

A Perspective on Wellness

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NielsenIQ

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Topics for the Journey

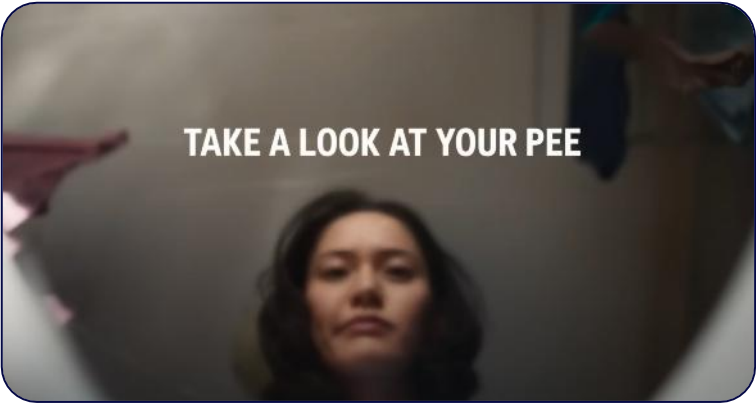
**Health and
Wellness is Driving
a Cultural
Movement**

**The
Convergence
Effect**

**Equity, Access and
the Cost Paradox**

**Trust is the New
Price of Entry**

No longer niche, *health and wellness* is shifting a *cultural expectation*



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Breakthrough Innovation

2025

North America



Athletic Brewing
Company non-alcoholic
brews (USA)



Barebells
(USA)



BODYARMOR Flash I.V.
(USA)



Buchanan's Pineapple
(USA)



Coca-Cola x OREO
(USA)



Dove x Crumbl
(USA)



**Dr Pepper Creamy
Coconut** (USA)



Duke Cannon
(USA)



**e.l.f. Glow Reviver
Lip Oil** (USA)



good2grow Snackers
(USA)



Hero Mighty Patch
(Canada)



**Jimmy Dean Griddle
Cake Sandwiches**
(USA)



**Just Bare Lightly
Breaded Chicken** (USA)



Legendary Foods
Protein Pastries (USA)



Lysol Air Sanitizer
(USA)



**Post Malone
OREO Cookies** (USA)



**Rao's Made for Home
Brick Oven Crust Pizza**
(USA)



Real Good Foods
Lightly Breaded
Chicken (USA)



**Red Bull Sea Blue
Edition** (USA)



Smucker's Uncrustables
Sandwiches (Canada)



**Taylor Farms Mini
Chopped Salad Kits**
(USA)



Topo Chico Saboros
(USA)



**Voodoo Ranger
Tropic Force IPA** (USA)

Consumer-led development drives product improvement & innovation



20g protein

<1g sugar

4-5g net carbs

**High-protein
toaster
pastries with
nostalgic
appeal**

*Legendary Foods
Protein Pastries*



20g protein

no added sugar

**No-sugar
bars that
feel
indulgent**

Barebells



2,290mg electrolytes

nothing artificial

coconut water

**Functional
hydration with
real ingredients**

*BODYARMOR
Flash I.V.*



non-alcoholic

lower calories

lower carbs

**Non-alcoholic
beer for
wellness
seekers**

Athletic Brewing



more protein

low carb

gluten free

no BS flours

**Keto-friendly
frozen chicken
with high
protein**

*Real Good Foods
Lightly Breaded Chicken*



no antibiotics

no added hormones
or steroids

nothing artificial

**Clean-label
for health-
conscious
families**

*Just Bare Lightly
Breaded Chicken*

2026 Insurgent Brands list

US Insurgent Brands criteria:

\$35M+*

Sales in tracked channels

>10x

Category growth

Existing Insurgent Brands

Food



Non-Alcoholic Beverages



Alcoholic Beverages



Beauty and Personal Care



Other

Vitamin, minerals and supplements



Pet

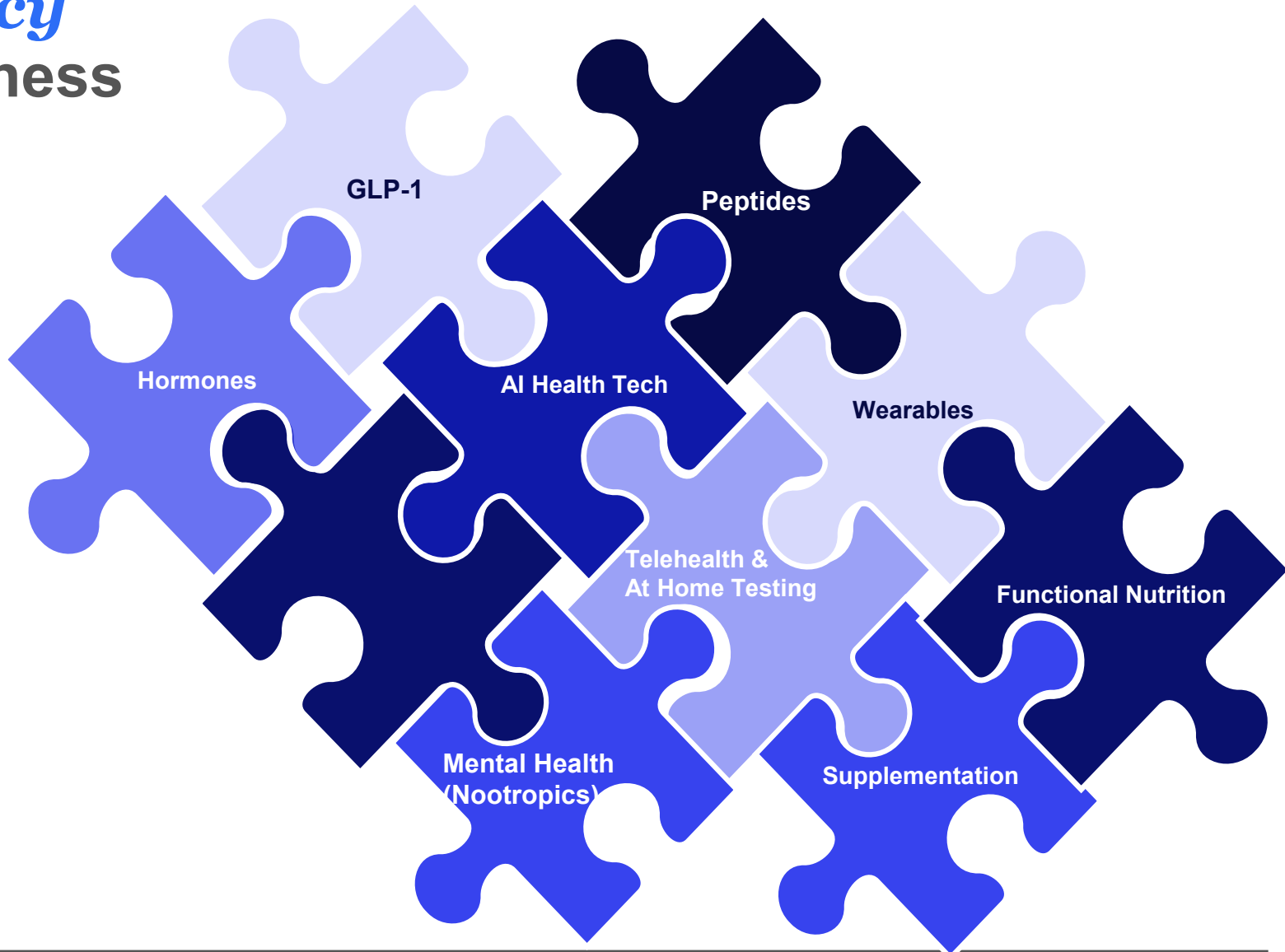
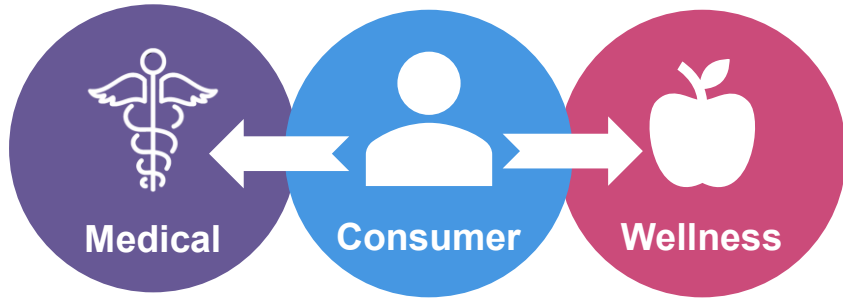


New to the list in 2026



Note: Excludes brands acquired >2 years ago by large CPGs, or with negative YoY sales growth in '23-25 or <10% Brand CAGR (in the category);
*Adjusted in 2026 from \$25M to account for inflation Source: Nielsen IQ; Bain analysis

Consumers, not providers,
increasingly have agency
over their health and wellness



Wellness Shifting Dimensions

REMOVAL

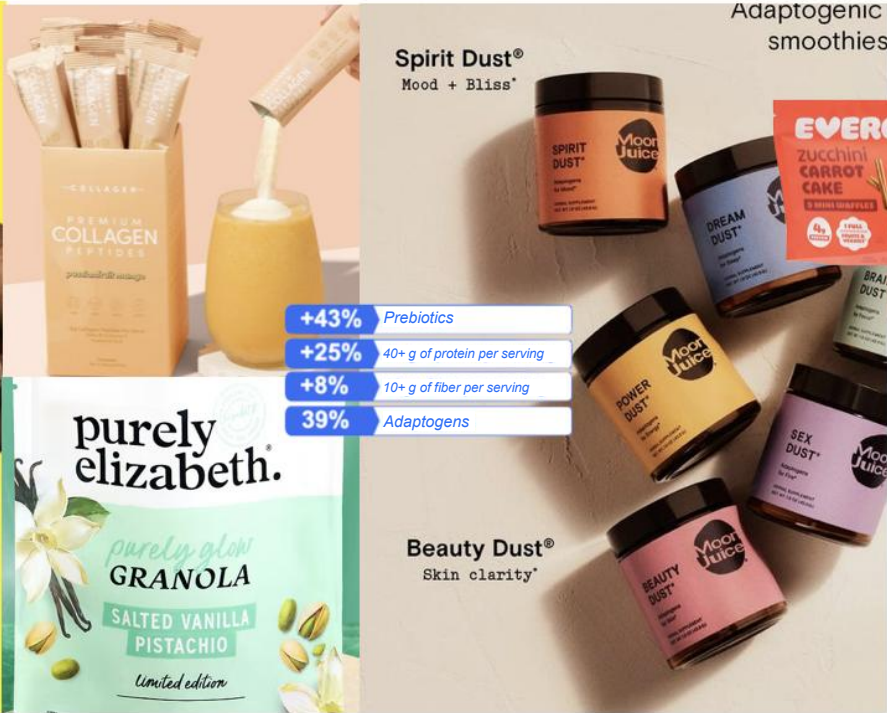
How wellness *borrowed* the codes



Wellness used to mean taking away, the era of low-cal, fat free, no parabens

ADDITION

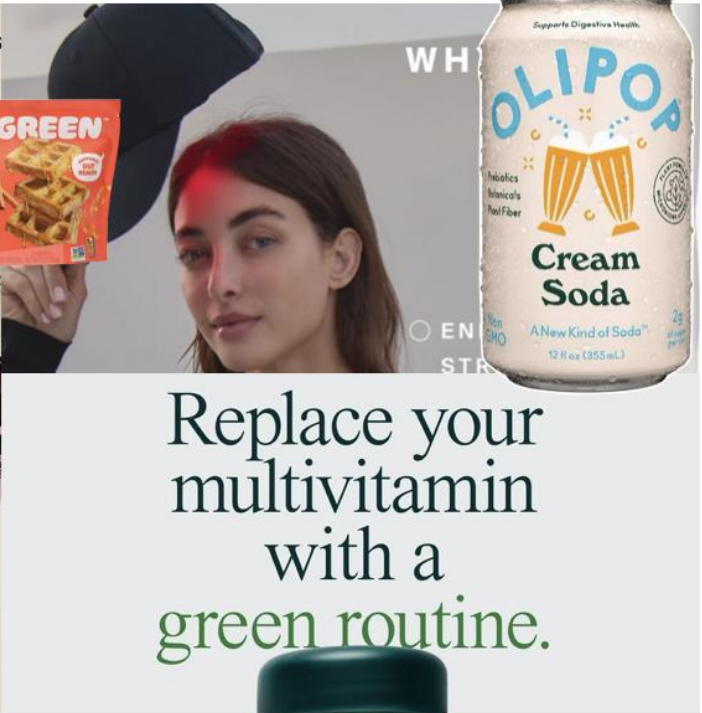
How wellness *blurred* the codes



Shift toward *adding* value + protein, + fiber, + adaptogens and blurring of food, beauty, supplements

OPTIMIZATION

How wellness is *integrating* the codes



Every bite, sip, application, counts toward cognitive health and quality of life



**Wellness will be measured
not by absence or addition but
by **impact and effectiveness****

Wellness Shifting Dimensions

CERTIFIED AUTHORITY

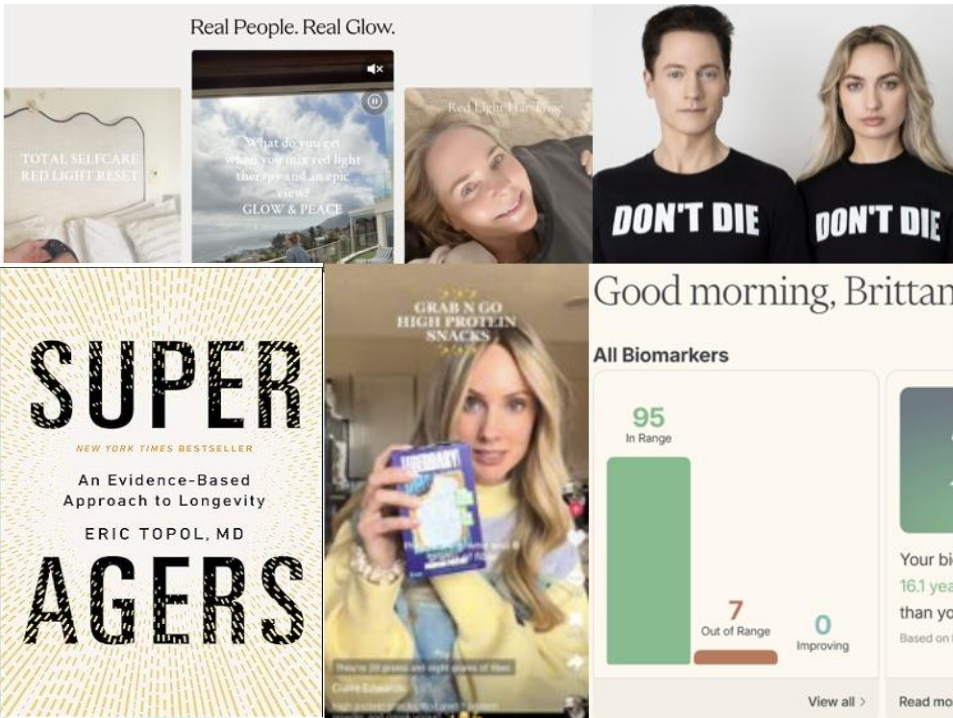
How wellness *borrowed* the codes



Credibility demonstrated through organizations, certified advisors and government

SOCIAL PROOF

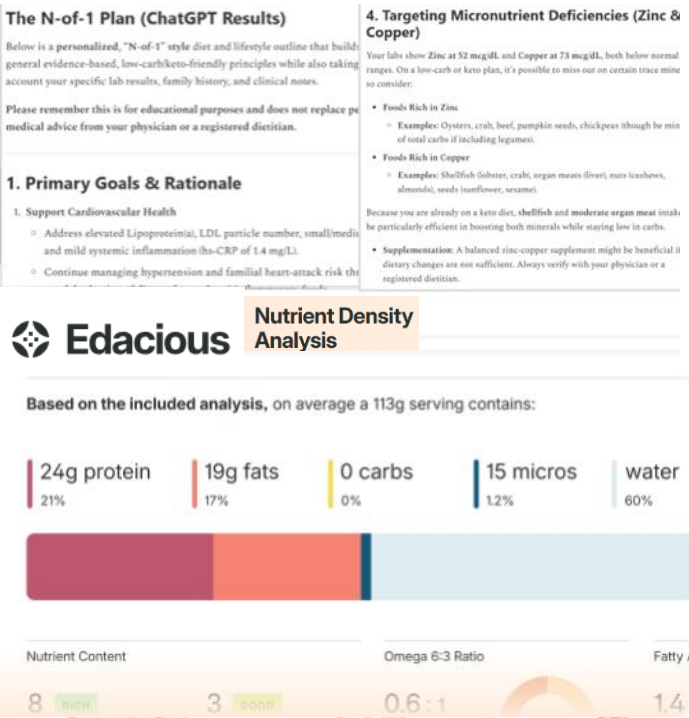
How wellness *blurred* the codes



Social media wellness becomes performance-driven and identity-based

CURATED VALIDATION

How wellness is *integrating* the codes



Trust rebuilt through *data transparency and AI-enabled curation*. Proof points replace slogans; personalization becomes social capital



The next wave of influence
comes from **personalized
proof**, not transparency
as personality

Wellness Shifting Dimensions

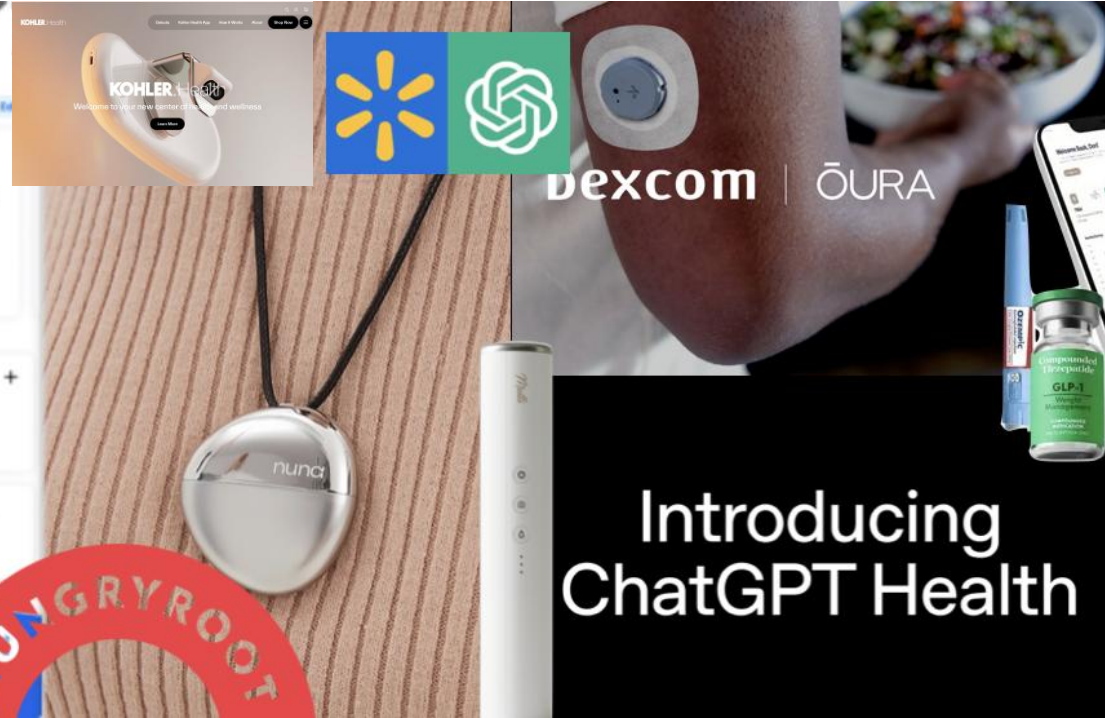
SIMPLISTIC SPECIFIC

How wellness **borrowed** the codes



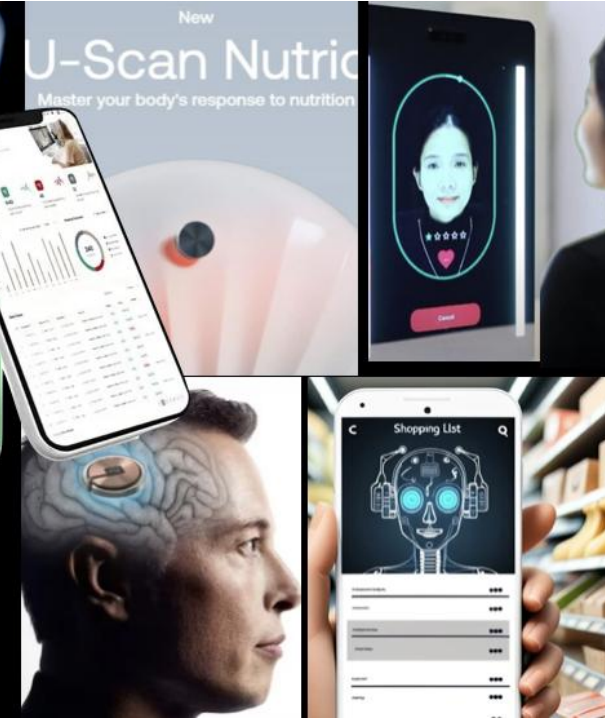
COMPANIONS

How wellness **blurred** the codes



ECO-SYSTEMS

How wellness is **integrating** the codes



Technology was rooted in foundational fundamentals and health tracking where each product worked in isolation

Technology is interacting with each other across categories, products and demonstrating behavioral changes

Technology will empower holistic health curation



**Tech will shift from tracking
behavior to directing behavior**

Consumers have real-time visibility into our own bodies

74% of consumers would prefer a tech product with extra health and wellness features over one without.

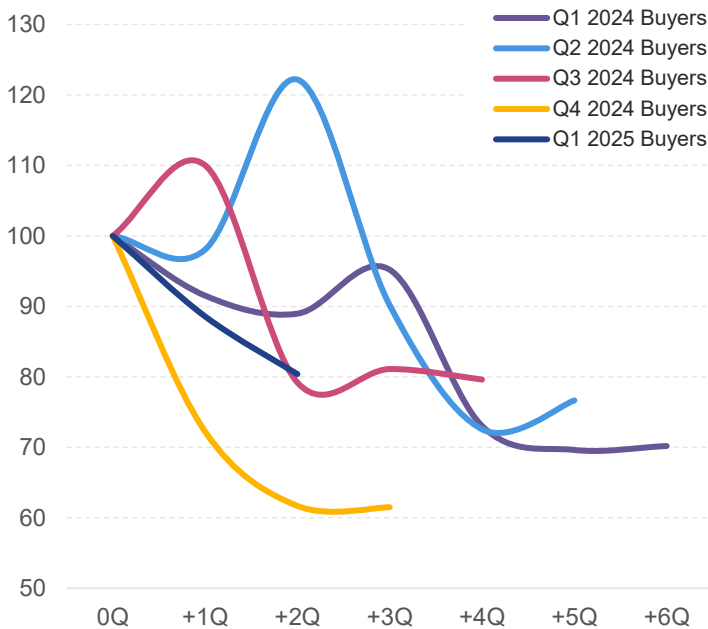
63% say “health-focused technology products are effective in helping my health and wellness”

57% would share select personal health information in return for smarter, more personalized recommendations to help achieve health goals.

New wearable buyers cut alcohol, result of personalized feedback on sleep and recovery?

Buyers who purchase Oura Ring, Whoop, Lumen, Tile, FitBit, or Garmin BeVAI

\$ Sales in Subsequent Quarters



Top Selling Tech Wearables Brands on Amazon Prime Day 2025

By Sales	
Apple	OURA
GARMIN	Galaxy
fitbit	AMAZFIT

Top motivations for buying health tech **healthier cooking, overall well-being, tracking physical activity, and improving sleep quality.**

Source: NielsenIQ Global Wellness Study; Apple App Store, NielsenIQ Digital Purchases, October 2025 top Health and Fitness and Medical apps

Wearables *impact nutrition choices almost 2x more* than wearers intend

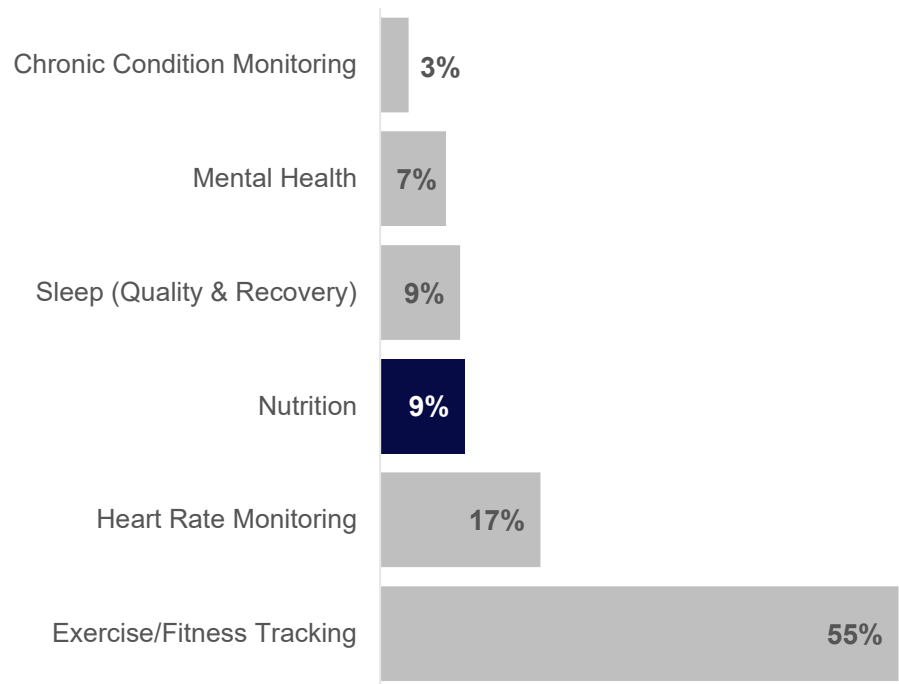
36%
of U.S. adults use a health wearable

62%
of wearable users have worn their device for >1 year

1.6x
higher wearable adoption among GLP-1 households vs. general population

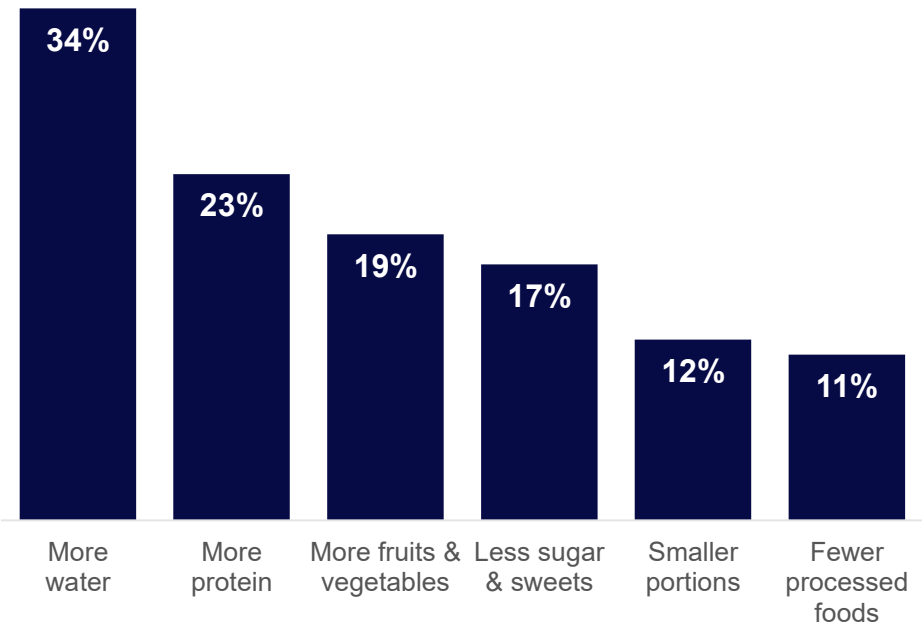
Nutrition is a low stated motivation for wearable use...

