



The infrastructure for the **AI economy**

INSIGHT BRIEF

CONSUMER SIGNALS · JULY 2026

Hidden Valley Ranch: Flavor of America

One brand's standout summer, witnessed across **Carbon Arc** data assets.

EXECUTIVE SUMMARY

Four numbers that define one well engineered breakout

THE MOMENT

+56%

Weekly ranch searchers vs 2025, across the four World Cup weeks.

THE MACHINE

+107%

US digital ad spend in June, year over year. The ramp began in late 2025.

THE MACHINE

~39%

Share of HVR 2026 creative themed "flavor of America." \$0 named the World Cup.

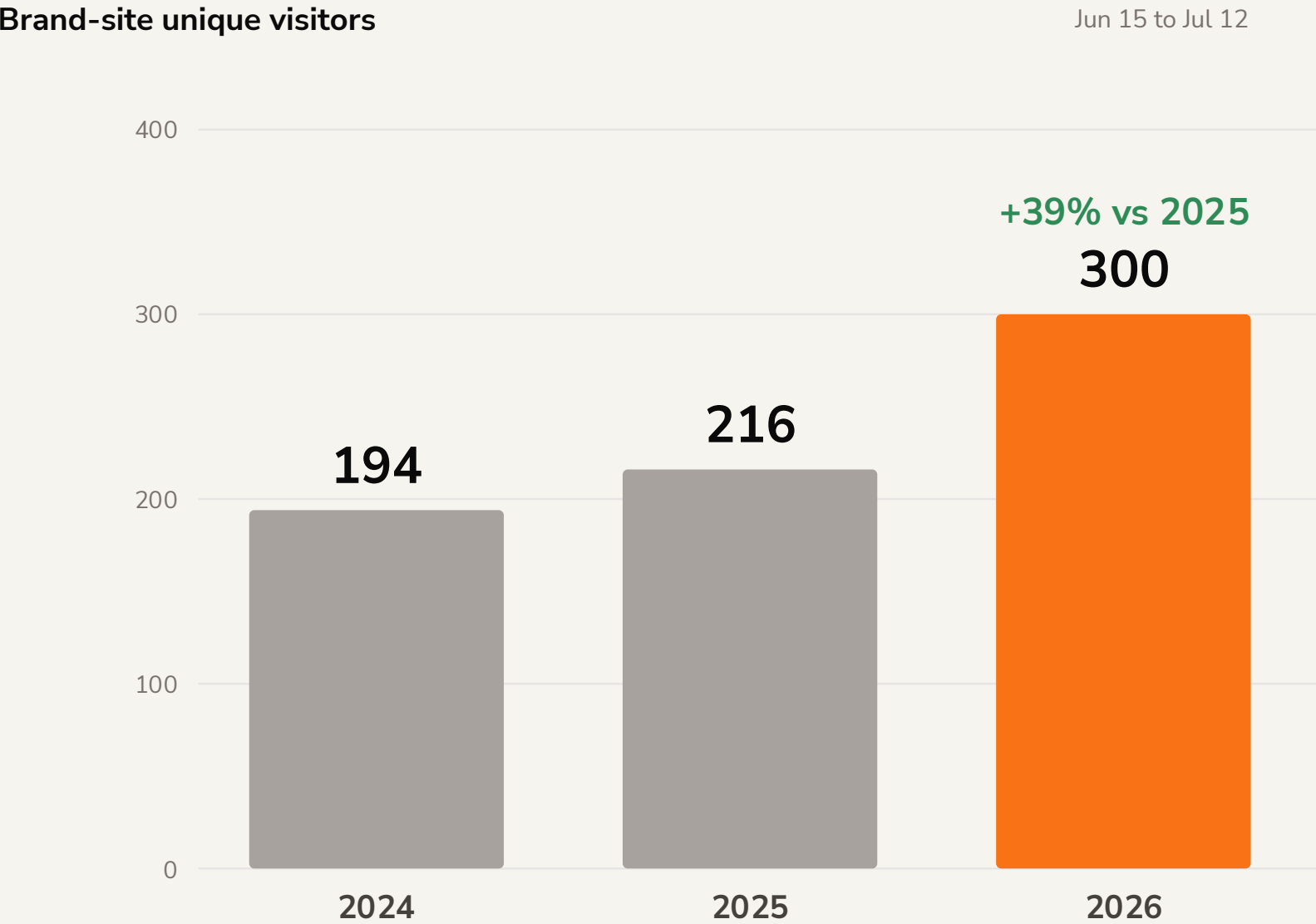
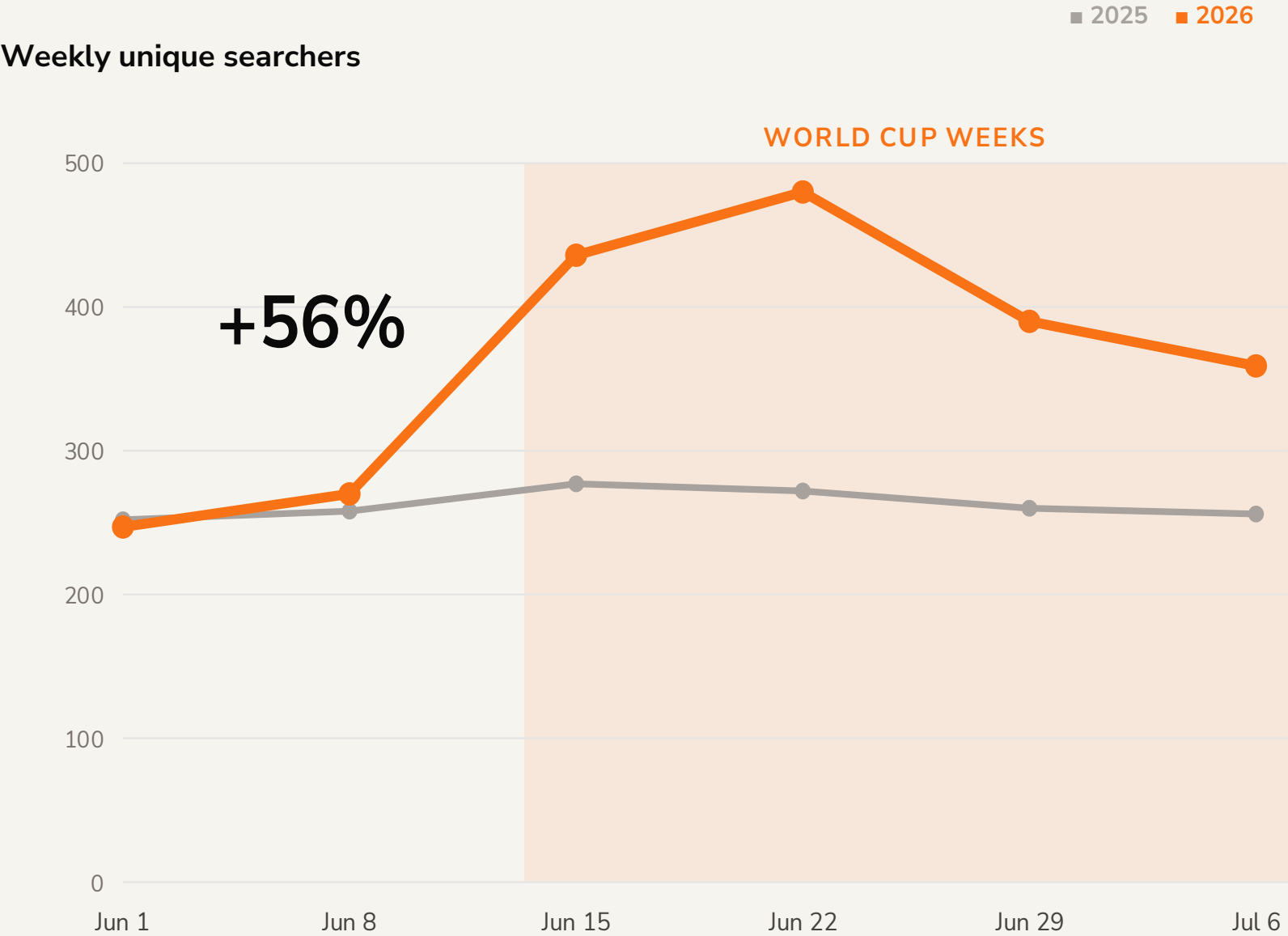
THE PAYOFF

5x

HVR units sold on Amazon in June vs a year ago. And there's even merch on TikTok Shop.

