

CRITEO

CPG Pulse 2026

GLOBAL





FOLLOW WHAT'S SHAPING CPG BASKETS

Everyday purchases are creating valuable moments for marketers to connect with shoppers. Drawing on commerce data from hundreds of brands and retailers and survey insights from 6,300+ consumers globally, Criteo's CPG Pulse 2026 reveals how shopping behavior is evolving and where marketers can turn routine purchases into lasting growth.

Standout insights to know:

- **CPG demand is moving differently around the world.** Food & Groceries are fueling growth in EMEA and APAC, while larger order values are helping offset softer demand across the Americas.
- **Digital journeys are bringing more brands into view.** More shoppers are increasing their online spending, while browsing across retailers is expanding the number of brands they encounter and consider.
- **Purchase decisions are staying open as AI enters the journey.** Promotions motivate action across generations, younger shoppers show greater openness to ads and new brands, and shoppers influenced by advertising also report higher AI usage.
- **Everyday purchases are compounding into lasting value.** Repeat buyers spend substantially more over time, with many returning to make their next purchase within just four weeks.

Take stock:

Q3 trends
and seasonality
shifts

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Take stock: Q3 trends and seasonality shifts

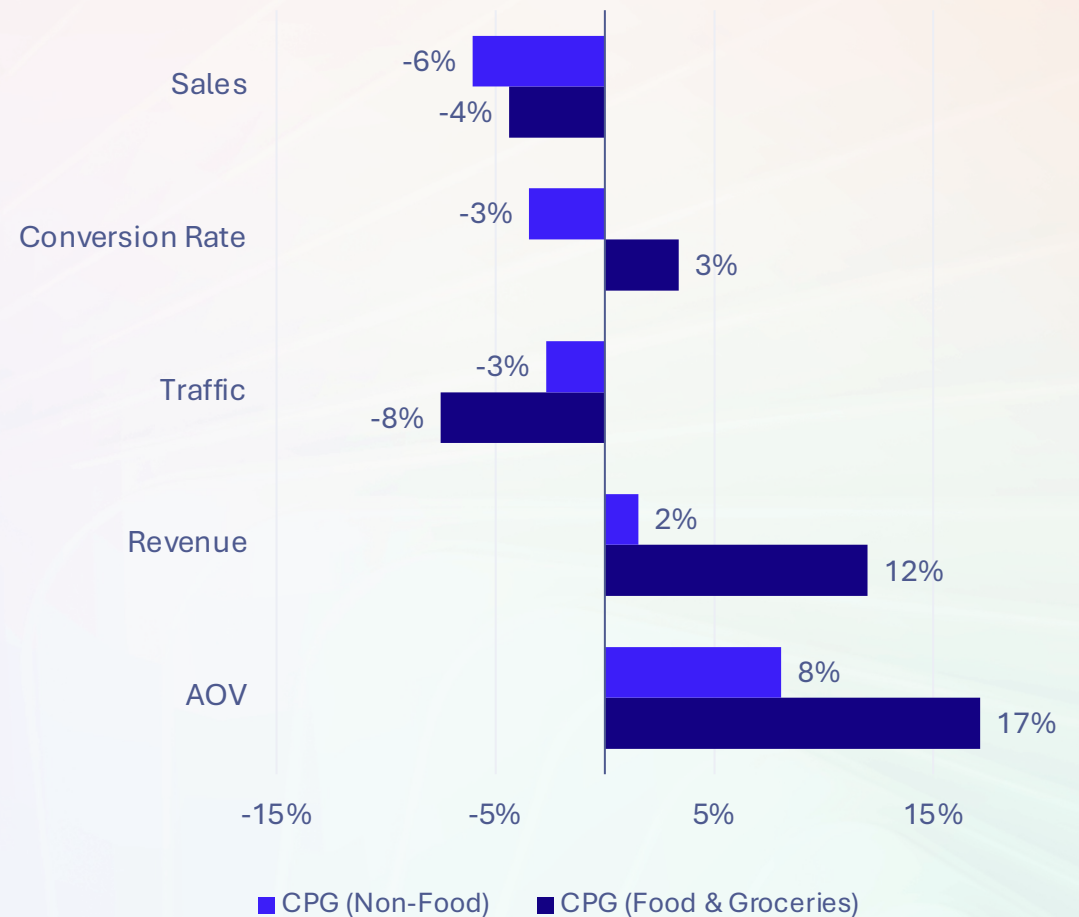


Shoppers in the Americas are going bigger at checkout

CPG sales declined 6% year-over-year for Non-Food and 4% for Food & Groceries.

However, shoppers placed larger orders, with average order value up 8% for Non-Food and 17% for Food & Groceries. Food & Groceries performed particularly strongly, generating 12% revenue growth despite an 8% decline in traffic.

Year-over-year CPG performance by segment, Americas , Q3-to-date 2026



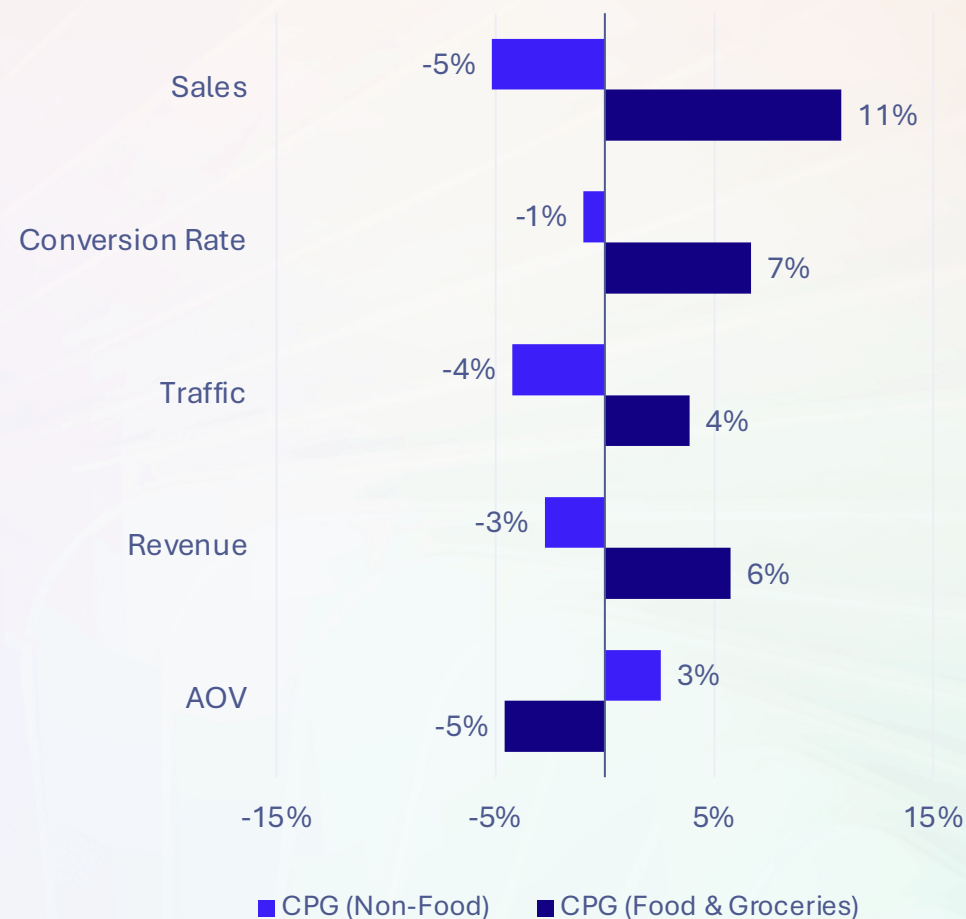
Source: Criteo Commerce Data. Retailer-level classification based on partners' vertical taxonomy. CPG, including Food & Groceries and Non-Food categories such as fragrances, cosmetics, and personal care. Year-over-year Q3-to-date change, comparing Jul 1–Aug 18, 2026 with Jul 1–Aug 18, 2025, across eligible commerce partners and site types in the Americas.

