The Next Frontier of Wellness

Transparency, trust, and a $9 trillion global market opportunity

Health and wellness is becoming a constant presence in consumers' thinking and daily routines

Global Wellness Institute:

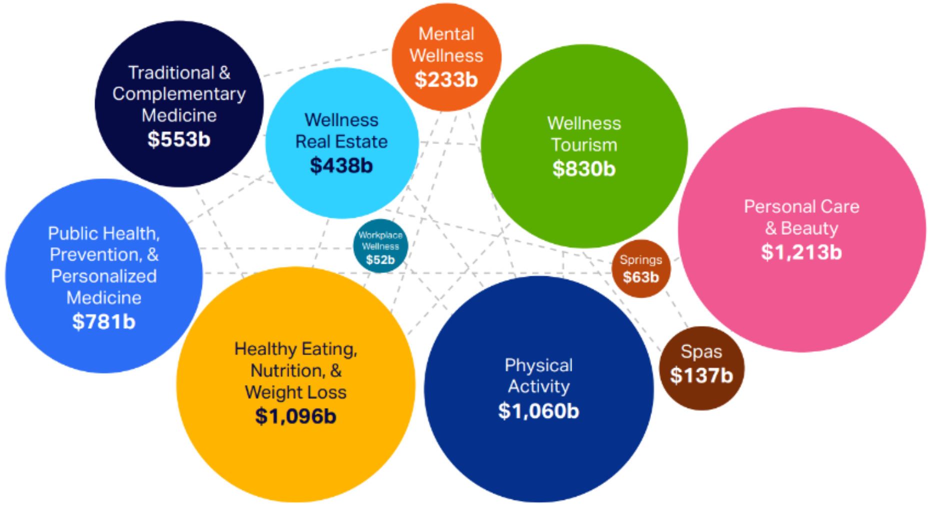
In 2023, the global wellness economy stood at $6.3 trillion (USD).

Today, it is 26% larger than pre-pandemic and four times the size of the pharmaceutical industry.

By 2028, it will reach nearly $9 trillion.

Global Wellness Economy

$6.3 trillion in 2023



Note: Numbers do not add due to overlap in sectors.
Source: Global Wellness Institute

Respondents in North America according to NIQ's 2025 Global Health & Wellness survey:

68%

Are proactive in doing things to improve heir health (vs 70% globally)

65%

"are more likely to buy from companies with a strong health focus across their portfolio (vs. 69% globally)

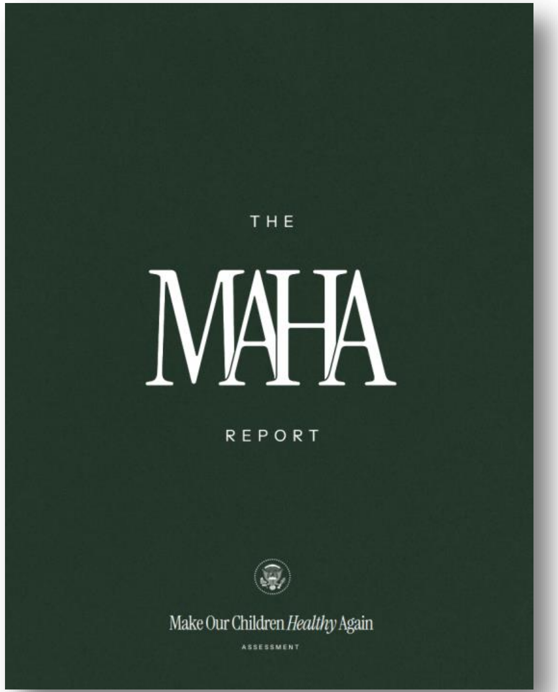
Top barriers to making healthier choices:

57% Cost

30% Motivation

24% Availability

In the US, health is a key focus in 2025



Poor Diet: The American diet has shifted dramatically toward ultra-processed foods (UPFs), leading to nutrient depletion, increased caloric intake, and exposure to harmful additives. Nearly 70% of children's calories now come from UPFs, contributing to obesity, diabetes, and other chronic conditions.

Aggregation of Environmental Chemicals

Lack of Physical Activity and Chronic Stress

Overmedicalization

Top barriers hindering healthier life choices

Global		US
1	**Cost** **54%** of consumers say the expense of healthier options is a major barrier	**55%** Cost
2	**Availability** **31%** say difficulty finding healthy alternatives is an issue	**31%** Motivation
3	**Time** **26%** of consumers say they simply don't have time to make healthier choices	**25%** Availability
4	**Motivation** **25%** don't feel driven to make healthier choices	**22%** Trust
5	**Trust** **25%** don't trust that the product or service will be effective	**17%** Time

65% of US consumers (75% of global) *agree that governments should regulate businesses to help them make healthier decisions*

Make America Healthy Again Assessment, published May 22, 2025; NIQ Global Wellness Report 2025, US and global results (% strongly/somewhat agree)

5 Emerging Trends in Health & Wellness for 2025

Opportunities for long-term impact in the U.S.

Trend #1: Nutrition and gut health

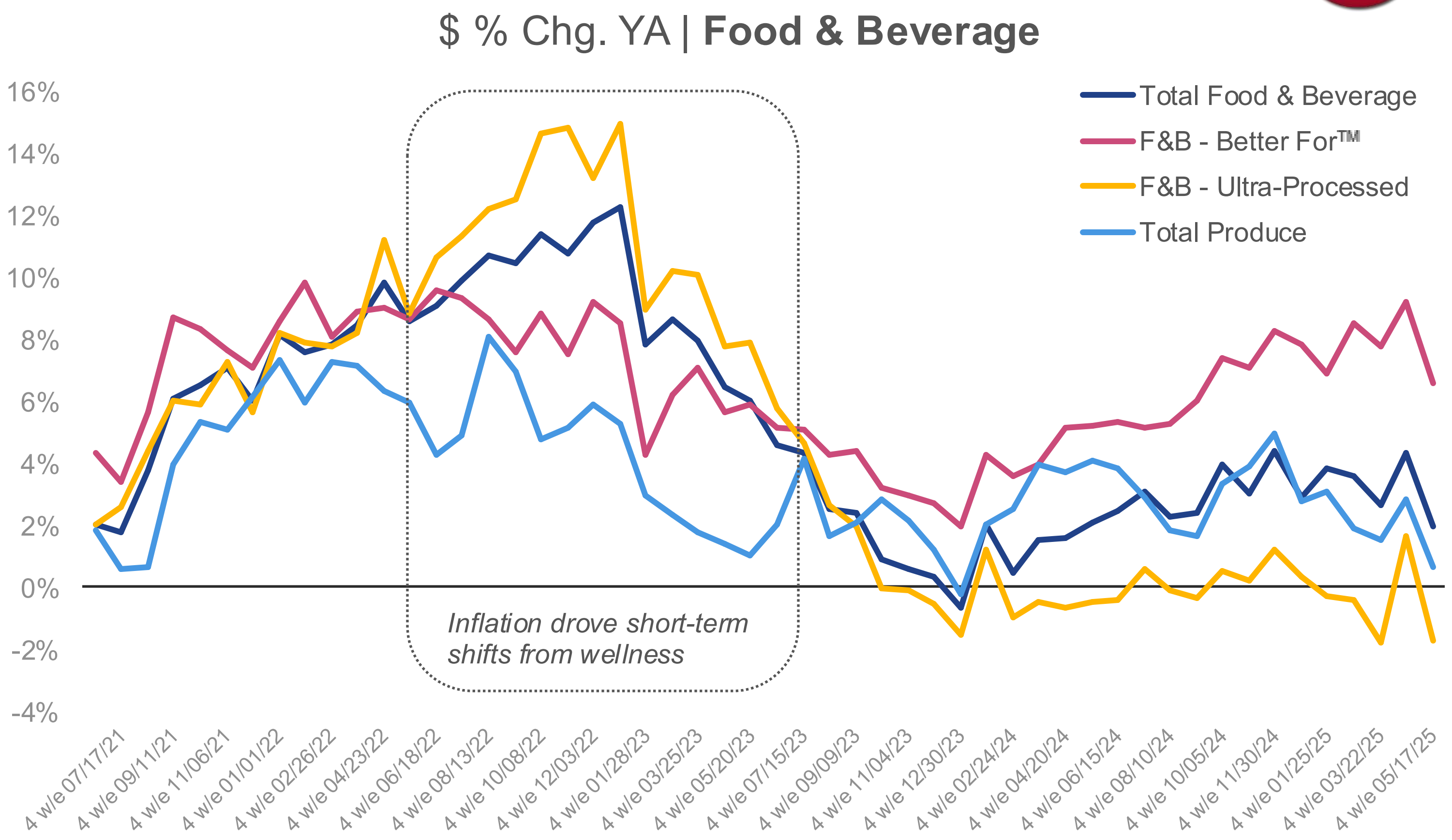
Consumers are becoming more conscious of the nutritional value—and potential downsides—of what they eat and drink.