Top motivations for wearing a wearable



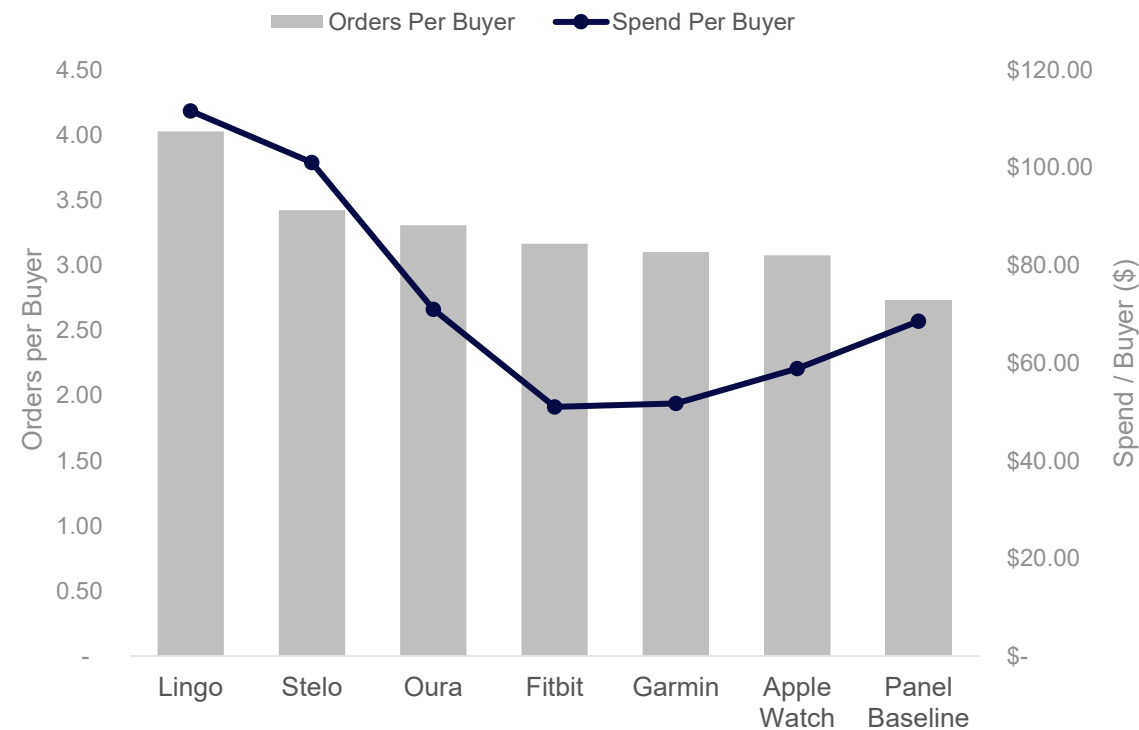
Despite low intent, wearable use drives meaningful nutrition behavior change

Behavior change as a result of using a wearable

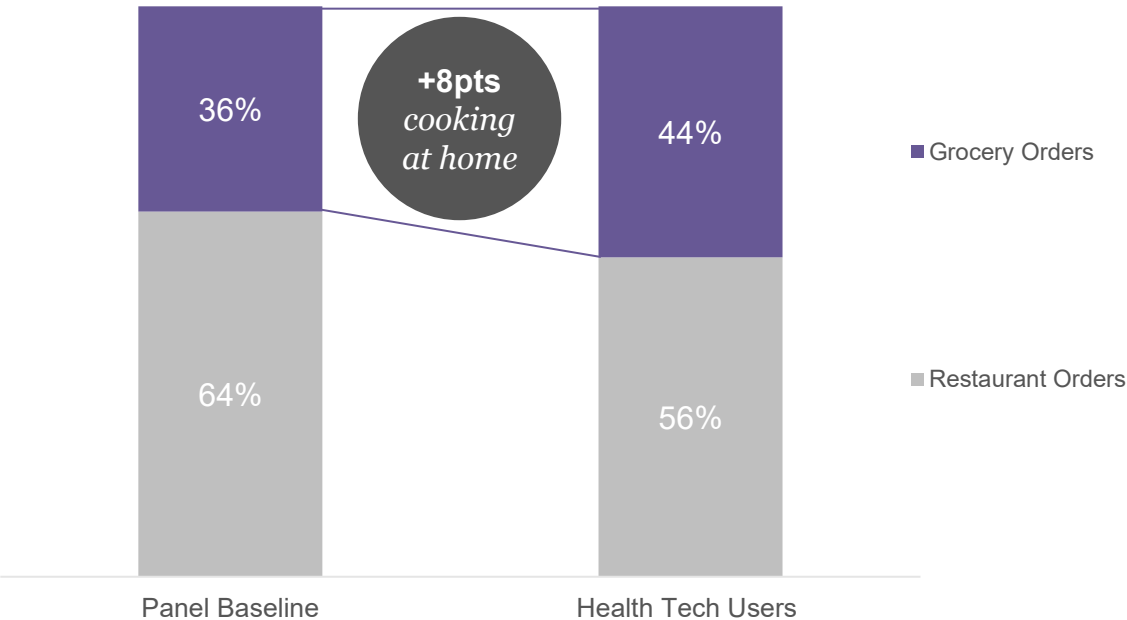


Wearable users focus on health and appear to *prioritize cooking at home* versus eating out

Supplement Orders vs Spend per Buyer by Cohort

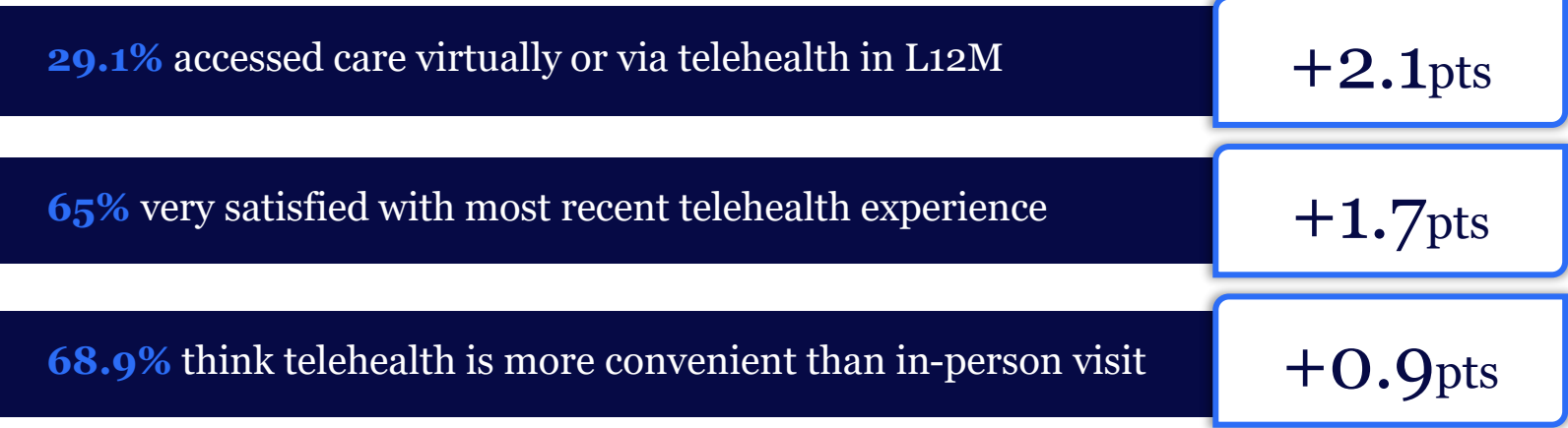
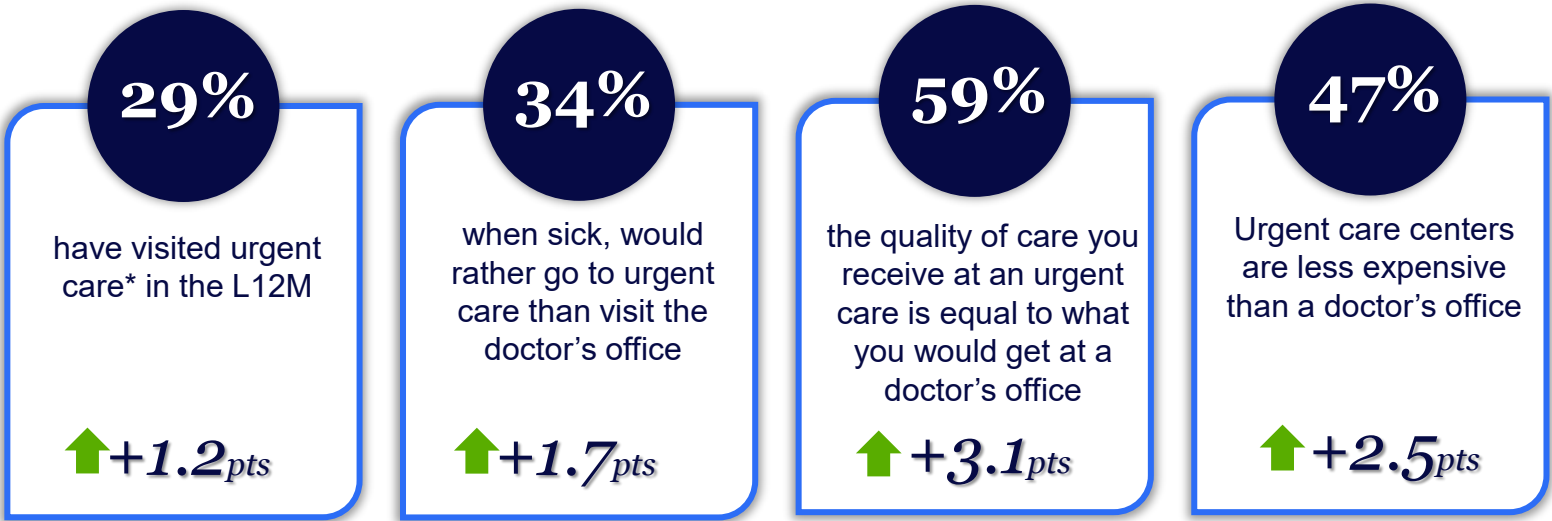


Grocery & Delivery Order Comparison (%)



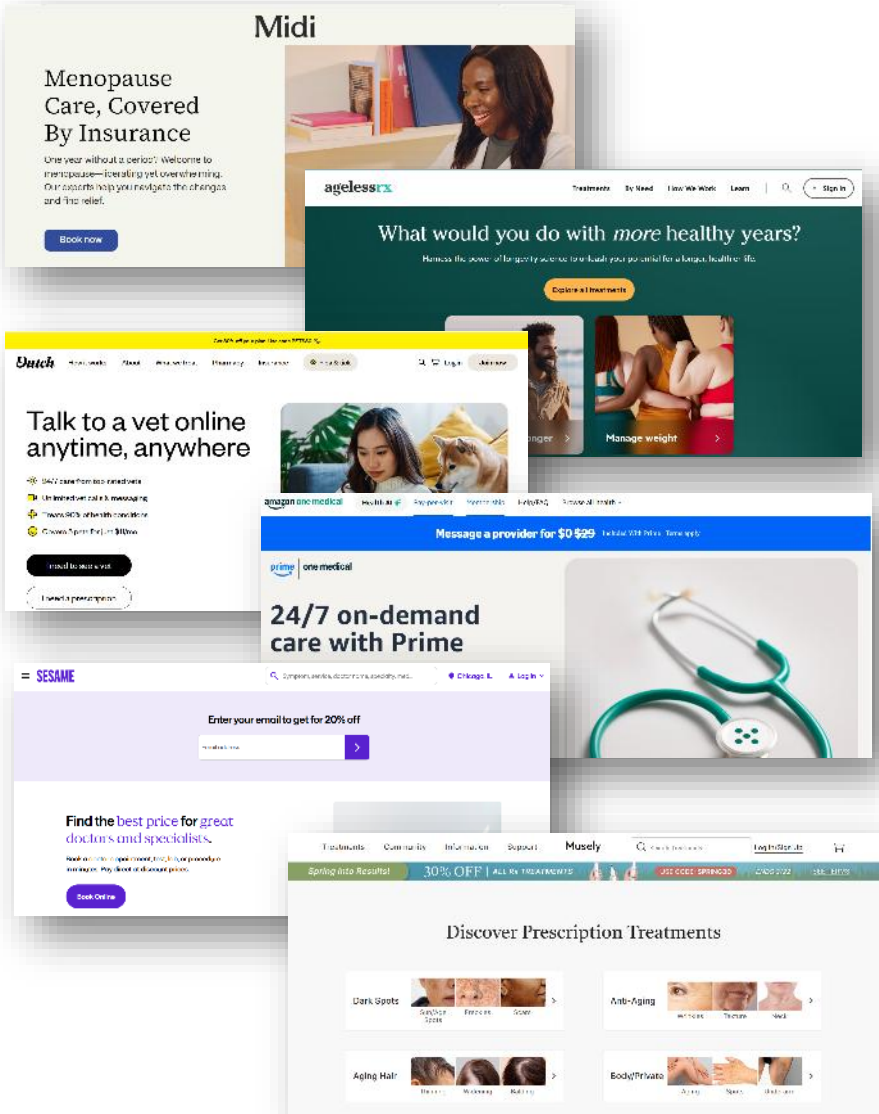
Source: NIQ US E-Receipt Panel, merchants used for this analysis included DoorDash, UberEats, Instacart, FreshDirect, GrubHub, and Amazon Fresh.

Redefining the healthcare experience

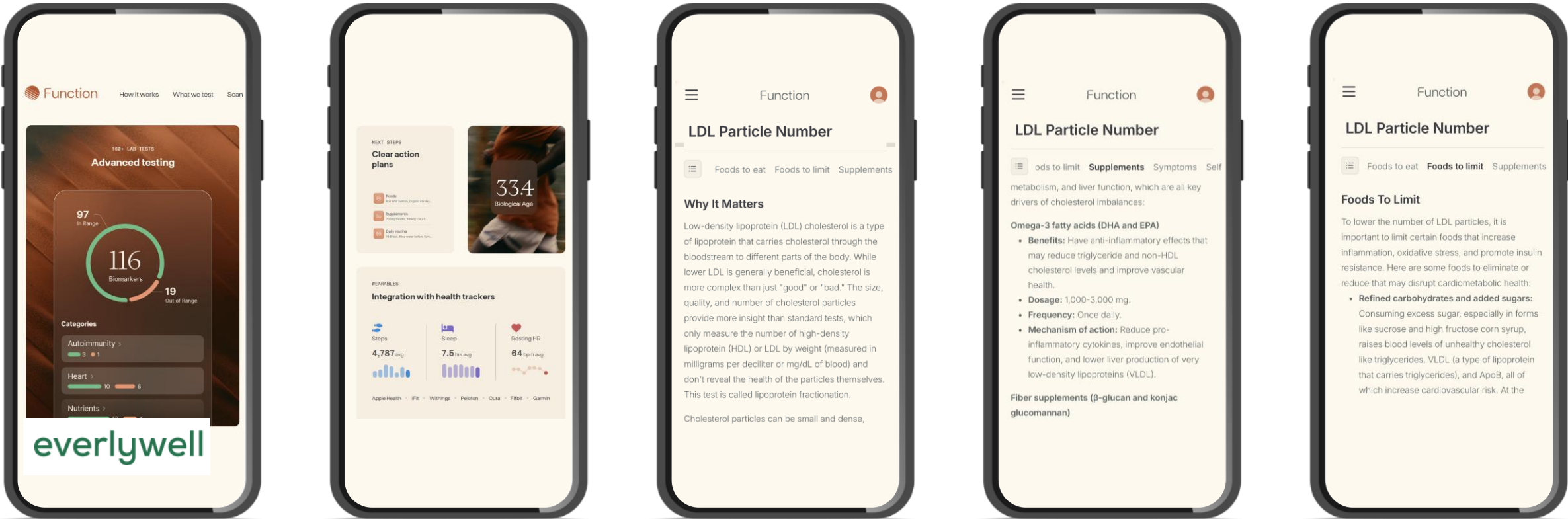


*does not include Retail Health Clinics: 30.1% of the US has visited in L12M

MRI Simmons 2025 Health & Wellness Survey: ~260M US Consumers – Any agree



Depth of testing is now in consumer hands with specific recommendations



Consumers
have choice

superpower

Quest

Mito

everlywell

EREWTHON

Function
World's
Healthiest
Smoothie

Peptides moving quickly from clinic to consumer

- **30G needles**
(peptide self-injection protocols) **+793%**
- **31G needles** (GLP-1 pens, dose slitting, needle replacement) **+242%**
- Growth in GHK-Cu, Matrixyl, Argireline, BPC-157

Metabolic, weight & energy regulation	Cognitive, mood & aesthetic health	Longevity, growth hormone & performance	Tissue repair & bone/joint health
Focus: weight & glucose control, energy balance	Focus: brain & mental health, skin health	Focus: avoiding chronic disease, energy balance	
Peptides & primary use case: • GLP-1 & 2: metabolic health, weight reduction, insulin balance • MOTS-c, SS-31 & NAD+: mitochondrial health and energy	Peptides & primary use case: • Semax & Selank: mental performance & anxiety • Oxytocin: mood regulation, social stimulant • GHK-CU: skin regeneration, hair growth, anti-aging • Melanotan I&II: tanning and skincare	Peptides & primary use case: • GLP-1 & 2: diabetes, heart disease, dementia • Tesamorelin, Ipamorelin, Sermorelin: growth hormone stimulation • PNC-27: anti-cancer	Peptides & primary use case: • BPC-157: tendon & ligament repair • TB-500: muscle & soft tissue repair • Collagen: structural support



Why watch?

This will start to impact their CPG purchases. It's an early signal of next-generation ingredient demand and proof of unmet need across core categories and an expansion beyond weight loss into a full ecosystem

Several thousand peptides are currently being studied for therapeutic use – with 100 - 200 estimated to be approved or in late-stage research

Source: FDA, desk research, NIQ US E-Receipt Panel; gray market activity captured across five domains; Amazon needle purchases tracked by gauge (30G/31G/32G).

A Practical Wellness Framework

Continuous measurement/Optimization: Real-time visibility of markers * Early discovery of healthspan threats * Comprehensive information

Continuous measurement/Optimization

Integrated Health
“How You Show Up Today”

Goals

- Physical health
- Mental performance and presence
- Skin vitality and appearance

Long-Term Resilience
“Healthspan”

Goals

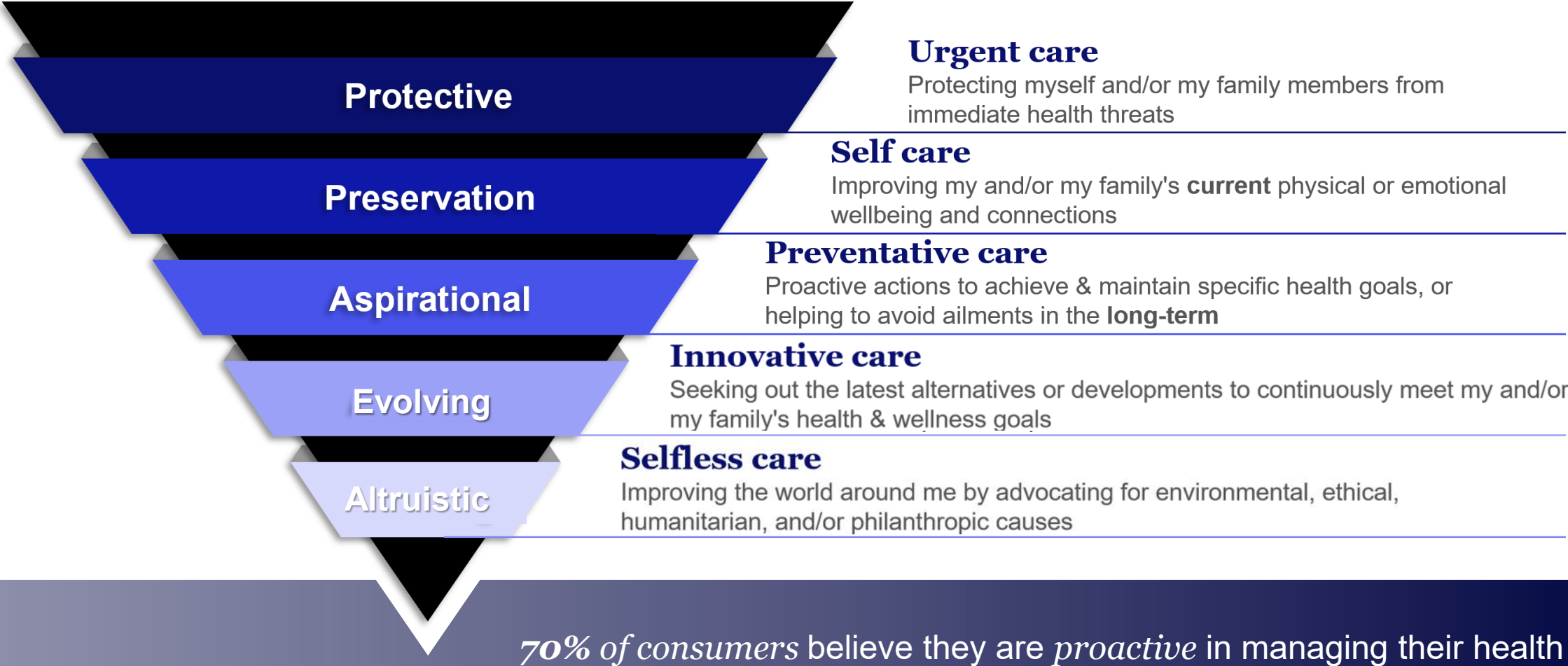
- Extend healthspan
- Avoid chronic diseases
- Metabolic optimization

Continuous measurement/Optimization

Functional Inputs
“Nutrition, Supplementation, Personal Care and Medication”

Continuous measurement/Optimization: Real-time visibility of markers * Early discovery of healthspan threats * Comprehensive information

Consumer Hierarchy of Needs on Wellness



NielsenIQ research on Consumer Hierarchy of Needs: Wellness, NielsenIQ 2025 Global Health and Wellness Survey, December 2025 BASES Omnibus

GLP-1 is reshaping CPG, impacts a broad population and continues to evolve

Market Context and Trajectory

- GLP-1s have moved from niche to mainstream, with explosive awareness growth since 2023 and acceleration in 2025.
- Oral GLP-1s and *broader indications* (cardiovascular, sleep apnea, etc.) will expand the addressable user base, increasing durability of impact on food, beverage, and wellness categories.
- Adoption is no longer limited to affluent, older consumers—*demographics are diversifying* (younger, lower income).

Treat as a long-term demand shaper, not a short-term headwind.

Consumer Journey

- Purchasing shifts are not linear and *patterns change over time*: pre-GLP sees higher than average, then spend contraction, then stabilization.
- *Side effects understanding* evolving with potential for CPG support (GI, hair loss, incontinence, aesthetics, oral health)
- Diabetes vs. weight loss and compound vs. Rx creating *unique user profiles*
- Rebound/cycling and bounce back and nutrition deficiency challenges illustrating *need for behavioral support and*
- Expansion from weight loss to broader metabolic health

Design for the full journey, not just initial phase. The journey continues to unfold.

CPG Impact

- *Intentional behavioral changes*/eating: *protein, fiber, organic, sugar conscious, nutrient dense, energy, muscle health, clean label.*
- Shifting prioritization of personal care, OTC, beauty, supplements throughout journey.
- Category-specific focus areas: *protein, fruits and vegetables, hydration, vitamins and supplements, health and beauty, GI support.*
- Categories under pressure: calorie-dense snacks, sugary sweets, large portion indulgence formats.

Growth comes from reformulation, right-sizing and repositioning

A person is shown in a yoga pose, standing on a rock in the middle of a body of water. The person's reflection is visible in the water. The background shows a forested shoreline and mountains in the distance under a soft, hazy sky.

*The convergence effect:
categories and channels
are blurring*

NielsenIQ

Wellness blurring across retail lines

Costco announces partnership for discounted fertility treatments

WHY ULTA BEAUTY IS INVESTING IN A DEDICATED WELLNESS EXPERIENCE

Walmart Health: Is the Retail Giant Becoming Healthcare Gateway?