EMEA shoppers are checking out with more Food & Groceries

Food & Groceries outperformed Non-Food in EMEA, with sales up 11% and revenue up 6%. A 4% increase in traffic and a 7% rise in conversion rate helped drive this growth.

Non-Food sales declined 5% and revenue fell 3%, despite a 3% increase in average order value, highlighting a sharp divergence between the two segments.

Year-over-year CPG performance by segment, EMEA, Q3-to-date 2026



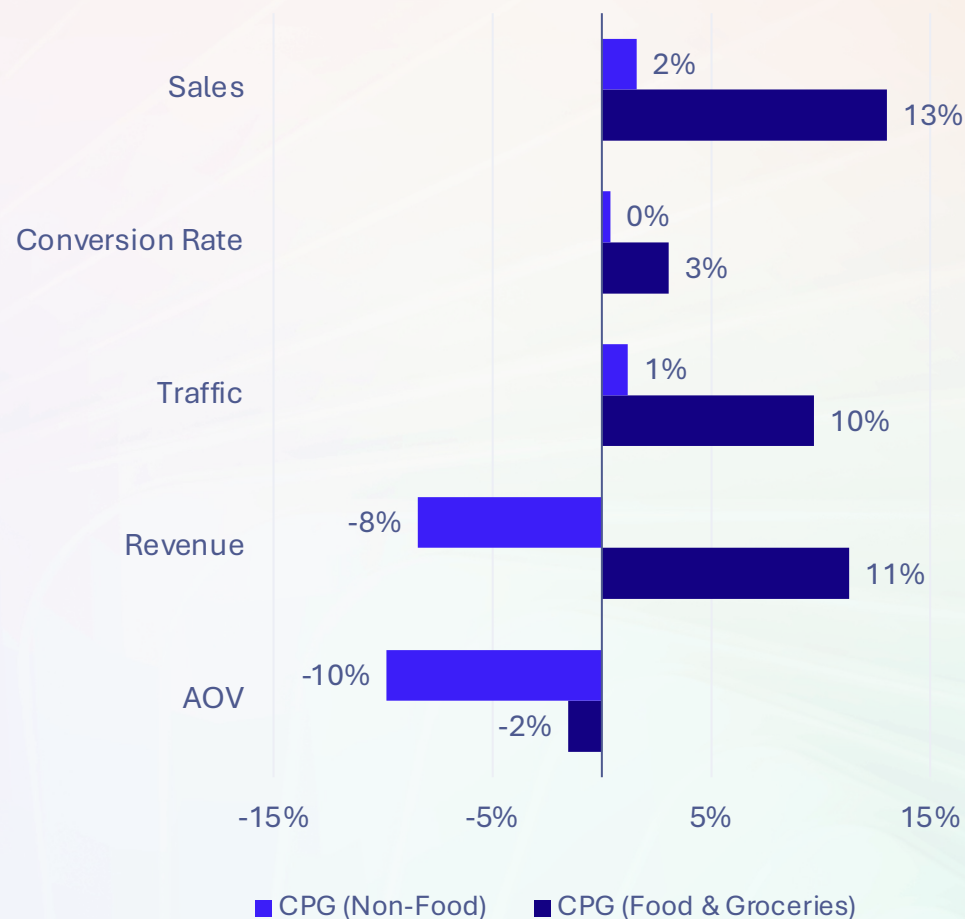
Source: Criteo Commerce Data. Retailer-level classification based on partners' vertical taxonomy. CPG, including Food & Groceries and Non-Food categories such as fragrances, cosmetics, and personal care. Year-over-year Q3-to-date change, comparing Jul 1–Aug 18, 2026 with Jul 1–Aug 18, 2025, across eligible commerce partners and site types in EMEA.

APAC shoppers are stocking up on Food & Groceries

Food & Groceries significantly outperformed Non-Food in APAC, with sales volume up 13% and revenue up 11%. Growth was supported by a 10% increase in traffic and a 3% rise in conversion rate.

Non-Food sales volume grew just 2%, while revenue declined 8% as average order value fell 10%. Average order value also declined 2% for Food & Groceries, despite strong demand across the segment.

Year-over-year CPG performance by segment, APAC, Q3-to-date 2026



Source: Criteo Commerce Data. Retailer-level classification based on partners' vertical taxonomy. CPG, including Food & Groceries and Non-Food categories such as fragrances, cosmetics, and personal care. Year-over-year Q3-to-date change, comparing Jul 1–Aug 18, 2026 with Jul 1–Aug 18, 2025, across eligible commerce partners and site types in APAC.