Hidden Valley Ranch (HVR), and ranch dressing, had a World Cup to remember.

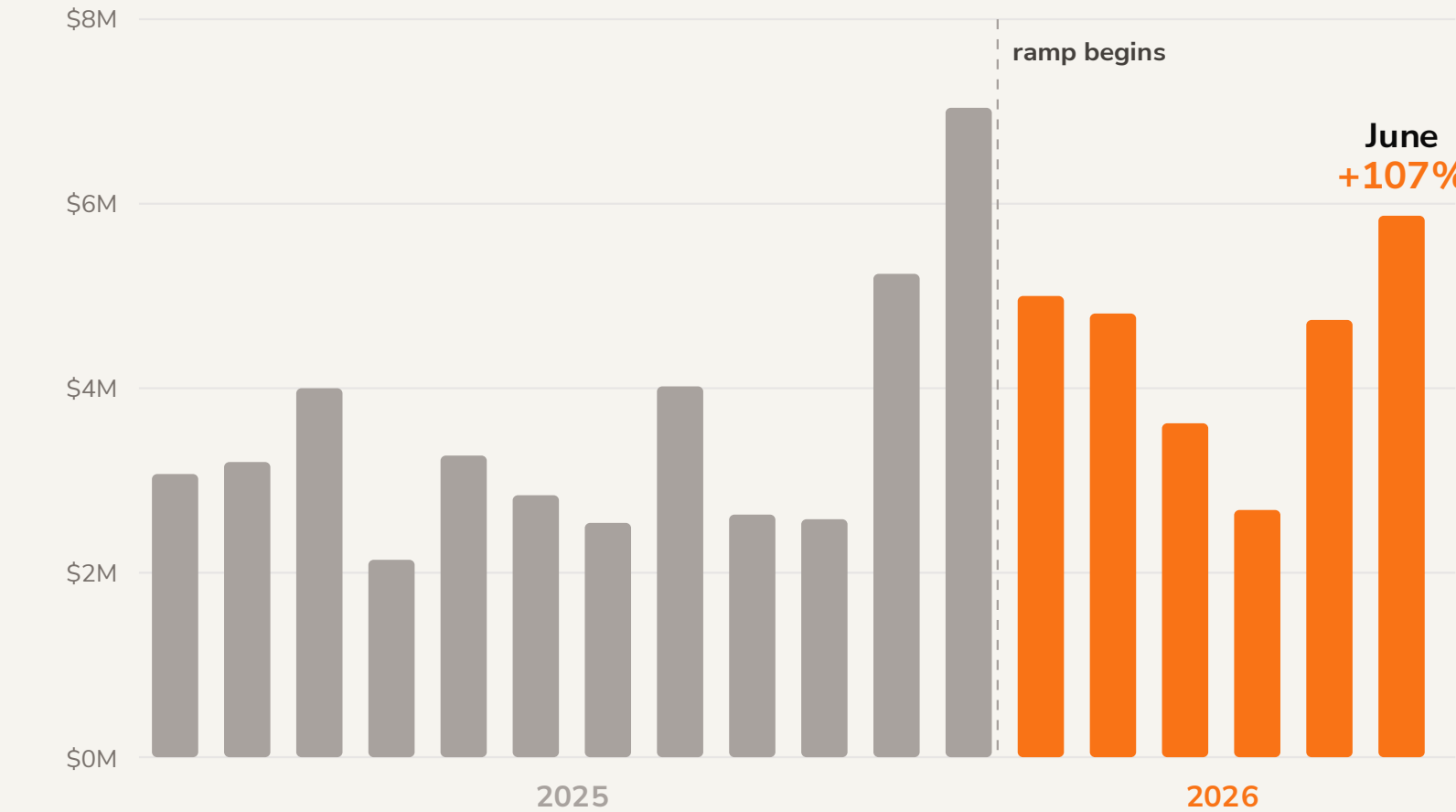
Searches for ranch dressing and the HVR brand-site visits both broke from prior years the week the tournament began, then stayed elevated.