Pick up your medication here

Amazon

Amazon Pharmacy adds in-office kiosks for immediate prescriptions



Target

Target added 2K items to wellness assortment



Ulta

Feminine Care
Supplements
Aromatherapy
Personal Care



Sephora

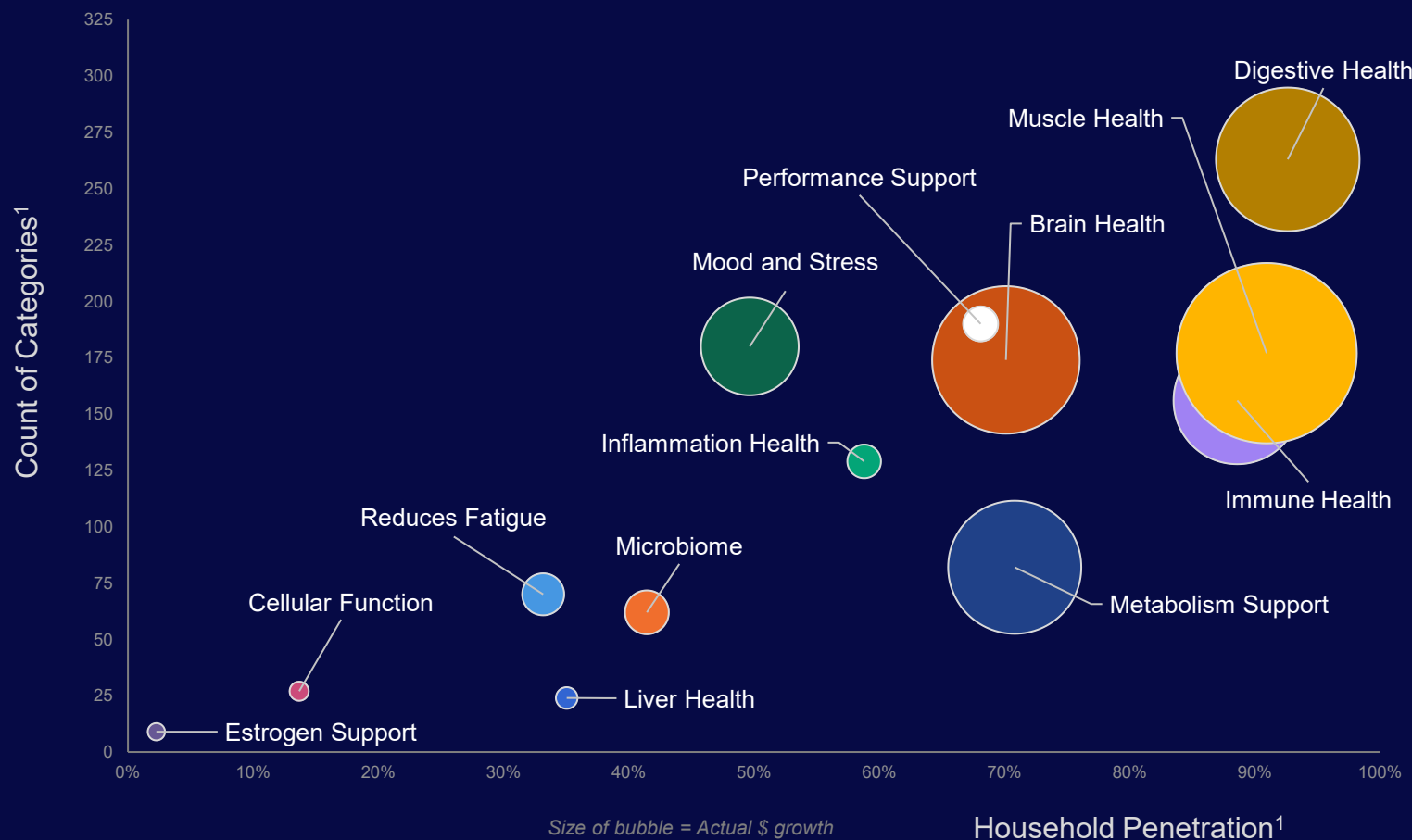
Supplements
Skincare
Devices
Feminine Care

LabCorp is growing +6.8% in sales over the last six months

Quest Diagnostics is growing +7.2% in sales over the last six months

Health priorities continue to grow across the store

Sizing the growing Health & Need Opportunities - 2026



What changed from last year?

This is Full View Measurement (includes Amazon and Costco) and Omnishopper, while last year was only xAOC and Homescan.

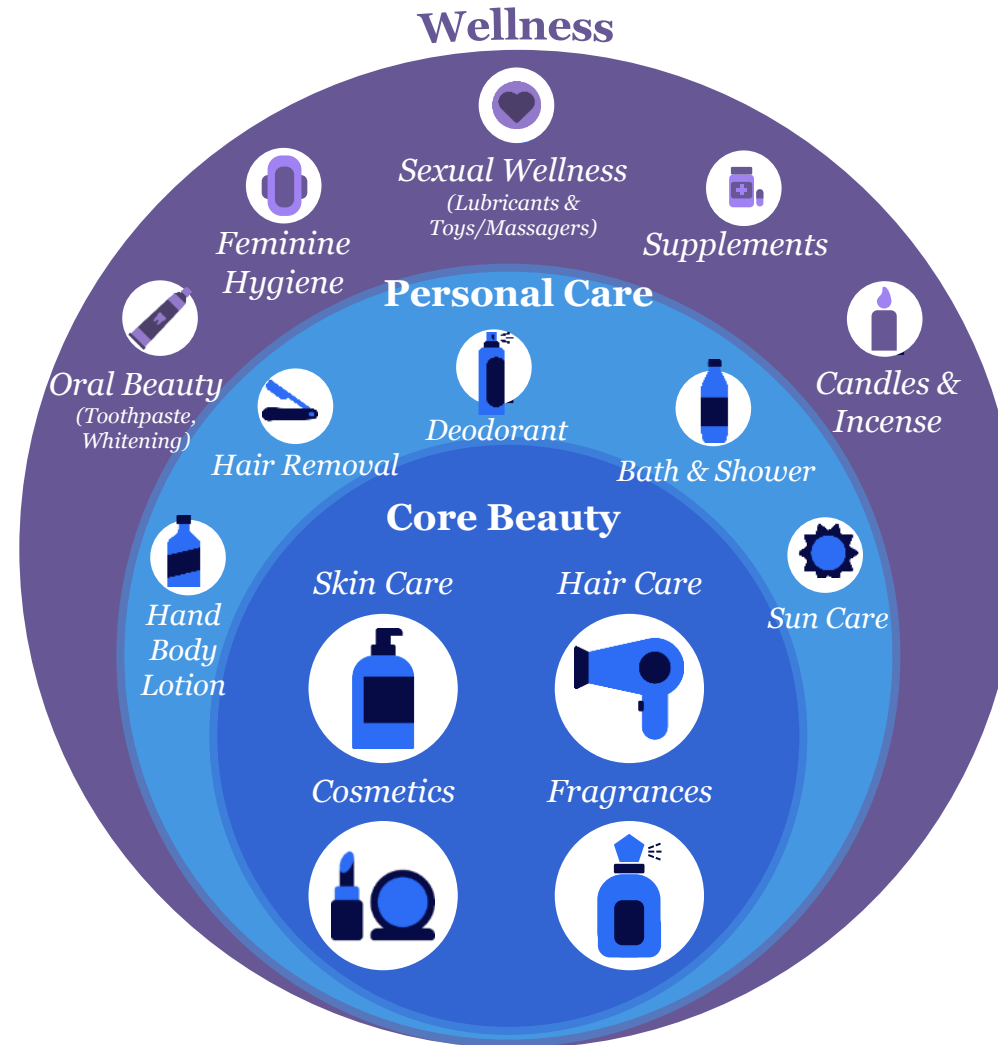
On average, increasing household penetration by 10+%

Source: Count of Categories and Sales growth = NIQ RMS Full View + Costco, 52 weeks ending December 27, 2025; Household Penetration – NIQ Omnishopper; Total US, Total Store - Health & Need States NPI claims, 52 w/e December 27, 2025

Wellness expands the beauty & personal care opportunity by 37%

Modern beauty isn't confined to cosmetics - daily rituals in wellness, health, and personal care are increasingly part of the beauty ecosystem.

Beauty Within a Wider Wellness Ritual



Value % Chg. vs YA

+10.0%

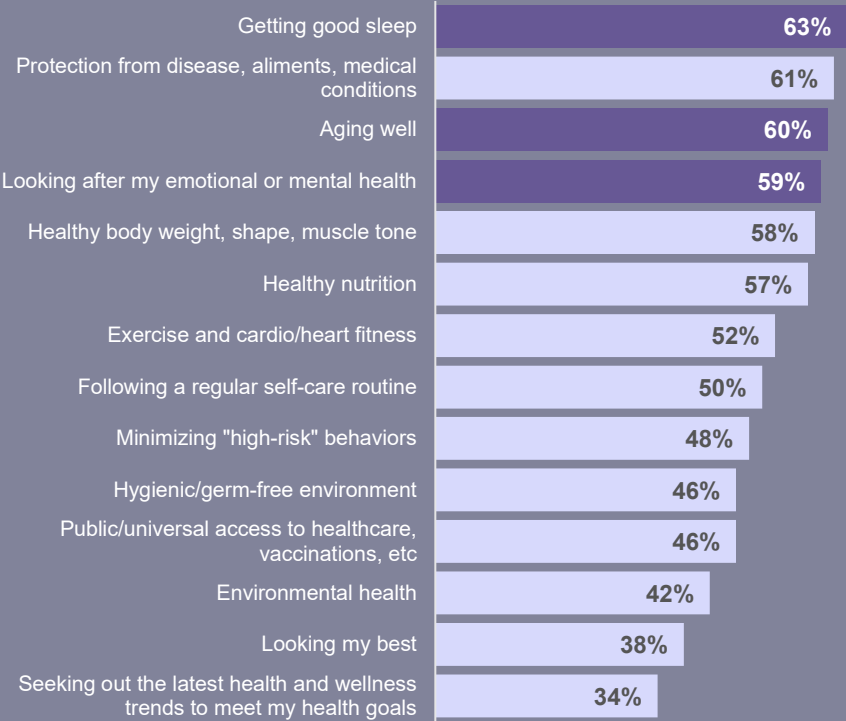
+8.8%

+9.6%

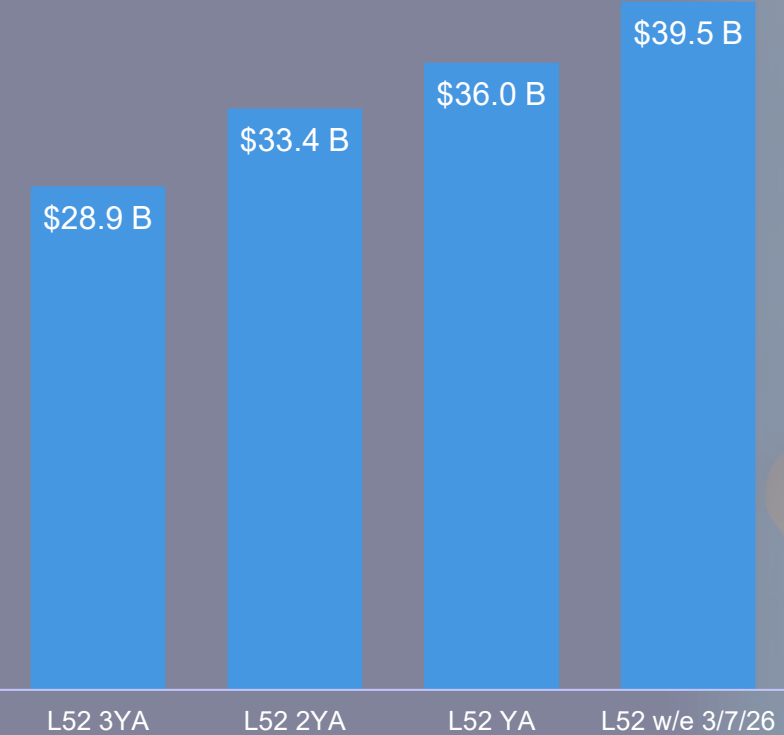
Source: NielsenIQ Omnishopper Panel Total US Latest 52 weeks ending 02/21/2026

Consumers continue to prioritize brain health, cognitive function and mental health

Are the following items more important to you now than they were five years ago?



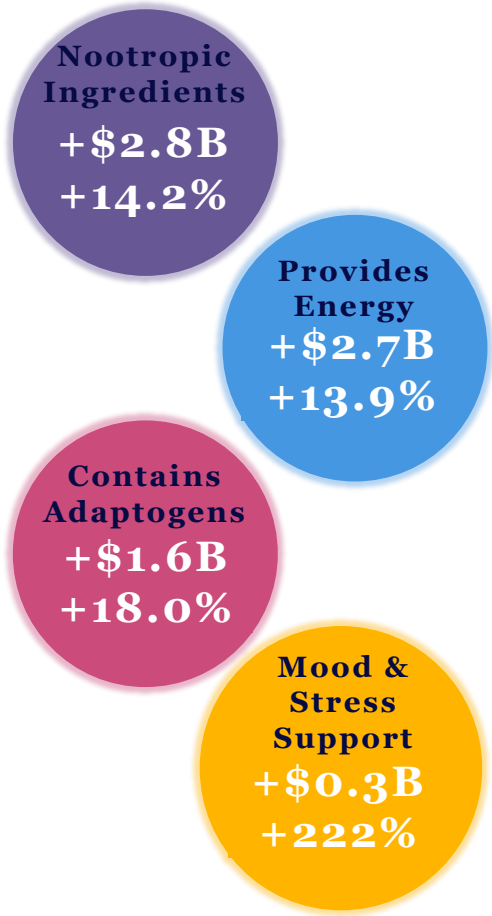
*Nootropics Ingredients Qualified
Total Store - \$'s*



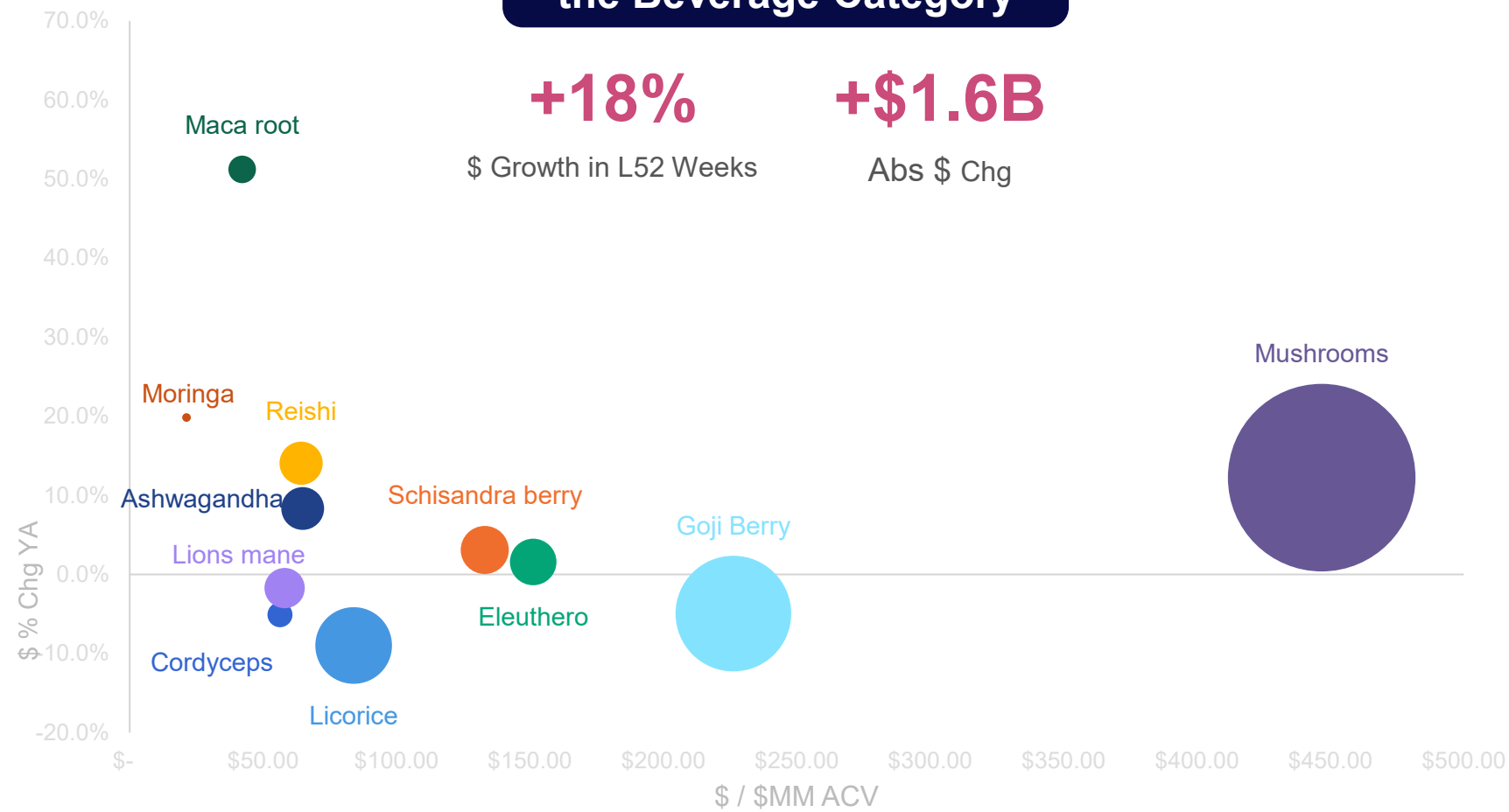
Source: NIQ Product Insight, Full View Measurement, data ending 1/24/2026

Functional beverages provide a breadth of benefits, exceeding **\$27.6 B** in dollar sales (+11.9%)

Growing Functional Beverage Attributes

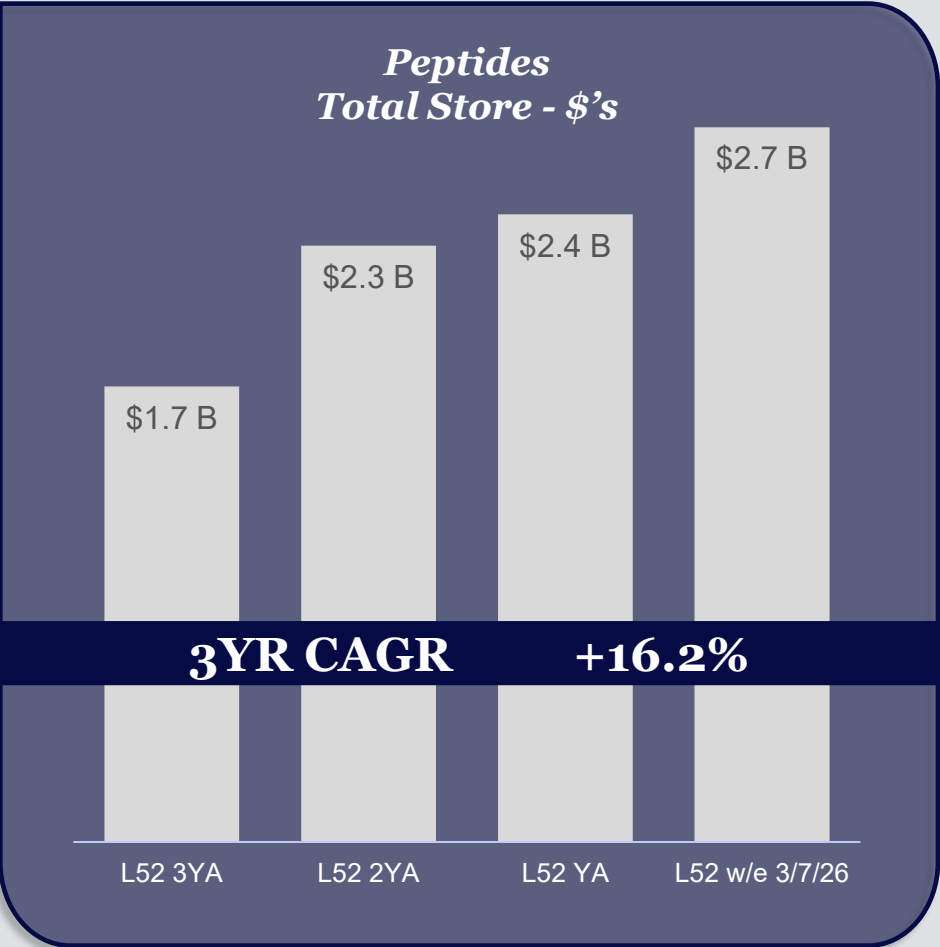


Adaptogens Trend across the Beverage Category



Source: NielsenIQ Retail Measurement | US Socialization TSR (Synd) | Total US Full View (Custom Model) + Conv | CY= 52 Weeks ending on 02/14/2026 | Functional NPI Characteristics for Beverages

Peptides surge across categories, driven by Health & Beauty and Pet



82% of Peptide-qualified items are found in Health & Beauty, up 48% (vs 3YA). Roughly 1/3 are facial moisturizers and 1/3 are supplements

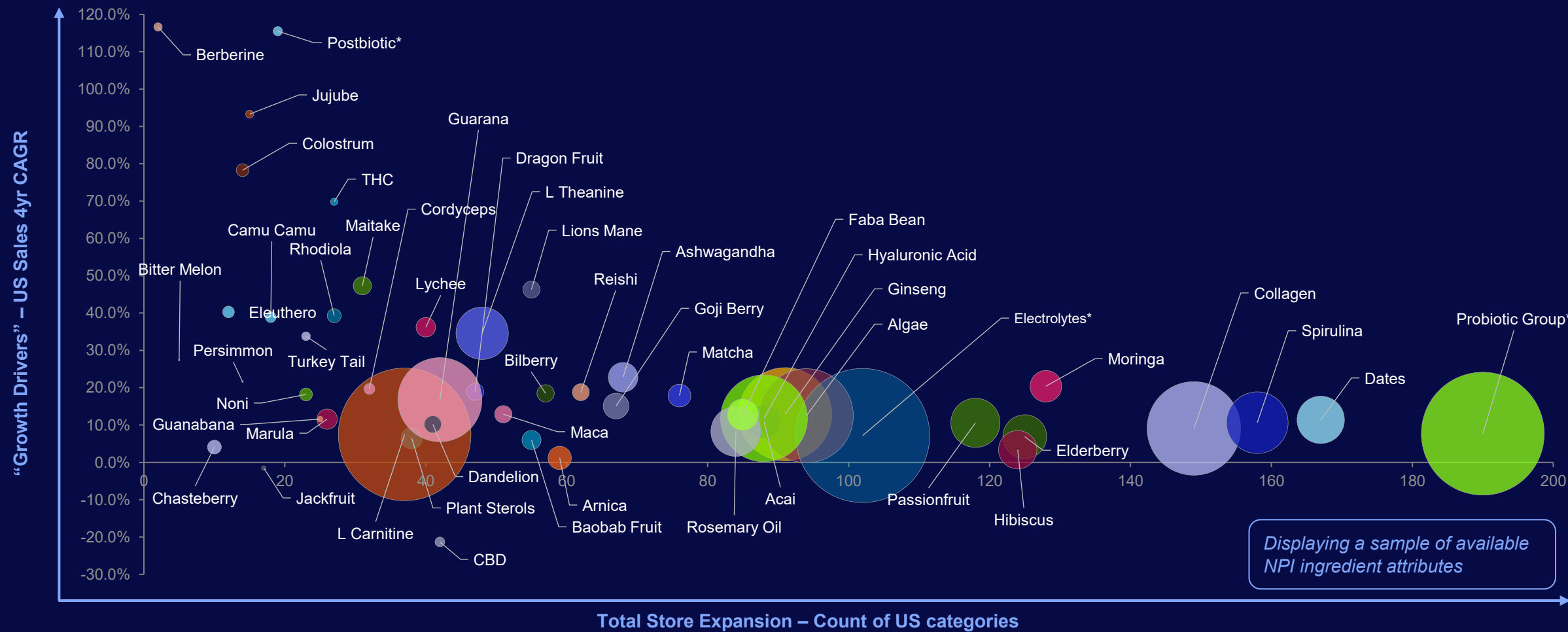
401% growth in Peptide-qualified dog food (vs 3YA)



Source: NielsenIQ Product Insights, Full View Measurement + Costco, data ending 1/24/2026

Ingredient growth across the store indicates blurring of lines of function and botanicals

Ingredients across the store



Bubble size denotes total sales in L52 week All attributes represent QUALIFIED ingredients on package—those indicated by an * symbol represent STATED claims on package
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 October 4, 2025

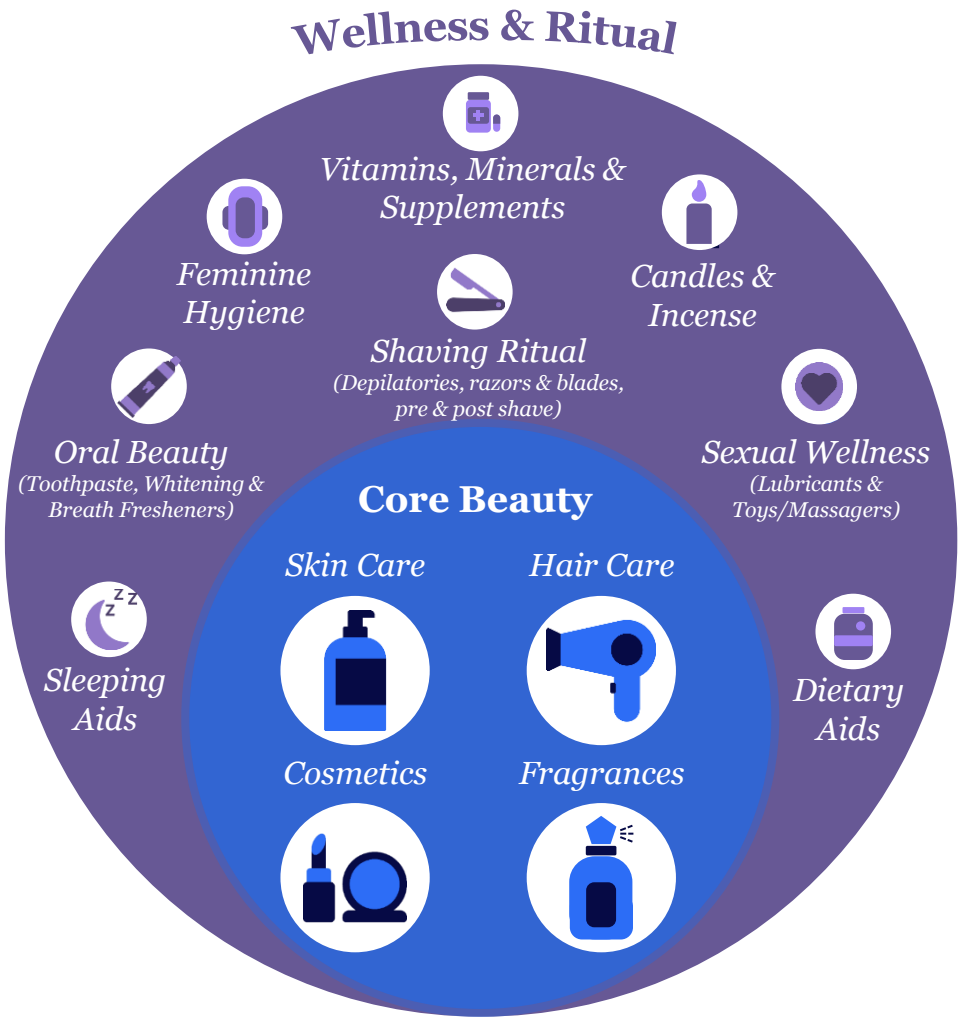
Wellness & Ritual expands the beauty opportunity by 64%

Discretionary Wellness
(39% of wellness & ritual value)

Elevated Functional Routines
(61% of wellness & ritual value)

Beauty Within a Wider Wellness Ritual

Modern beauty isn't confined to cosmetics - daily rituals in wellness, health, and personal care are increasingly part of the beauty ecosystem.