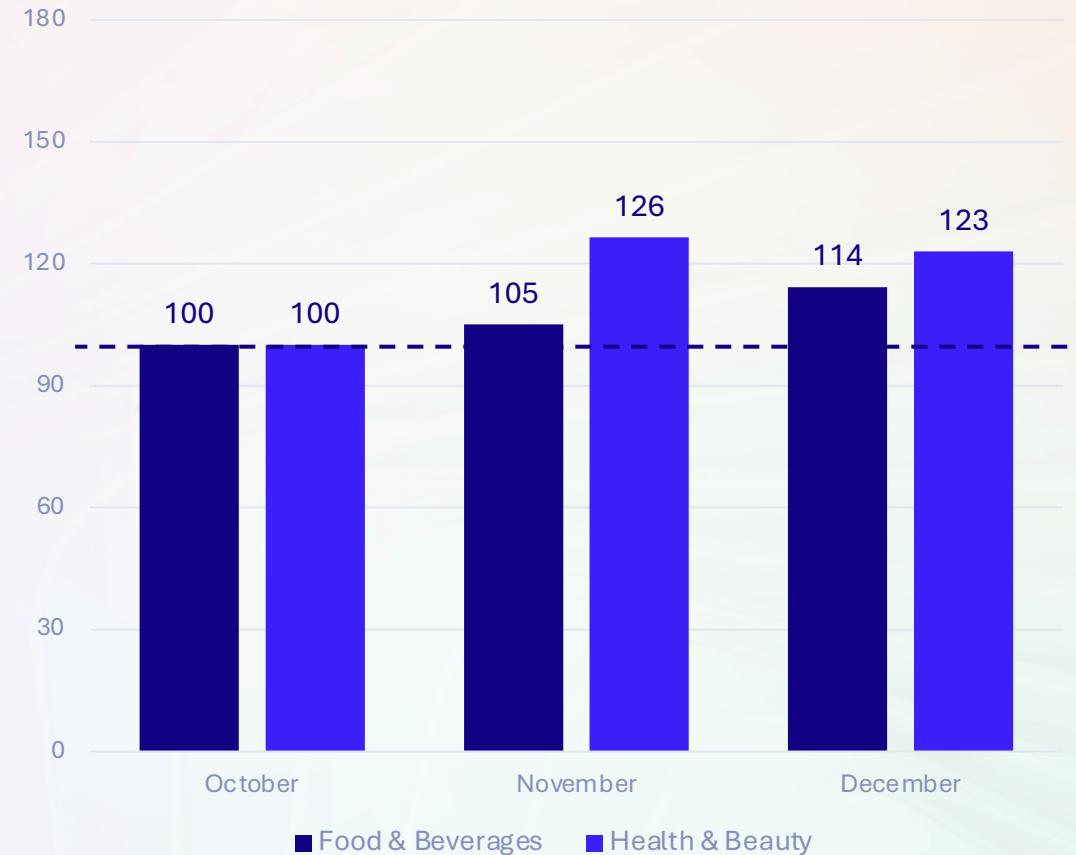
Health & Beauty was the 2025 holiday standout in the Americas

When looking at product level classifications, Health & Beauty sales rose 26% above the October baseline in November and remained 23% higher in December.

Food & Beverages saw a more gradual increase, rising 5% in November and 14% in December. This points to stronger holiday momentum for Health & Beauty across the Americas.

Source: Criteo Commerce Data. Product-level classification based on product catalogs supplied by CPG partners. Monthly sales for Food & Beverages and Health & Beauty across eligible commerce partners and site types in the Americas, Q4 2025. Sales are indexed to average October 2025 sales.

Q4 2025 sales index by CPG category, compared with October baseline, Americas



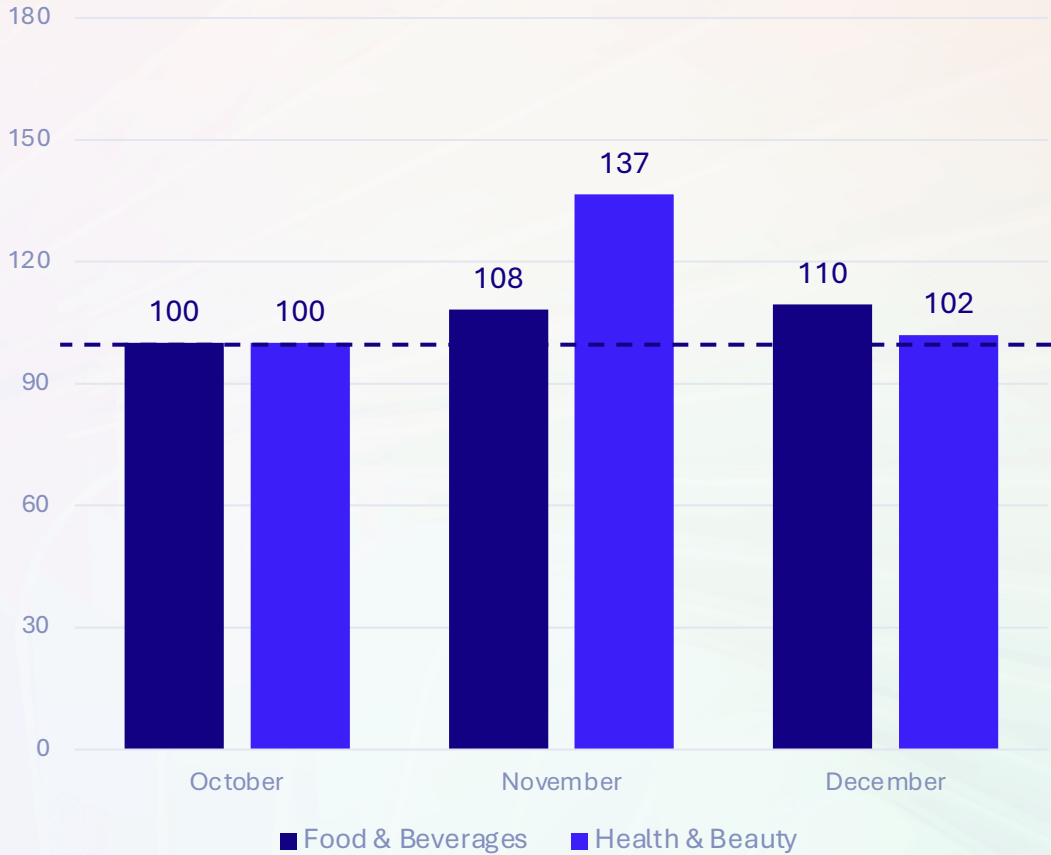
Health & Beauty stole the show last November in EMEA

Health & Beauty sales surged 37% above the October baseline in November and returned to the initial levels in December.

Food & Beverages grew more steadily, rising 8% in November and 10% in December, highlighting a sharper holiday peak for Health & Beauty across EMEA.

Source: Criteo Commerce Data. Product-level classification based on product catalogs supplied by CPG partners. Monthly sales for Food & Beverages and Health & Beauty across eligible commerce partners and site types in EMEA, Q4 2025. Sales are indexed to average October 2025 sales.

