

NIQ Health Solutions

Unlock consumer health and behavior trends



For more information, please contact
Timothy.Blankshain@nielseniq.com
Jeff.Gregori@nielseniq.com
Zach.point@nielseniq.com
niq.com/govt

Power your health and nutrition research and outreach with NIQ solutions

*NIQ data is renowned worldwide as the gold standard for retail market measurement and consumer behavior. Through the synergy of three solutions, NIQ drives the insights on consumer health and wellness as it evolves on shelf. Overlay Point of Sales (POS) scanner data with panelist ailments supplemented by full product attribution for the **Full View™** of health and nutrition for US consumers.*

NIQ Health Focused Solutions



NIQ RMS Data

“What is happening?”

UPC and fresh random weight POS sales data collected from retailers across the US and compiled into one dataset



NIQ Homescan Surveys

“Why is it happening?”

Demographics and shopper behavior of 100,000 panelists across the US. Supplemented with syndicated surveys to capture consumer health and lifestyle



NIQ Product Insights

“Which types of products?”

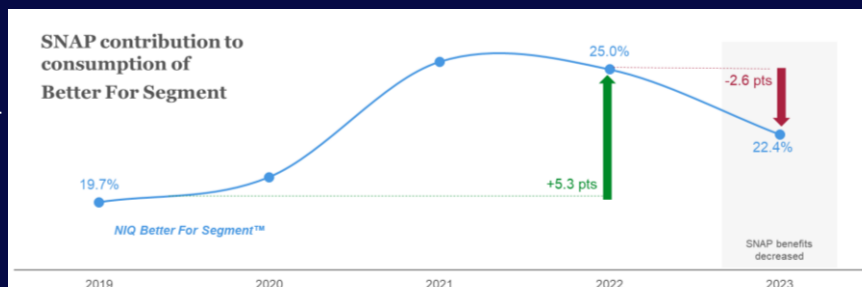
Rich product attribution focused capturing all information on product packaging from ingredients to marketing claims

Data Details

Retail Measurement	Homescan Consumer Surveys	Product Insights
- Food, Drug, Mass, Club, Dollar, Convenience, Military and more - Food, Beverage, Health, Beauty, Gen Merch, Pet, Alcohol, Tobacco, Baby and Household Care - Up to weekly reporting and 5 years of history 200+ metrics including \$, Units, Volume, Price, Distribution and Promotion	50+ Ailments including Heart Health, Diabetes, Allergies, Asthma, Gastro-Intestinal and Pain Management - SNAP/WIC, Medicare/Medicaid, Special Diets, GLP-1 use - Demographics – Age, Income, Race, Ethnicity, Occupation, Education and more	- Ingredients, Nutrition/Drug Facts, Allergens, Claims, Certifications - Organized into easy-to-understand themes such as plant-based, clean label, diets, sustainability and more 1,000+ attributes covering products across the entire store - Attributes include stated on label vs qualified for claim detail

Uncover New Insights and Perspectives

Using NIQ Health solutions, we can analyze how SNAP recipients changed their buying behavior post benefit decrease



NIQ Health Solutions

Better health through consumer insights

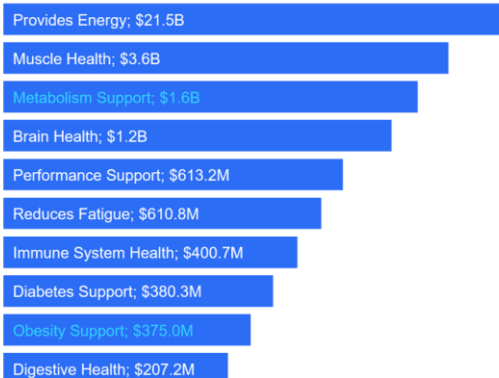


For more information, please contact
Timothy.Blankshain@nielseniq.com
Jeff.Gregori@nielseniq.com
Zach.point@nielseniq.com

Tracking nutrition health trends in real time

Functional beverages, food as medicine and vitamins and supplements often earliest indicators of emerging consumer wellness priorities

Functional Beverages



Food as Medicine Attributes

4-year CAGR stronger than Total Food and Beverage

- Digestive Health**
 - Metabolism Support
 - Immune System Health
 - Fruit and Vegetable and Grains and Heart Disease
- Microbiome**
 - Folate & Neural Tube Defects
 - Heartburn/Acid Reflux Support
 - Inflammation Health

Fastest growing Vitamins and Supplements (4-year CAGR)

- Hydration
- Electrolyte
- Performance
- Mood
- Sleep
- Mental

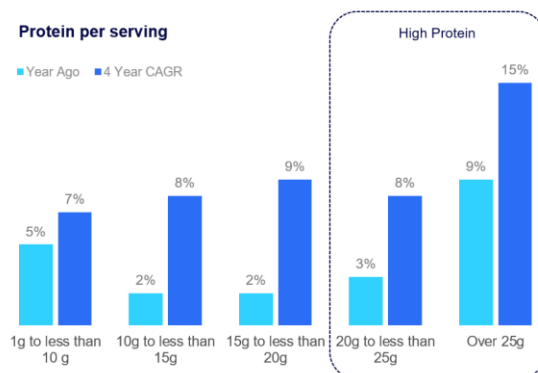
Source: NIQ Scantrack, Total US xAOC + Conv 52 Weeks Ending 12/2/2023; Note: All claims are listed as "stated"
 NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight, Total US xAOC; 52 weeks ending 12/30/2023
 Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight, Total US xAOC; Total Store; Sorted by \$ sales, \$ 4-year CAGR; Latest 52 weeks week ending 10/7/2023

The demand for protein continues to grow

25g Protein+ per serving continue to see fastest growth

Protein per serving

■ Year Ago ■ 4 Year CAGR



67%

of consumers are trying to consume more protein in 2023, according to IFIC

+14%

Keto Diet stated claims sales up in latest year

+23%

Paleo Diet stated claims sales up in latest year

#highprotein

776 views

NIQ Trending Attributes Search trends show increased demand for protein

"high protein" >317K searches (+19%)

"pea protein" >289K searches (+9%) +8% in sales vs year ago

"protein isolates" >1.1million searches (+13%)

International Food Information Council, 2023 Food and Health Survey, TikTok Trends
 Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; 52 weeks ending 12/30/2023; *NIQ Label Insight Trending Attributes search data; All Channels, 12 Months, October 2022 – September 2023*