Survey Respondents in North America:

- **55%** say healthy nutrition has become more important to them in the last five years (vs. 58% globally)
- **20%** are willing to pay **over 10% more** for products with enhanced nutritional benefits (vs. 33% globally)
- Positive perception is most prevalent for high-fiber foods (**82%**), superfoods (**72%**), and probiotic foods (**67%**), with **over one-third** planning to buy more of these types of foods this year.
  - **22%** hold a "*very* negative" view of ultra-processed foods—**among the highest of any region**

NIQ *Better For™*...

Better For™ is a bellwether of wellness trends and consumer priorities



Source: NIQ, Retail Measurement Services – NIQ Product Insight; Total US xAOC; Total Food & Beverage vs Better For segment; $ % Change vs year ago; 4-week trended through week ending May 17, 2025; NIQ Ultra-processed

The challenge and confusion around processing

*87% of US consumers agree that eating **fewer processed foods is better for health** and **75% try to limit** their intake of processed foods.*

NOVA Food classification

Unprocessed or minimally processed foods	Processed culinary ingredients	Processed foods	Ultra-processed foods
Foods which did not undergo processing or underwent minimal processing technics, such as fractioning, grinding, pasteurization and others.	These are obtained from minimally processed foods and used to season, cook and create culinary dishes.	These are unprocessed or minimally processed foods or culinary dishes which have been added processed culinary ingredients. They are necessarily industrialized.	These are food products derived from foods or parts of foods, being added cosmetic food additives not used in culinary.
Legumes, vegetables, fruits, starchy roots and tubers, grains, nuts, beef, eggs, chicken, milk	Salt, sugar, vegetable oils, butter and other fats.	Bottled vegetables or meat in salt solution, fruits in syrup or candied, bread, cheeses, purees or pastes.	Breast milk substitutes, infant formulas, cookies, ice cream, shakes, ready-to-eat meals, soft drinks and other sugary drinks, hamburgers, nuggets.

NIQ NPI ULTRA-PROCESSED QLFD: Use nutrition facts panels (NFP) and ingredient declaration:

Products with NFPs containing one of the following: *1.5g or more of sodium per 100g, 5 grams or more of saturated fat per 100g, 22.5g or more of sugar per 100g, or 17.5g or more of total fat per 100g.*

And

Products with at least three of the following: *Added Sugar, Hydrogenated Oil, Formaldehyde Releasing Preservatives, Artificial Colors, Artificial Flavors, Artificial Sweeteners, Hydrogenated Oils, Artificial Fragrances, Added Sulfites, Color Additives, or Sequestrates.*

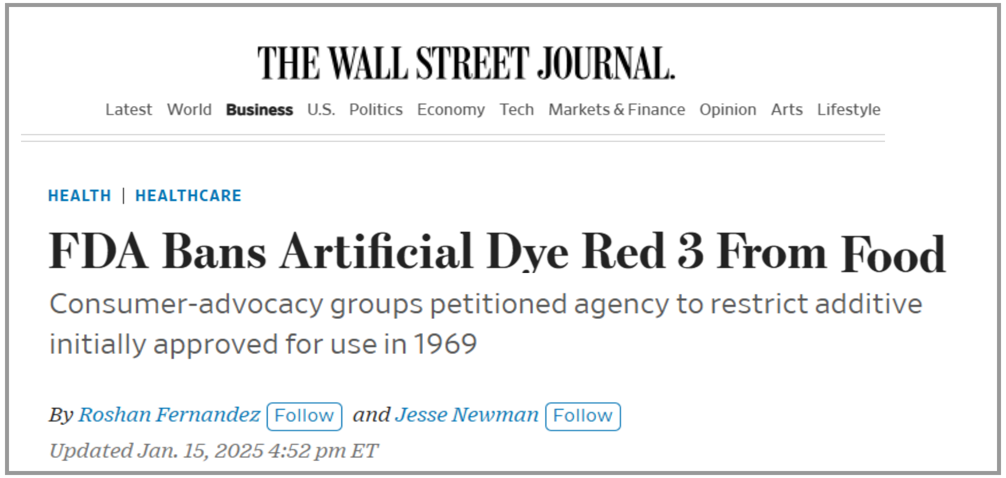
Products eligible for this attribute cannot make organic certification claims.

78% from Northeastern University's Network Science Institute compared to…

22% of US Food and Beverage qualify as "ultra-processed" using current NIQ Product Insight definition

Source: NIQ Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage; $ Share, 4-year $ CAGR; 52 weeks ending November 30, 2024
MRI Simmons, Health and Wellness study

Consumers reacting to policy changes on ingredients



THE WALL STREET JOURNAL.

Latest World **Business** U.S. Politics Economy Tech Markets & Finance Opinion Arts Lifestyle

HEALTH | HEALTHCARE

FDA Bans Artificial Dye Red 3 From Food

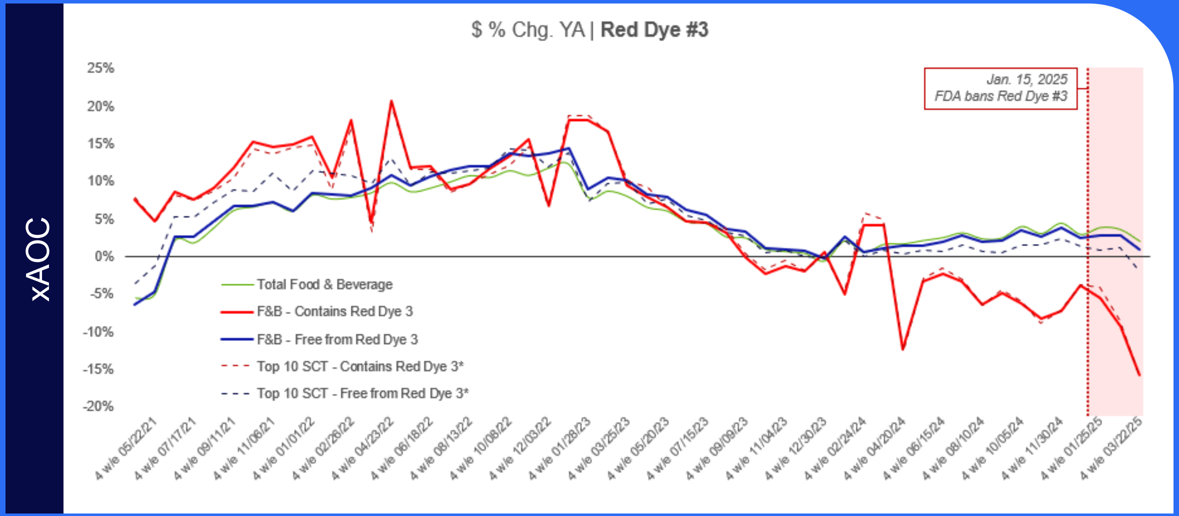
Consumer-advocacy groups petitioned agency to restrict additive initially approved for use in 1969

