Welcome to:

Forecasting the Future

A Conversation with Investors

NIQ

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Today's Panel Discussion Outline

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Meet Today's Moderator:

Andrew Criezis

President, E-Commerce & Omni, NIQ

Andrew Criezis is the President of Global E-Commerce, SMB at NIQ.

Prior to this role, Andrew has served in senior NIQ leadership roles including SVP of Global Sales Operations and Sales Enablement before helping launch Byzzer as its Chief Product Officer in 2020.

He is regularly featured as a CPG subject matter expert for go-to-market strategy (GTM), retail and brand analytics, global operations, comprehensive financial analysis and revenue generation.

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Imran Manji

Partner, Forward Consumer

Imran brings a broad range of experience across private equity, management consulting, and general management.

Prior to Forward, Imran was at McKinsey & Company for over eight years, where he was a Leader in the Global Consumer and Private Equity practices.

Imran has counseled clients across multiple consumer sectors, spanning North America, Latin America, and Europe.

His private equity experience spans the full investment lifecycle including thesis development, diligence, portfolio value creation, and exit readiness.

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Jen Holland

Partner, Bain Private Equity

Jen Holland is a partner in Bain’s Private Equity practice, specializing in Retail and Consumer Products, based in Boston.

Jen holds significant experience in serving private equity sponsors on diligence and post-acquisition strategy projects.

She has led well over 150 projects in a broad range of consumer sectors, including food and beverage, beauty and personal care, apparel, home goods, restaurants, nutrition and wellness, D2C, consumer tech, and other specialty sectors.

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Michael Song

VP, Data Science, Advent International

Michael is currently VP Data Science at Advent International, focusing on deal diligence and portfolio initiatives in business & financial services, tech and consumer retail.

Prior to Advent, he worked in investment banking and private equity in the financial institutions group before learning programming and switching to data science.

He received a MS in Data Science / MBA from the University of Virgina and BA in Economics (with German secondary) from Harvard University.

He grew up in China and has previously worked in Frankfurt, Hong Kong and London. Hobbies include rowing, traveling and reading.

His favorite NIQ dataset is email receipts.

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Consumer Trend Forecasts

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Consumer Trends: Audience Poll

How quickly do you think consumer preferences are changing in today's market?

- Very quickly
- Moderately quickly
- Slowly
- Not at all

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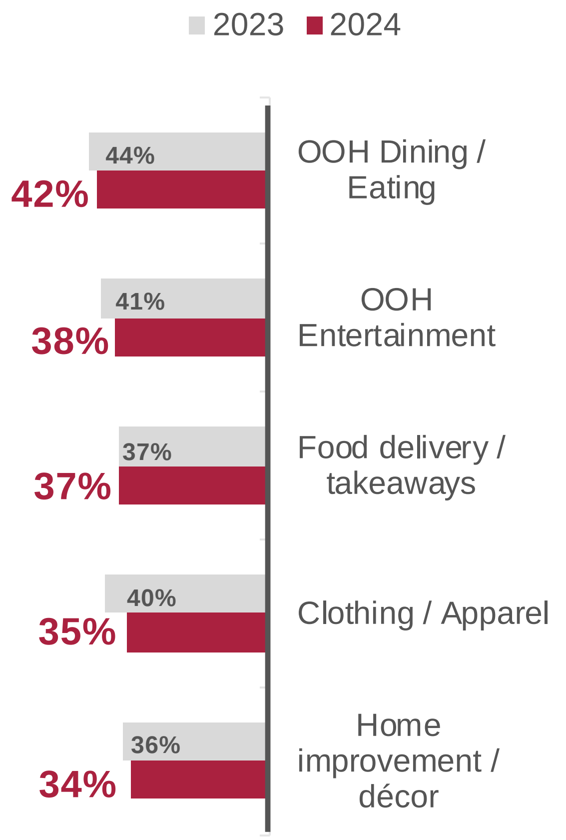
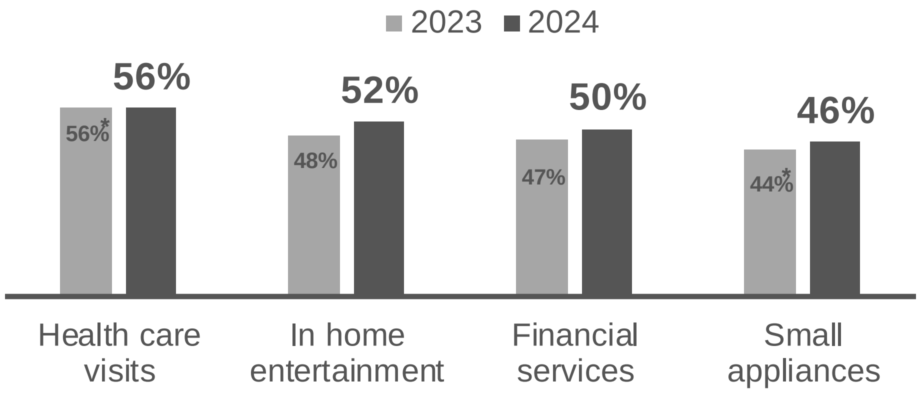
Wallet shifts favor spending more on life essentials

