

SCINTILLA CASE STUDY



Inspire 2025

This case study was shared live at Walmart Data Ventures Inspire Event, October 29, 2025.

Creating Space Without Space:

Adding Innovation When the Category Footprint Isn't Growing

Overview

How do you create more space on the modular without expanding your footprint? That's exactly what Next Phase Enterprises solved in the Produce Dips, Dressings, and Vegetarian category. By using Scintilla insights, they identified and recommended removing duplicative items from the shelf and aligned product placement based on shopper expectations. The insights unlocked additional modular space and enabled a full-scale, rest-of-market audit to uncover white-space opportunities—driving more efficient merchandising and incremental growth.

**Kyle Gore**

Next Phase Enterprises
Senior Category Advisor,
Produce and Bakery

**Justin Dell**

Walmart
Associate Merchant
Produce Dips, Dressings, and Vegetarian

Key Takeaways

- 1 By removing extra or duplicate items, Next Phase made more room on the shelf
- 2 Putting items where shoppers expect to find them makes more space and improves the shopping experience
- 3 By conducting a full-scale rest-of-market audit, Next Phase uncovered opportunities in its category and made better assortment choices

**We couldn't have
come to wise and
thoughtful decisions
for our customers
without Scintilla.**

Kyle Gore

NextPhase Enterprises/FoodStory Brands
Senior Category Advisor Produce and Bakery



The Opportunity

Scintilla Case Study: Next Phase

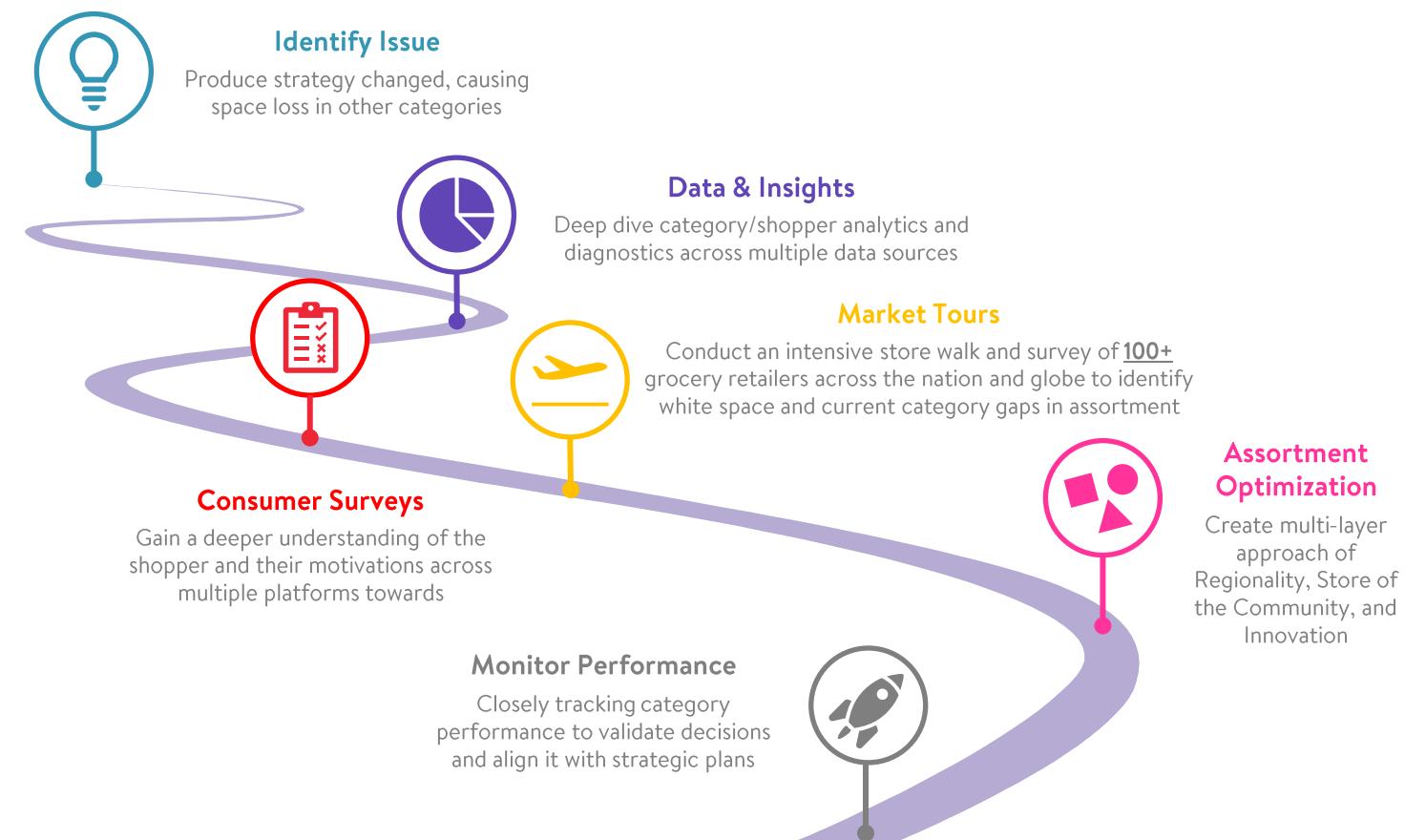
Next Phase built a framework to help solve key business problems and find new opportunities in the Produce Dips, Dressings, and Vegetarian (DDV) category.