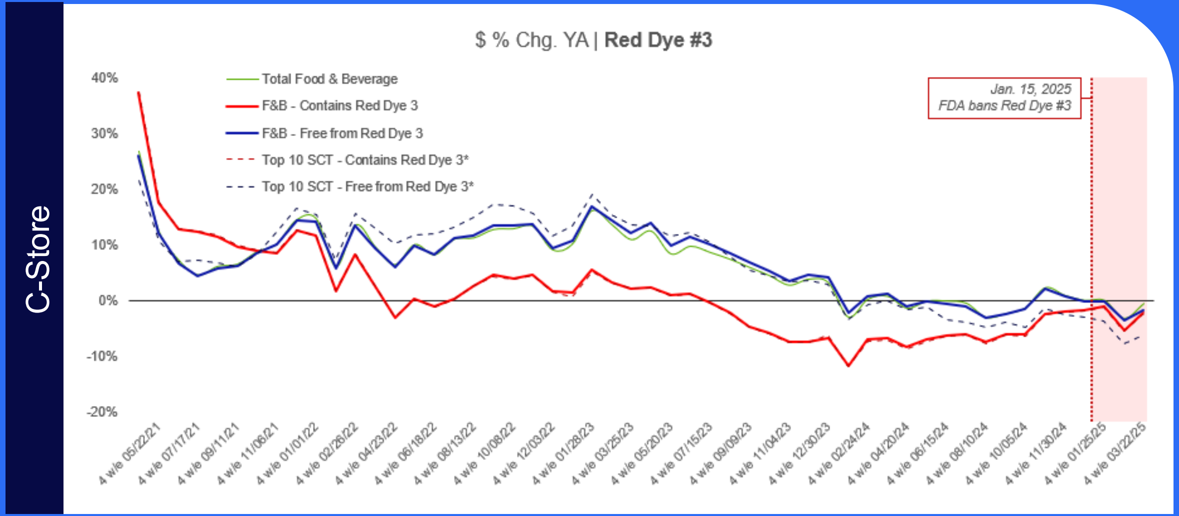
By Roshan Fernandez Follow *and Jesse Newman* Follow

Updated Jan. 15, 2025 4:52 pm ET

5,416 items total

Candy, gum, mints
Baking supplies
Desserts
Salty Snacks
Cookies and Crackers
Sweet snacks
Milk products

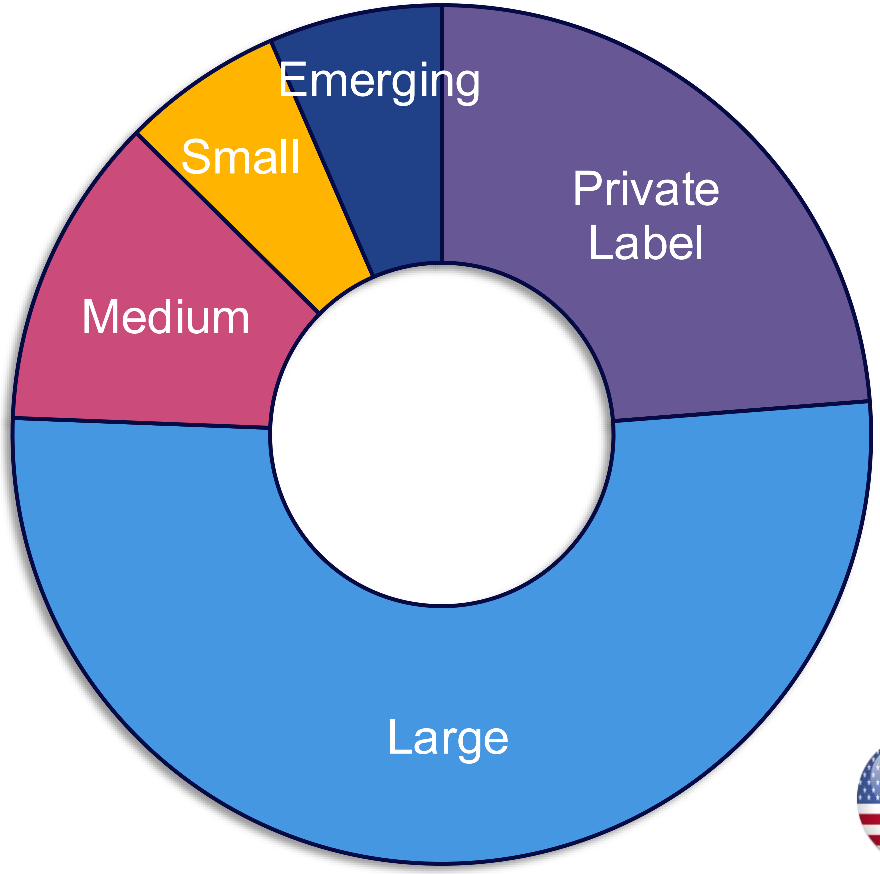




Top 10 super categories that contain Red Dye #3
Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC vs Total US Conv; Total Food & Beverage vs Better For segment; $ % Change vs year ago; 4-week trended through week ending March 22, 2025

Large manufacturers make up most of Food & Beverage sales

Total Food & Beverage Sales | Size of Manufacturers



Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage; Total Food & Beverage $ sales by size of manufacturer; Latest 52 weeks ending …

Small & Medium manufacturers growing the most in Better For™ sales

Better For™	Share of total $ sales	4yr CAGR
Private Label	9%	+4.9%
Large (>$1BN)	7%	+4.0%
Medium ($200MM to <$1BN)	20%	+10.9%
Small ($50MM to <$200MM)	28%	+10.1%
Emerging ($10K to <$50MM)	25%	+6.6%

Source: NIQ RMS – NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage; NIQ Better For Segment™; Better For™ $ share of Food & Beverage and 4yr $ CAGR; Latest 52 weeks ending May 17, 2025

Trend #2: Weight loss

A new era in weight management

Survey Respondents in North America:

- **55%** say maintaining a healthy body weight is more important now than five years ago (vs. 54% globally)
- **56%** plan to do more exercise in the next 12 months
- Leading motivators for achieving and maintaining a healthy weight are health reasons (**69%** saying "*very* important"), appearance (**43%**), and athletic performance (**23%**).