Q4 2025 sales index by CPG category, compared with October baseline, EMEA

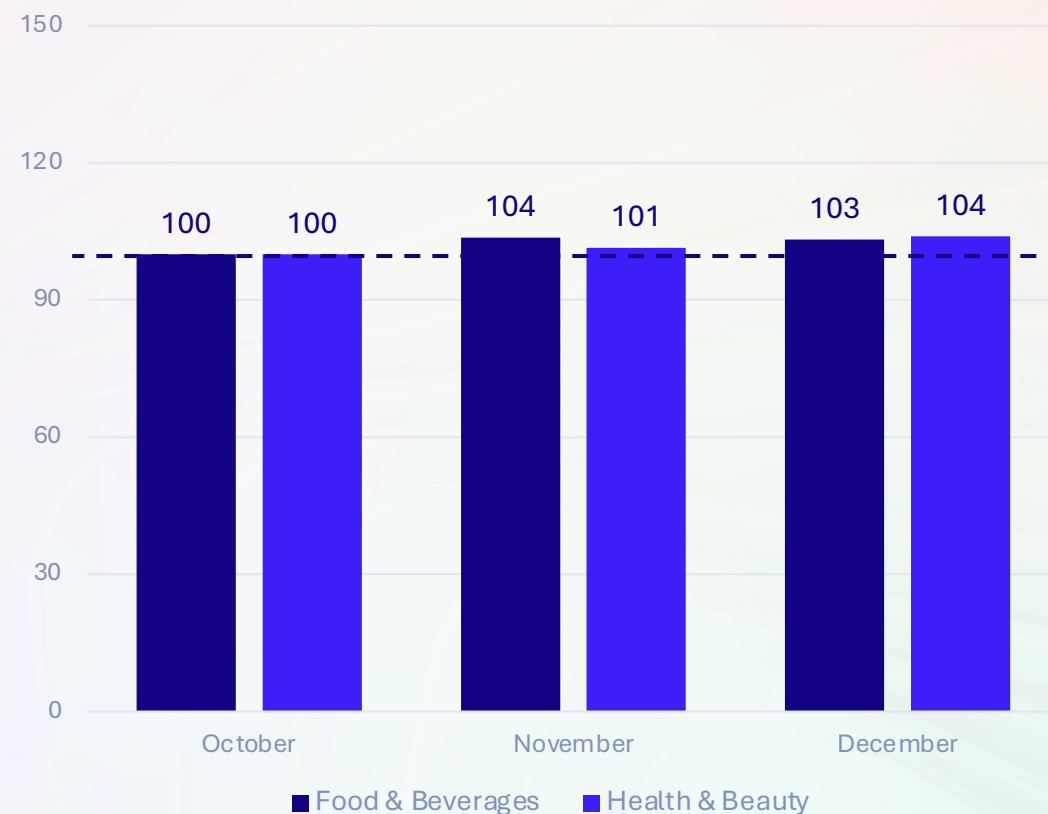


CPG sales held steady Q4 2025 in APAC

CPG sales remained relatively stable in APAC throughout Q4 2025. Food & Beverages rose 4% above the October baseline in November and 3% in December, while Health & Beauty increased 1% in November and 4% in December. Overall, both categories saw limited seasonal variation.

Source: Criteo Commerce Data. Product-level classification based on product catalogs supplied by CPG partners. Monthly sales for Food & Beverages and Health & Beauty across eligible commerce partners and site types in APAC, Q4 2025. Sales are indexed to average October 2025 sales.

Q4 2025 sales index by CPG category, compared with October baseline, APAC



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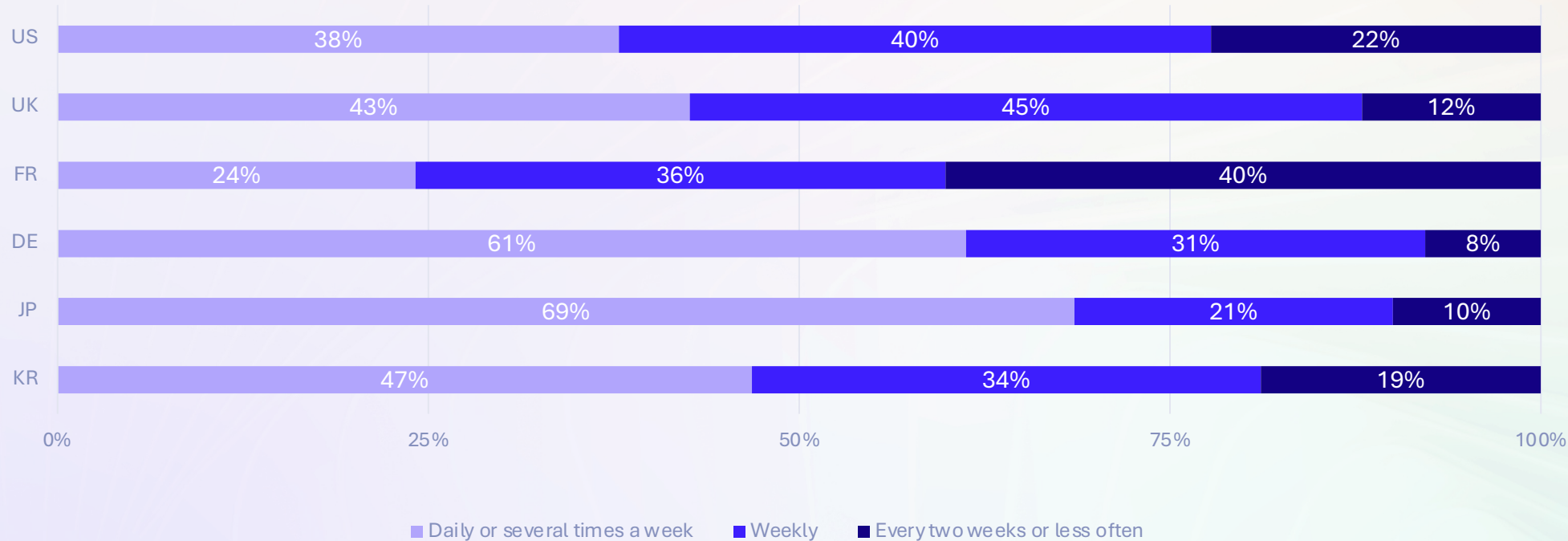
Map the grocery run: How CPG journeys take shape



Restocking routines vary sharply across markets

Grocery and household shopping is most frequent in Japan and Germany, where 69% and 61% of shoppers, respectively, make purchases daily or several times a week. France stands apart, with just 24% shopping this often and 40% shopping every two weeks or less often.

How often do you shop for groceries or household items?