The moment was authentic, but it was also planned.

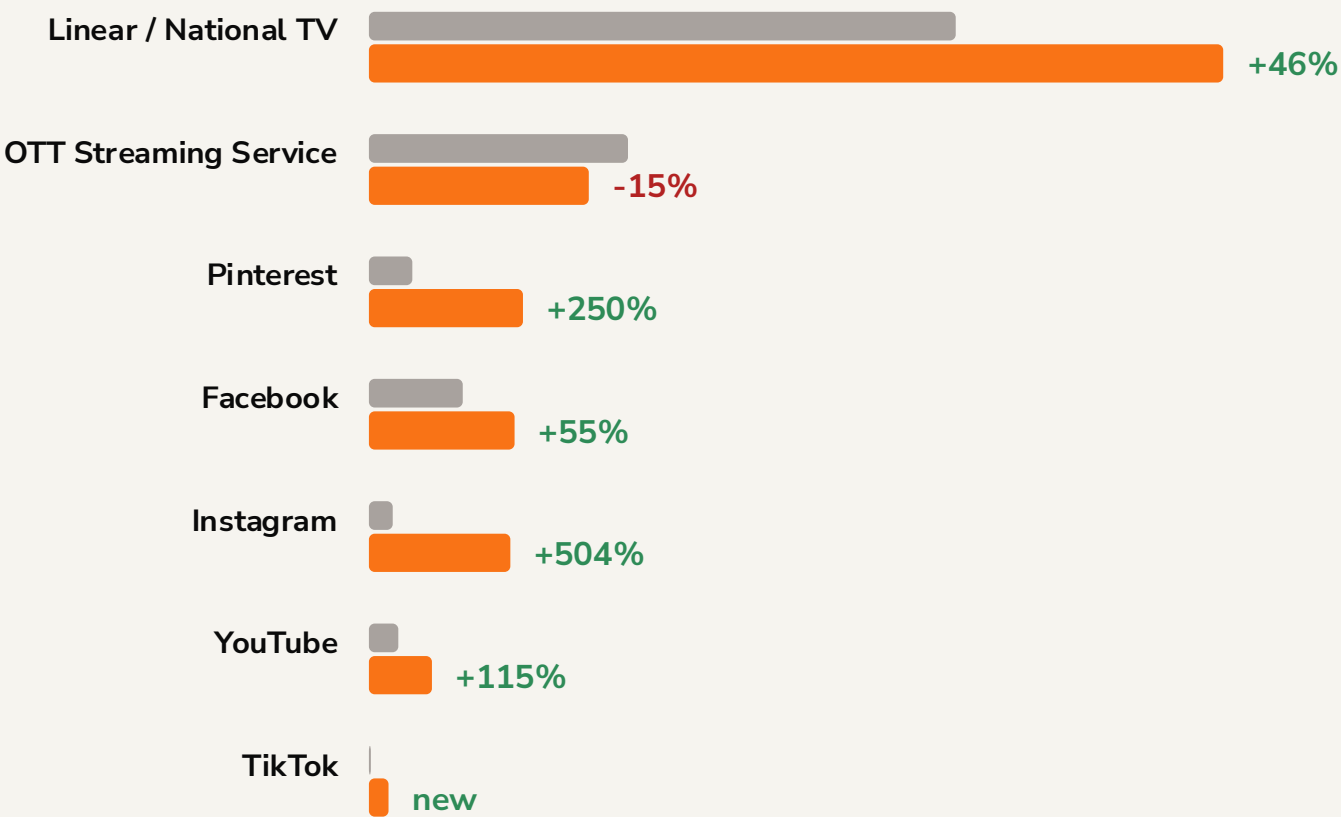
US digital ad spend, \$M per month

■ 2025 ■ 2026



Spend by channel, \$M (May to Jul)