Anti-obesity medications (AOMs):

- **36%** are familiar with AOMs
- **25%** hold a positive perception of them (vs. 31% globally)
- **32%** would be willing to use a weight loss drug in the future, if recommended by a health professional (vs. 43% globally)

GLP-1s are changing lives and creating the next frontier for brands

***Consumer Focus:** GLP-1 Users*

~130M clinically indicated across the United States^

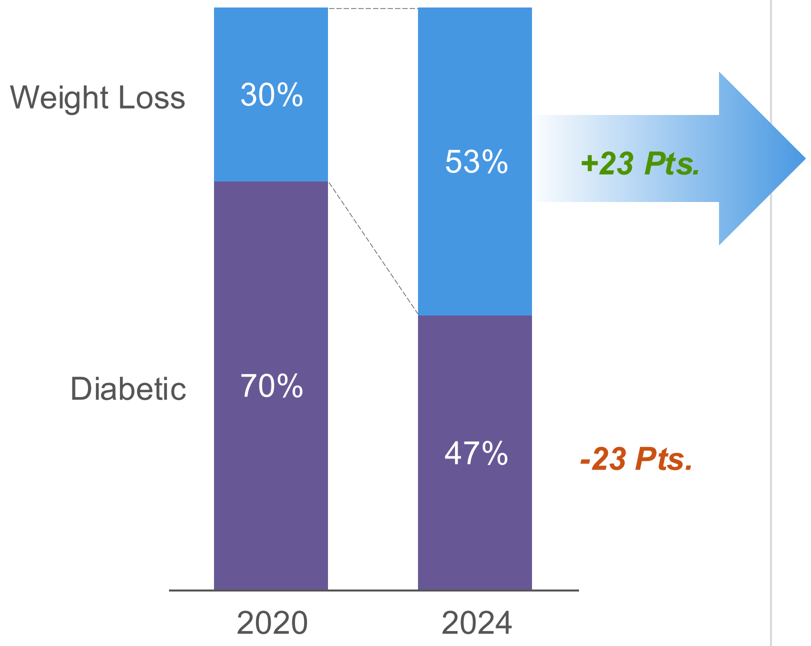
~100M
Obese

~45M
Over-Weight*

~35M
Type 2 Diabetic

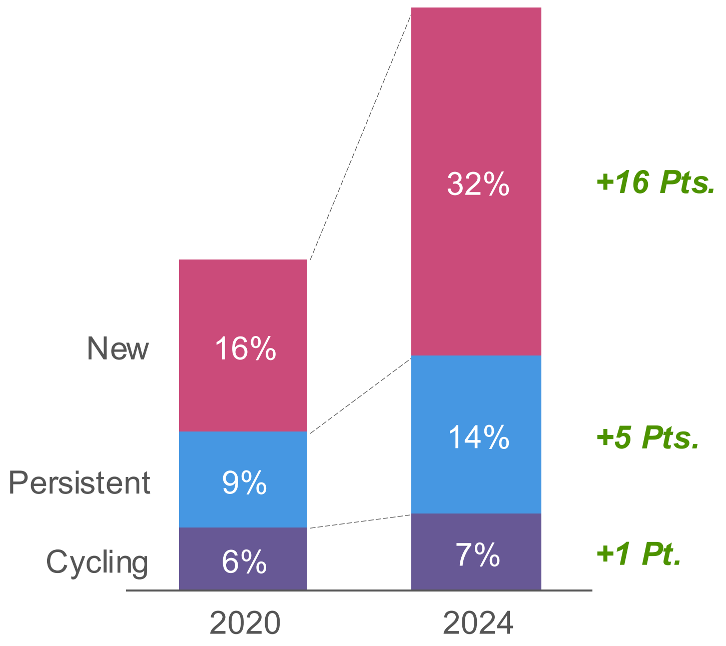
Medical records show weight loss is now the #1 reason for taking GLP-1s

% Patients Taking GLP-1s Based On Anonymized Medical Record Data



New weight loss GLP-1 users are driving adoption

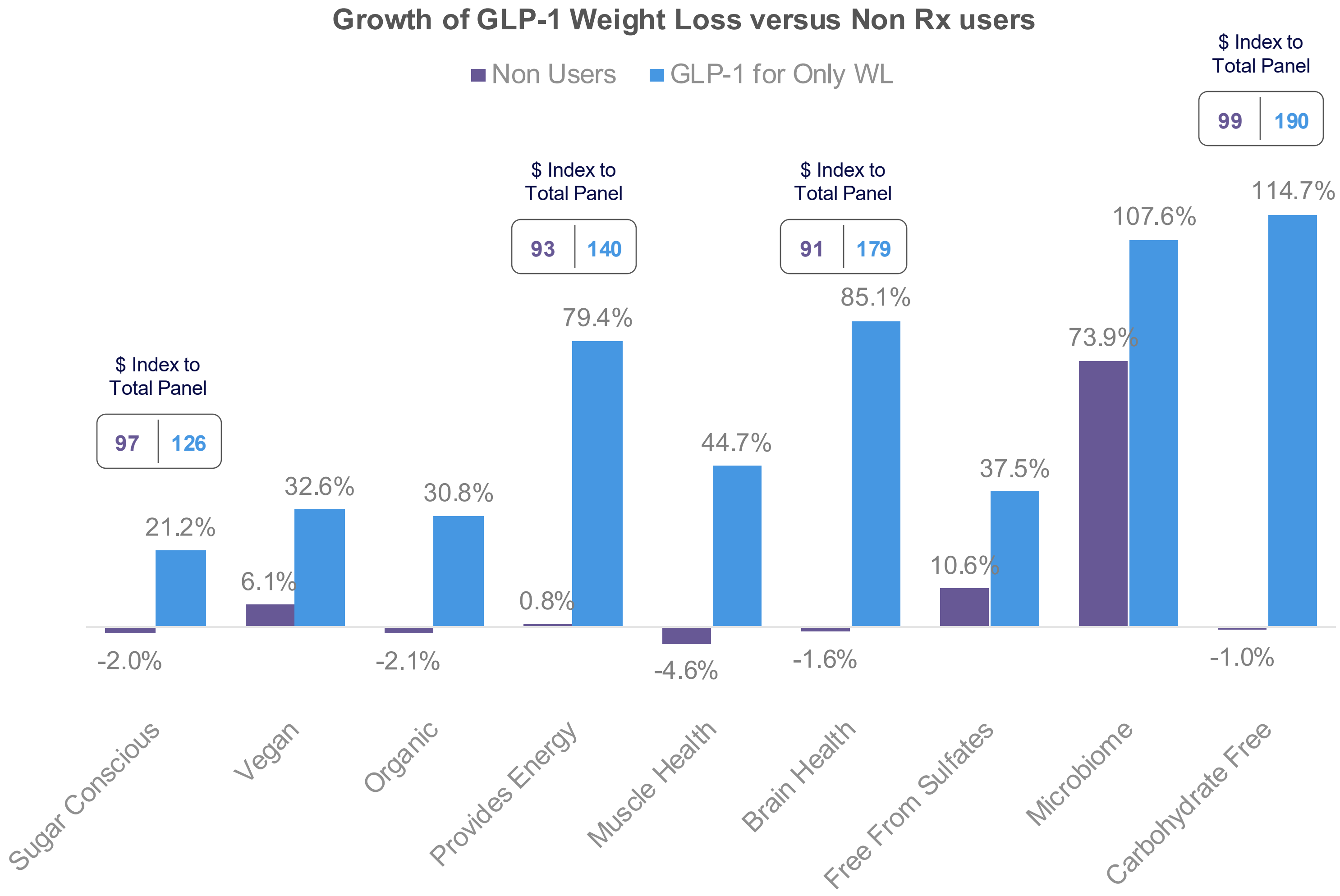
% Weight Loss Patients Taking GLP-1s



Left Source: Centers for Disease Control; Middle & Right Source: Management Science Associates, Inc.
Notes: *Over-weight with one or more comorbidities; ^Defined as over-weight/obese/diabetic
Right Chart: Sums may not equal totals in middle chart due to rounding

