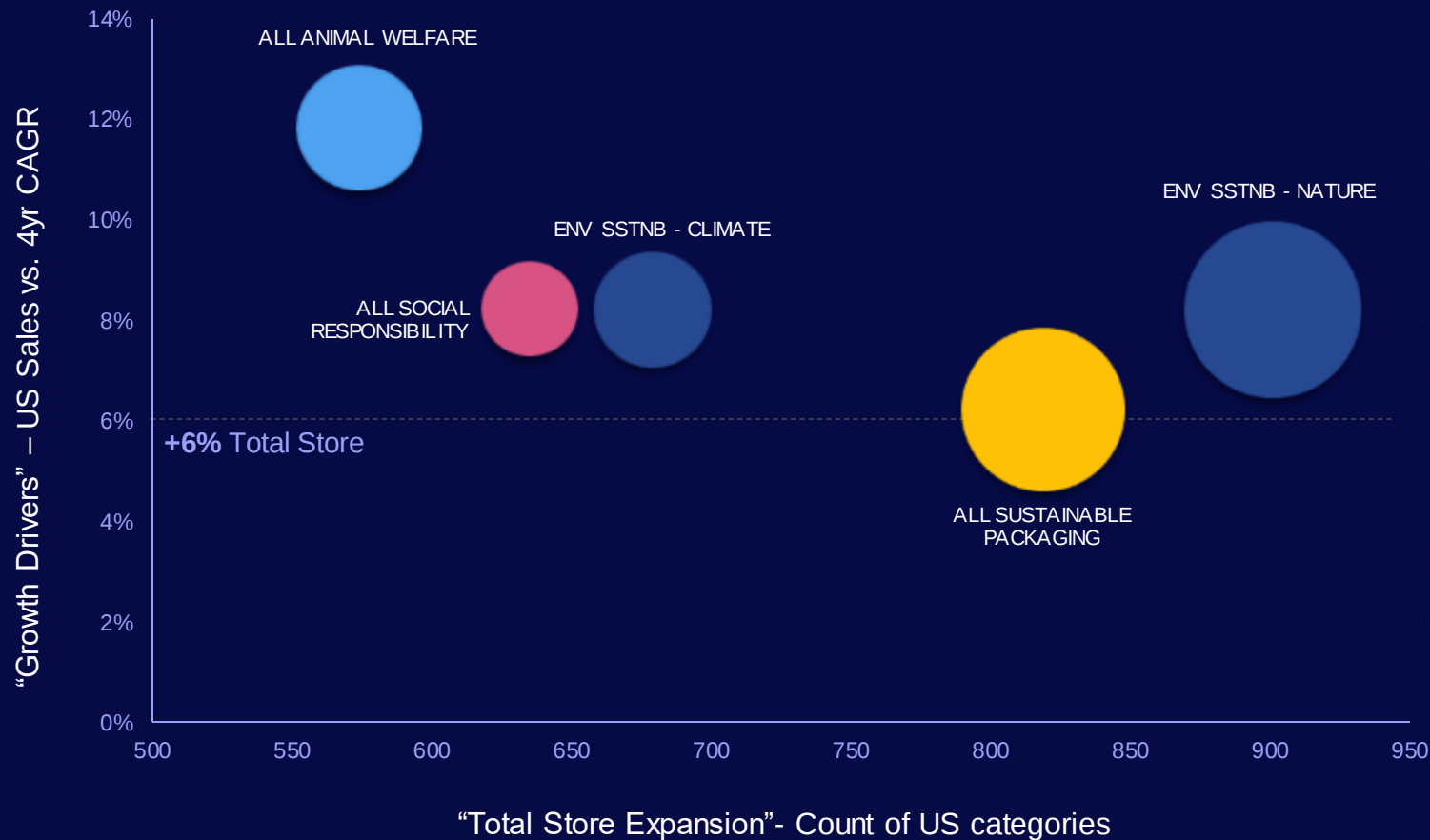




Climate Day 2024

Sherry Frey, VP Total Wellness
Sherry.frey@nielseniq.com

Sustainability outpacing store growth

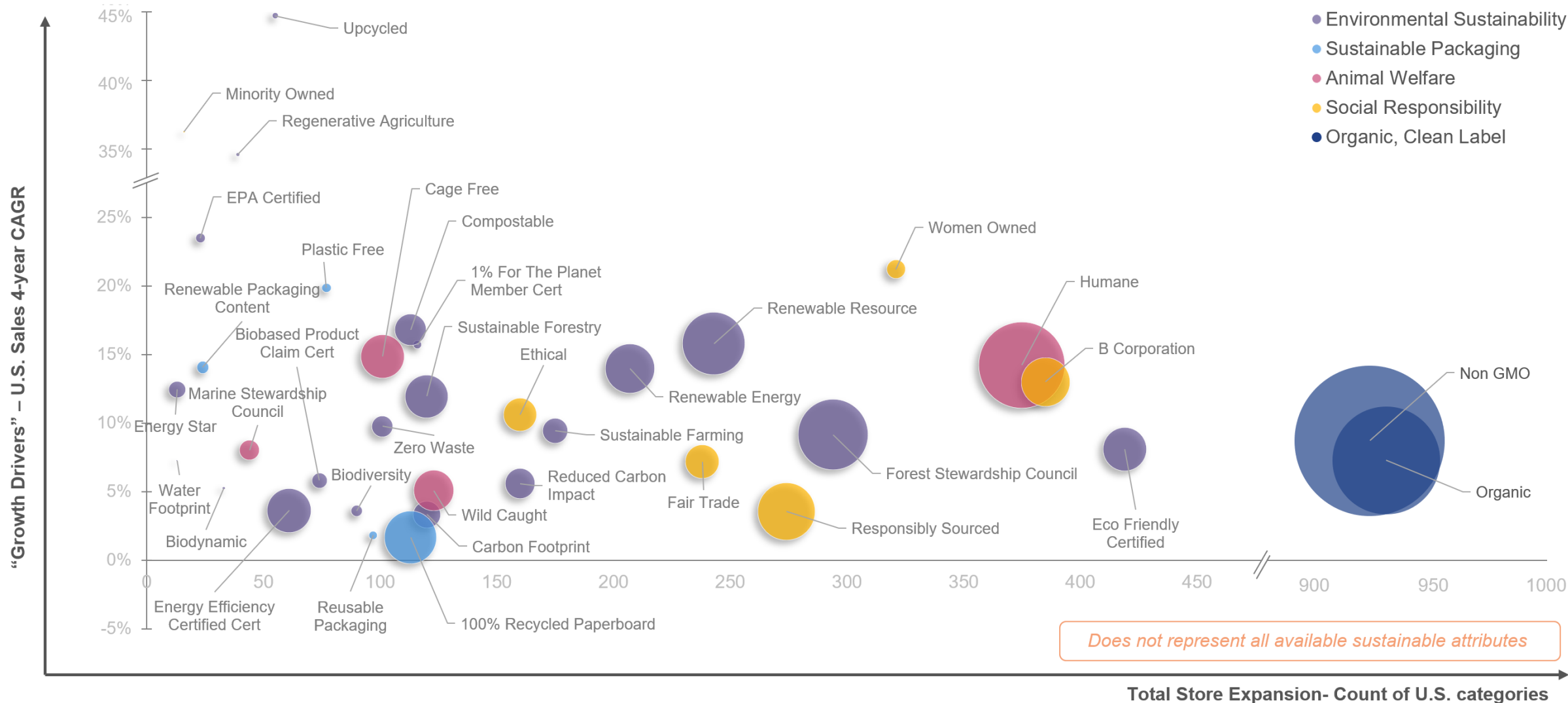


+248
basis points

More growth in products with claims on **environmental, sustainable packaging, animal welfare, social responsibility** than on products without over the last four years

Bubble size denotes total sales in L52 week All attributes represent claims STATED on package unless indicated by an * symbol
Source: NIQ, Retail Measurement Services, NIQ Product Insight, powered by Label Insight, Total US xAOC; Total Store; # of Categories selling, 4-yr CAGR (\$); 52 weeks ending December 30, 2023

Sustainability claims continue to grow across the store



Bubble size denotes total sales in L52 week All attributes represent claims STATED on package unless indicated by an * symbol
Source: NIQ Retail Measurement Services, NIQ Product Insight—powered by Label Insight, Total US xAOC ; Total Store; Count of categories, 4-year \$ CAGR; 52 weeks ending January 27, 2024

Consumer engagement with sustainability varies

Say
How important is sustainability?

Do
What actions do they take?