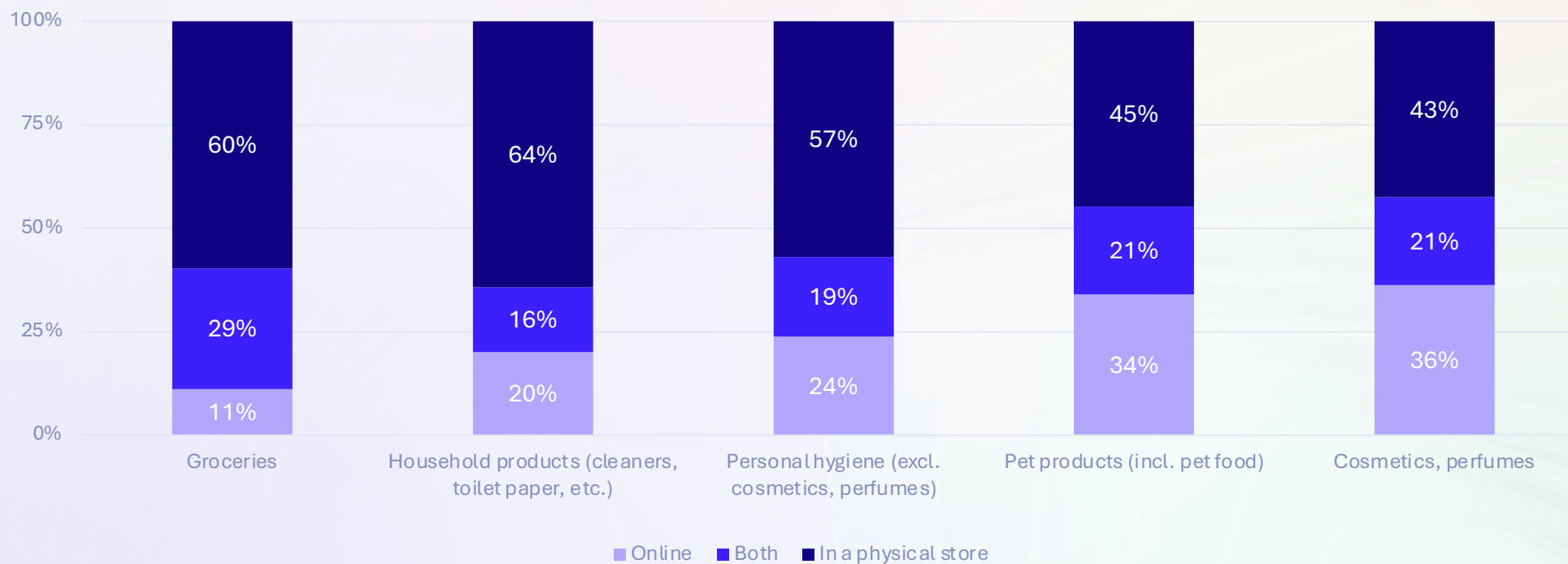


Source: Criteo Shopper Survey, June 2026 (N=3,496). Base: Category buyers in past 30 days.

In-store is in favor for grocery purchases, online is more common for beauty buys

Physical stores remain central to CPG shopping, especially for groceries and household products, which 60% and 64% of recent buyers, respectively, purchased exclusively in-store. Digital channels play a larger role in Health & Beauty, with 57% of cosmetics and perfume purchases involving online.

Thinking about your recent purchases in the following categories, where were they made?



Source: Criteo Shopper Survey, June 2026 (N=6,042). Base: Category buyers in the past 30 days.

Most are splitting their budget between clicks and bricks

Globally, 29% of shoppers report splitting their spending evenly between online and physical stores for groceries, personal hygiene items, and pet food. Another 19% spend 51%–90% of their budget online, while 17% spend more than 90% in physical stores.

Thinking about your grocery, personal hygiene, and pet food purchases in the last 30 days, how much did you spend online versus in physical stores?

	GLOBAL	United States	United Kingdom	France	Germany	Japan	South Korea
More than 90% online	12%	13%	12%	11%	7%	5%	23%
51%–90% online	19%	18%	24%	15%	17%	9%	29%
50% online / 50% in-store	29%	35%	30%	29%	30%	21%	31%
51–90% in-store	24%	22%	21%	23%	28%	35%	12%
More than 90% in-store	17%	13%	12%	21%	18%	29%	5%

Source: Criteo Shopper Survey, June 2026 (N=3,496). Base: Category buyers in the past 30 days.

Online carts are ringing up more spend

Globally, 37% of respondents report spending more online on groceries, personal hygiene, and pet care than they did a year ago, compared with 18% who are spending less. Another 45% report spending about the same amount online.

Compared with a year ago, how much do you spend online on groceries, personal hygiene, and pet care?

	GLOBAL	United States	United Kingdom	France	Germany	Japan	South Korea
Much more	11%	17%	13%	12%	8%	5%	10%
Somewhat more	26%	26%	30%	25%	24%	24%	29%
About the same	45%	40%	41%	34%	44%	61%	47%
Somewhat less	12%	11%	12%	17%	15%	7%	11%
Much less online	6%	7%	5%	12%	8%	2%	4%

Source: Criteo Shopper Survey, June 2026 (N=3,496). Base: Category buyers in the past 30 days.

The grocery run is taking more paths for younger shoppers

Superstores and big-box retailers remain the leading grocery shopping option across generations, preferred by 65% of shoppers globally. Younger shoppers are also embracing a broader channel mix: Gen Z leads in preference for local grocery stores (55%) and home-delivery providers (25%), while Millennials lead in preference for online marketplaces (46%).

Which are your preferred ways to shop for groceries? (Select all that apply)

	All Respondents	Gen X	Millennials	Gen Z
Superstores/big-box stores (Walmart, Costco, E-mart etc.)	65%	65%	66%	63%
Local grocery retailers (Either physical or online)	51%	50%	49%	55%
Online marketplaces (Amazon, Thrive Market, etc.)	42%	38%	46%	44%
Online home delivery providers (Fresh Direct, Instacart, etc.)	21%	18%	23%	25%