Value % Chg. vs YA

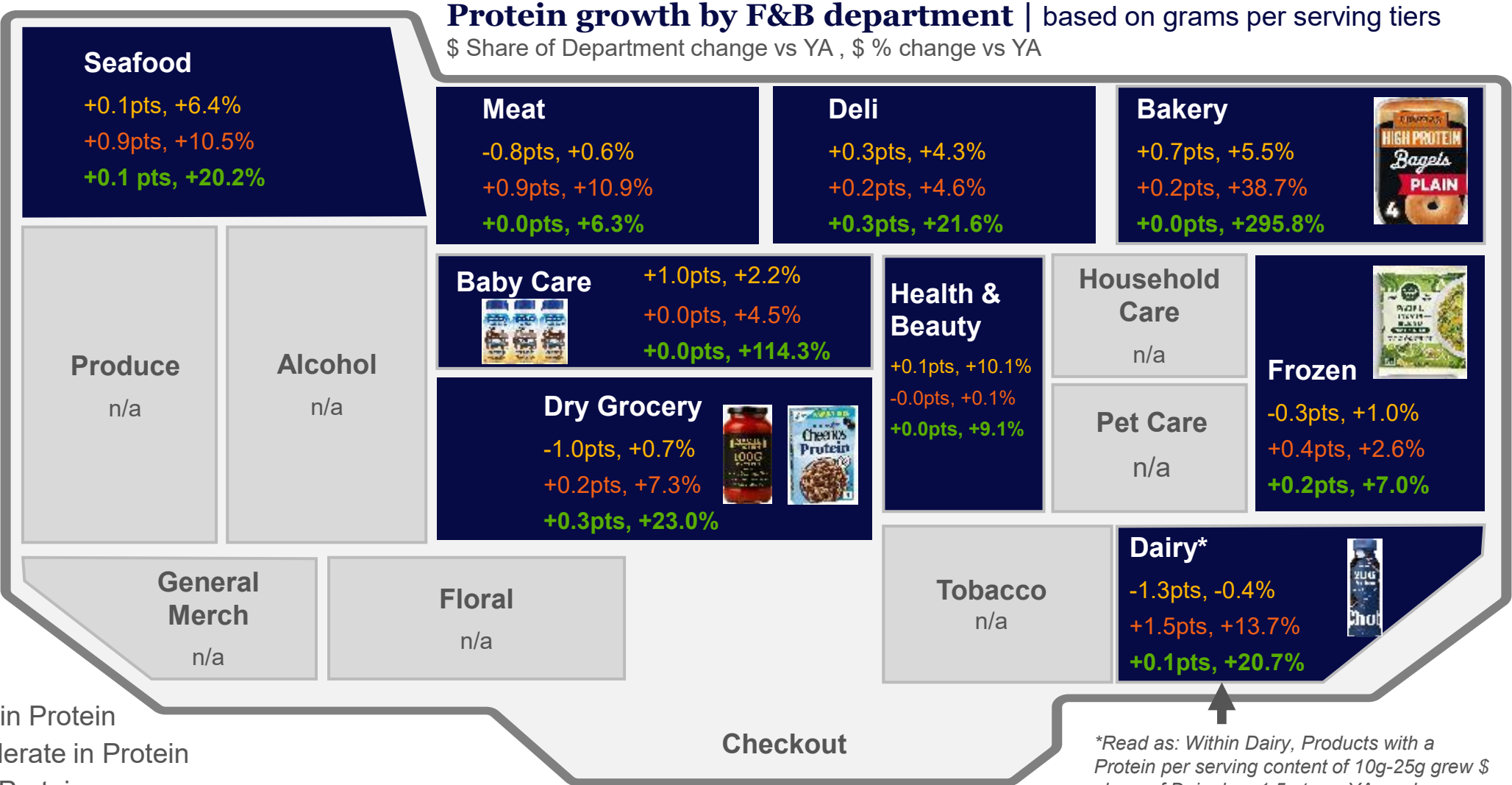
+10%

+8%

Source: 58 Markets - NIQ Omnisaies, Omnishopper panel, Strategic Planner Global – Latest 52 Weeks July 2025 | This % indicates how much larger the total value opportunity becomes when wellness and ritual are included in the definition of beauty

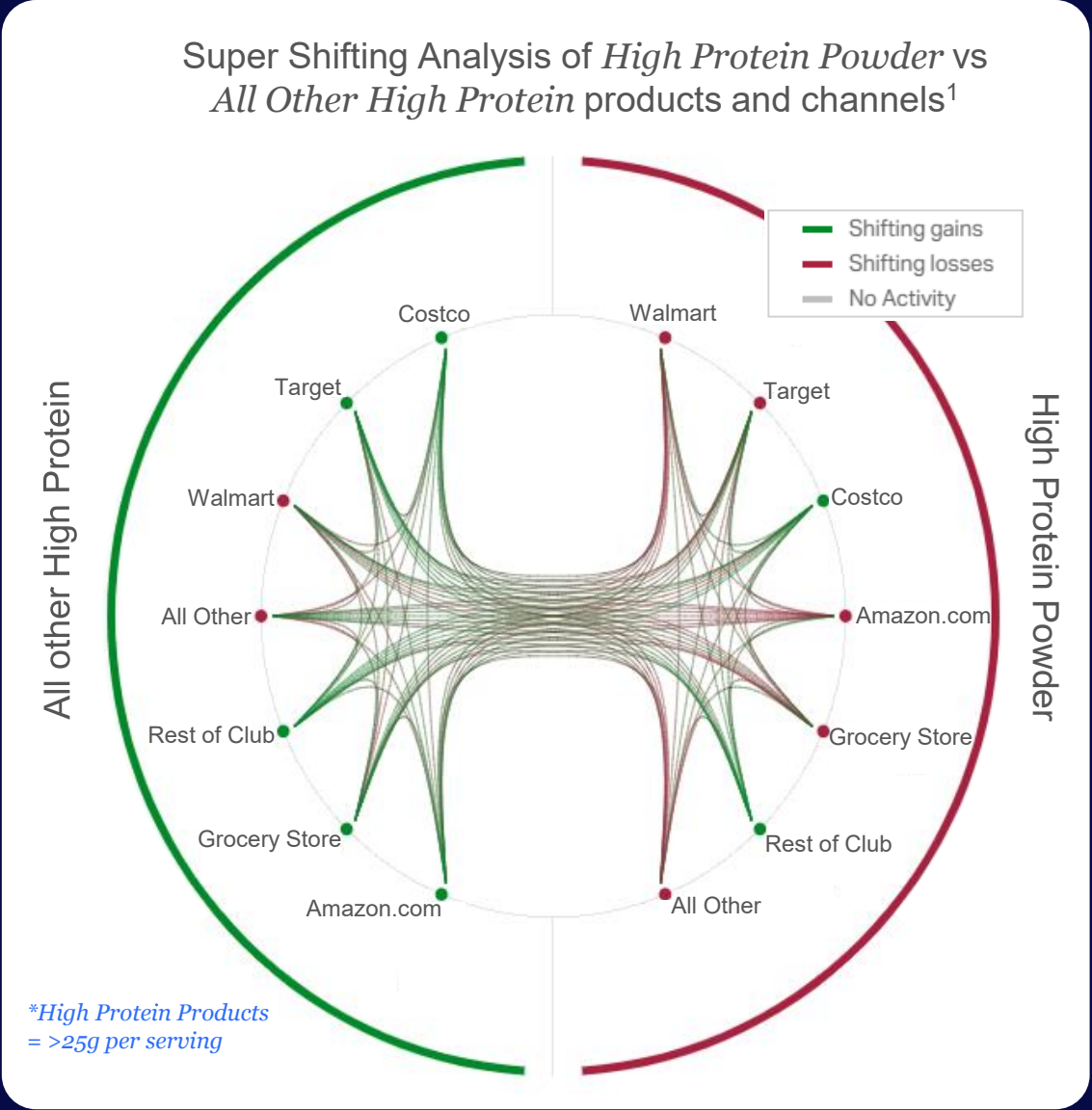
Protein's growth is ubiquitous across the store

60%
of consumers say
they are making
an intentional
effort to *consume
more protein
every day*



Source: Retail Measurement Services, NIQ Product Insight, powered by Label Insight, Full View Measure Total Store Syndicated Data, Full View incl xAOC, Amazon 1P, Costco | Latest 52 weeks w/e 03/14/26

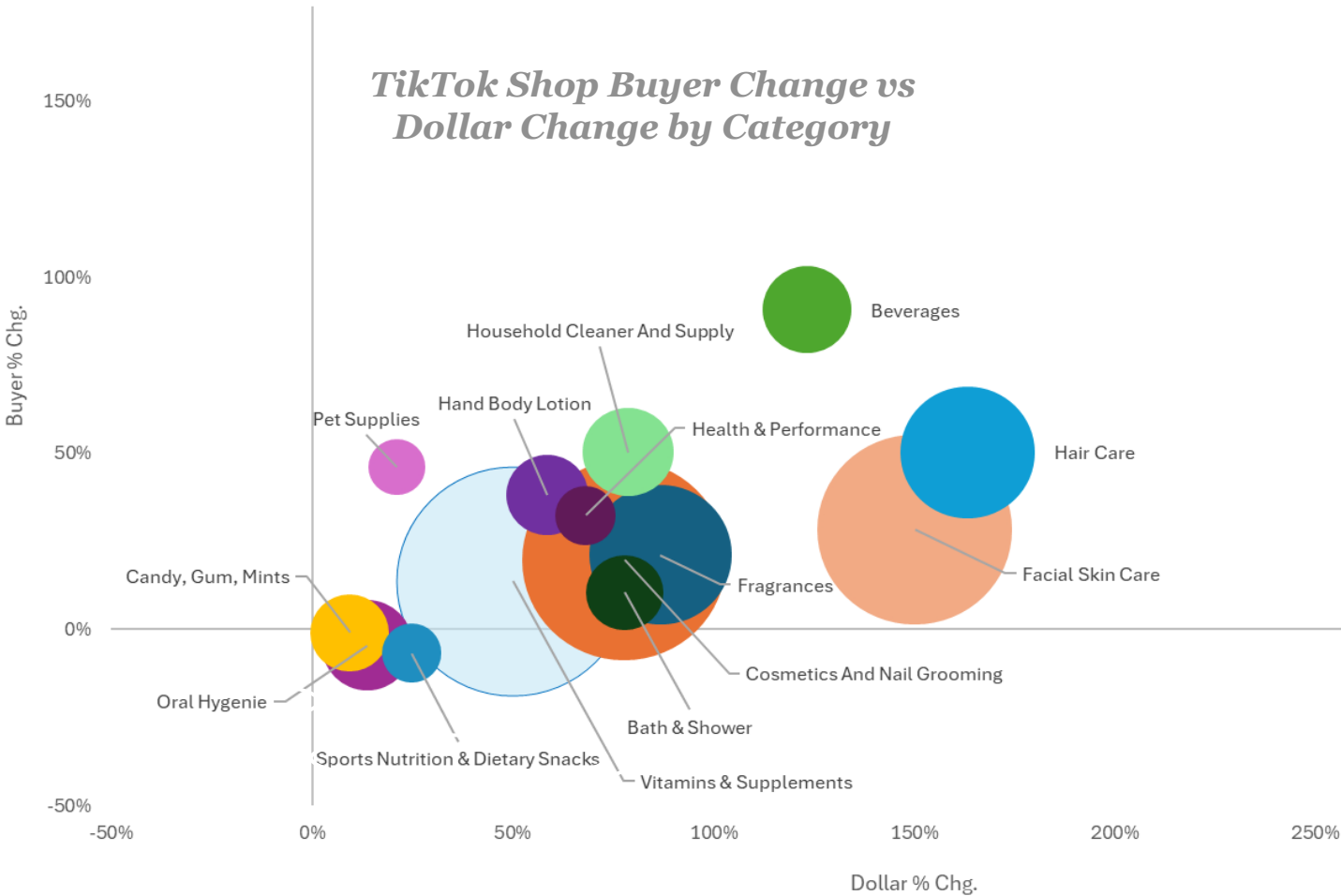
Protein prioritization
creating shifting
across the store and
across channels



Value is shifting *away from Protein Powder* to other High Protein offerings throughout most channels

Source: NIQ Expanded POD Omnishopper – Super Shifting, Total Store, Total Outlets, 52 weeks ending August 9, 2025

Health and wellness typically sells well on TikTok shop



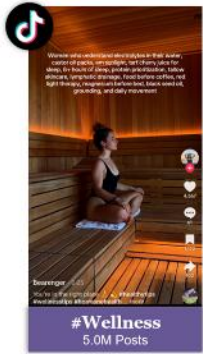
Bubble Size = Dollar Volume


Beverage Enhancers

31%
Use social media as their primary source to learn about new products and services

28%
Changed brands based on the recommendation of a social media influencer

Trending now on social



Source: NielsenIQ e-commerce Retailer View, TikTok Health & Beauty Categories, 12 months ending 1/31/2026, Source: NIQ 2024 Consumer Outlook, U.S

A person is standing on a rock in the middle of a calm body of water, performing a yoga pose (Tree Pose). Their reflection is visible in the water. In the background, there are silhouettes of mountains and trees under a soft, hazy sky. The entire scene is overlaid with a dark blue gradient.

Equity, access and the cost paradox

NielsenIQ

Cost is top barrier of health

Top barriers hindering healthier life choices



News Release

Annual Family Premiums for Employer Coverage Rise 6% in 2025, Nearing \$27,000, with Workers Paying \$6,850 Toward Premiums Out of Their Paychecks

More of the Largest Firms Cover GLP-1s for Weight Loss, and Use Is Higher Than Expected; Some May Be Limiting Coverage

Published: Oct 22, 2025

45% struggle to pay the costs of health care

MRI | SIMMONS



64% of US: Rising insurance costs are causing me financial stress

MRI | SIMMONS

39% I have decreased my medical insurance coverage because of cost

MRI | SIMMONS

HEALTH | HEALTHCARE

Big Changes Are Coming for 2026 Medicare Plans. What You Need to Know.

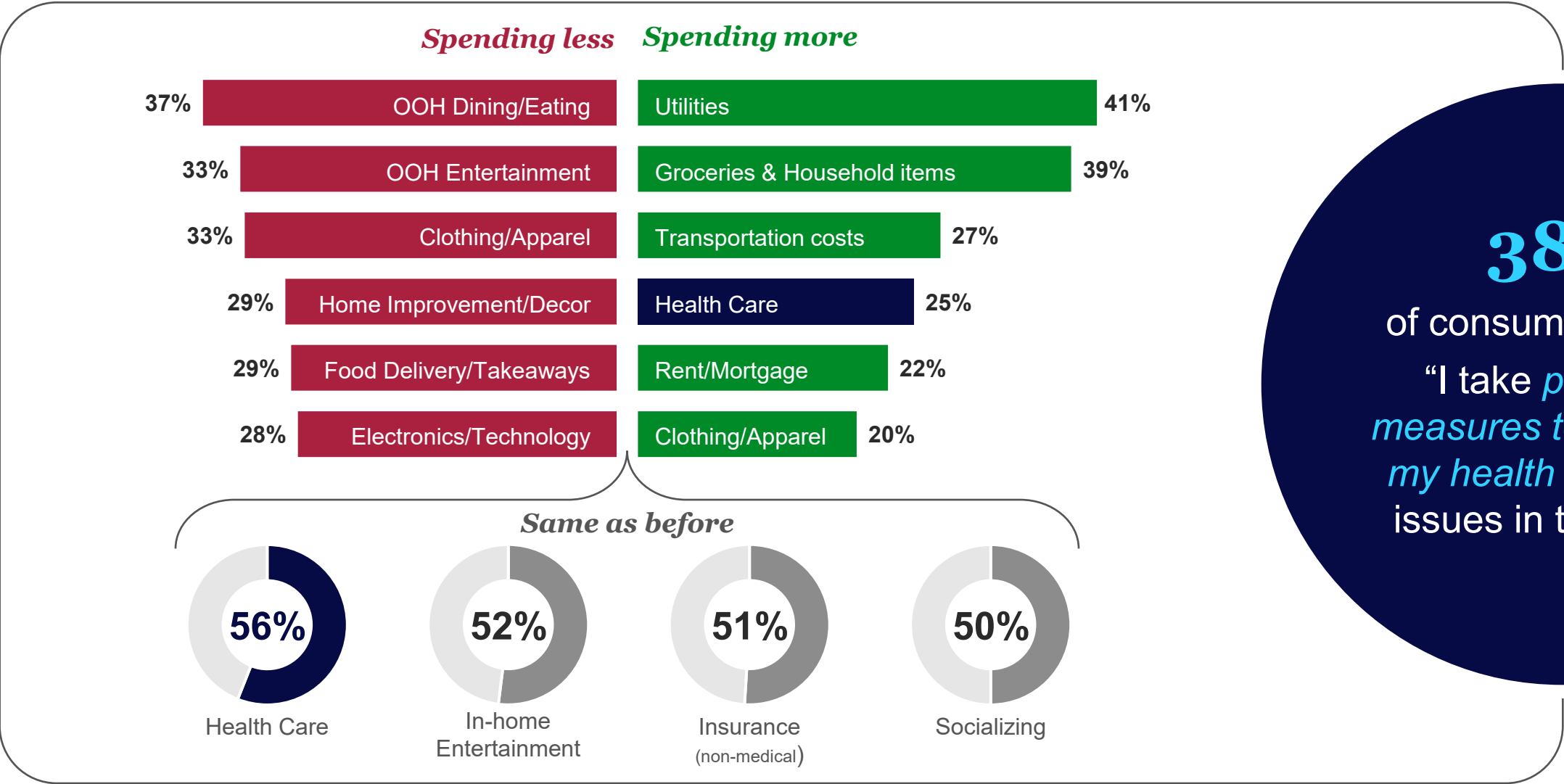
Skinnier benefits, higher premiums and fewer options mean more than a million seniors should shop for new coverage during open enrollment

40% often go without medical care because it costs too much.

MRI | SIMMONS

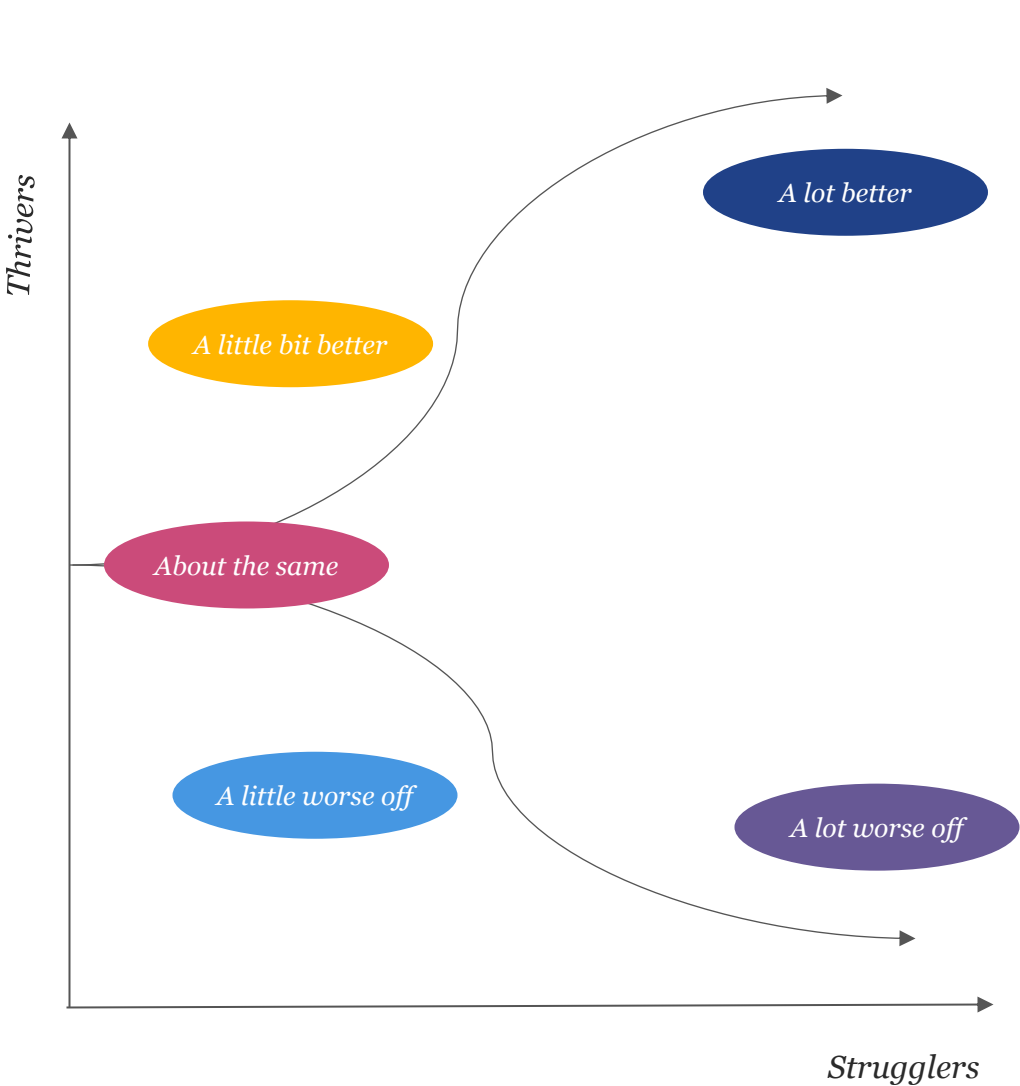
2026 wallet intentions reinforce the idea of a cautious mindset

Health care costs are anticipated to be same or more of overall budget



Source: NIQ Consumer Outlook 2025 (US View for 2026)

Value seeking and premium seeking will both accelerate in the K shaped economy



“Simply put, the upper part of the K refers to higher-income Americans seeing their incomes and wealth rise while the bottom part points to lower-income households struggling with weaker income gains and steep prices.”

The Associated Press, Dec 1 2025

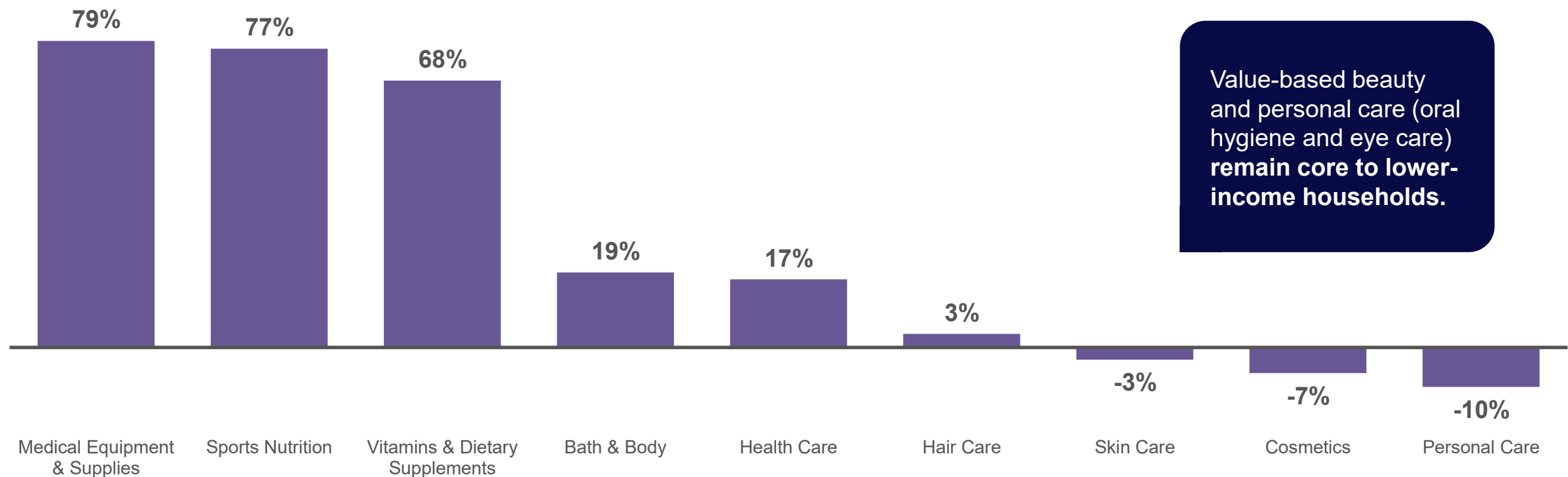


“Those at the bottom are living with the cumulative impacts of price inflation. At the same time, those at the top are benefiting from the cumulative impact of asset inflation.”