Survival instincts reign supreme, but in some cases, fewer consumers intend to cut back on discretionary categories than in 2023 (e.g., Clothing / Apparel)

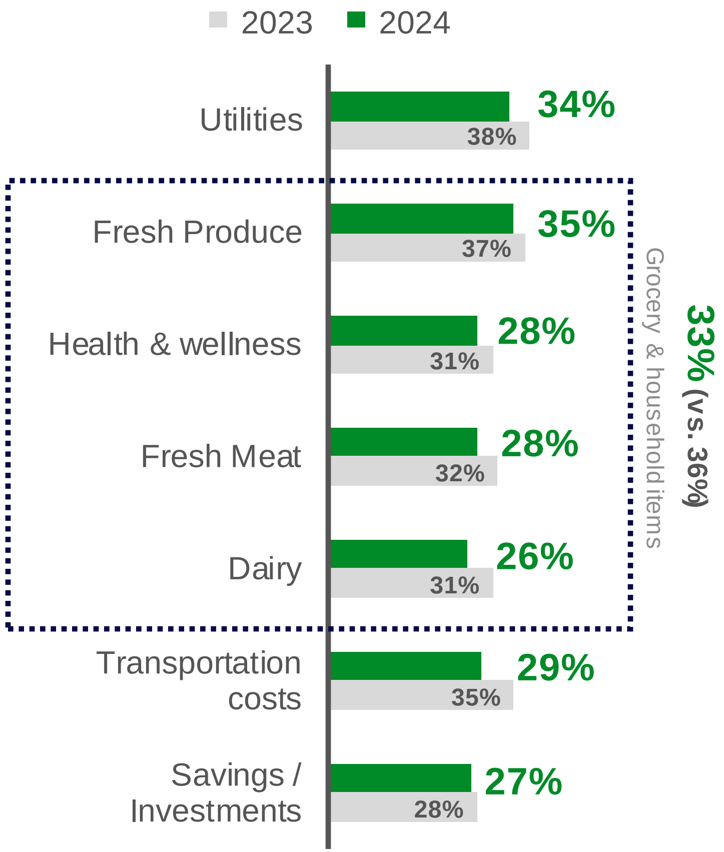
Spending less



Same as before



Spending more



* = comparison data from mid-2023, instead of Jan 2023

Source: NIQ Consumer Outlook 2024, compared to metrics from 2023 study (or, Mid-year 2023 where required), Global

Interpreted as: "42% of global respondents plan to spend less on Out-of-home (OOH) Dining and Eating in the next 12 months, compared to 44% who said the same back in 2023."

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Digital Transformation and E-commerce Growth

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Digital Transformation and E-commerce Growth:
Audience Poll

In your opinion, what is the most significant challenge for e-commerce growth at CPG companies?

- Inadequate digital marketing and consumer engagement
- Logistics and delivery challenges
- Lack of data to support an ecommerce strategy
- We are already fully embracing ecommerce in our practice
- Something else

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Omni Shopping is Here to Stay

9%
of buyers
exclusive in store

0%
of buyers
exclusive online

91% of shoppers purchase across both in-store & online channels

* NielsenIQ Omnishopper Panel, 52 w e 4/22/23

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Innovating for the Future

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Why does innovation matter?

Impact of innovation on overall growth

4.2x Home Care

2.9x Personal Care

1.8x Confectionery & Snacks

1.5x Food

1.6x Non-alcoholic Beverages

Manufacturers growing innovation sales in 2022 were

1.8x

more likely to grow overall sales than those with stagnant or declining innovation sales

Source: NIQ BASES Innovation Measurement. Impact is calculated as a ratio of percentages of manufacturers growing total sales among those growing innovation sales vs. those with no growth in innovation sales.