The roadmap starts with stepping back to identify the issue.

They asked:

- **What's happening?**
- **What do we need to solve?**
- **Where should we begin?**

Once they understood the problem, they move into using Walmart first-party data within Scintilla to guide their next steps.



Turn Loss of Shelf Space Into an Opportunity



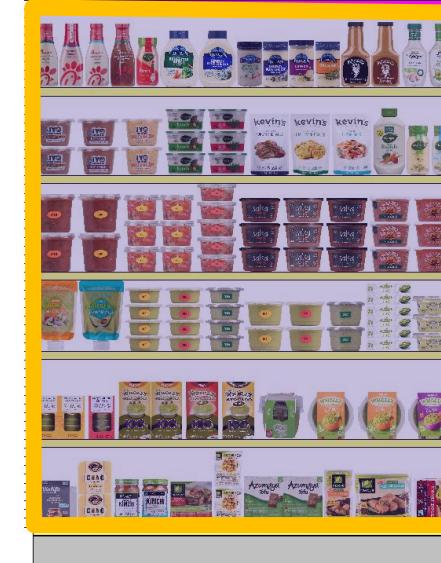
Between Week 37 of 2024 and Week 15 of 2025, the Temp Veg Team focused on making shopping easier by emphasizing the Cooking Veg category. After a successful test of two new combination modulars, they expanded to 3,000 stores. To do so, they moved the Herbs rack, combining six categories into one 8-foot modular. This reduction in DDV shelf space led to a big question—how can we keep growing with less space?

Cook Veg Expansion: The Herbs rack was removed from the Cook Veg set to expand top-performing items.

Comb Mod Creation: New Mod categories were created to combine Herbs, Value Added Veggies (VAV), Mushrooms, and DDV.

Shelf Space Reduction: 15% reduction in space translates to ~6' of linear shelf space.

6 Shelves (2024)



5 Shelves (2025)



The Approach

Scintilla Case Study: Next Phase

Gain Data and Insights



The team began by revisiting how they would have approached this challenge before Scintilla. In the past, they relied mainly on basic data points. With Scintilla, they were able to go beyond sales data to gain deeper insights into customers and their buying behaviors.

Without Scintilla

Basic Internal Reporting:
What Sells with My Item?



With Scintilla

First Time Pick Rate
Nil Pick Rate
Exclusivity
Repeat Rate %
Frequency of Purchase
Basket Penetration
OPD/eCommerce
Demographics
Price Sensitivity
Customer Penetration
and so much more...

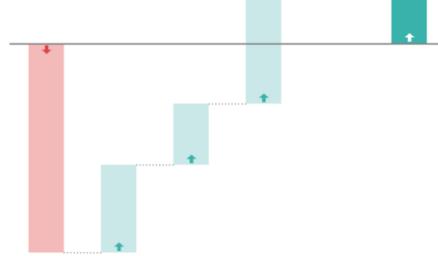
Next Phase turned to Scintilla, using various modules to dig deeper into Walmart shopper behaviors and purchase motivations to help them plan how to adapt after losing space.

Shopper Behavior

Best regions for Dressings Brands?

What else is in the basket of
Vegetarian items?

Performance Report | Performance In Detail - Tofu



Customer Perception

Where do shoppers expect Vegetarians items to be?

What items are our category missing that our customers want?