GLP-1 weight loss shoppers seem to be increasingly intentional

Health needs states, nutrition, clean label all showing strong growth



Some attributes GLP-1 weight loss users showing stronger growth

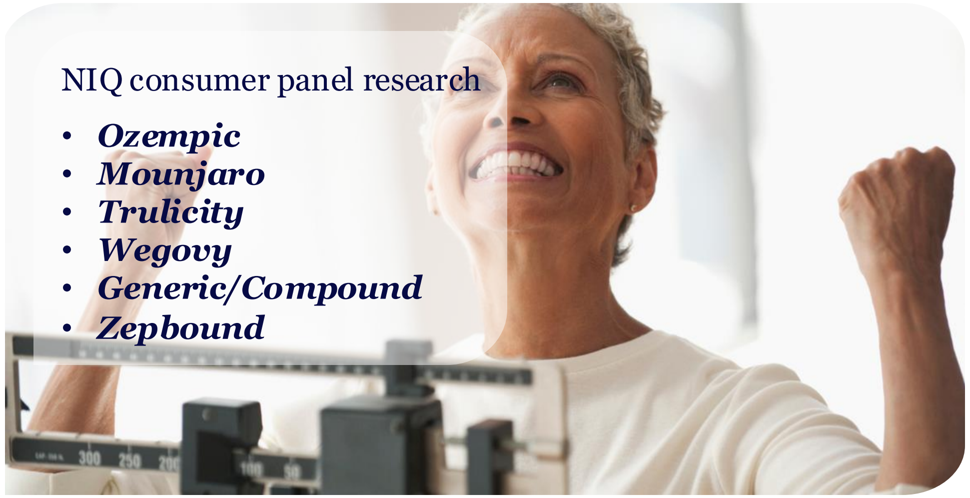
- *Immune health*
- *Joint health*
- *Muscle health*
- *Osteoporosis*
- *Bone Health*
- *Digestive Health*
- *Hair, Skin Nail support*
- *Clinically tested*
- *Free from aluminum*
- *Free from antibiotics, hormones*
- *Free from high fructose corn syrup*
- *Free from artificial colors, flavors, fragrances, ingredients*
- *Free from parabens and phthalates*
- *Free from sulfates*
- *Natural, natural flavors*
- *Calorie conscious, fat conscious*
- *Sodium conscious (especially very low sodium)*
- *Contains added sugar*
- *Nutrient dense*
- *Antioxidants stated*
- *Paleo*
- *Non-GMO*
- *Plant-based*
- *Free from gluten*
- *Excellent and good source of protein*

Source: NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024); Total US; Total Outlets; Total Food & Beverage; Product Insight stated claims on package; Unit % Change, 52 weeks ending September 28, 2024

The GLP-1 Dynamic: GLP-1s are not a weight loss fad

Their growth will change the way consumers eat, prioritize health and self-care

Background	Approved for weight-loss in 2014, with ***dramatic growth* in usage for weight-loss over the *last four years***
Challenges	**Side effects, supply, affordability, persistence/cycling** Compounding pharmacies and telehealth improved access in last year
Future	**Significant growth – projected to reach $115B (US) by 2030** Robust pipeline of innovative drugs/delivery mechanisms and generics, and new health indications signaling growing competition, greater choice, accessibility and lower prices



NIQ consumer panel research

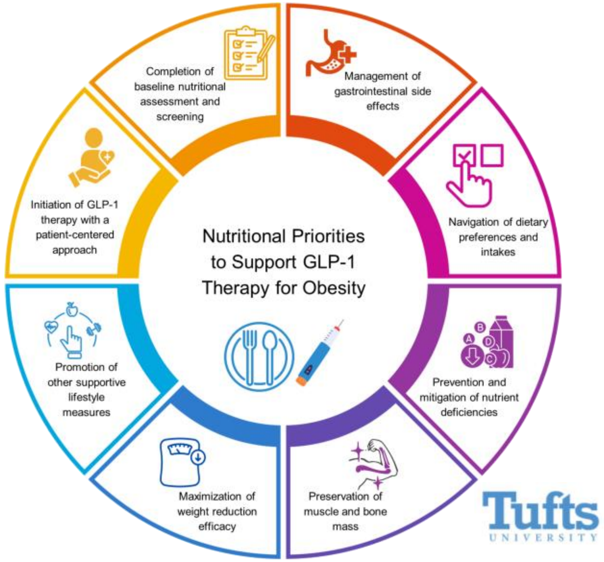
- ***Ozempic***
- ***Mounjaro***
- ***Trulicity***
- ***Wegovy***
- ***Generic/Compound***
- ***Zepbound***

31% of US consumers and global *consumers have a generally positive perception of anti-obesity medications (AOMs) or GLP-1s*

GLP-1 weight loss shoppers seem to be increasingly intentional

Protein **Fiber/Gut health**
Hydration **Macro/Micronutrients**

Brain health, Microbiome, Energy, Clean Label



NIQ Global Wellness Report 2025, US and global results (% very/somewhat positive perception)