Meaning
What sustainability means to them



34%
Skeptics

Low awareness and priority



Low association to any aspect



14%
Idealists

Passionate but struggle to put into practice



*Better conditions for farmers
Giving back to society
Support of minorities*



22%
Minimalists

Basic awareness of sustainability but no strong motivation



Reduced pollution



11%
Healthy 'me' & 'planet'

Embrace importance with a focus on health and take some action



Almost all aspects from planet to people



19%
Evangelists

"Walk the talk"

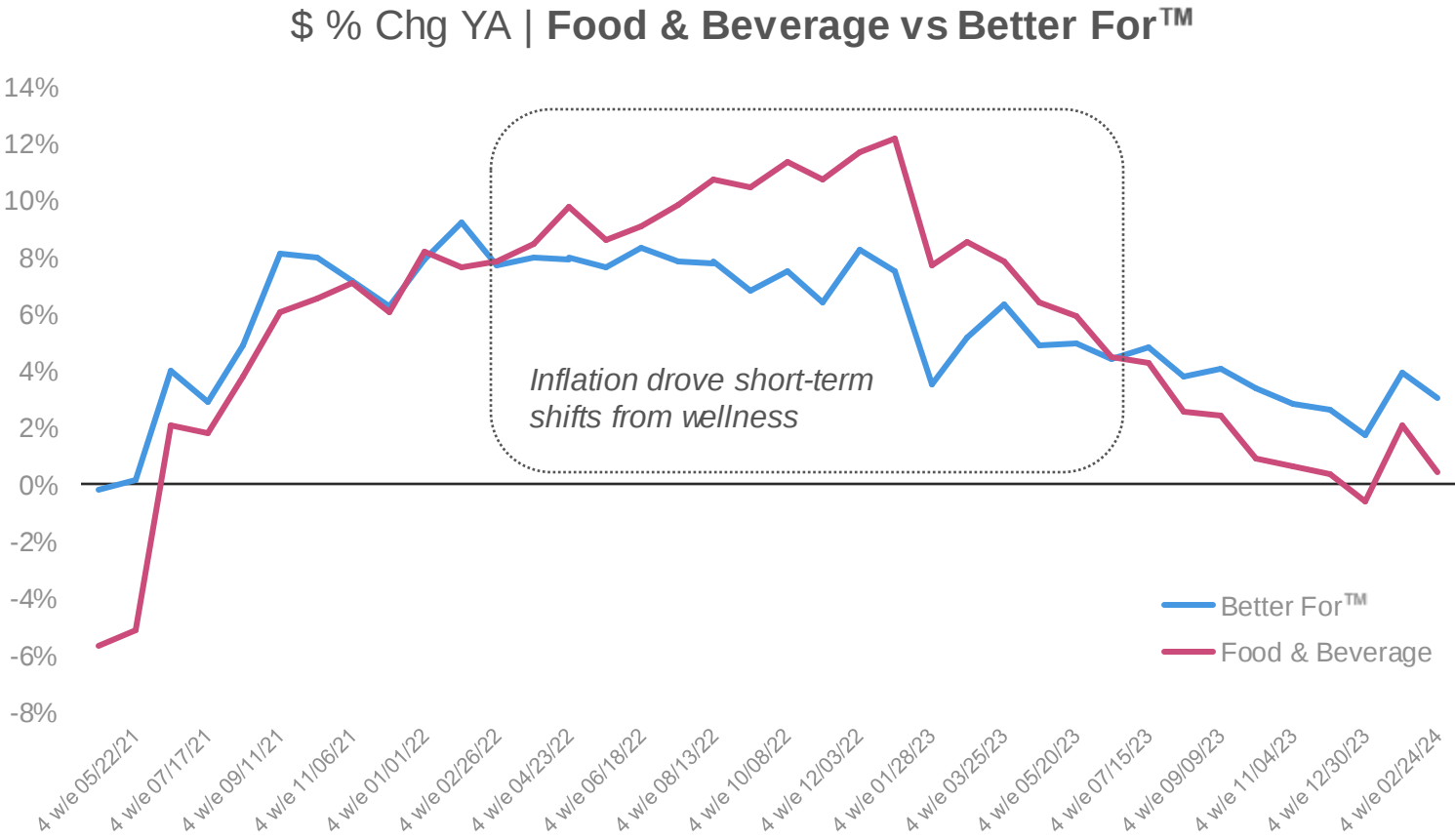


All aspects from planet to people

NIQ *Better For*TM...



Inflation impacted Better ForTM trends in the past year, trend is shifting back



Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage vs Better For segment; \$ % Change vs year ago; 4-week trended through week ending February 24, 2024