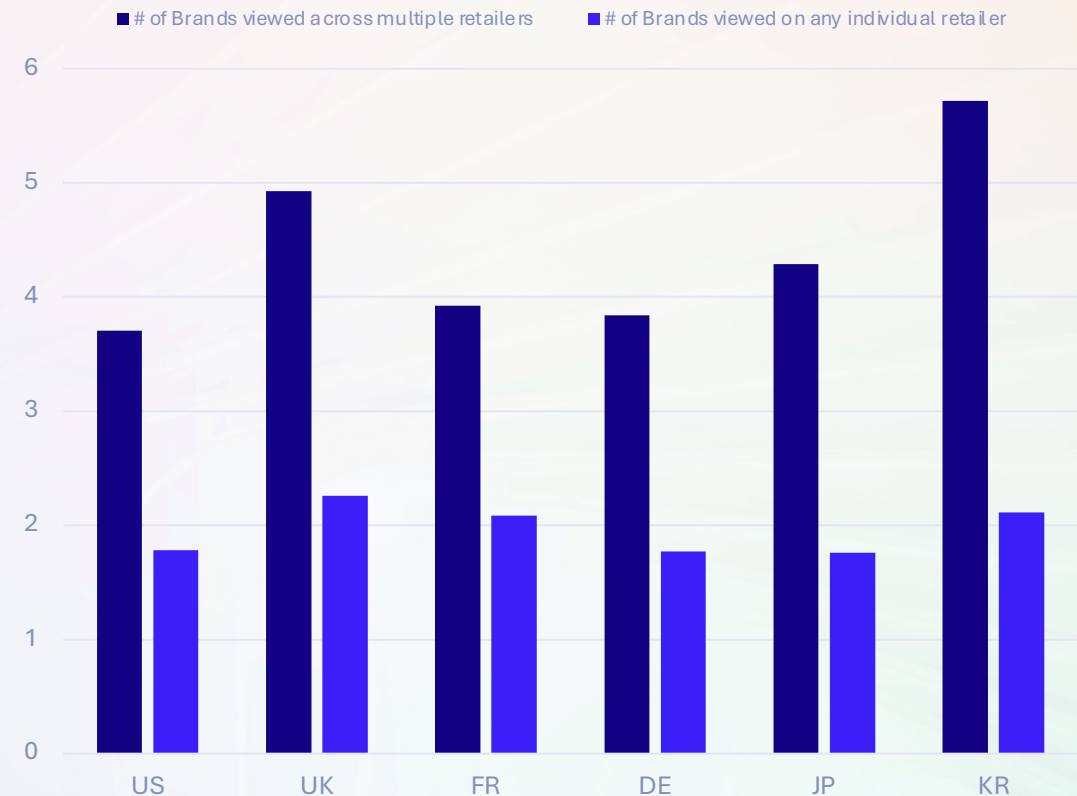
Source: Criteo Shopper Survey, June 2026 (N=3,496). Global (US, UK, FR, DE, JP, & KR). Base: Category buyers in the past 30 days.

Cross-retailer browsing expands brand consideration

Across every market, shoppers browsing multiple retailers encounter more CPG brands than those browsing a single retailer. The difference is greatest in South Korea, where multi-retailer shoppers view approximately 5.7 brands on average, compared with 2.1 brands at a single retailer.

Source: Criteo Commerce Data. Grocery, Household Supply and Health & Beauty purchases made Jul 25 – Aug 7, 2026, with browsing activity measured during the previous month. Hundreds of retailers and brands across the US, UK, France, Germany, Japan, and South Korea.

Global — Average number of brands viewed across multiple retailers vs. a single retailer



Shoppers prefer browsing the full shelf

Globally, 41% of shoppers prefer to see all available options and filter for themselves, compared with 33% who prefer personalized recommendations. Browsing the full assortment leads across most markets, while South Korea stands out with a stronger preference for personalization at 44%.

What is your preferred shopping experience when purchasing groceries or household items?

	Global	US	UK	FR	DE	JP	KR
Show me everything (I browse all options and filter myself)	41%	44%	51%	37%	40%	37%	36%
Personalized recommendations (based on my tastes and purchase history)	33%	33%	32%	30%	28%	31%	44%
Fewer, curated picks (expertly selected “best of” options)	11%	12%	7%	18%	14%	9%	8%
I don’t have a preference, or it depends	15%	11%	10%	15%	18%	23%	13%

Source: Criteo Shopper Survey, June 2026 (N=2,696). Base: Online groceries/household products buyers in the past 30 days.



Younger shoppers are most open to ads and new product discovery

CPG purchase decisions remain open to influence. Sales motivate action across generations, with 78% purchasing at least one discounted item.

Younger shoppers show even greater openness to discovery: Millennials and Gen Z are more likely than Gen X to try new brands and say advertising motivated their purchases.

Source: Criteo Shopper Survey. June 2026 (N=3,496). Global (US, UK, FR, DE, JP, & KR).
Base: Category buyers in the past 30 days. Question: “Thinking about your online purchases of groceries, personal hygiene or pet care products in the last 30 days, which of the following, if any, apply?”.

78%

Purchased at least one item because it was on sale in the past 30 days

Gen X

78%

Millennials

78%

Gen Z

79%

60%

Purchased at least one new brand in the past 30 days

Gen X

51%

Millennials

67%

Gen Z

68%

52%

Said ads motivated at least some of their purchases in the past 30 days

Gen X

44%

Millennials

56%

Gen Z

60%

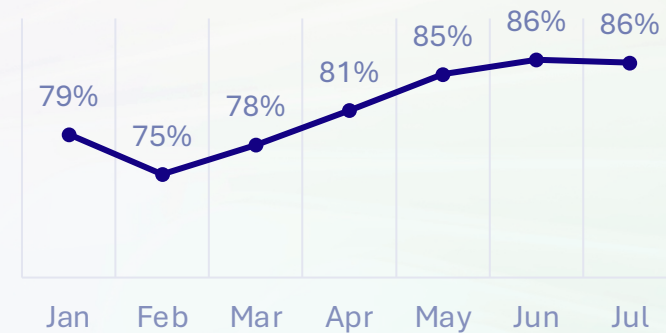
ChatGPT is opening a new aisle for discovery

CPG discovery is expanding beyond traditional search engines. From January through July 2026, ChatGPT's share of product-page landings was 1.6x that of search engines, on average. ChatGPT referrals are also reaching checkout: In July, 86% of Criteo CPG clients recorded at least one ChatGPT-referred transaction.

Share of Product Page Landings Referred
by ChatGPT vs. Search Engines

1.6x

Share of Criteo CPG Partners with at least 1
ChatGPT-referred Transaction



Source: Criteo Data, Global CPG clients with consistent ad spend in each month between January and July 2026.



Shoppers are most comfortable letting AI reorder personal care products

Globally, 40% of respondents feel comfortable allowing an AI assistant to automatically reorder personal care items when supplies run low. Household cleaning products follow at 34%, while groceries and staple foods rank third at 32%. At the same time, one-third of respondents say they would not trust AI to reorder products automatically.

Source: Criteo Shopper Survey, June 2026 (N=6,307). Global (US, UK, FR, DE, JP, & KR). Question: “For which of the following categories would you feel comfortable allowing an AI assistant to automatically reorder items on your behalf when supplies run low? (Select all that apply)”

Share of shoppers comfortable with AI reordering on their behalf

40%

Personal care (e.g., shampoo, toothpaste, skincare)