Veganaise Usage



Channel Performance

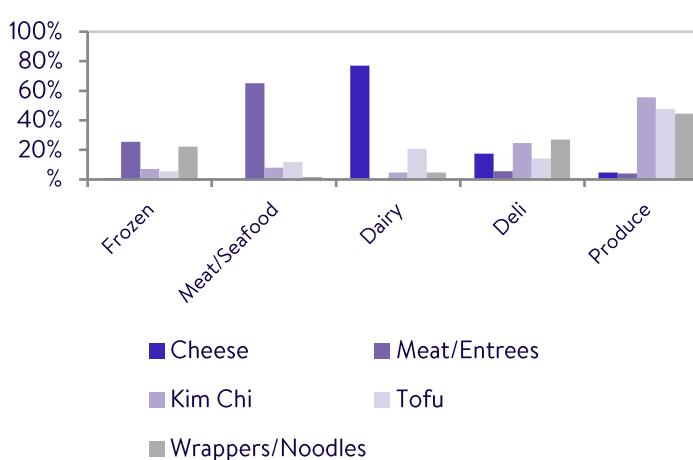
Velocities by Item by Region

OPD Penetration of each of our brands

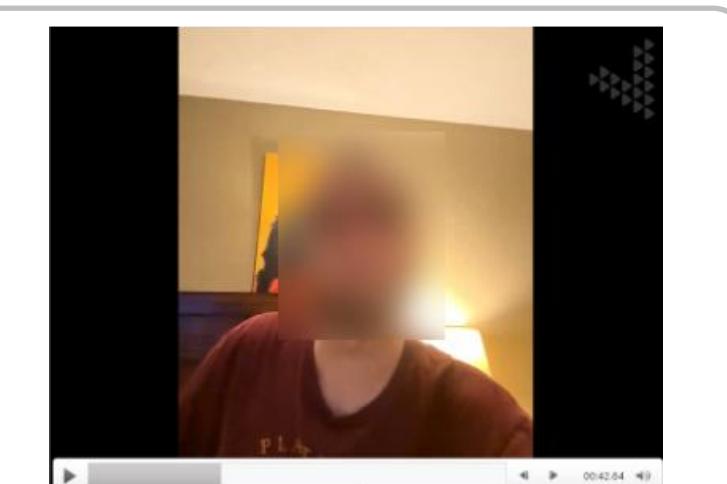
WK32 YTD WMTWeekly Performance by Fineline by Item Store Sales & Inventory

Using multiple **Customer Perception** surveys, they tapped into the Walmart Customer Spark Community to ask double-verified Walmart shoppers questions about their behaviors and purchase motivations.

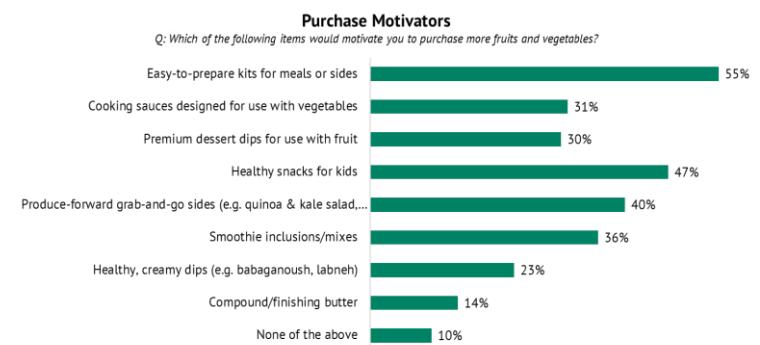
Q: In which Walmart departments would you most expect to find the following Plant-Based items in-store?



Q: Comparing Walmart to other retailers, what products do you wish Walmart would add to its DDV section?



Q: Please rank which of the following items would motivate you to purchase more fruit and vegetables at Walmart.



The results helped Next Phase connect with customers beyond just numbers and charts.

Findings showed that 96% of “vegetarian” shoppers don’t identify as vegan or vegetarian—and they prefer to shop where animal-based products are, not in the produce aisle.

Next Phase also built a global retailer portfolio encompassing key competitors and diverse markets—low-income, ethnic, and premium—to gain a full view of the global Produce Set and help guide their assortment decisions.

41 U.S. MARKETS

In 29 states

100+ DIFFERENT LOCATIONS

Across 93 retailers

6 COUNTRIES, ACROSS 3 CONTINENTS

(USA, United Kingdom, Japan, Indonesia, Mexico, South Korea)

50+ EMPLOYEES MOBILIZED

from FoodStory Brands and Next Phase Enterprises

**1,900+ U.S. CUSTOMERS SURVEYED**

2 weeks total project completion



The Results

Scintilla Case Study: Next Phase

Assortment Optimization Uncovered \$6.6M Opportunity by Removing Duplicates



Rationalizing Dressings Assortment:

Many stores carried duplicative items across three different brands, so those items were cut to make space for new growth and the opportunity to lean into the top-performing items.