Sustainability& ESG Investing

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Sustainability & ESG Investing: Audience Poll

How significant do you believe sustainability efforts are in enhancing a CPG brand's value?

- Extremely significant
- Somewhat significant
- Not very significant
- Not significant at all

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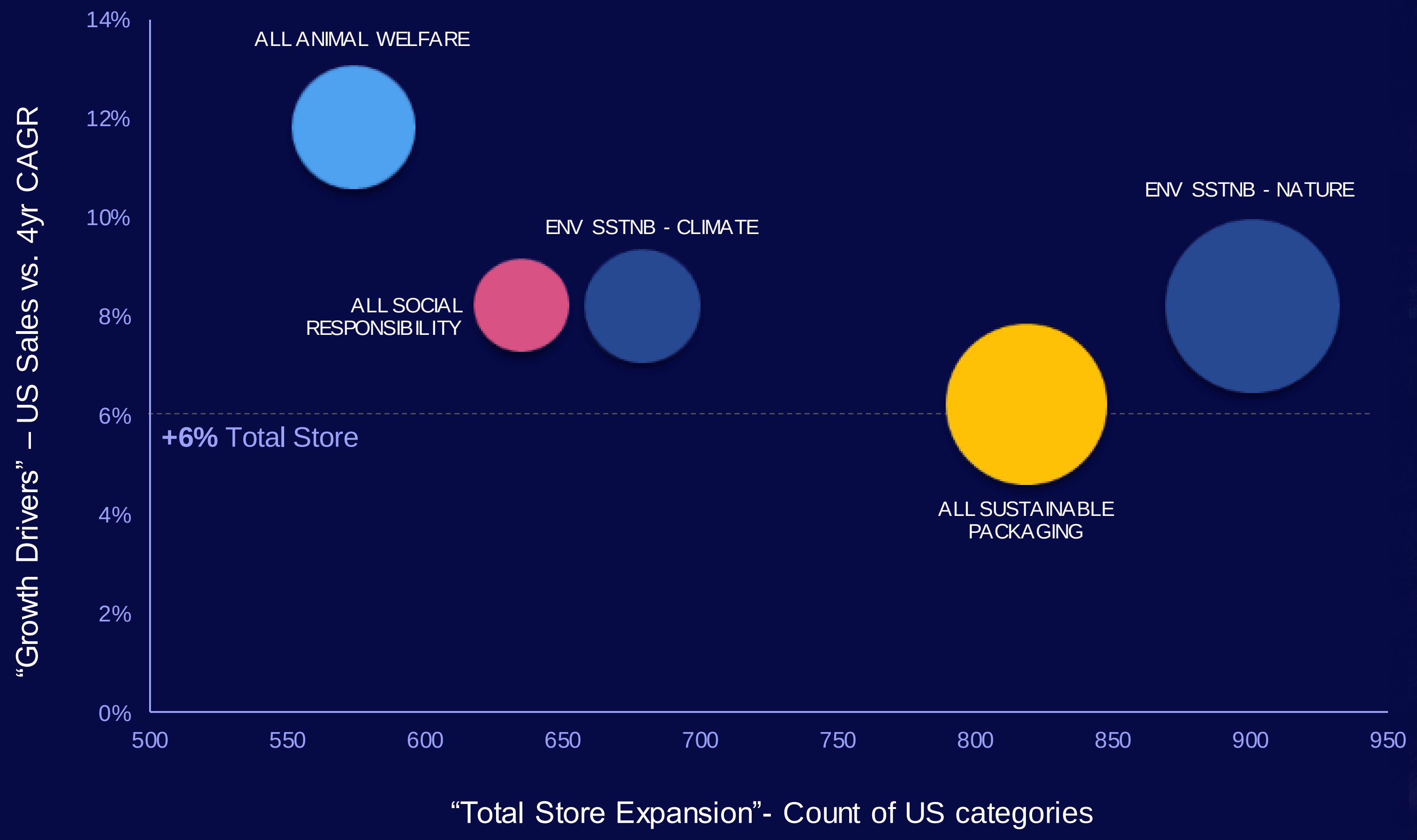
Sustainability outpacing store growth



+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

34%

Brands with >50% of sales from products with *sustainability-related claims* achieve repeat rates of up to 34%

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

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Audience Q & A

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Thank You for attending today's session.

Have questions or need additional information?

Contact:
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