■ 2025 ■ 2026



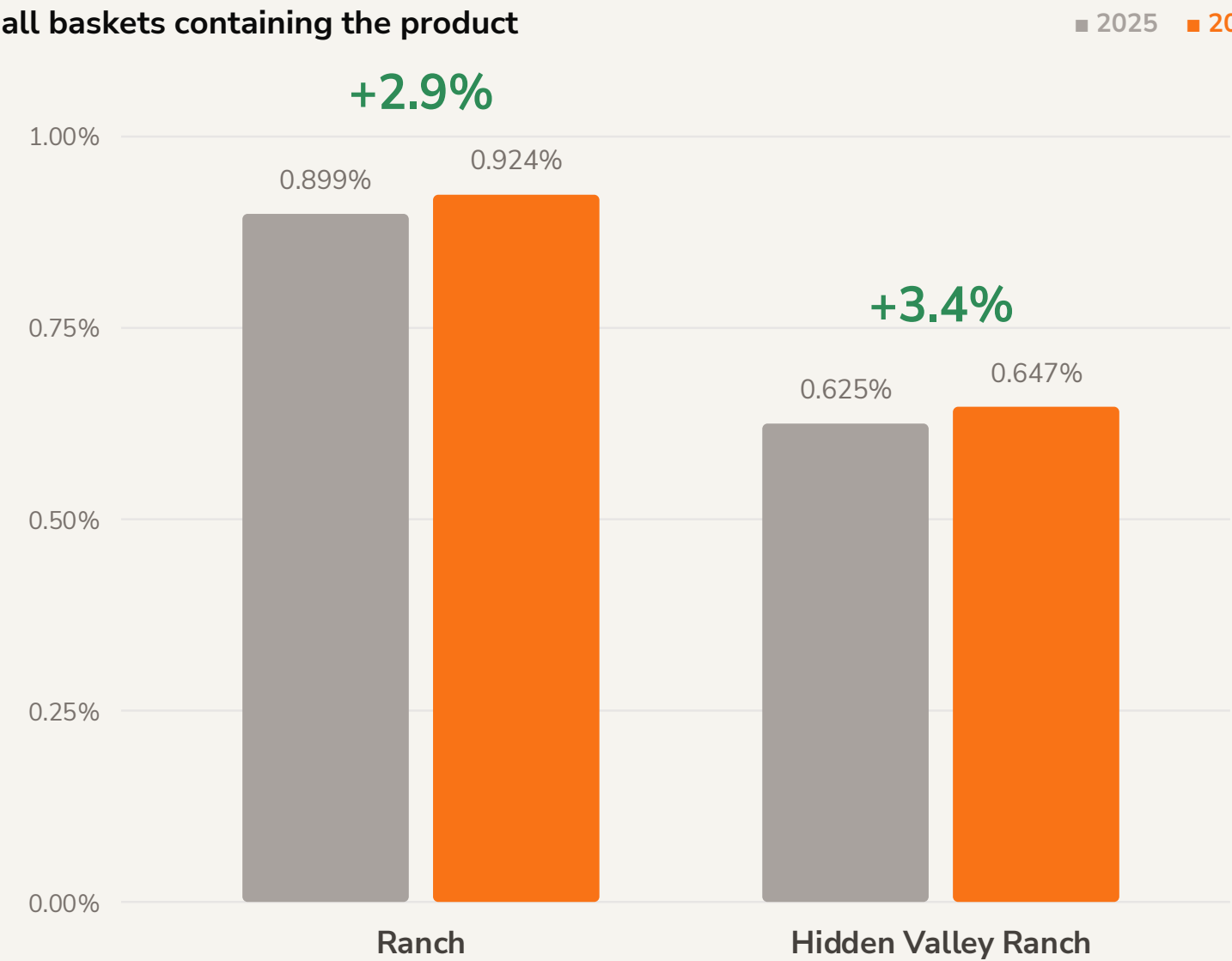
Linear / National TV = national broadcast and cable network buys (ABC, CBS, NBC, ESPN, Food Network, HGTV, and more). Excludes Desktop / Mobile Site (under \$15k).

~39% of 2026 creative ran "flavor of America" and America's-250th themes. **\$0 referenced soccer or the World Cup**, an unlicensed ambush.
Classified from ad creative text.