Trend #3: Wellness

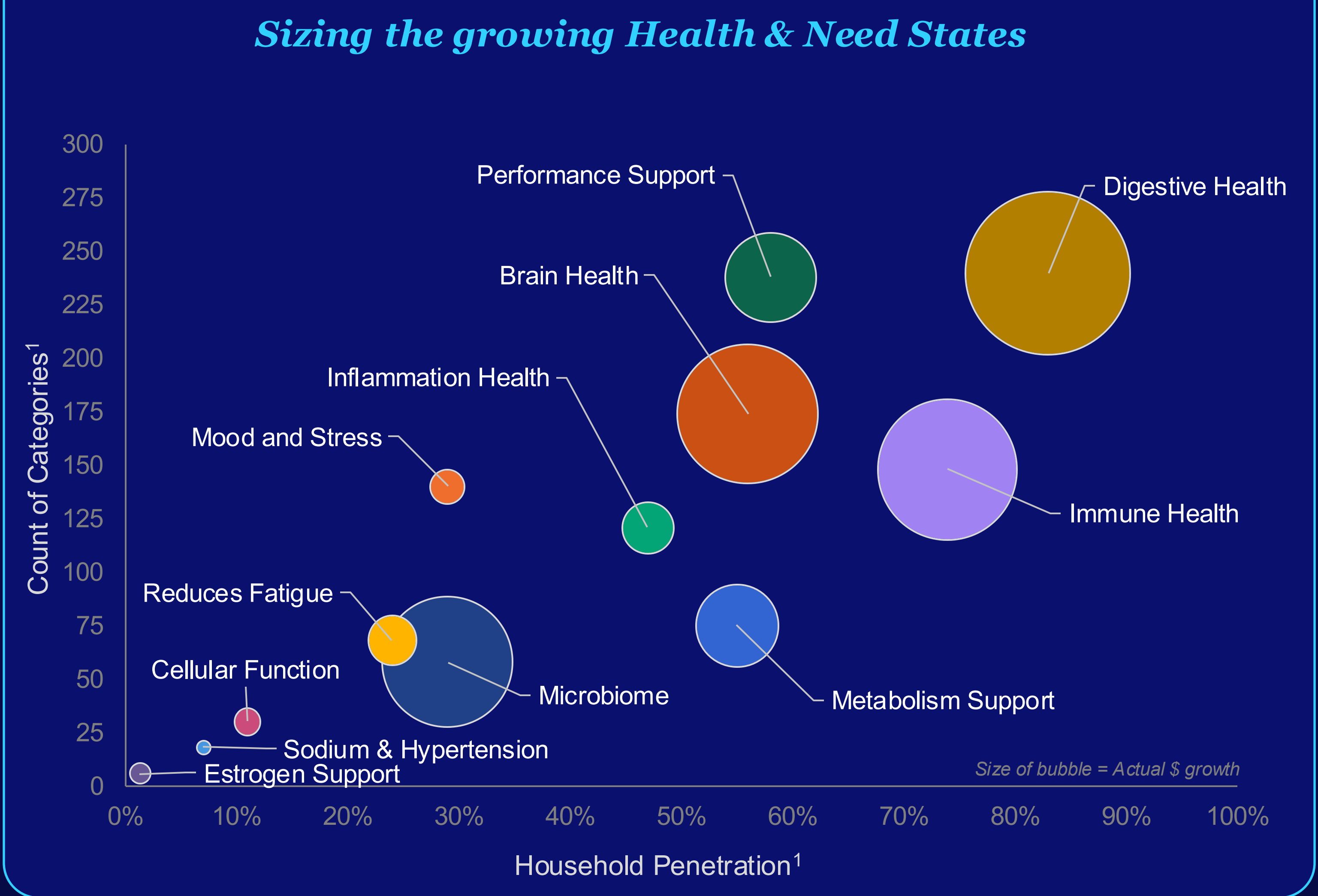
The new frontier of self-care

Survey Respondents in North America:

- **59%** say looking after their mental health is more important to them now than five years ago (vs. 63% globally)
- **62%** say the same about getting good sleep (vs. 63% globally)
- **48%** say the same about following a regular self-care routine (vs. 50% globally)
  - Top self-care activities that people plan to do more of in the coming year are:
    - Physical exercise: **56%**
    - Spending more time in nature: **50%**
    - Spending time with family/friends: **49%**

NIQ

Consumers indicating their top health priorities across the store



Functional Beverages[2]

Microbiome *(Soft Drinks)*
Digestive health *(Soft Drinks)*
Immune system health *(Soft Drinks, Sp. Water, Energy beverages)*
Metabolism support *(Energy beverages, Sports Drinks)*
Sleep support *(Soft Drinks)*
Inflammation health *(Kombucha)*

Top claims in Pet Care[2]

Mood and Stress	Immune system health
Hair, Skin, Nail Support	Joint health
Microbiome	Muscle health
Brain health	Obesity support

Vitamins, Minerals, Supplements[2]

Hydration supplement*	Obesity support
Headache & migraine	Immune system health
Performance supplement*	Cholesterol support
Electrolyte supplement*	Reduces fatigue

**Supplements sub category*

1 – Source: Count of Categories and Sales growth = NIQ RMS, 52 weeks ending November 30, 2024; Household Penetration – NIQ Homescan; Total US, Total Store - Health & Need States NPI claims, 52 weeks ending November 23, 2024
2 – Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; Pet Care, Health & Need States NPI claims within VMS, Beverages; 4 year $ CAGR; 52 weeks ending November 30, 2024

Trend #4: Health-related technology

Shaping the future

Survey Respondents in North America:

- **63%** would prefer tech products with additional health and wellness features over ones without (vs. 74% globally)
- **52%** believe such products are effective in improving their well-being (vs. 63% globally)
- Top motivations for buying health tech are:
  - Cooking more healthily: **41%**
  - Improving sleep quality: **40%**
  - Improving mental health and well-being: **38%**
- Primary factors influencing purchase decisions are price (**77%**, vs. 69% global), features and functionality (**54%**), and user reviews (**43%**).

NIQ

Technology empowering the consumer

The emerging wave of P4 Healthcare: *predictive, preventative, personalized, participatory*

Function measures all major biological functions: heart, hormones, metabolic, inflammation, kidneys, liver, heavy metals, and more.

Over-the-counter hearing aids: Elehear Beyond Pro Smart hearing aids can translate languages or help with tinnitus

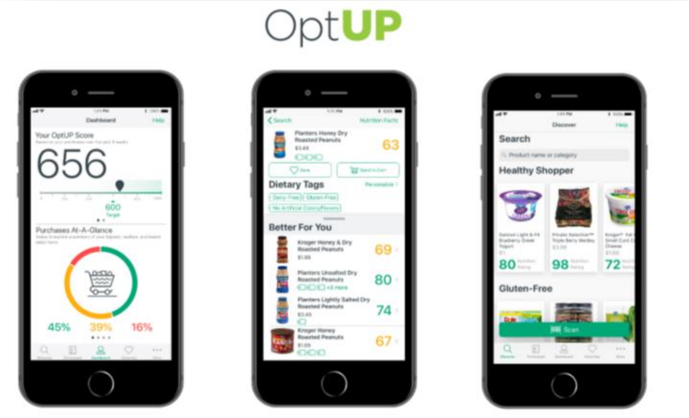
SmartSKN has partnered with LillyCover to introduce AI-driven skincare robots to the US market. MULLI AI Dermascope tracks skin over time for personalized skin care.

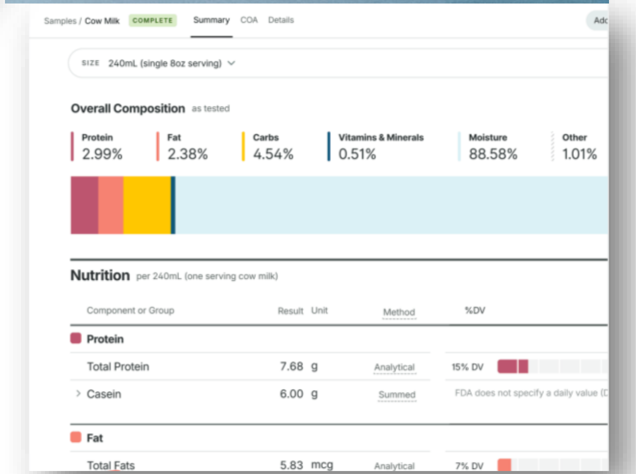
The Eli Hormometer is the first instant saliva-based hormone monitoring system. Eli will soon launch a beta period with cortisol and progesterone tests.

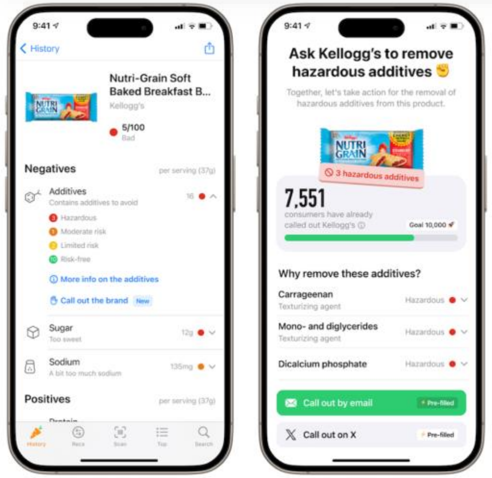
Dexcom and Oura announce a strategic partnership to improve metabolic health through the integration of Dexcom glucose data with vital sign, sleep, stress, heart health and activity from Oura.

The Amazfit V1tal is a new health gadget that automatically logs food and provides nutritional info by recording you while you eat. It analyzes the recording and sends the data to the Zepp app, eliminating the need to manually enter meal details.

