customers

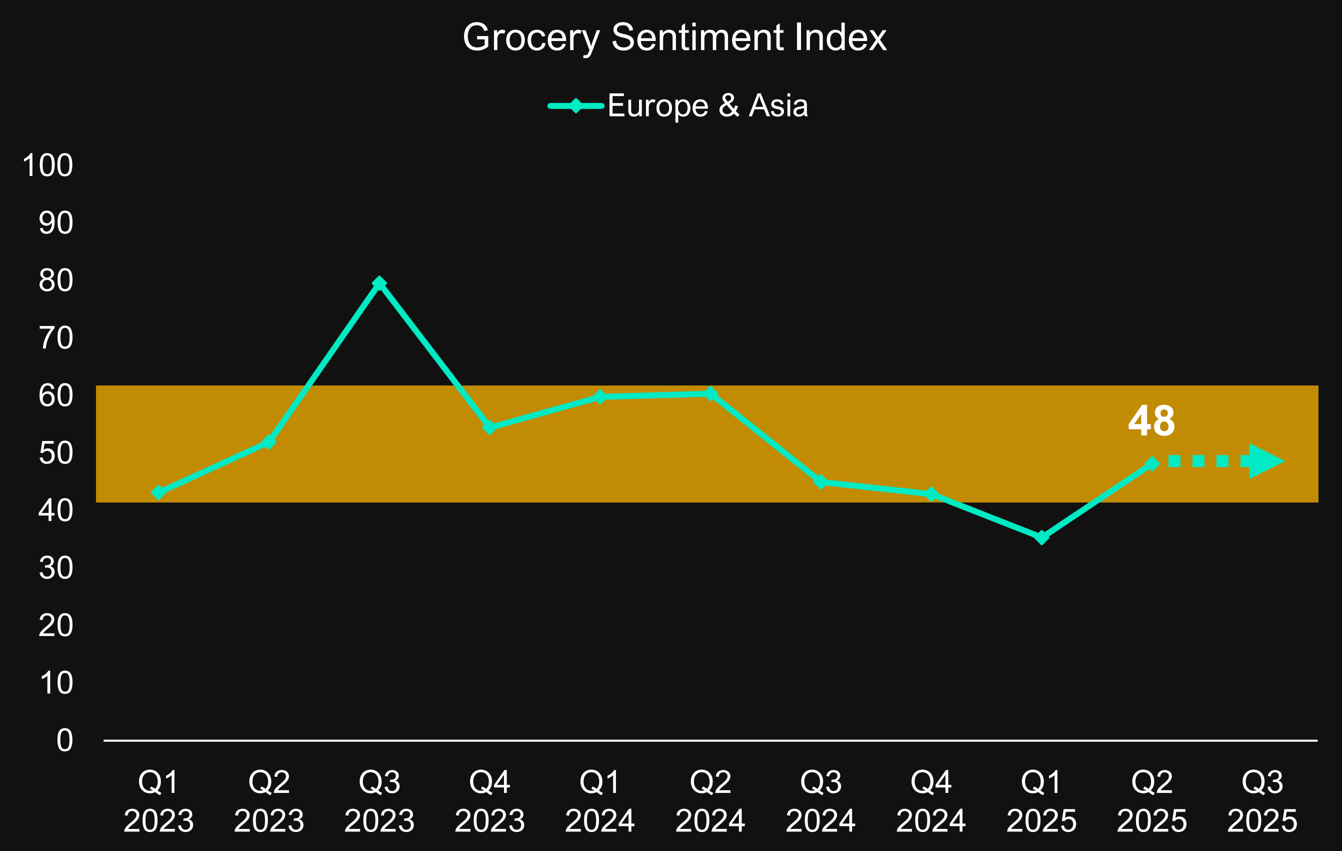
DRIVER AND DRAGGER CATEGORIES

DRIVERS	DRAGGERS
COOKING INGREDIENTS	BABY FOOD
DAIRY PRODUCTS	SALAD
SNACK	READY TO EAT
INSTANT FOOD	BAKING INGREDIENTS
CANNED PRODUCTS	FROZEN FRUITS & VEGETABLES

The Europe & Asia Grocery Sentiment Index is forecasted to remain stable in Q3 2025

AI predictions indicate a **steady increase in units** despite slighly increasing prices; however, a **decline in number of loyal customers** is also expected, which could result in the stabilization of the index

AI PREDICTIVE TREND IN THE UPCOMING QUARTER



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EU/Asia Region Summary

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

Key takeaways

- GSI rebound to **Neutral** in Q2 from 35 to 48, and is forecasted to **remain at this level in Q3**
- The increase in **units purchased** significantly contributes to the sentiment index
- **Cooking Ingredients, Dairy products and Snack** should be maintained to drive positive sentiment while **Baby Food** requires attention to improve

Recommendations

- Double down on loyalty retention strategies
- Monitor and strengthen underperforming categories, especially emotional categories like Baby Food
- Invest in traffic-driving promotions and visibility strategies

The United States GSI fell back slightly driven primarily by a decrease in the number of loyal customers

49 ↓

NEUTRAL

BEHAVIORAL DRIVERS

- The U.S. Grocery Sentiment Index has slightly declined from 54 to 49 in Q2 2025, remaining in the Neutral range
- Although unit purchases have increased, there has been a decline in the number of loyal customers visiting stores