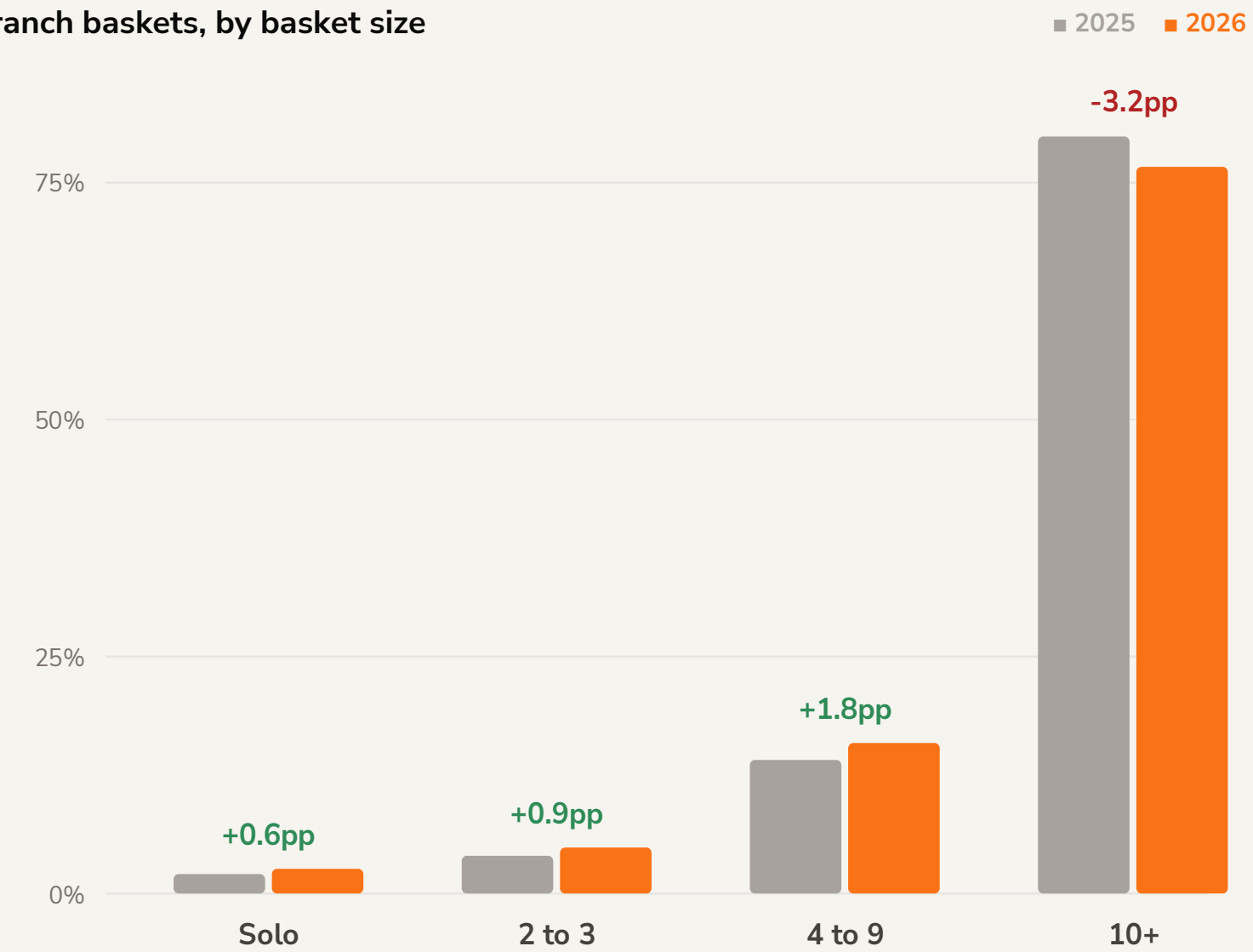
Ranch corralled a bigger dip of supermarket baskets.

Both ranch dressings and Hidden Valley Ranch crept into a larger share of supermarket baskets and landed in smaller, grab-and-go type trips rather than big stock-ups, indicating ranch was increasingly a primary target.