Peter Atwater, Professor, William & Mary

Income Divide Sharpest in Health & Beauty Care Categories

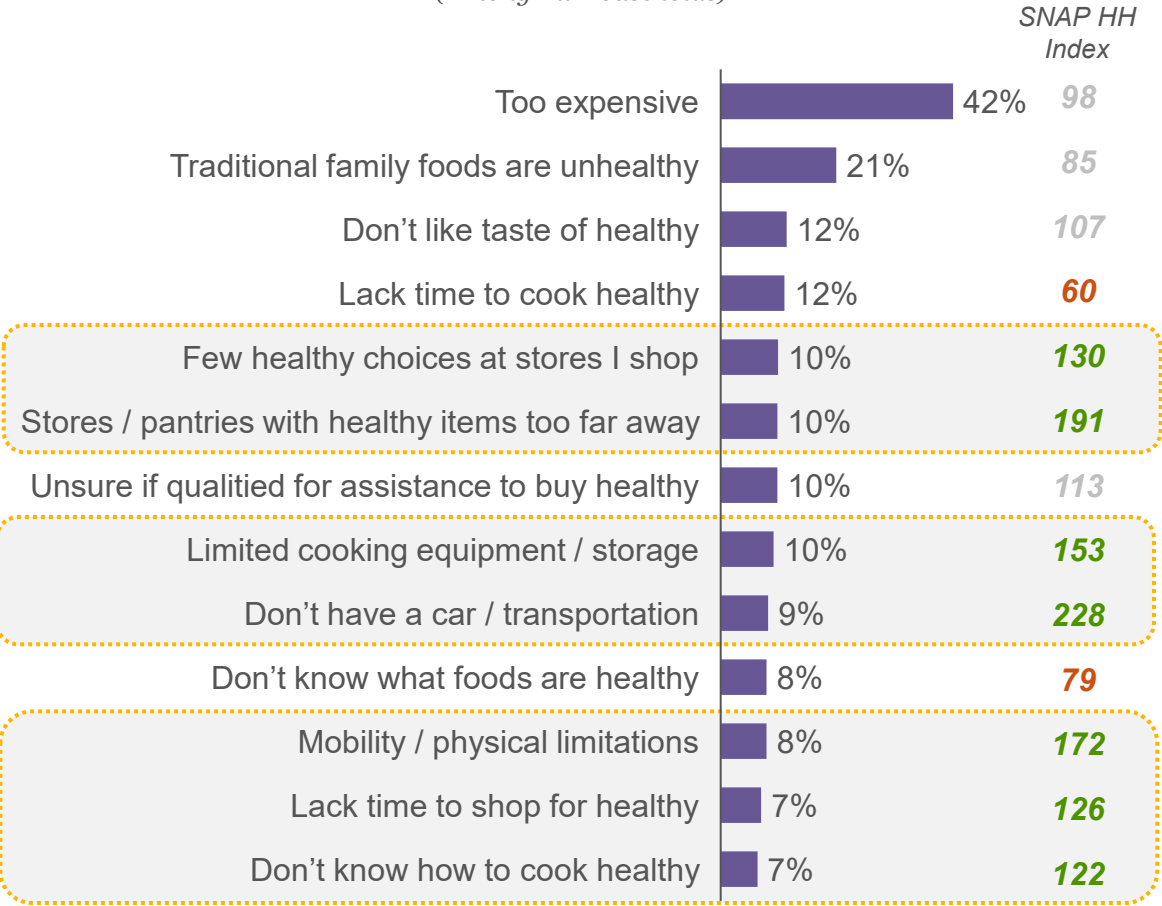
Year-Over-Year Gap in Health & Beauty Spending: \$150K+ vs <\$50K Households



Source: NIQ US E-Receipt Panel; Health & Beauty purchases L52w vs. prior year; Gap = YoY spending difference between \$150K+ and <\$50K households

Cost is the leading barrier to eating healthy

Leading Reasons For Eating Unhealthy Foods (Among All Households)



Source: NIQ, BASES Quick Question Omnibus Survey, November 2025, n=1,021



We are not where we want to be from a health standpoint and not all households face the same challenges to healthy shopping

Distribution of US Household FoodHealth Scores



Higher income means healthier grocery carts

Higher education leads to healthier grocery carts

Higher poverty rates often mean lower FoodHealth scores

If every household replaced 3 items with healthier choices each week, the national score would jump 19pts

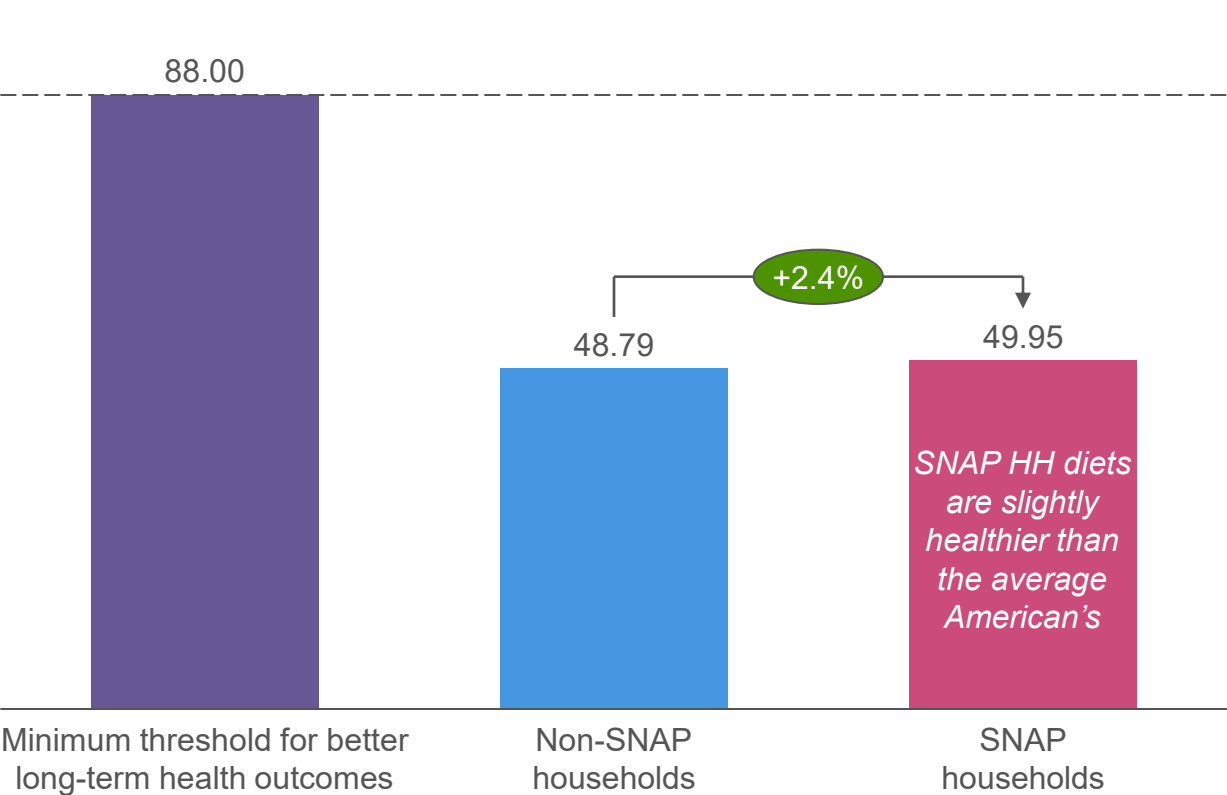
[Get the full report](#)

Source: FoodHealth Company and NielsenIQ. The Health of America's Grocery Carts: How we shop, how (un)healthy we eat—and how to fix it. 2025. FoodHealth Company & NielsenIQ

SNAP households are not the wellness problem, access is



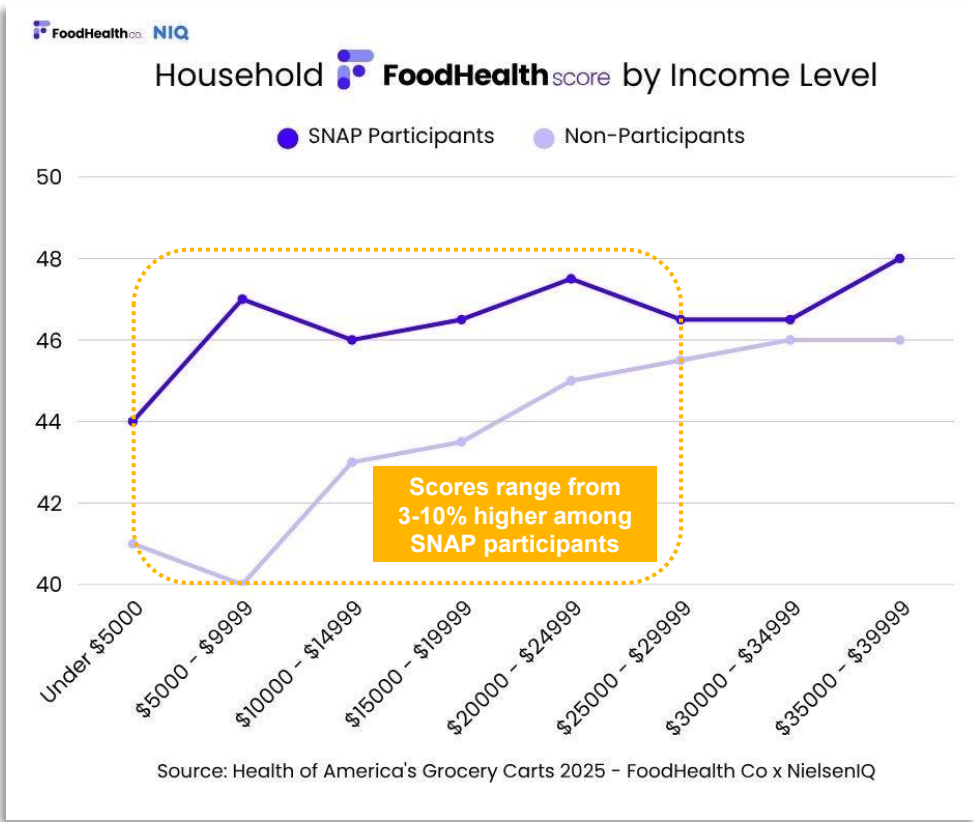
FoodHealth Scores
Non-SNAP VS. SNAP Households



[Get the full report](#)

Source: FoodHealth Company and NielsenIQ. The Health of America's Grocery Carts: How we shop, how (un)healthy we eat—and how to fix it. 2025. FoodHealth Company & NielsenIQ

FoodHealth Scores
Normalized By Income Levels

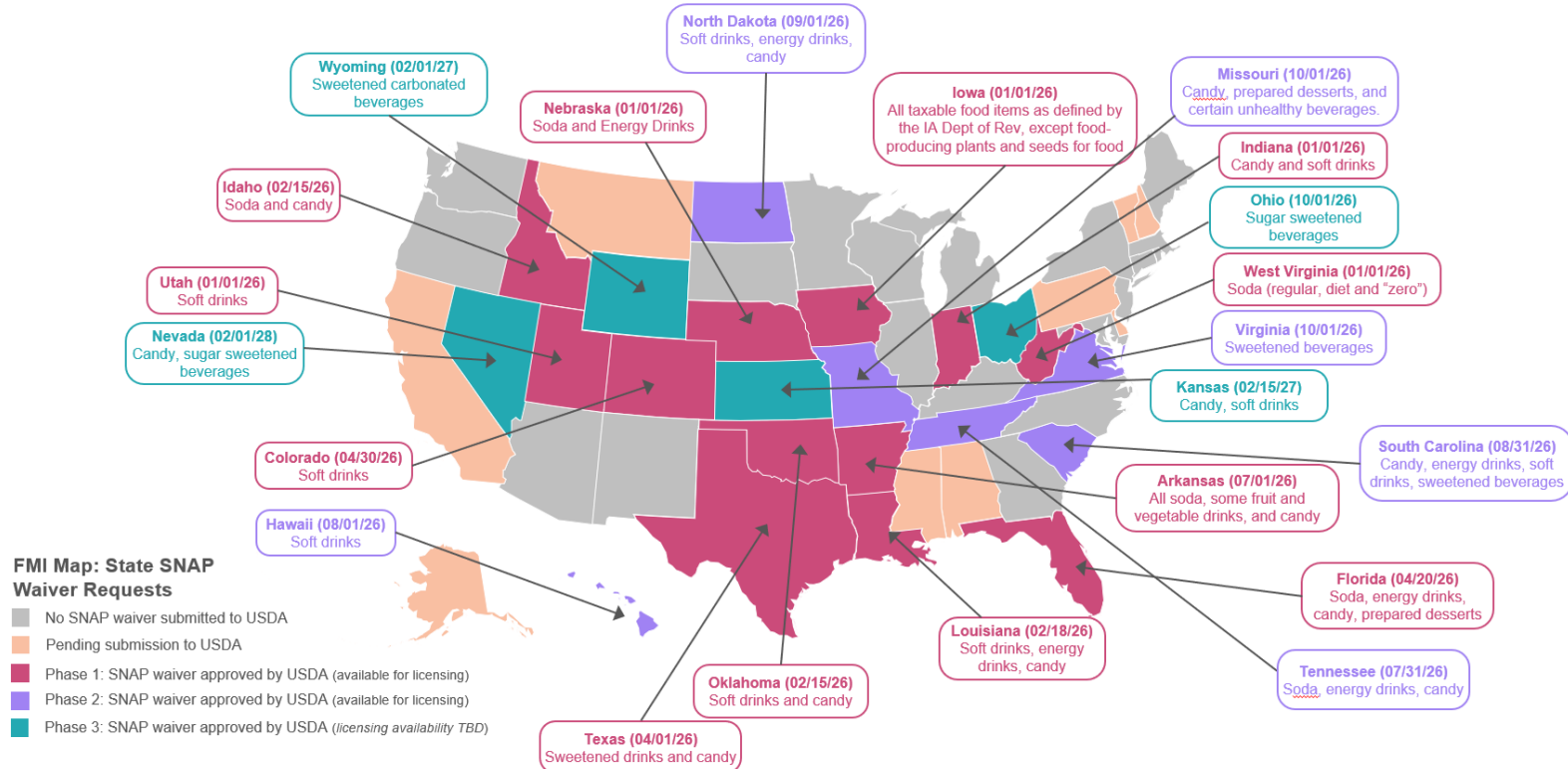


State-level SNAP restrictions taking effect and having impact

In first 12 states with new SNAP restrictions...

- **91% of Confection** SKUs shifted from SNAP-eligible to restricted ~ \$7B
- **29% of Beverage** SKUs shifted ~ \$11.4B
- **16% of Snacks** SKUs shifted ~\$2.2B

...reshaping category performance overnight



SNAP households illustrate how wearables extend preventative care upstream

Recent adoption and chronic condition monitoring highlight wearables as a high-frequency, low-cost preventative care layer

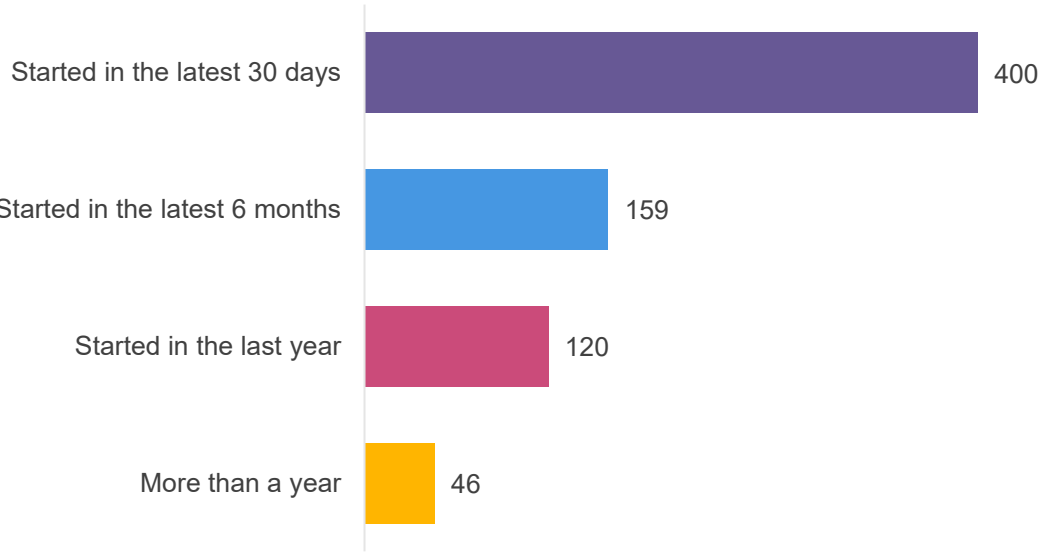
37% of SNAP households use a health wearable

29% of SNAP wearable users started using their device in the last 30 days

41% Have said using a wearable has led to increased protein use

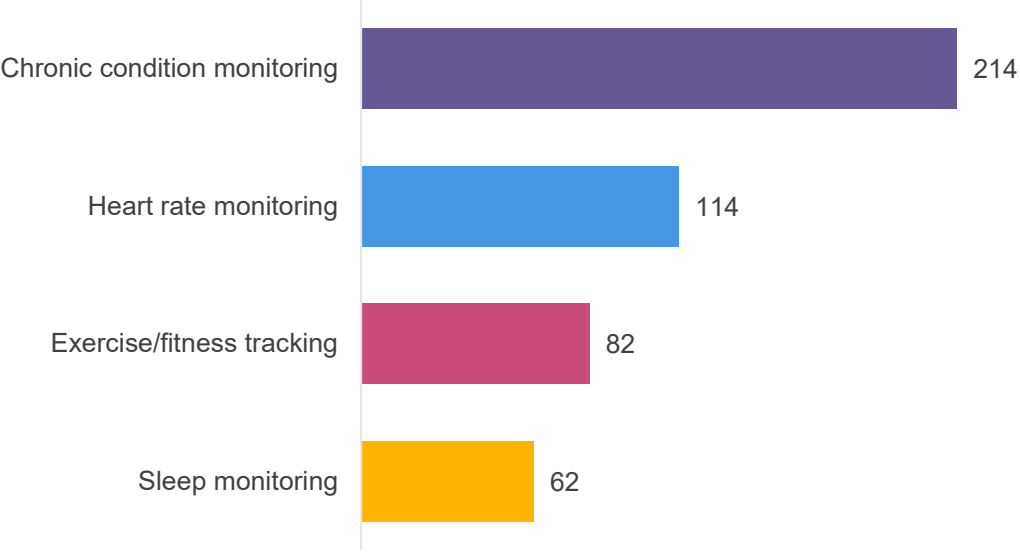
Wearable adoption among SNAP users is recent and accelerating

Indexed to U.S. general population (100)¹



SNAP users prioritize monitoring-oriented use cases opposed to fitness and sleep optimization

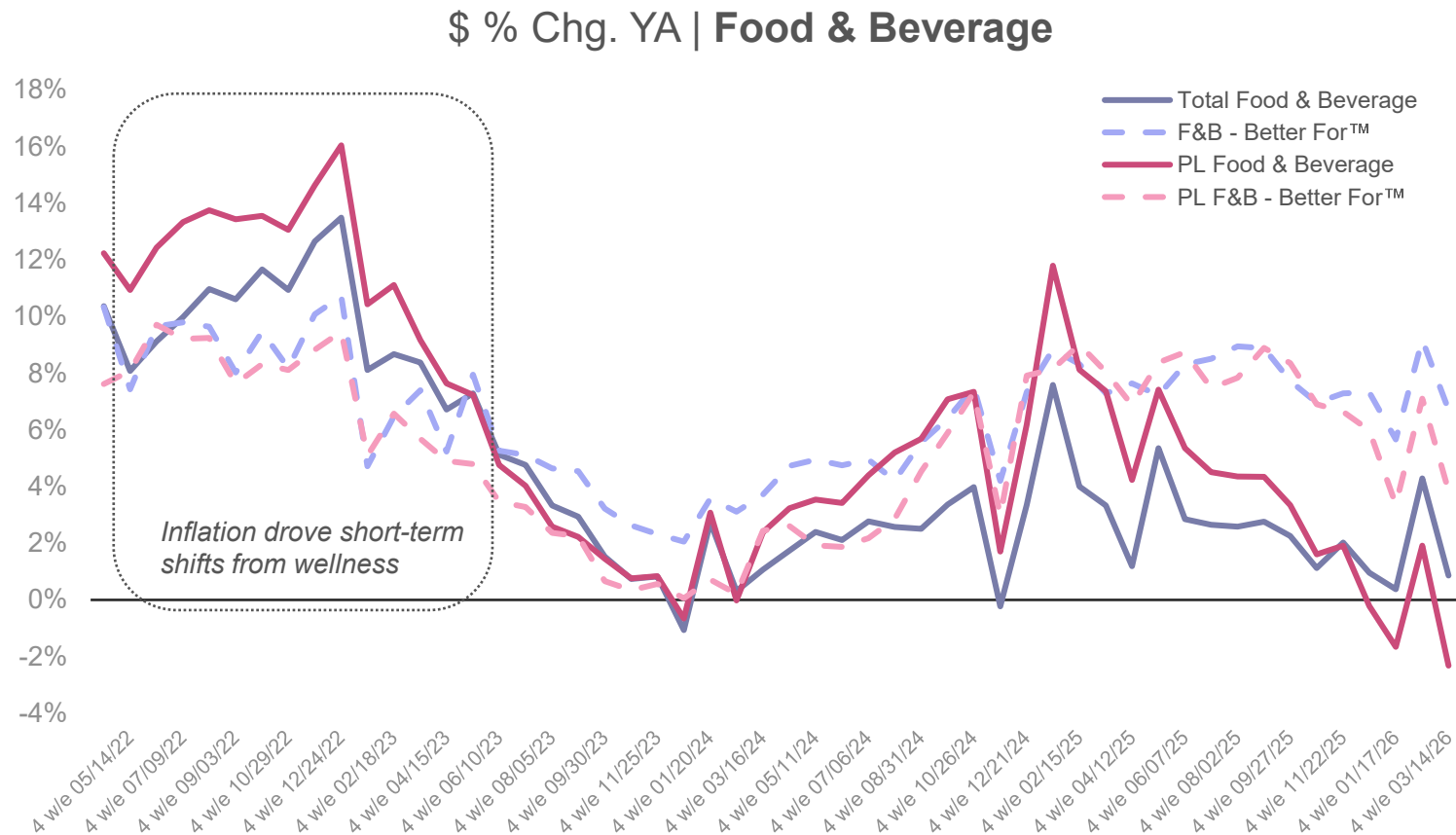
Indexed to U.S. general population (100)¹



NIQ Better For™...



Better For™ national and private label outpaces total Food and Beverage



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 March 14, 2026 | Only includes coded UPCs (items must have a label on package)

While Better For™ tends to index higher income, strongest recent growth coming from low and medium-income consumers

Units per Buyer of Better For™ Across Income



The heavy Better For™ consumers are...

College graduates/Post College Graduates



Born

1981-1996

Millennials

HH Income \$150K+



4 member HHs with Kids Under Age 18

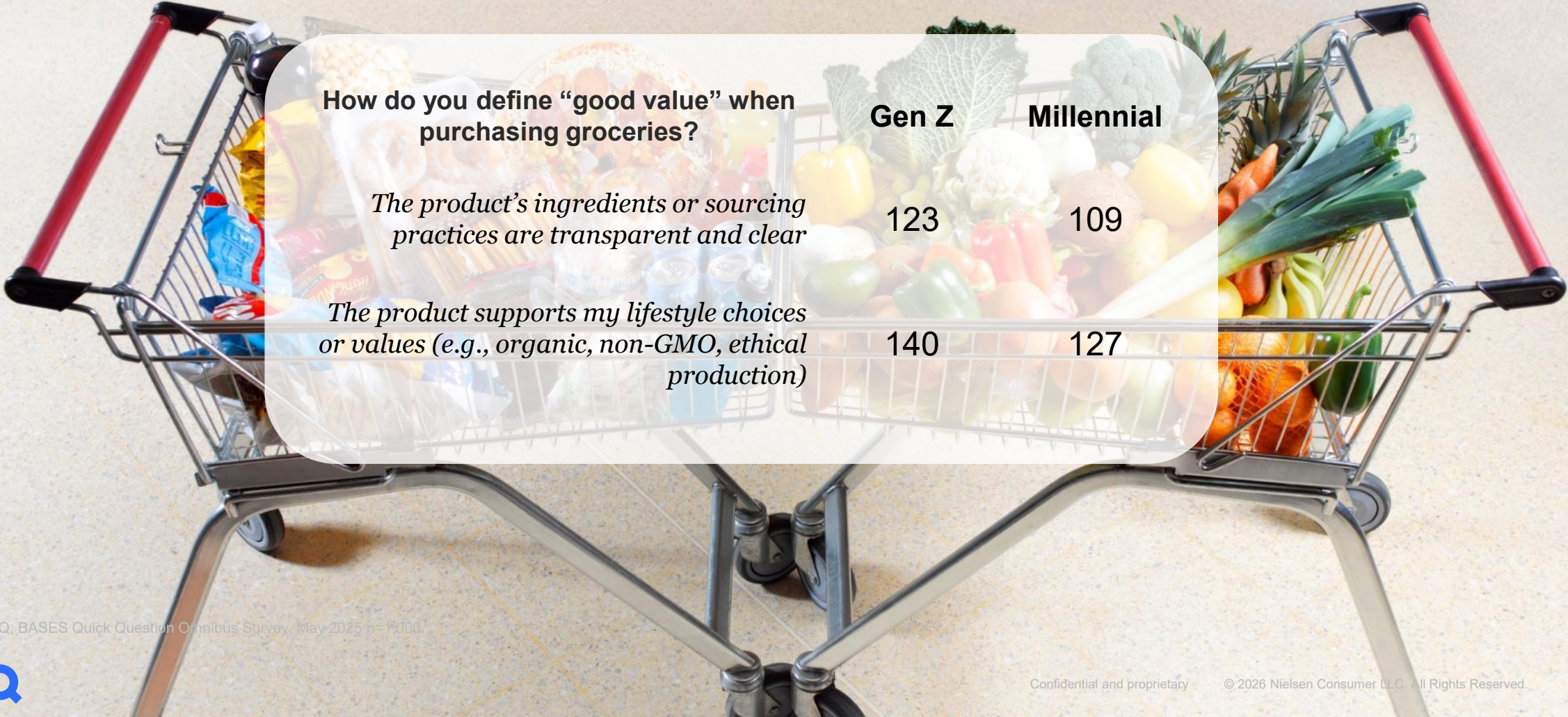
Asian/Pacific Islander & live in the Western U.S.

Dataset: NielsenIQ Panel On Demand Homescan | US HS - NDH Synd UPC Full View - 445 5yr | Entire Dataset Plus NPI Chars, Total Outlets, Total US, Better For™

16% of snack buyers are switching to healthier snacks because they feel **more filling and cost effective**



Source: NIQ, BASES Quick Question Omnibus Survey, May 2025 n=1,000.



How do you define “good value” when purchasing groceries?

The product’s ingredients or sourcing practices are transparent and clear

Gen Z

123

Millennial

109

The product supports my lifestyle choices or values (e.g., organic, non-GMO, ethical production)

140

127

Source: NIQ, BASES Quick Question Omnibus Survey, May 2025 n=1,000

“

*If Better For™ and wellness is only a “premium tier”
in your portfolio, **are you already behind?***

”

A person stands on a rock in the middle of a calm lake, their reflection visible in the water. The background features a range of mountains under a soft, hazy sky, suggesting a sunset or sunrise. The overall scene is serene and contemplative.