Technology increasingly curating for consumer health priorities



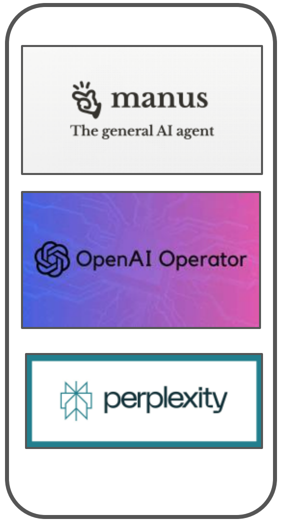




HUNGRYROOT

*"Most customers trust the company to select the majority of their weekly groceries for them, and **72% of all items purchased are chosen by the algorithm.**"*

Yuka



Edacious

Trend #5: Conscious buying

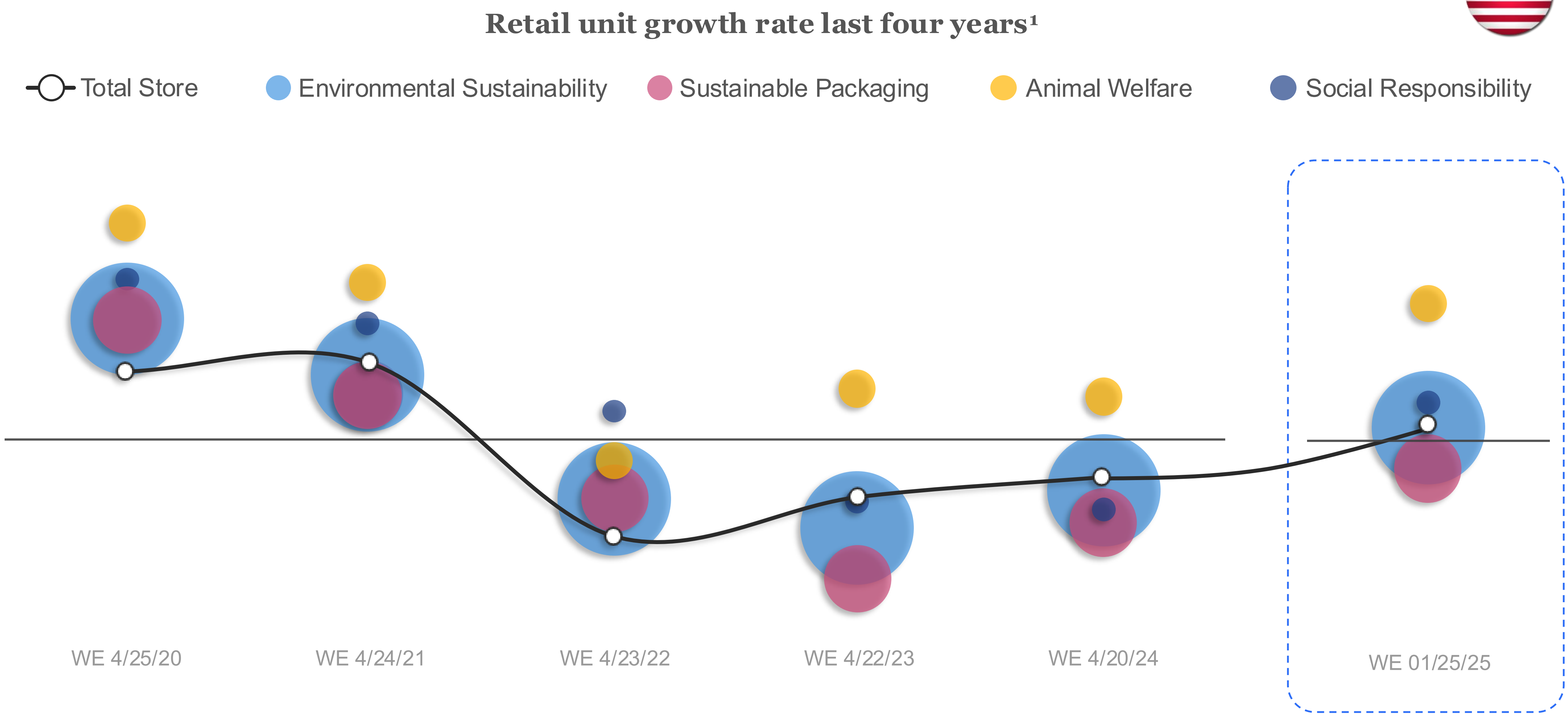
Demand for ethical health and eco-friendly wellness products

Survey Respondents in North America:

- **47%** are familiar with the concept of conscious buying
- **61%** say it's important to them that the wellness products they buy are also eco-friendly and/or ethical (vs. 70% globally)
- **58%** are worried that environmental issues like pollution and climate change are impacting their *current and future* health (vs. 69% globally)
- **58%** would pay more for wellness products that are also ethical and/or eco-friendly (vs. 71% globally)

NIQ

Sustainability sales have seen shifts over the last four years

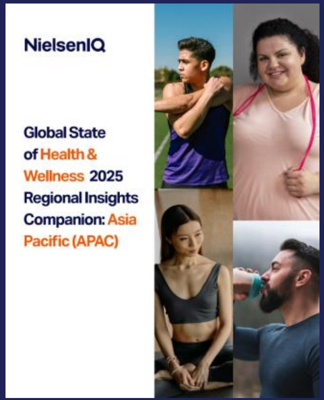


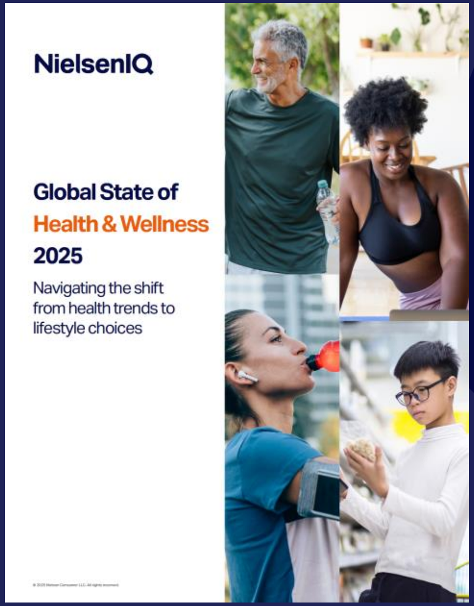
1 – Source: NielsenIQ Retail Measurement Services, NIQ Product Insight, powered by Label Insight, Total US xAOC; Total Store; Units % change year over year, through 52 weeks ending January 25, 2025

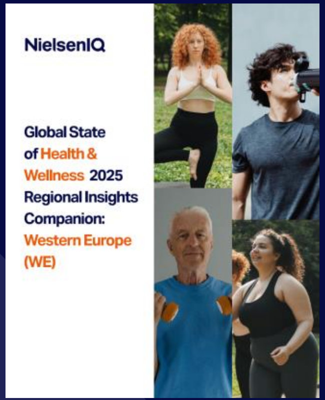
NIQ

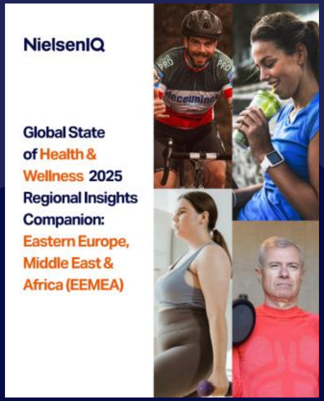
Want to go deeper?