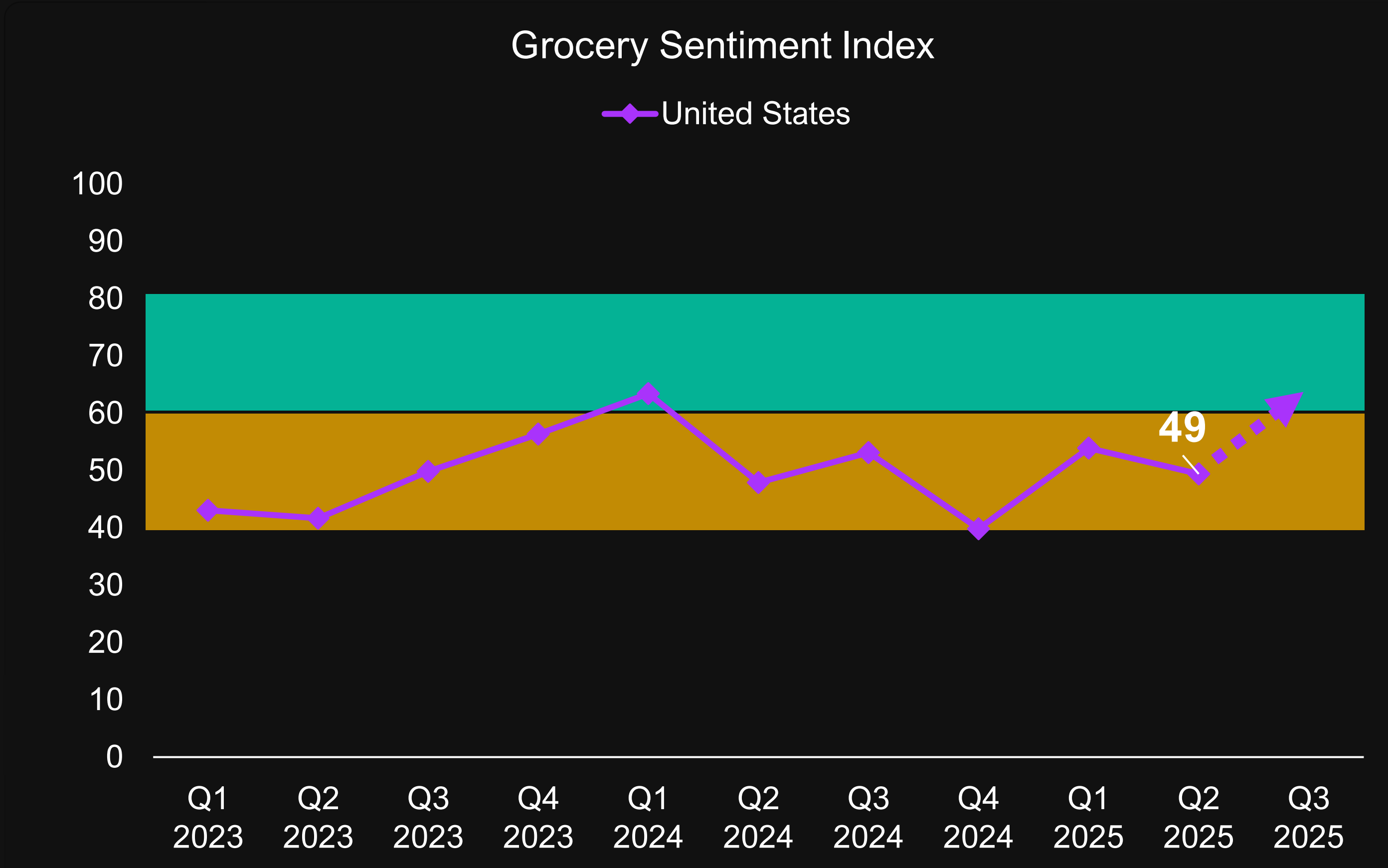
DRIVER AND DRAGGER CATEGORIES

DRIVERS	DRAGGERS
CONFECTIONERY	FISH & SEAFOOD
FRUIT & VEGETABLE	BEVERAGE
BAKING INGREDIENTS	BAKERY
SNACK	PET
COOKING INGREDIENTS	CLEANING

AI prediction shows a positive trend of the United States Grocery Sentiment Index into Q3 2025

AI PREDICTIVE TREND IN THE UPCOMING QUARTER

Predictive models forecast that the **recovery of loyal customer** traffic will contribute to an uptick, while the volume per HH of these loyal customers will hold back the Q3 sentiment



US Region Summary

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

Key takeaways

- GSI declined slightly from 54 to 49, but it **remains within the neutral range**. However, it is **expected to rise** nearing the Good range in Q3
- The **decrease in the number of loyal customers** has contributed to the decline in the index, despite a positive outcome in their units per customer
- Volatility seen in categories as drivers and draggers from Q1 to Q2, with indulgence and ingredients performing well

Recommendations

- Look to maximize momentum with loyal customer improvement, with a focus on bolstering units/basket
- Review share position for Pet and Cleaning categories to alternate channels and win back with loyal customers
- Consider meal and recipe solutions to maintain cooking at home, and steal share from QSR and Restaurants

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

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AI that knows retail