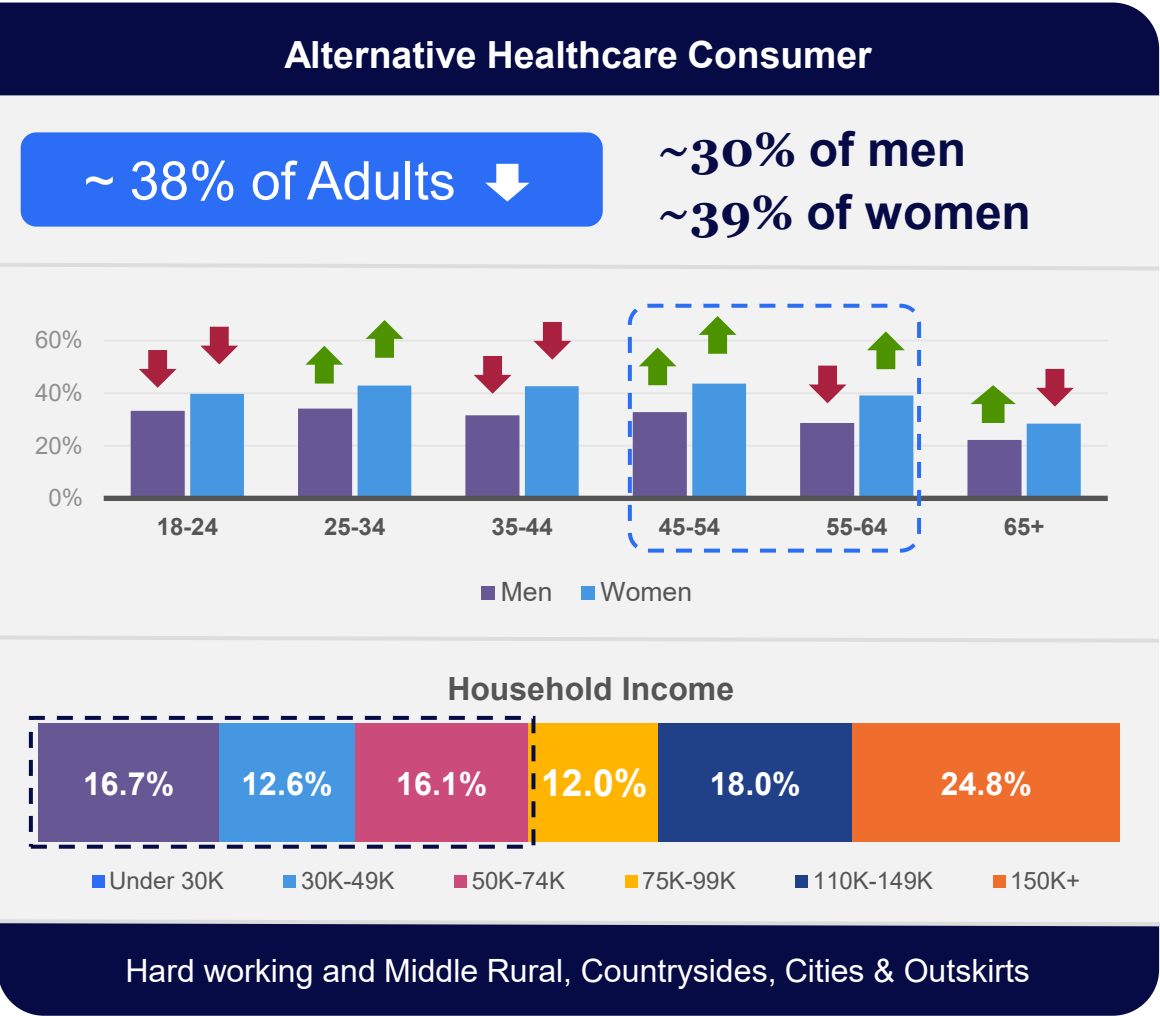
*Trust is now required to even
compete and directly
determines conversion*

NielsenIQ

Emerging perspective on healthcare

Driven by differing views on treatments, supplements, types of practitioners, access

Direction of arrow reflects change vs. YA



83% typically read online reviews submitted by others

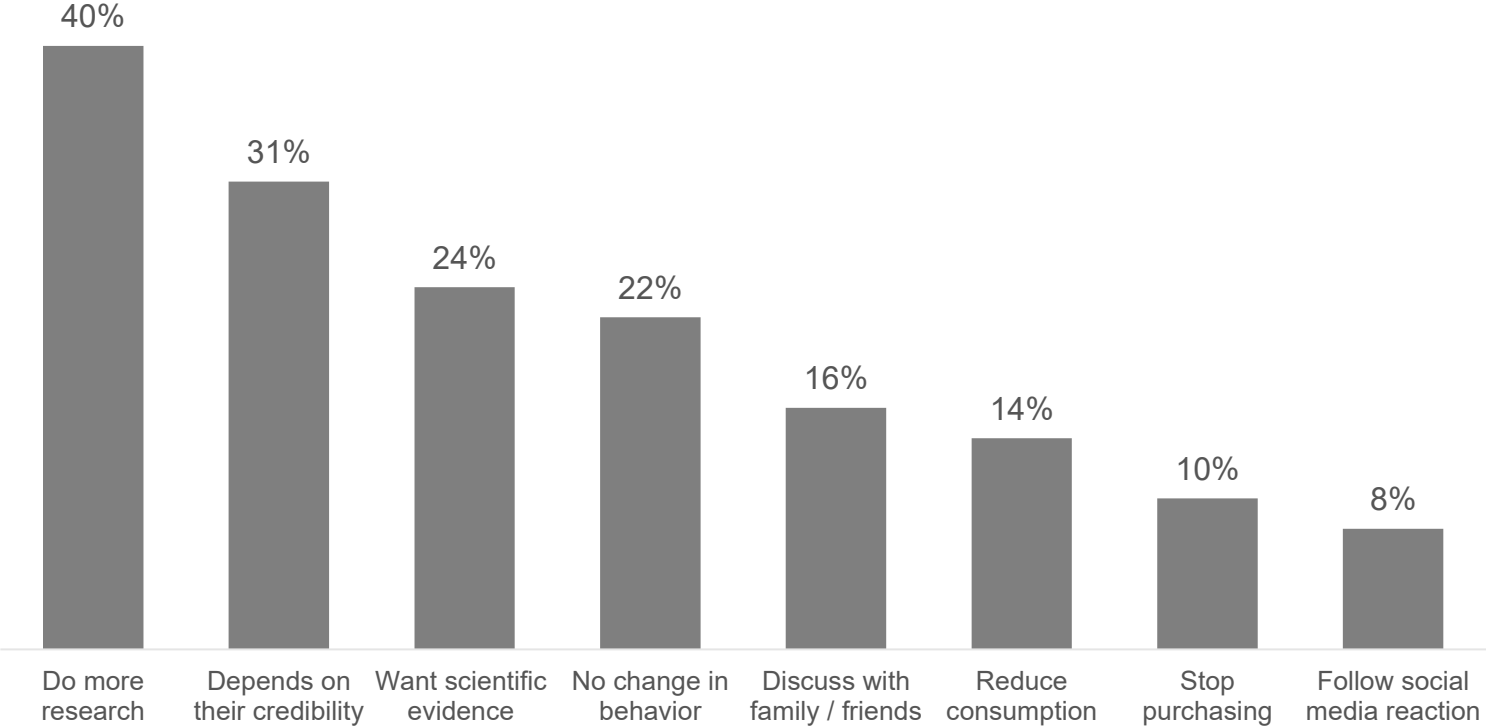
30% say social media influencers impact the brands I buy

76% usually read the information on product labels

MRI Simmons 2025 Health & Wellness Survey: MRI-Simmons 2025 Health & Wellness Study; Traditional Healthcare Consumer relies on conventional doctors and brand-name medications; decisions guided by physician recommendations. Alternative Healthcare Consumer prefers natural remedies and homeopathy; self-researches or follows advice from peers/influencers; skeptical of traditional medical professionals.

Growing skepticism is reshaping health decisions in America

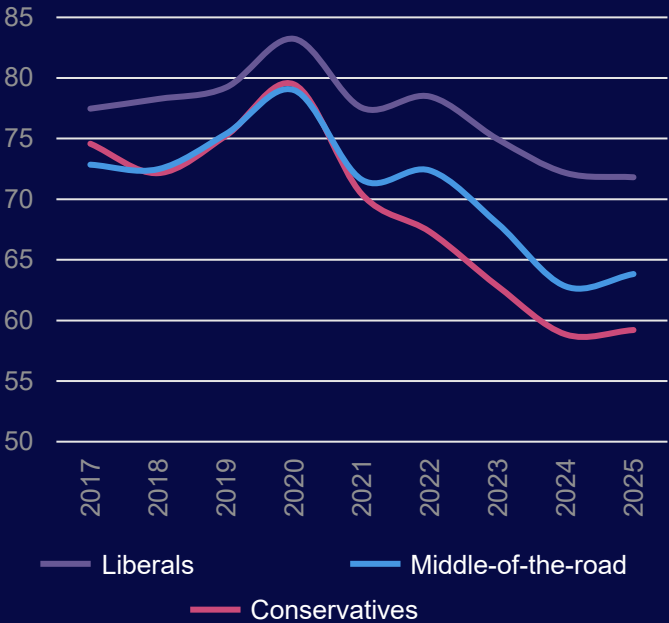
Typical response when a government official raises health concerns about a product or ingredient¹



BASES Quick Question Artificial Ingredient Survey, October 2025, n=1,025

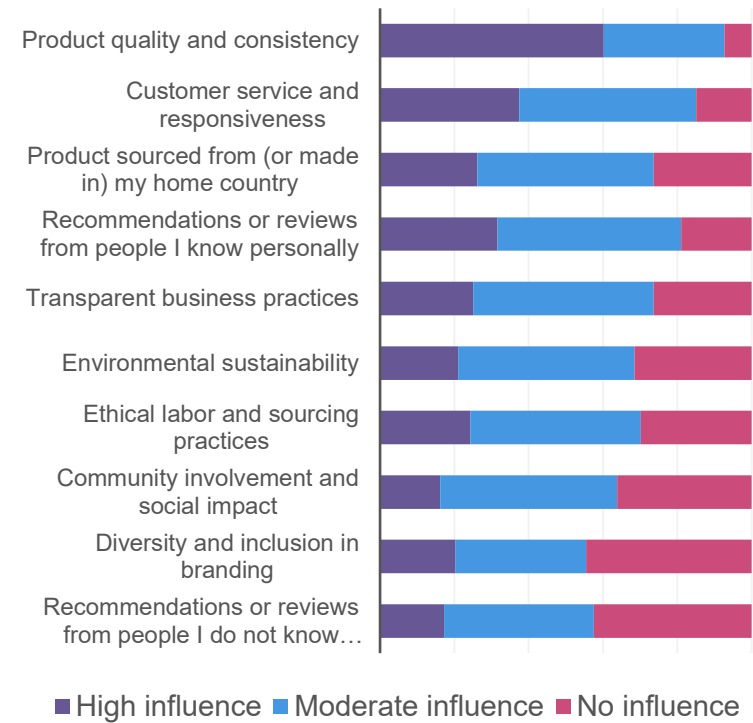
64% of American consumers agree “The benefits of vaccines outweigh any possible risks,”

↓**10 pts** from 2017, ↓**9 pts** from 2021, the **fastest-declining** health attitude since 2021



97% of consumers say trusting the brand they're buying from is very or somewhat important.

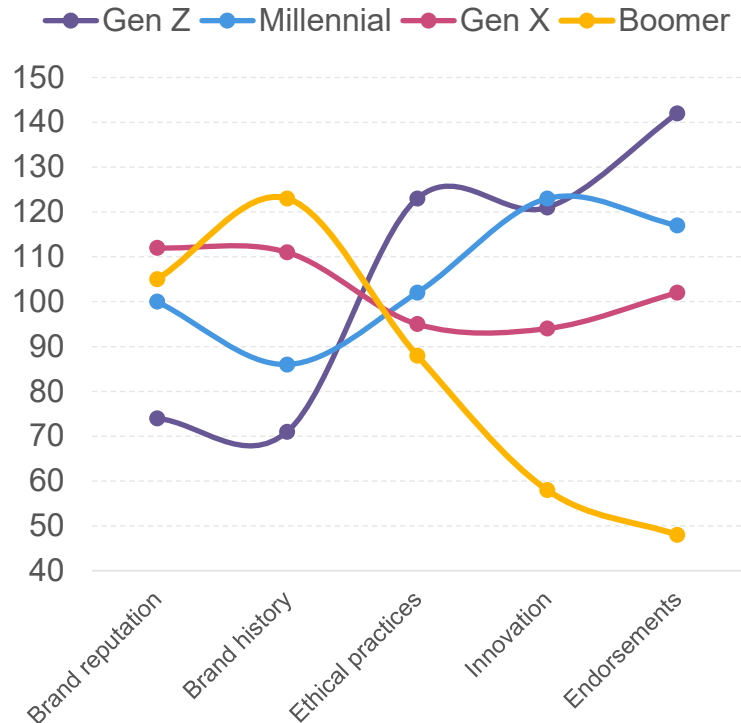
As consumers become more intentional with their savings strategies, brands have a *greater emphasis on earning trust*



Trust starts with quality: Factors that contribute the most to Food Brand Trust



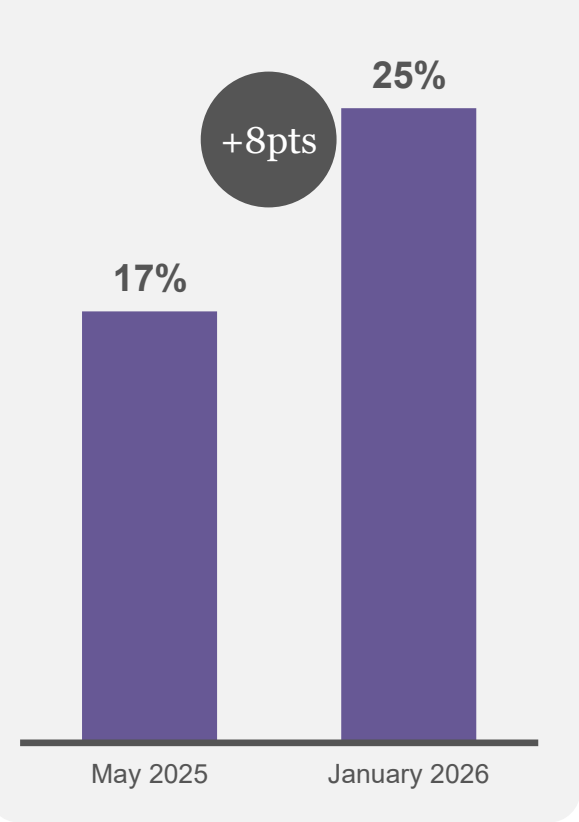
Brand legacy does not guarantee trust: Trust Drivers by Generation



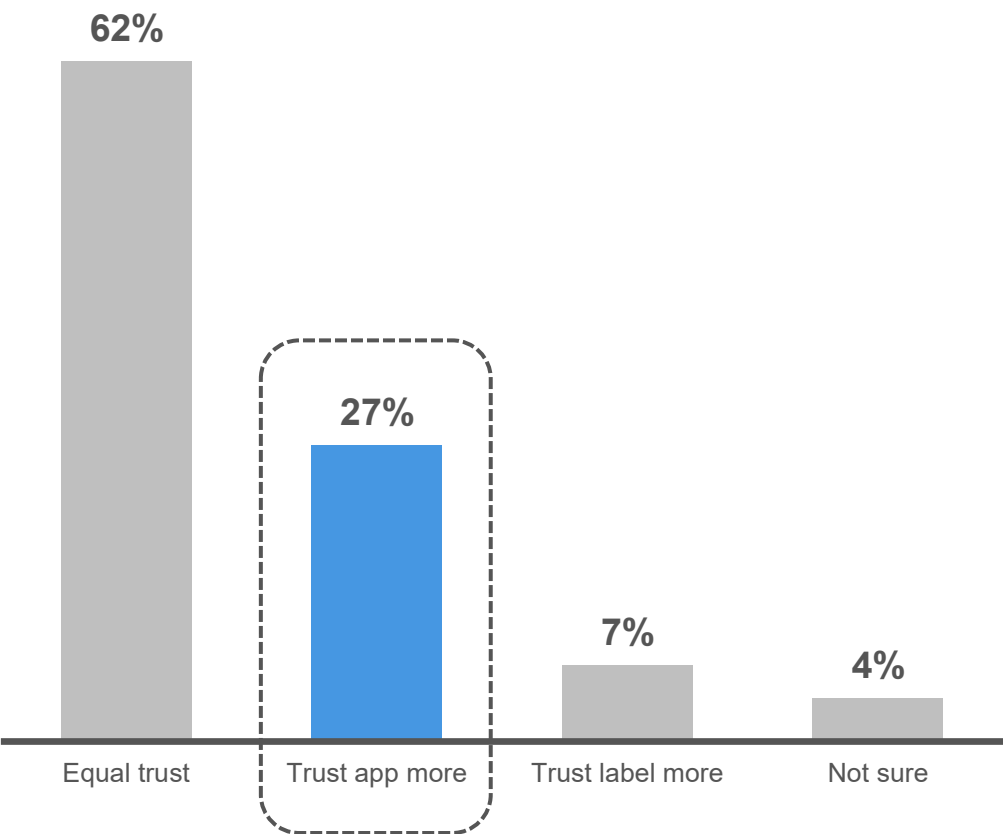
Source: NIQ 2025 Consumer Outlook survey
Source: NIQ, BASES Quick Question Omnibus Survey, May 2025, n=1,000
Note: Index value ≥120 indicates above average significance, <80 indicates below average significance

Consumer usage and trust in scanning apps increasing

Use Third Party Scan Apps to Check Ingredients



Trust: App versus Label



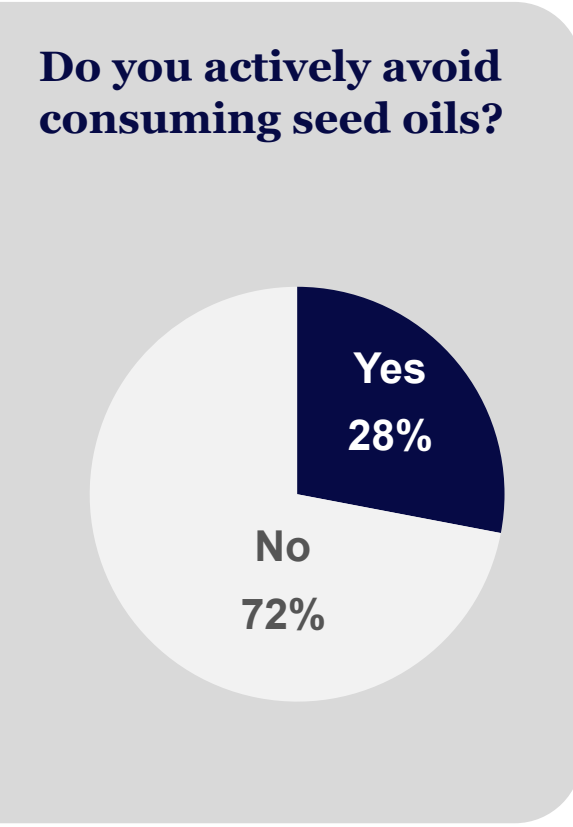
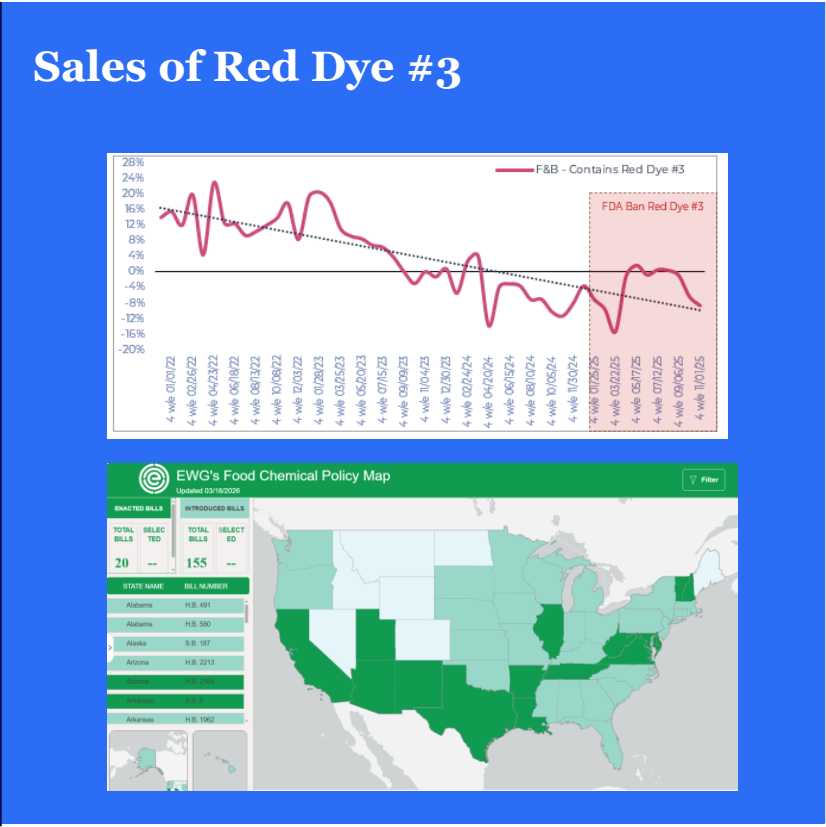
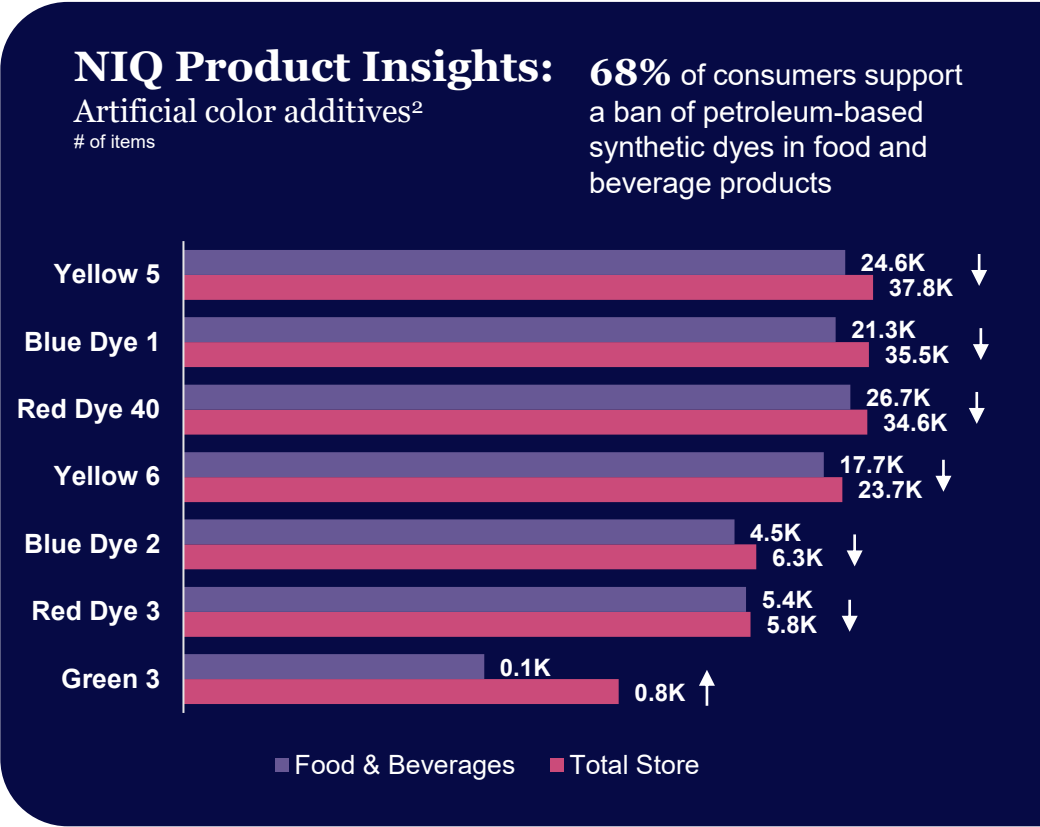
87% are likely to put a low-scoring item or item flagged as containing artificial ingredients *back on the shelf*

What do you watch for when using a third-party scanning app to assess the snacks you purchase?

- Sugar content – 49%
- High-risk additives – 40%
- Protein content – 39%
- Overall numeric rating – 37%
- Calories – 37%
- Sodium content – 33%
- Fiber content – 33%
- Moderate-risk additives – 33%
- Seed oils – 29%

Source: NIQ, BASES Quick Question Omnibus Survey, n=1,000, May 2025 Vs. n=2,006, January 2026, Source: NIQ, BASES Quick Question Omnibus Survey, n=2,006, January 2026

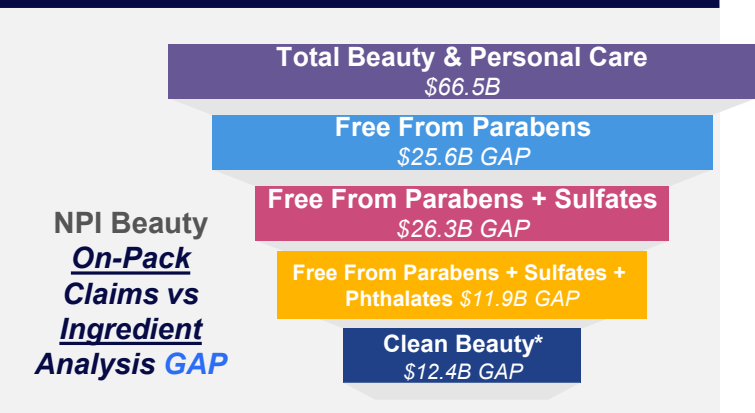
Rapidly changing regulatory environment is accelerating focus in key areas and we're seeing increasing consumer ingredient literacy



Source: 2 NIQ RMS Full View + Costco, NIQ Product Insight, powered by Label Insight; Total Store & Food & Beverage; Number of UPCs selling impacted; 52 weeks ending March 7, 2026, International Food Information Council

Clean is now the baseline, functional is where value comes

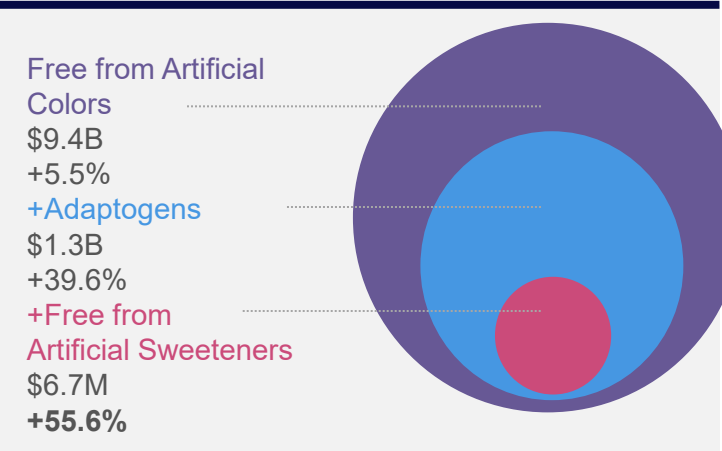
Beauty



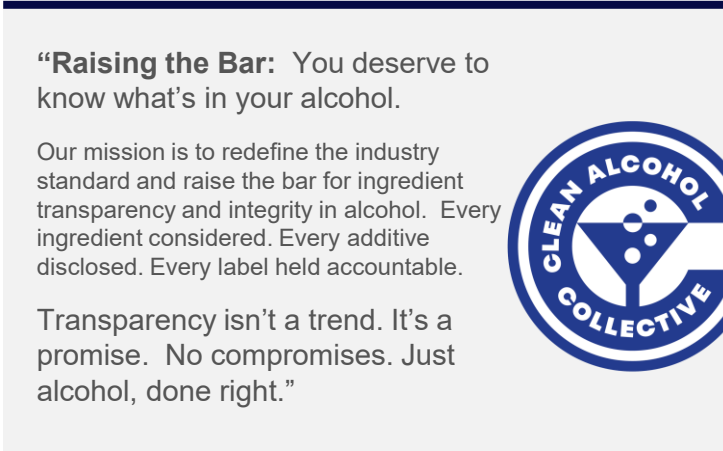
Laundry Care



Non-Alcoholic Beverages



Beverage Alcohol



Clean Label +5.8%
Total Store +2.9%
% \$ Change

Clean + Functional = Value

Source: Source: NielsenIQ Retail Measurement Services, NIQ Product Insight, powered by Label Insight, Total US Full View + Costco, Total Store & Clean Label; Dollars % change vs. YA, w/e March 7, 2026; NIQ Retail Measurement; Total US Full View + Costco; Total Beauty & Personal Care = H&B without OTC/VMS Super Categories; NPI Clean Beauty Attributes; \$ % change vs year ago; 52 weeks ending Dec. 27, 2025 CLEAN BEAUTY = free from parabens, phthalates, sulfates, formaldehyde, triclosan, triclocarban, hydroquinone, BHA, BHT, and nonylphenol ethoxylate; NIQ, Retail Measurement Services; US NIQ Total Store Inc Fresh – 445 – Weekly (Synd); Entire Dataset Plus NPI Chars; Total US Full View + Costco; Functional Beverages; Latest 52 weeks ending March 07,2026

Retailers increasingly *curating* for transparency and consumer priorities

Amazon Compliance Testing for Dietary Supplements and Cosmetics

Nutrition Facts Per Serving

- ☐ Fat Free (<0.5g)
- ☐ Low Fat (<3g)
- ☐ Free of Saturated Fat (<0.5g)
- ☐ Free of Trans Fat (0g)
- ☐ Cholesterol Free (<2mg)
- ☐ Sodium Free (<5mg)
- ☐ Low Sodium (<140mg)
- ☐ Carbohydrate Free (<0.5g)
- ☐ Sugar Free (<0.5g)
- ☐ Dietary Fiber (>10g)
- ☐ Protein (>10g)

Seller

- ☐ Scott's Cakes
- ☐ ZooScape

Food Type

- ☐ Single-Origin
- ☐ Organic
- ☐ Low-Carb
- ☐ Lactose-Free
- ☐ Non-GMO
- ☐ High-Fructose Corn Syrup-Free
- ☐ Grain-Free

Subscription Options

- ☐ Subscribe & Save Eligible

Diet Type

- ☐ Kosher
- ☐ Gluten Free
- ☐ Vegetarian
- ☐ Keto
- ☐ Vegan
- ☐ Halal
- ☐ Paleo

Premium Brands

- ☐ Premium Brands

More-sustainable Products

- ☐ Climate Pledge Friendly

Calories Per Serving

- ☐ 0 Calories
- ☐ 1 to 40 Calories
- ☐ 41 to 100 Calories
- ☐ 101 to 200 Calories
- ☐ 201 to 300 Calories

USA TODAY

U.S. Politics Sports Entertainment Life Money Travel Opinion Crossword

HEALTH

Robert F. Kennedy Jr. Add Topic +

Why Target will soon stop selling cereal with synthetic food dye

1-minute read

Daniel Munoz NorthJersey.com

Updated March 3, 2026, 8:37 p.m. ET

Grove

20% Off + Free Shipping: Spend \$75 and use code WELCOME at checkout

Free Shipping on all first orders \$29+

20% off at \$75+ with code WELCOME

THE UNPLASTIC SHOP

Plastic isn't just around us — it's inside us.