Leveraging Scintilla:

Utilizing the Where Sold report showed \$'s by Region

The Switching and Cross-Shop reports helped them forecast potential customer behavior

The Assortment Deep Dive illuminated the impact of removing duplicative items in particular regions

	Supplier A	Supplier B	Supplier C			
Region	LY POS	LY POS	LY POS	Recommendation	POS \$ Impact	PODs Now Available
SOUTHEAST	100.00%	100.00%	100.00%	Delete all Supplier C except for Top 2 Items	-\$1,000,000	+1,515
SOUTHWEST	100.00%	100.00%	100.00%	Keep only top performers of Suppliers B and C	-\$1,000,000	+1,701
NORTH	100.00%	100.00%	100.00%	Delete Supplier B	-\$100,000	+926
EAST	100.00%	100.00%	100.00%	Delete all Supplier A except for Top 2 Items	-\$100,000	+1,222
WEST	100.00%	100.00%	100.00%	Delete Supplier C	-\$100,000	+1,460
					-\$946,418	+6,824

Opened up 3% of Points of Distribution (POD) at the expense of 0.3% of Sales

\$138/POD annually is all that's needed to make up losses

With shelf space available, the DDV category can focus on top-performing items and explore fresh innovation opportunities like the following:



Fill the Gaps

Add Fine Lines that Complement Adjacent Produce Categories

Dressings are the only DDV subcategory struggling with customer penetration

Bring in meaningful line extensions and innovation to close the gap vs. key competitors



Grow with the Customer

Attract Younger and Ethnic Customers

Vegetarian is the only DDV subcategory that over-indexes with the Younger and Ethnic shoppers

Add Better-For-You assortment in Dips and Dressings to follow trends



New Impulse Destination

Increase Shopper Trips and be a go-to Impulse destination in Produce

60% of DDV shoppers only engage with the Category one time per year

Only 2% of DDV trips are for “Impulse” purchases



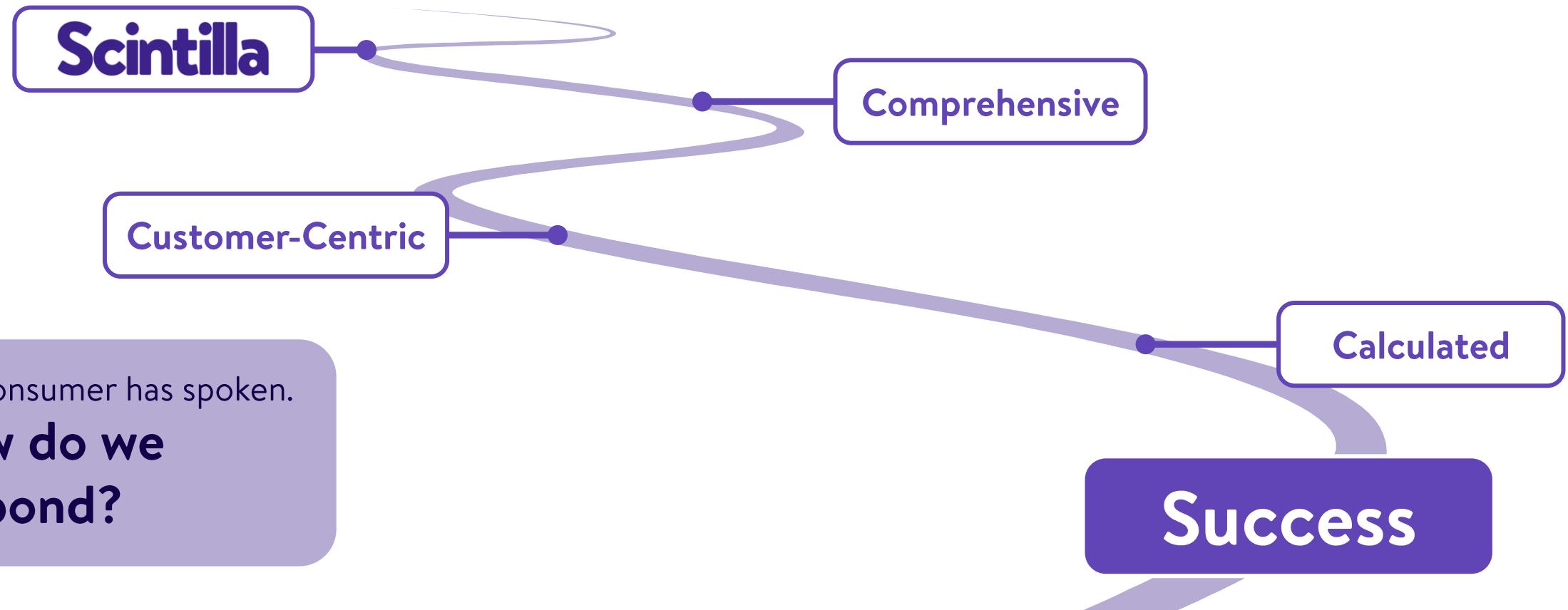
Keep the OPD Train Rolling

Continue Growth Trajectory across eCommerce

27% of DDV customers prefer to shop online, but only have a 15% Category OPD Penetration Rate

Scintilla Case Study: Next Phase

Encouraged by positive customer feedback, Next Phase will continue using Scintilla to deliver customer-centric, data-driven insights for the DDV category.



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Thank you.

Inspire
2025

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