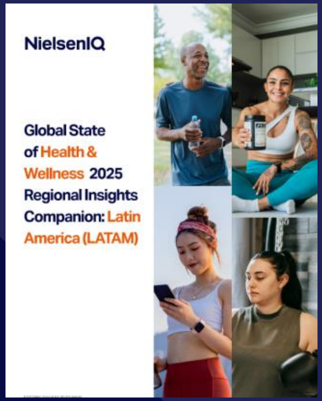
Download our full report,
[Global State of Health & Wellness 2025](),
along with our five in-depth
Regional Insights Companions.

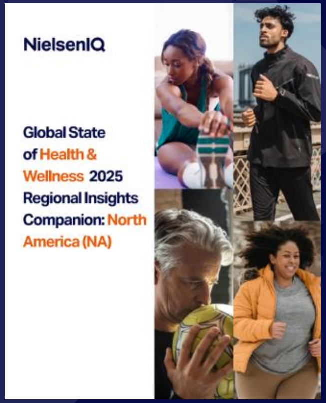












NIQ Product Insights to deeply understand wellness trends

Shoppers are sharing what they want—are you listening?

NIQ Product Insight (NPI)

What is Product Insights?

Analyzes the *complete* product profile to unearth what is **most important to consumers:**

- Claims
- Certifications
- Ingredients
- Allergens
- Nutrition Facts
- Romance Copy

Category growth drivers are organized into **easy-to-understand attribute themes such as:**

- Clean Label
- Sustainability
- Plant Based
- Free-From
- Diets and Lifestyles
- Food as Medicine

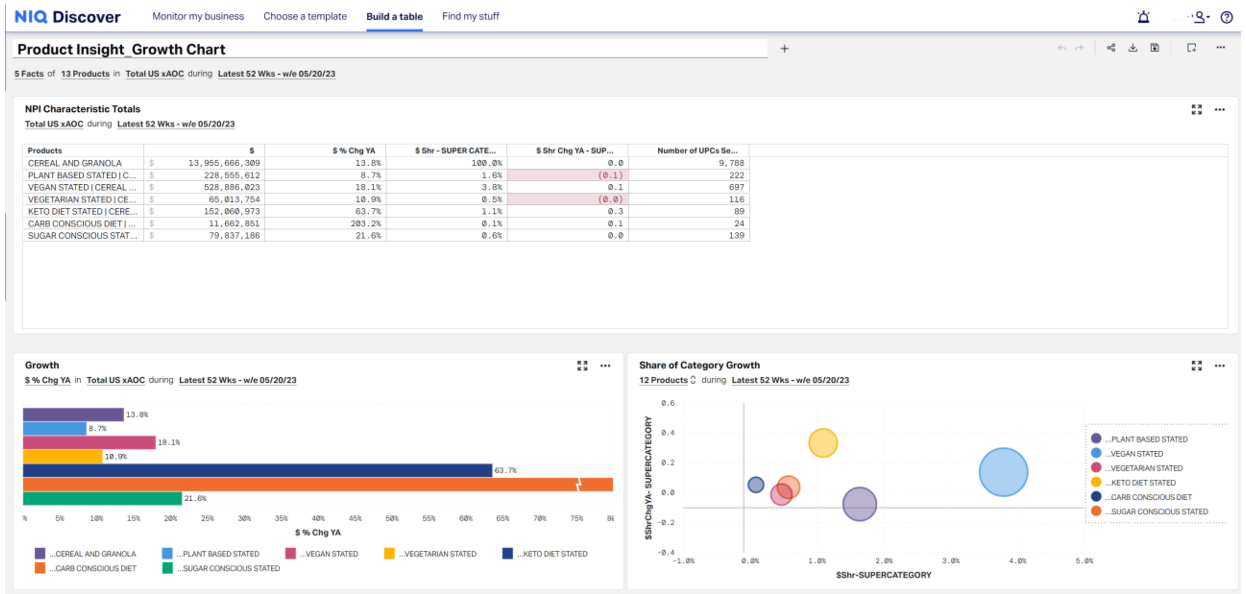
Key benefits

Unlock opportunities to query internal brands and **position against competitors** based on their performance with stated & qualified attributes

1,600+ attributes cover products across total store including 250+ attributes available only from NIQ

Find answers faster with **integrated insights** connected to leading NIQ measurement and consumer data

Discover Product Insights



ON-PACKAGE ATTRIBUTION

Standardizing attributes present on the label by analyzing marketing claims, warnings and third-party certifications.

DERIVED ATTRIBUTION

Uncovering attributes not physically stated on the label by analyzing nutrients and ingredients against regulations.

- USDA Organic
- Non GMO
- Vegan
- Gluten-Free
- Kosher
- Raw

Hand-crafted in small batches using only the freshest organic and raw ingredients, flavored with **cold-pressed juice** from organic produce, **fermented 100% in glass**, and packaged in **uv-protective amber bottles**, it's simply the best tasting & **highest quality** kombucha you can buy.

- Cold Pressed
- Small Batch
- Fermented
- Highest Quality

Nutrition Facts
Serving Size 8 fl oz (237 ml)
Servings Per Container: 2

Amount Per Serving	
Calories 40 Calories from Fat 0	
	% Daily Value*
Total Fat 0g	0%
Sodium 10mg	0%
Total Carbohydrate 9g	3%
Sugars 3g	
Protein 0g	

Not a significant source of calories from fat, saturated fat, trans fat, cholesterol, dietary fiber, vitamin A, vitamin C, calcium and iron.
*Percentage Daily Values are based on a 2,000 calorie diet.

- Low Calorie
- Fat Free
- Saturated Fat Free
- Trans Fat Free
- Very Low Sodium
- Atkins Acceptable
- Diabetes Friendly

INGREDIENTS: FILTERED WATER, KOMBUCHA CULTURE (YEAST & BACTERIA CULTURES), ORGANIC BLACK TEA, ORGANIC GREEN TEA, ORGANIC CANE JUICE (SUGAR), COLD-PRESSED ORGANIC PINK LADY APPLE JUICE.

- Contains Added Sugar
- Gluten Free Ingredients
- Artificial Color Free
- Artificial Sweetener Free
- High Fructose Corn Syrup Free

FAT FREE

NIQ

NIQ Product Insights

Category Essentials
- Essentials - Baby
- Essentials - Food
- Essentials - Feminine Care
- Essentials - Household Care
- Essentials - Oral Care
- Essentials - OTC/Medicine
- Essentials - Litter NEW
- Essentials - Supplements NEW

Ingredients
- Animal Proteins
- Plant Based Proteins
- Eastern and Botanical
- Extracts
- Fruits
- Sweeteners
- Vegetables
- Oils
- Functional Ingredients
- Herb & Spice
- Ingredients of Interest
- Starch & Fiber
- Active Ingredients

Beauty Vertical
- Clean Beauty Package
- Beauty Benefits Package
- Beauty Ingredients Package
- Beauty Ingredients Package-Sun/Deo Supplemental
- Sustainable Beauty
- Supplemental HBC Packages
  - Sunscreen
  - Deodorant
  - Oral Care
  - Feminine Care
  - OTC Medicine

Environment/Social/Governance
- Animal Welfare
- Environmental Sustainability
- Social Responsibility
- Sustainable Packaging

Insights
- Natural & Organic
- Allergens & Intolerances
- Clean Label Trends
- Plant Based Insights
- Diets – Lifestyles & Programs
- Menopause Support
- Health & Need States - Ailment, Body, Functional
- FDA Beneficial Nutrient Claims
- FDA Detrimental Nutrient Claims
- Artisan/Premium

Pet Vertical
- Pet Ingredients
- Pet Health and Need States
- Clean Label & Human Grade Pet

Bev AI
- Beer
- Wine
- Spirits
- Mixers

NIQ