Curated with the Oceanic Preservation Society — the production team behind *The Plastic Detox*, now streaming.

Explore The Unplastic Shop

Ensure MAX PROTEIN

New 42g Complete Protein. Supports muscle health.

Sort by | Best Match

Shop all GLP-1 support Shop all protein Shop all digestive relief Shop all vitamins Protein shakes Protein bars Protein dairy Protein powders Protein snacks Nausea relief Constipation relief Diarrhea medicine Probiotics

Price GLP-1 Support (314) Uses item details. Price when purchased online.

Brand Best seller Barebells Protein bar Protein bar Protein bar QUEST QUEST

Walmart Cash Offers

THRIVE MARKET

How It Works Quality Standards Our Products For Healthy Families

Log In Get Started

LIMITED TIME: \$60 FREE Groceries + 30% OFF 1st order! Claim Offer

Tired of inflated grocery prices?

Healthy essentials delivered. Low prices guaranteed.

Yes! I like overpaying

WHOLE FOODS MARKET

LET'S WHAT'S NOT IN THE BAG.

ALDI

What can we help you find?

Log in Cart

Q. Are ALDI products MSG free?

A. We removed certified synthetic colors, added MSG, and partially hydrogenated oils from all of our exclusive brand food products in 2015. These reformulated products are the exact same high-quality and taste shoppers expect from ALDI exclusive brands. Added MSG is an artificial flavor enhancer commonly found in savory foods. It is also considered safe by the FDA, however we have opted to remove added MSG from our products due to customer concerns. It is important to note that MSG also naturally occurs in certain foods like [produce](#) and [dairy products](#), such as tomatoes and cheese.

50% off* Select Beauty! New deals every day. *Exclusions/terms apply. SHOP TODAY'S DEALS

SEPHORA

AI Beauty Chat Shop Store & Delivery ONE PACIFIC PLACE • 98114 Services & Events Sign In for FREE Shipping

New Makeup Skincare Fragrance Hair Tools & Brushes Bath & Body Mini Size Brands Gifts & Value Sets Gift Cards Sale & Offers

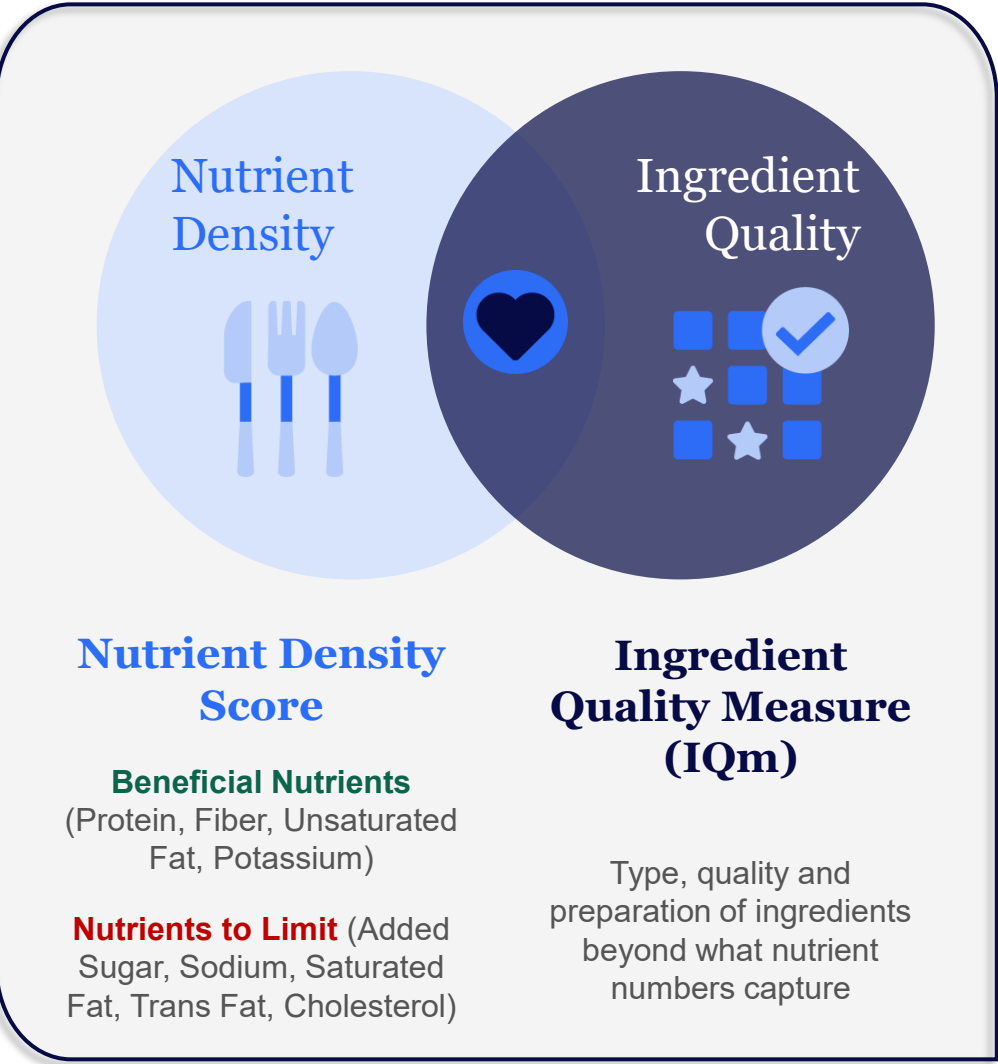
Buying Guides > Skincare > Essential Skincare Ingredients > BHA/PHA: The Epic Exfoliator

BHA/PHA: The Epic Exfoliator Squalene: The Mega Moisturizer Vitamin C: The Dullness Ditcher Lactic Acid: The Smoothing Wonder Collagen: The Firming Fave

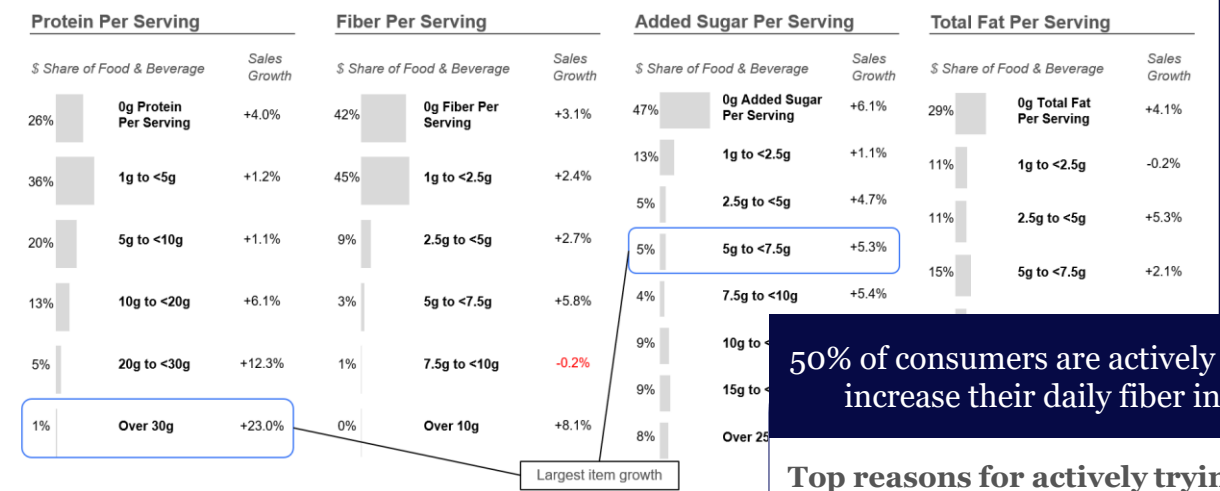
BHA/PHA for Congested Skin

Clear away buildup with these epic exfoliators.

The metrics are shifting: from calories or single macros to nutrient density + ingredient quality



Higher protein thresholds outperform other nutrient claims



50% of consumers are actively trying to increase their daily fiber intake

- Top reasons for actively trying to increase daily fiber intake?**
- Improve digestive comfort/regularity
 - Support gut health or microbiome
 - Support weight management
 - Support heart health
 - Reduce risk of long-term health issues

NIQ BASES Omnibus, February 2026, Full View Measurement + Costco, NielsenIQ Product Insights, data ending 1/24/2026

New Research: From Classification To Context: Ultra-Processed Foods, Nutrient Density & Real-World Food Choices

Join us tomorrow, March 26 for a deep dive into joint research conducted by the International Food Information Council and NielsenIQ

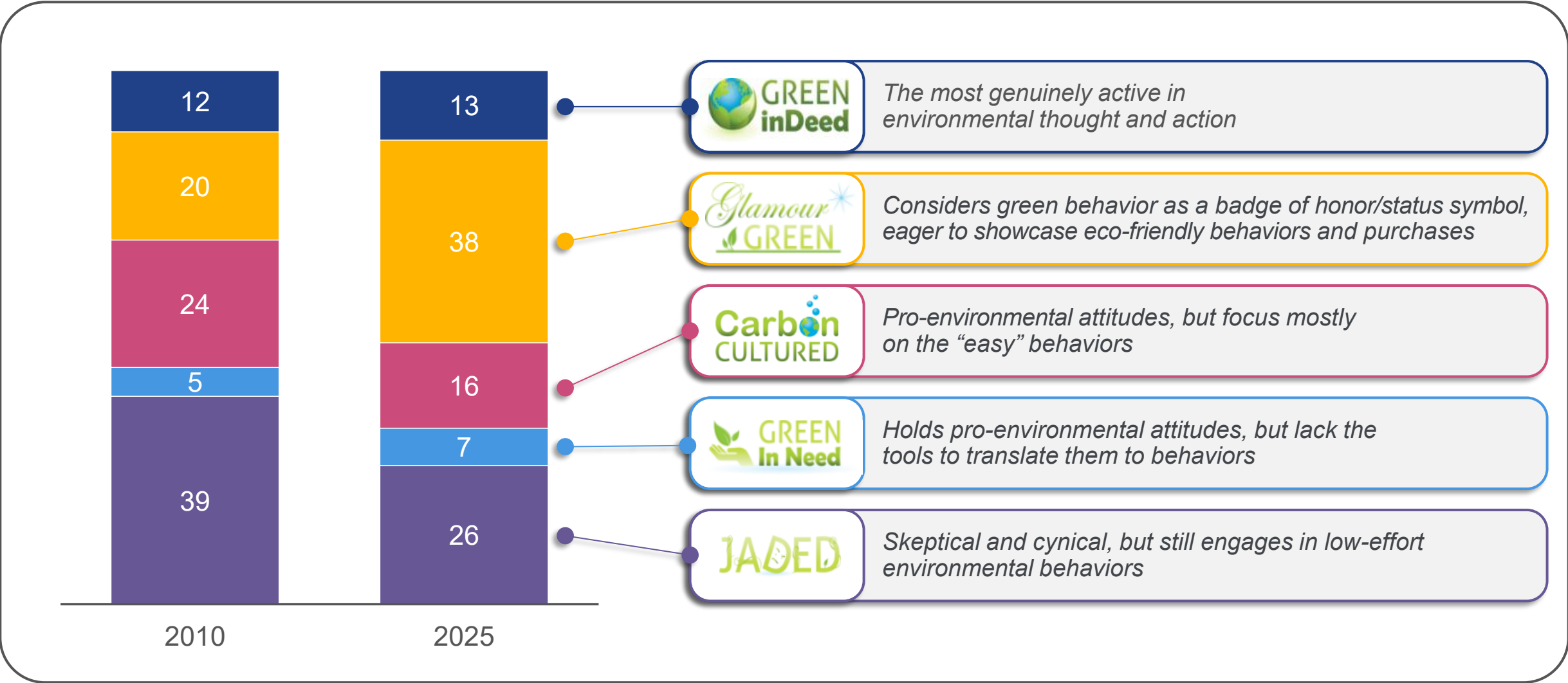
[From Classification To Context: Ultra-Processed Foods, Nutrient Density & Real-World Food Choices - IFIC](#)

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 techniques, 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.

Research highlights

- Processing classification alone does not reliably distinguish nutritious from less nutritious foods, as nutrient density varies widely within both Nova 4 and non-Nova 4 products, highlighting the **importance of integrating nutrient profiling into policy discussions** and consumer guidance.
- Category context matters** when evaluating the role of processed foods in the diet, as the relationship between processing classification, nutrient density, affordability, and sales performance differs significantly across food groups,
- Policies that focus solely on reducing or eliminating Nova 4 classified foods may overlook the reality **that these products represent a substantial share of everyday grocery purchases** across staple categories, indicating that policy solutions must account for current consumer behavior and food system realities.
- Affordability differences between Nova 4 and non-Nova 4 foods suggest an **important equity dimension**, with less processed options often carrying a price premium that may make them less accessible for nutrition-insecure households.

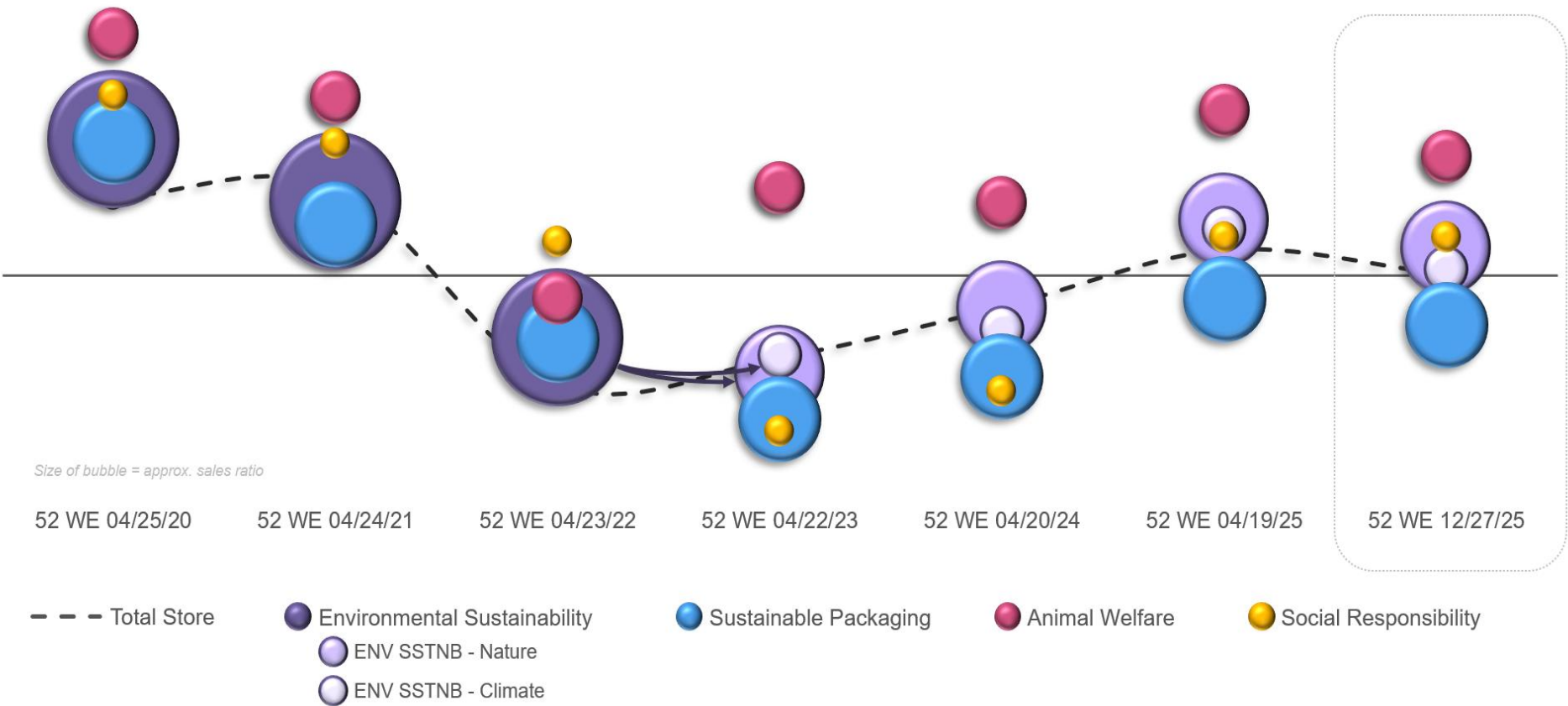
Consumers have different priorities and actions around conscious buying



NielsenIQ Annual Green Gauge® Report | Consumer Life Global 2025 and previous (US filter)

Is *conscious buying more resilient* than expected?

US xAOC - Retail unit growth rate last four years

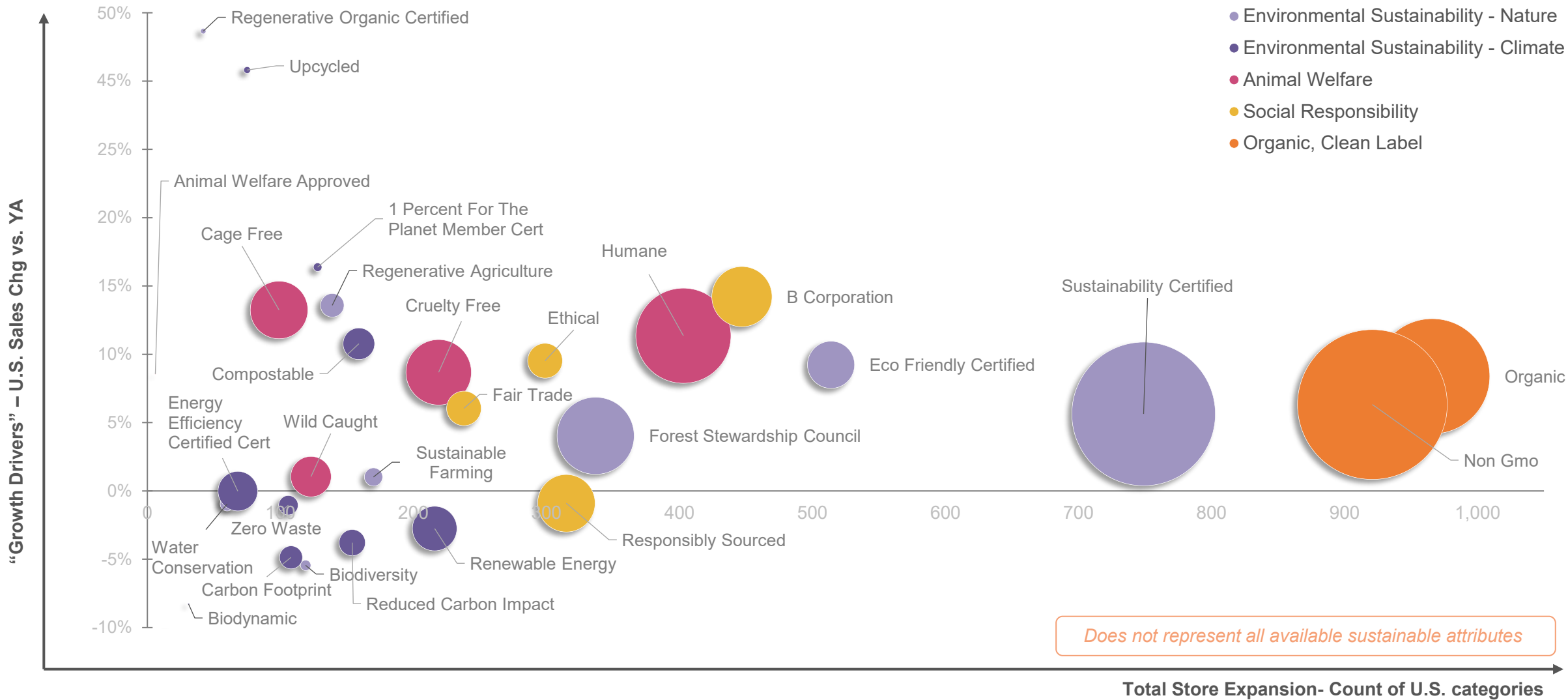


67% of consumers say it's important that companies take environmentally responsible actions

45% of consumers are willing to pay up to 10% more for health and wellness products that align with their ethical and environmental standards. And another **13%** would pay even more.

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 December 27, 2025
NIQ Global State of Health and Wellness 2025 Report, US Respondents; NIQ Consumer Life Green Gauge® Report: NIQ Consumer Life Global 2025 and previous: GG_3 (US filter),

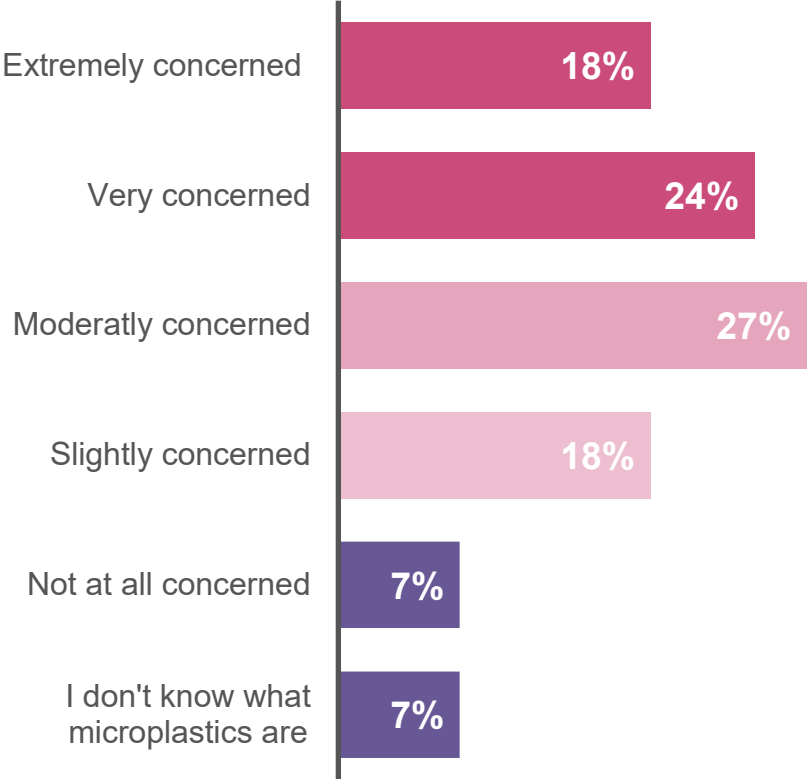
Consumers continue to find sustainability attributes aligned with their values



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 Full View + Costco ; Total Store; Count of categories, % \$ Chg vs. YA; 52 weeks ending December 27, 2025

Packaging consistently at top of consumer priorities with many concerns about microplastics

How concerned, if at all, are you about microplastics in the food and beverage products you consume?



What’s happening in Sustainable Packaging?

Curbside Recycle Stated
\$17.4B, +4.8%

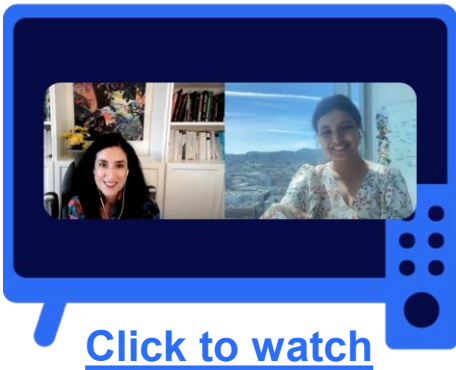
Tetra Pak Certified Stated
\$2.0B, +13.6%

Plastic Free Stated
\$689.0M, +5.5%

Consumers say the top three sustainability factors that influence food and beverage purchase choosing decisions are:
reduction of single use plastics, eco-friendly packaging and waste reduction

Extended Producer Responsibility

- **Extended Producer Responsibility (EPR)** is a regulatory framework that shifts the responsibility of managing packaging waste from local governments to producers, making brands accountable for the collection, recycling, and proper disposal of the products and packaging they introduce to the market.
- This will impact the consumer packaged goods industry in many multiple states this year.
- Watch this interview with Svanika Balasubramanian from RePurpose to understand what you need to know in 2026.