34%

Household cleaning products

32%

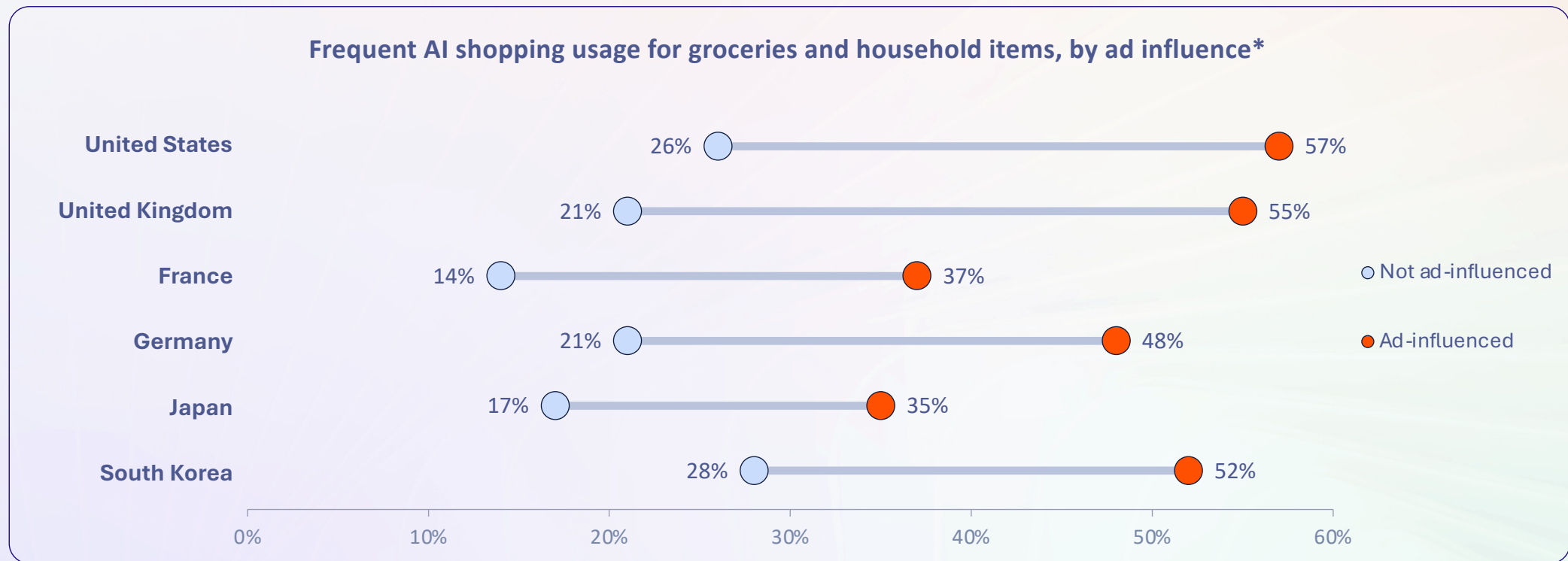
Groceries / staple foods

28%

Vitamins or supplements

Shoppers influenced by ads are also turning to AI

Across every market, shoppers who said ads motivated at least some of their recent purchases were also more likely to use AI for at least some grocery and household shopping. The overlap is greatest in the UK and US, where reported AI usage is 34 and 31 percentage points higher, respectively, among shoppers influenced by ads.



Source: Criteo Shopper Survey, June 2026 (N=3,496). Base: Online CPG shoppers in the past 30 days.

* Frequent AI users are who selected one of the following options "For all or almost all my purchases", "For most of my purchases", "For some of my purchases" to the question "How often do you interact with AI chatbots or assistants when shopping groceries/household items?". Ad-influenced shoppers are who selected "Some of my purchases were motivated by ads that I saw" to the question "Thinking about your online purchases of groceries, personal hygiene or pet care products in the last 30 days, which of the following, if any, apply?"

03

Make every cart count: What builds shopper value



Home cooks are high spenders

Shoppers identified as home-cooking enthusiasts based on their purchases from April through June 2026 continued to show stronger purchasing behavior from July 1 through August 15. Compared with other active shoppers, they were 4.1–5.4x more likely to purchase fresh food and dairy products. Among category buyers, they spent 41%–73% more and purchased 71%–109% more units.

Source: Criteo Commerce Data – US. Home-cooking enthusiasts are shoppers who purchased from at least two qualifying home-cooking product categories in at least two distinct months from April 1–June 30, 2026. Subsequent category purchases were measured from July 1–August 15, 2026 and compared with other active shoppers. Spend and unit comparisons are calculated among outcome-category buyers with valid positive order-value and sales-unit observations.

Home-cooking enthusiasts compared with other active shoppers

Category	More likely to purchase	Higher spend per buyer	More units per buyer
Fresh & Frozen Vegetables	5.2x	73%	109%
Fresh & Frozen Fruits	4.8x	68%	105%
Meat	4.1x	69%	107%
Cheese	4.6x	66%	106%
Yogurt	5.4x	41%	71%

Young families are yogurt lovers

Shoppers identified as young family shoppers based on their purchases from April through June 2026 continued to demonstrate broad household needs from July 1 through August 15. Compared with other active shoppers, they were 2.9–4.4x more likely to purchase selected food, health, and household-care products. Among category buyers, they purchased 19%–51% more units.

Source: Criteo Commerce Data – US. Young-family shoppers are shoppers who purchased from at least two qualifying young family product categories in at least two distinct months from April 1–June 30, 2026. Subsequent category purchases were measured from July 1–August 15, 2026 and compared with other active shoppers. Spend and unit comparisons are calculated among outcome-category buyers with valid positive order-value and sales-unit observations.

Young family shoppers compared with other active shoppers

Category	More likely to purchase	Higher spend per buyer	More units per buyer
Yogurt	4.4x	34%	51%
Vitamins & Supplements	4.0x	6%	47%
Household Cleaning Products	3.2x	3%	19%
Fresh & Frozen Fruits	2.9x	32%	39%
Cheese	2.9x	22%	45%

New buyers won during Black Friday weekend have major long-term value potential

New buyers won during Black Friday weekend who made repeat purchases in the following six months spend roughly 6x as much as one-time buyers, driven primarily by frequency rather than basket size.

Their average order value is only about 6% higher, but they return to purchase four more times. Nearly 6 in 10 repeat buyers make their next purchase within four weeks.

Repeat buyers compared with one-time buyers over six months

Country	Average Order Value	Total Spend
US	+3%	4.7x
UK	+0%	4.7x
FR	+8%	6.3x
DE	+0%	2.8x
JP	+5%	6.4x
KR	+15%	9.4x

Source: Criteo Commerce Data – Global, New Buyers with CPG purchase from major retailers during Black Friday Weekend (Nov 28 - Dec 1, 2025), and their repeat purchases on the same retailer in the following 6 months. *New buyers are first-time buyers on a given retailer. *1st purchase includes any of the following categories: Food & Beverages, Personal & Health Care, Household Supplies, Diapering, Nursing & Feeding

Smaller price tags are adding up to greater spend

CPG products cost approximately 50% less per item than non-CPG products, but shoppers buy 3.9x as many units and purchase 18% more frequently. Together, this higher volume and purchase frequency contribute to 29% greater total spend.

CPG vs non-CPG items

Total units purchased per buyer

3.9x

Purchase frequency

+18%

Total spend per buyer

+29%

Source: Criteo Commerce Data – United States, New Buyers from major retailers during Black Friday Weekend (Nov 28 - Dec 1, 2025), and their repeat purchases on the same retailer in the following 6 months. *New buyers are first-time buyers on a given retailer.