Share of all baskets containing the product



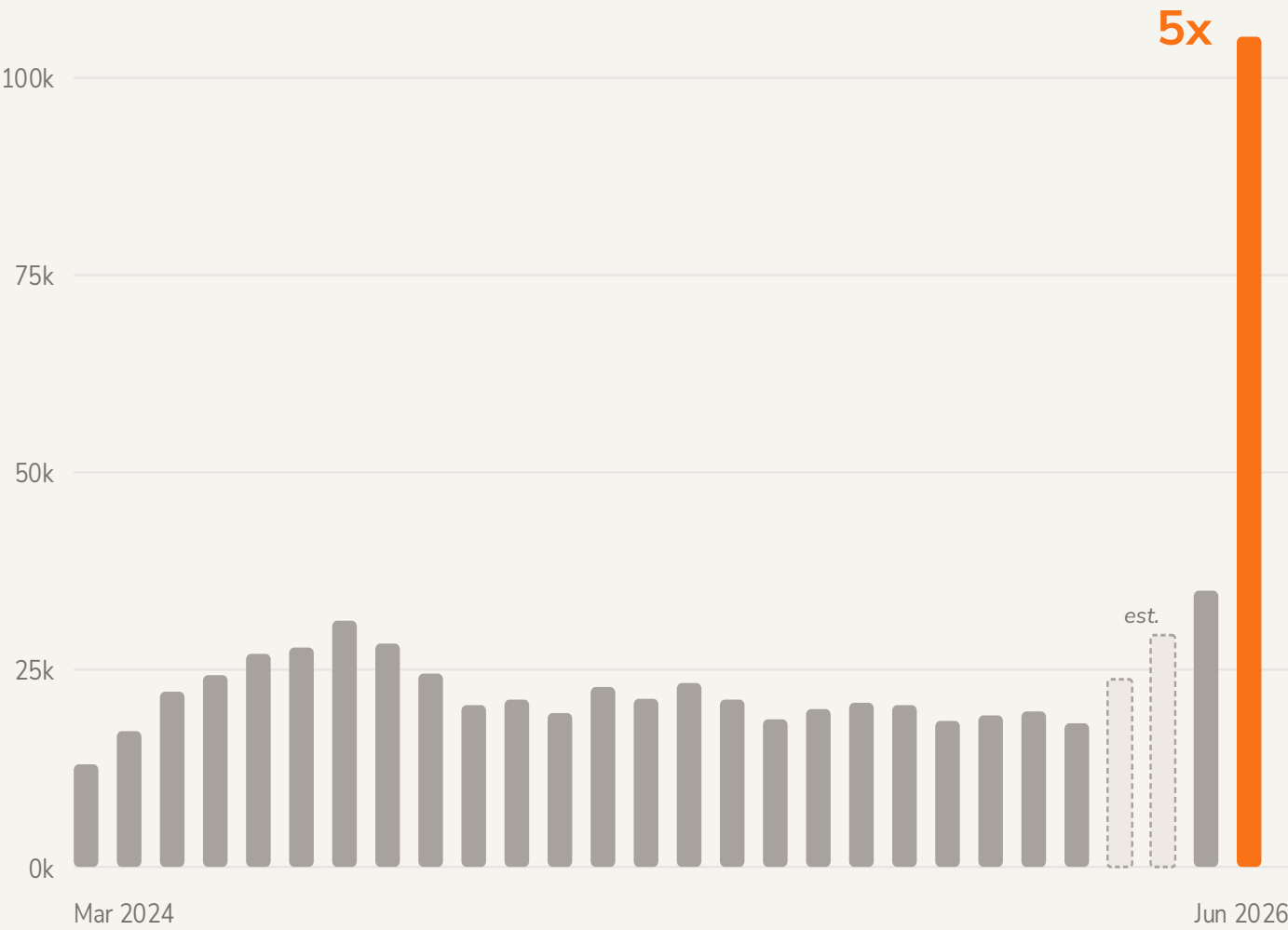
Share of ranch baskets, by basket size



Amazon units went 5x. HVR merch went from nothing to something.

HVR Amazon units went roughly 5x Y/Y in June, while branded merchandise on TikTok Shop, which never sold before December 2025, ignited with the campaign launch months ahead of the tournament.

HVR estimated units on Amazon, monthly



HVR merch revenue on TikTok Shop, monthly