CPG-filled carts are more likely to reach checkout

Globally, baskets containing CPG items had a 9% lower abandonment rate than baskets containing only non-CPG products, indicating that CPG-filled baskets were more likely to reach checkout across markets.

Cart Abandonment Rate — CPG vs. Non-CPG Baskets

– 9%

Source: Criteo Commerce Data – Global, New basket users from major retailers during Aug 1 - 7, 2026, and their purchases on the same retailer in the following week. *New basket users are shoppers who have not made a purchase on a given retailer.

US shoppers are leaving fewer CPG-filled carts behind

In the US, baskets containing CPG items had a 13% lower abandonment rate than baskets containing only non-CPG products, indicating that CPG-filled baskets were more likely to reach checkout.

Cart Abandonment Rate — CPG vs. Non-CPG Baskets

– 13%

Source: Criteo Commerce Data – United States, New basket users from major retailers during Aug 1 - 7, 2026, and their purchases on the same retailer in the following week.

*New basket users are shoppers who have not made a purchase on a given retailer.

Frequent category buyers still switch brands

Across the categories shown, brand consideration remains fluid even among frequent buyers. In Candy & Chocolate and Skin Care, about half of shoppers with four or more prior category purchases bought at least one brand that was not present in their immediately preceding purchase. This means they continue to buy different brands--either switching back and forth or trying new brands--rather than sticking with the same brand each time. Coffee stands apart with lower brand exploration overall and the clearest decline as purchase frequency increases.

Brand exploration rate, by prior category purchase frequency

	1 prior purchase	2-3 prior purchases	4+ prior purchases
Candy & Chocolate	52%	51%	51%
Household Cleaning Products	49%	49%	47%
Skin Care	48%	50%	50%
Shampoo & Conditioner	39%	39%	39%
Coffee	32%	29%	27%

Source: Criteo Commerce Data – Average brand exploration rate across markets (US, UK, FR, DE, JP, KR, CA, BR). CPG products purchased in the period of Jul 25 – Aug 7, 2026. Includes shoppers with at least one prior purchase in the category in the last 12 months. Brand exploration is defined as the latest category purchase containing at least one brand not present in the immediately preceding category purchase.

Shoppers of small to mid-size retailers trade frequency for higher-value orders

Globally, shoppers who engaged with small to mid-size retailers purchase from fewer categories (-7%) and brands (-12%) and made 25% fewer transactions than Large retailer shoppers, but their average order value was 29% higher.

This higher order value largely offset their lower purchase frequency, leaving total Food and Beverage spend per shopper broadly in line with Large retailer shoppers

Source: Criteo Commerce Data – US, UK, FR, DE, JP, and KR, qualifying Food and Beverage purchases, May 1–July 31, 2026. Large retailers represent the top 10% of scoped retailers by category sales within each country. Cross-retailer shoppers are included in both audiences. Metrics were indexed within each country to Large retailer shoppers (=100) and then averaged equally across the six markets. Spend and average order value reflect qualifying Food and Beverage product-line revenue only.

Average Indexed Metrics per User - Global
(Small to Mid-size Retailer Shoppers compared to Large Retailer shoppers)



04

Stand out on the shelf: Where marketers can win



Show up at every stop on the shopping trip

Follow each market's shopping rhythm

Adapt timing and investment to local purchase frequency, category trends, and seasonal peaks. Regional patterns show that a single global activation calendar can miss important moments of demand.

Keep every aisle connected

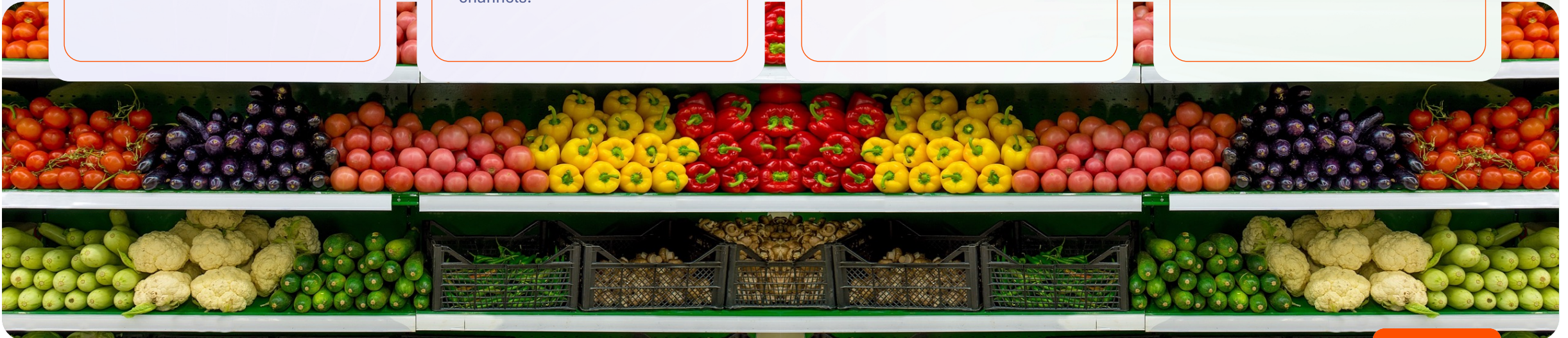
Coordinate campaigns across retailer environments and the open internet as shoppers divide their spending between online and physical stores. A connected approach helps brands remain visible as the journey shifts across channels.

Expand the digital shelf

Activate across multiple retailers to reach shoppers while their consideration sets are still growing. Cross-retailer browsers encounter more brands in every market, creating more opportunities to earn attention before purchase.

Help shoppers pick the right product

Balance broad assortment visibility with relevant recommendations. Many shoppers want to browse every option, while personalized experiences and AI can guide those seeking a faster path to the right product.



Turn everyday essential purchases into lasting value

Put real-life needs at the top of the list

Build audiences around meaningful purchase patterns, such as home cooking or young family needs. These signals can reveal demand across related categories and support more relevant activation.

Give shoppers a reason to pick your brand

Use promotions to drive broad action while tailoring discovery strategies for younger generations, who show greater openness to advertising and new brands. Keep value and differentiation clear as shoppers compare their options.

Keep the value ringing after the first checkout

Treat conversion as the beginning of the customer relationship. Repeat buyers generate substantially more long-term value, with nearly 6 in 10 making their next purchase within four weeks.

Make the next restock easy to reach

Use commerce signals to anticipate replenishment moments and stay visible when shoppers are ready to buy again. Consider how emerging AI-assisted behaviors could create new paths to recurring purchases, particularly in personal care and household products.



Thank you

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