US Packaging Policy: Pulse Check

EPR OVERVIEW

- **7 states** have active EPR laws
 - Oregon
 - Colorado
 - California
 - Maryland
 - Maine
 - Minnesota
 - Washington
- **3 states** have completed reporting cycle via CAA (OR, CO, CA) - late reporting and registrations are still open through CAA portal
- **2 states** have issued initial invoices (OR, CO)
- **1 state** has not appointed a PRO (ME)



California update:

Draft regulations for SB 54 are still being finalized

Key bills to watch for:

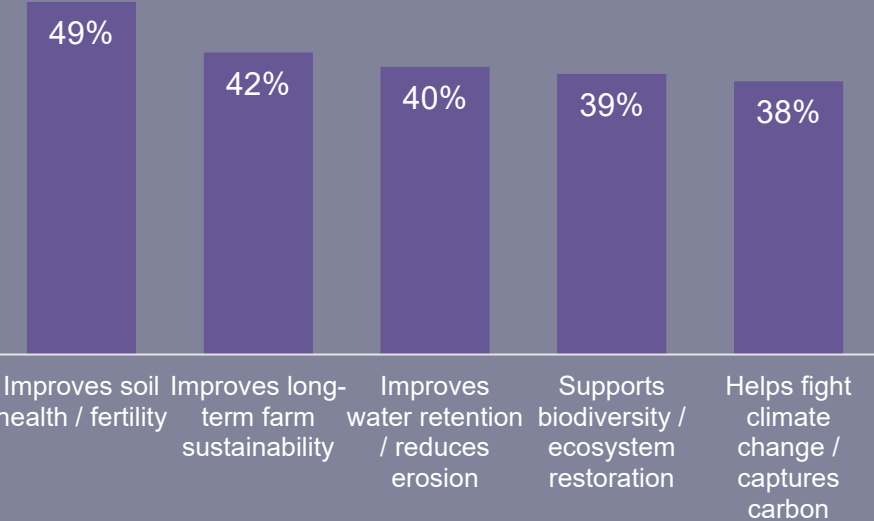
New + carry-over bills that could move forward in 2026

- New York
- New Jersey
- Illinois
- Massachusetts
- Nebraska
- Georgia
- New Hampshire
- Wisconsin

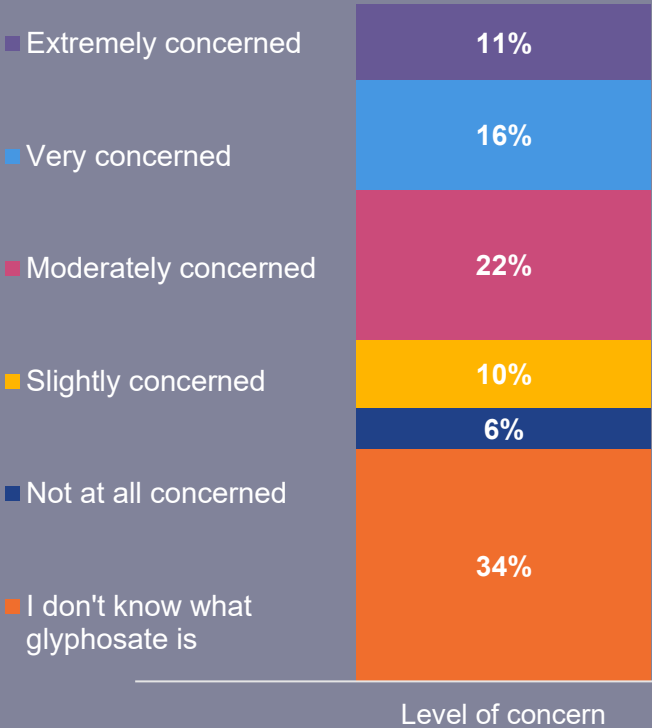
Consumers increasingly paying attention to agricultural practices

37% of consumers are very familiar or somewhat familiar with the term “Regenerative Agriculture”

Top 5 perceived benefits of regenerative agriculture
(Among those familiar with the term)



Concern about glyphosate usage in food and beverage



65% of “Free from Glyphosate” claim sales are in grocery

“

The biggest wellness risk isn't regulation, it's irrelevance. Make America Healthy Again, dye bans, SNAP restrictions are edge cases, they're signals. Brands waiting for “certainty” will be forced into reactive formulations while faster competitors redesign portfolios proactively around simplicity and compliance.

”

“

Trust is more valuable than taste and harder to manufacture. A trust deficit can't be out-innovated nor can it be fixed with marketing alone.

”

A person is shown in a yoga pose (Tree Pose) standing on a rock in the middle of a calm lake. The person's reflection is visible in the water. In the background, there are mountains and a forest under a sunset sky with warm orange and yellow hues. The overall scene is serene and peaceful.

The curated future of wellness

NielsenIQ

Wellness concentration varies significantly by channel

Share of Attribute Indexed to Total Share

Retailer	All Health & Needs States Stated	Environmental Sustainability + Organic Marketing Claim	All Social Responsibility	All Clean Label	Contains Red Dye 3
Grocery Stores	46	132	97	120	67
Remaining Mass	133	99	104	141	179
Amazon.com	151	87	90	25	64
Costco	118	190	222	110	38
AO Channels	41	11	35	9	17
Remaining Warehouse Club	99	57	120	149	129
Dollar Stores	134	3	53	58	241
Convenience/Gas	74	6	37	33	77
Drug Stores	367	41	110	40	125
Pet Stores	339	7	46	0	204

Shr Chg >0.2

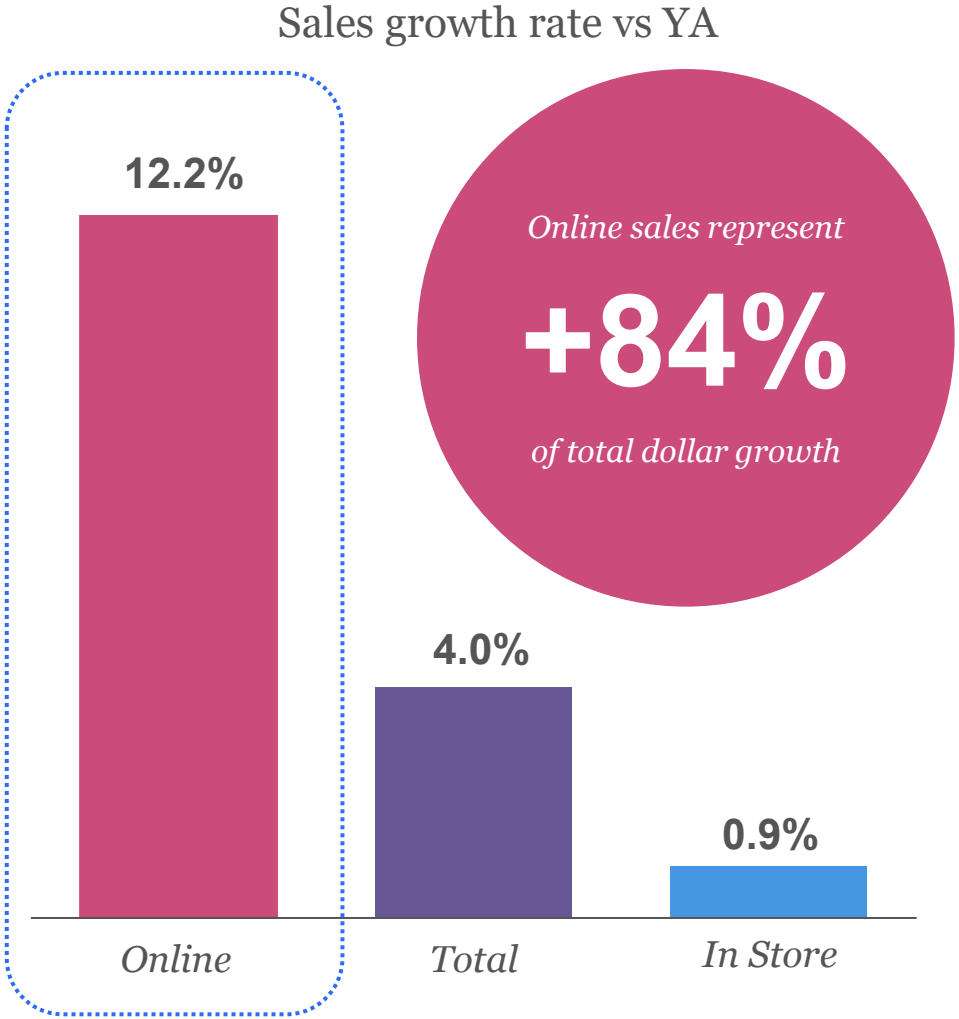
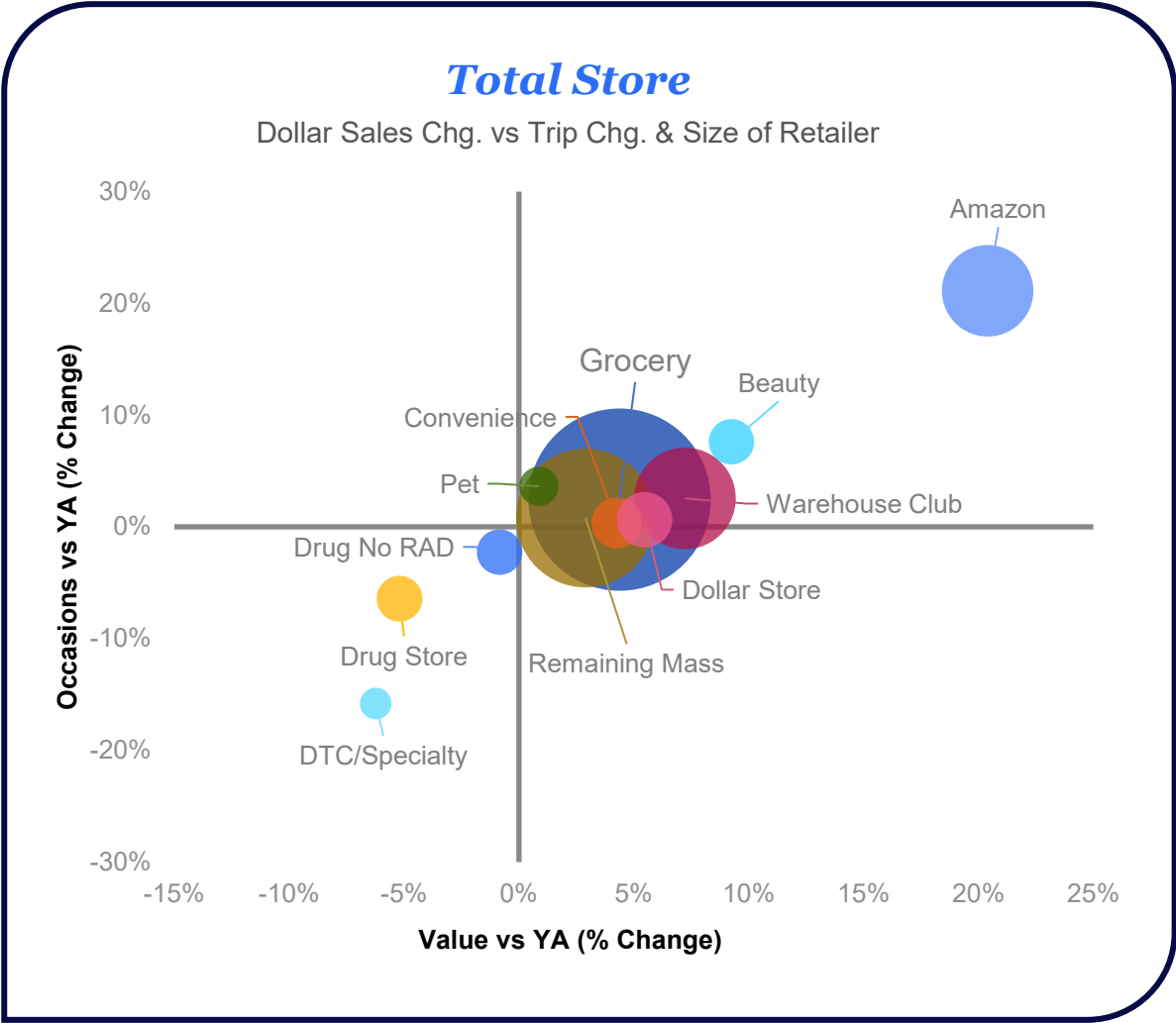
Shr Chg Between -0.2 & 0.2

Shr Chg <-0.2

Index >120

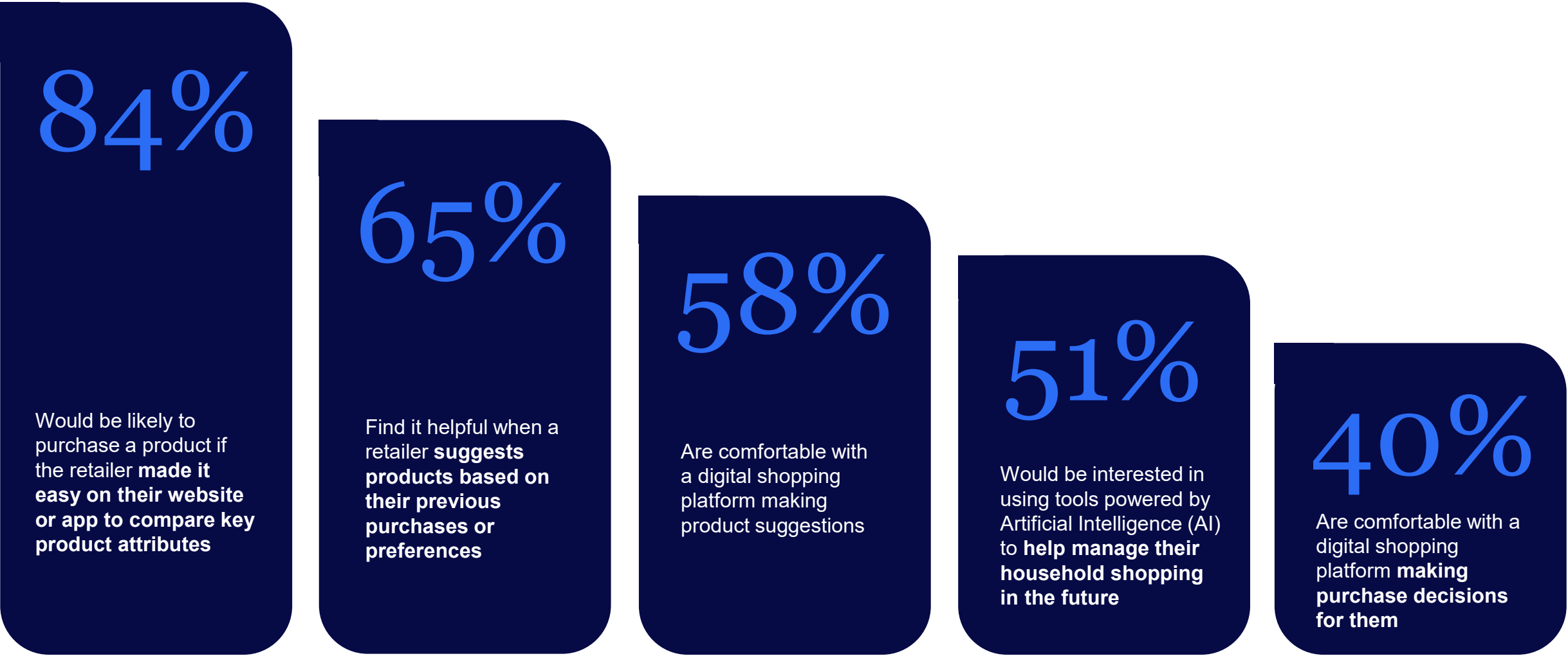
Source: NIQ Expanded Omnishopper; Total US All Outlets by Channel; Attribute Grouping vs Total Store; Dollar Share Index to Total Store Share and Dollar Share Chg; Latest 52 Weeks Ending 02/21/2026

Channels are shifting and products are chosen online before consumers ever step foot in a store or click add to a cart



Source: NIQ Expanded Omnishopper; Total US All Outlets by Channel; Total Store; Dollar vs Occasions/Trips % change vs year ago; Latest 52 Weeks Ending 02/21/2026; NielsenIQ Omnisales, \$ %Chg YA and \$ Chg YA for All Departments in Total US | Latest 52 wks w/e 8/23/25

Today, shoppers show a great appetite for AI-driven personalized solutions globally



Source: NIQ Global Consumer Outlook Jul-25

But a new era of shopping is *changing the way consumers search for, discover, and purchase products*

What is agentic commerce?

- AI systems that **act on behalf of users to make purchases**
- Can **anticipate needs, compare options**, and **execute transactions**
- **Operate autonomously** (or semi-autonomously) based on consumers' prompts, with **limited human interaction or oversight**
- Don't "browse" products or content like a human would—they **extract structured data to make parameter-based decisions**

Give me a menu for a bbq tonight with chicken for four people with one person who has a dairy food allergy and one person who is on a GLP-1.

Here's a **BBQ menu for four** that centers on **chicken**, is **100% dairy-free**, and is **GLP-1-friendly** (protein-forward, lighter sides, easy to portion, not overly greasy).

Grilled Lemon-Herb Chicken (Bone-in thighs or breasts)

- **Marinade (dairy-free):** olive oil, lemon juice & zest, garlic, rosemary or thyme, salt, pepper
- **Why it works:** flavorful without heavy sauces; easy to eat smaller portions
- **GLP-1 tip:** serve **½–1 piece** per person, sliced before serving to reduce overwhelm

You should be able to find *everything on that BBQ menu easily at mainstream grocery stores*. Here's a **local, practical guide** so you can make one stop

Hy-Vee...*would you like a grocery list?*

Best overall for this menu.

- Fresh chicken (thighs or breasts), Fresh herbs (rosemary, thyme, parsley, mint), Produce (lemons, corn, zucchini, berries), Canned beans (cannellini/white beans), Dijon mustard, olive oil, spices

Strong labeling for allergens

Good quality meat and produce

Allergy and GLP-1 Reminder at Checkout

- Check Dijon and spice blends for hidden dairy
- Skip creamy marinades or pre-marinated chicken
- Prioritize lean protein and fresh produce

*Illustrative example:
Food shopping without an app; truncated for illustration purposes*

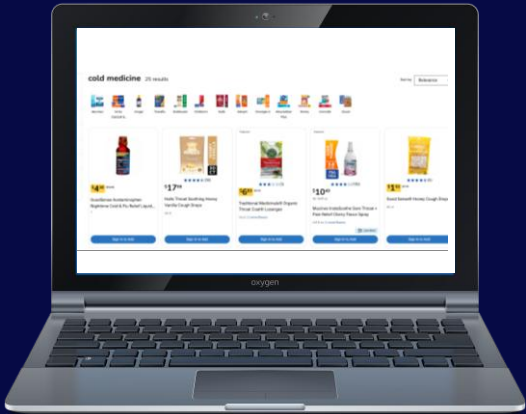
AI has the potential to transform shelf strategy

A new, even more challenging competitive environment

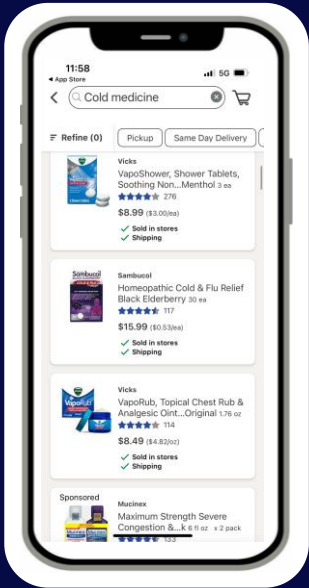
Number of visible SKUs



Physical Shelf
50+ SKUs



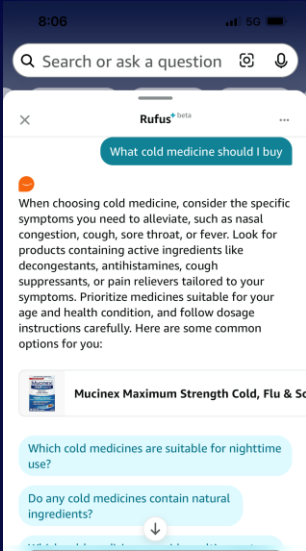
Digital Shelf
5+ SKUs



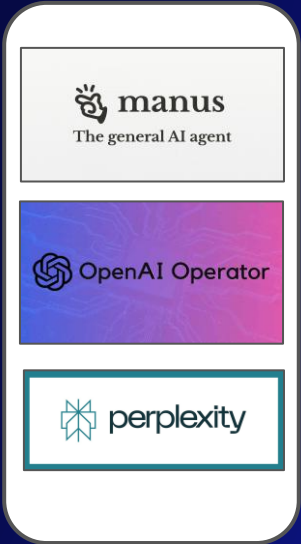
Mobile Shelf
4+ SKUs

AI will decide your brand's future, before consumers ever see your packaging

As AI agents take over discovery and replenishment, brands that don't structure product data, claims and benefits for machine interpretation will disappear from the consideration set – no matter how strong their shelf presence once was. It will also change the game on discoverability, leveling the playing field for brands.



AI Controlled Shelf
1-2 SKUs



Digital Maturity

Source: NIQ Digital Shelf

Wellness highlights around the store



Beauty Care

From appearance to whole body health (beauty reframed as skin, hair and confidence as signals of internal health)

Innovative Beauty is also on the rise, with increased emphasis on pre- and probiotics, adaptogens, and essential oils.

Many beauty products now highlight advanced formulas, with a strong focus on microbiome health and dermatologist-tested claims.

“Beauty has expanded to be not just about looking good, but feeling good as well. Products with high quality ingredients, and science-backed benefits are primed to win in 2026.”



Anna Mayo
Vice President, Beauty Thought Leadership



Pet

Pet wellness mirrors human wellness – functional nutrition, longevity, anxiety and mobility support. Consumers increasingly project preventative health logic onto pets

Clean, Human-Grade Ingredients
Digestive health (Microbiome and Metabolism Support)

Pet supplements: joint, gastro, multi-condition, behavior/brain and derm/skin
Packaging is more specific to benefits, calling out specific ingredients

“The pet supplement market is booming as pet owners increasingly seek ways to support their companions’ health and longevity.”



Andrea Binder
Vice President, Pet Thought Leadership

“As wellness becomes a priority, consumers are moderating alcohol consumption, though drinking less but better and seeking flavor-forward and better-for-you-positioned products.”



Kaleigh Theriault
Director, BevAl Thought Leadership



Baby Care

Added sugar consumption continues to trend downward

Heavy focus on immune health, fiber, and free from antibiotics

Government is revisiting infant formula guidelines around seed oils.

“Most consumers are not actively avoiding seed oils but the spotlight from the government and possible news it creates can sow doubt, especially for those with infants.”



Darren Seifer
Vice President, Home, Family and Baby Thought Leadership



Beverage Alcohol

Consumers consistently seeking lower calorie options, specifically products stating they are under 100 calories.

Focus on sugar conscious products and free from ingredients like high fructose corn syrup

Non-Alc products surge as consumers seek alternatives to alcohol, such as THC

“Today’s wellness mindset is outcome-first: shoppers judge food and beverage by what it helps them achieve, not what it promises.”



Chris Costagli
Vice President, F&B Thought Leadership



Household Care

The living environment as health input: home products increasingly evaluated through air quality, chemical exposure, stress and sleep impact. Wellness shifts home from CLEAN to safe, calming restorative
All natural ingredients, free from phosphate, USDA Cert-biobased; Sustainability remains a priority, with growing emphasis on certifications such as EPA Safer Choice and Eco-Friendly.

Woman-owned businesses continue to gain momentum, alongside an increasing demand for products made in the USA. Humane products are growing quickly (Not tested on animals, Cruelty Free, Humane)



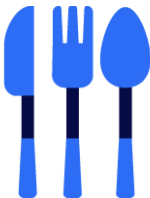
Personal Care

Daily rituals as wellness infrastructure

Removing unnecessary ingredients (sugar-free, gluten-free, hypoallergenic)

Stated Doctor Recommendations

Made in USA



Food/Supplements

From fuel to functional partner

Fresh foods increasingly growing

Focus on Health Benefits (Protein, Fiber, Omega Group, Sugar Conscious, Vitamins)

Innovative Health (Nootropics, L-Theanine, Collagen) growing quickly

Source: NIQ RMS Full View + Costco, NielsenIQ Product Insights, 52 weeks ending 1/24/26



Closing Thoughts

The wellness landscape is experiencing major shifts and the consumer has more agency than ever in their health:

***When consumers are CEOs of health, they don't want brands and retailers...they want systems
...for themselves
...for their homes
...for their families
...for their pets***

The convergence of categories, blurring of retail and re-imagining of priorities requires a new lens of the consumer:

Design for need states, not categories, and support health journeys (from prevention to performance

It's time to understand the challenges and myths of health equity and access to see real growth potential:

Engineer value, not just premiumization. Balance access, equity and profitability because while cost is the biggest barrier to wellness, it's the next growth opportunity

The rules of trust and transparency have changed and will be influential on sales with technological changes

Discoverability and consumer engagement will change and consumer expectations of curated wellness will only increase in the future

Top Wellness Questions You Might be Asking

in partnership with NielsenIQ

How are these trends relevant for my business and are we ahead or behind these trends?

Does our definition of wellness match the shifting view consumers have?

What are the top Wellness Trends (product claims) in your category?

NIQ products & sources

you can use to answer top questions

- **NIQ Product Insight (NPI)** *characteristics*
- *NIQ Better For Segmentation™*
- *SNAP survey + SNAP state waiver*
- *GLP-1 survey + Homescan panel*
- *Health Ailment survey + Homescan panel*
- **Discover** – *Omnishopper*
- **BASES** *Innovation*
- **Discover** – *Retail Measurement Services (RMS)*

Thank you!

Sherry Frey
NIQ, VP Wellness - Industry Leader

NielsenIQ

EPR in 2026: What's Changed, What's Coming, and How to Prepare

100+ brands trust
rePurpose as their
partner for
packaging
compliance across
North America.

EPR Compliance

California
EPR Submitted

First report due
Mar 31, 2025

Fees due
Jul 1, 2025



Home

Packaging Library

Packaging Insights

Legal Compliance

Plastic Recovery

Community



Packaging Compliance

Upcoming deadlines



Oregon EPR

Report due
Mar 31, 2025

Fees due
Jul 1, 2025

SUBMITTED



Colorado EPR

Report due
Jul 31, 2025

Fees due
Jan 31, 2026

IN PROGRESS



California EPR

Registration due
Sep 5, 2025

Report due
Nov 15, 2025

UPCOMING



Canadian Federal Plastics Registry

Report due
Sep 29, 2025

UPCOMING



Washington Plastic PCR Mandate

Report due
Apr 1, 2026

Fees due
Jan 2027

UPCOMING



California Truth in Recycling

Label updates due
Oct 31, 2025

UPCOMING



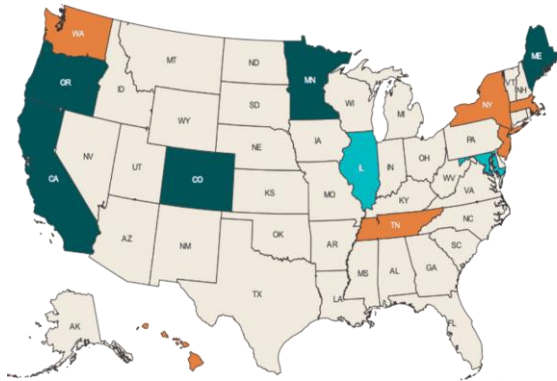
rePurpose

The Foundations: At a glance - Who's involved in EPR?

Extended Producer Responsibility (EPR) is a regulatory framework that shifts the responsibility of managing packaging waste from local governments to producers, making brands accountable for the collection, recycling, and proper disposal of the products and packaging they introduce to the market.

States

Create and enforce EPR laws



Producer Responsibility Organizations

Serve as the central entity managing compliance for producers.



Covered Entities

Producers that sell products in packaging that fall under the state's EPR laws.



US Packaging Policy: Pulse Check

EPR OVERVIEW

- **7 states** have active EPR laws
 - Oregon
 - Colorado
 - California
 - Maryland
 - Maine
 - Minnesota
 - Washington
- **3 states** have completed reporting cycle via CAA (OR, CO, CA) - late reporting and registrations are still open through CAA portal
- **2 states** have issued initial invoices (OR, CO)
- **1 state** has not appointed a PRO (ME)

California update:

Draft regulations for SB 54 are still being finalized

Key bills to watch for:

New + carry-over bills that could move forward in 2026

- New York
- New Jersey
- Illinois
- Massachusetts
- Nebraska
- Georgia
- New Hampshire
- Wisconsin

U.S. EPR 2026 Overview

9 Reports, 7 States

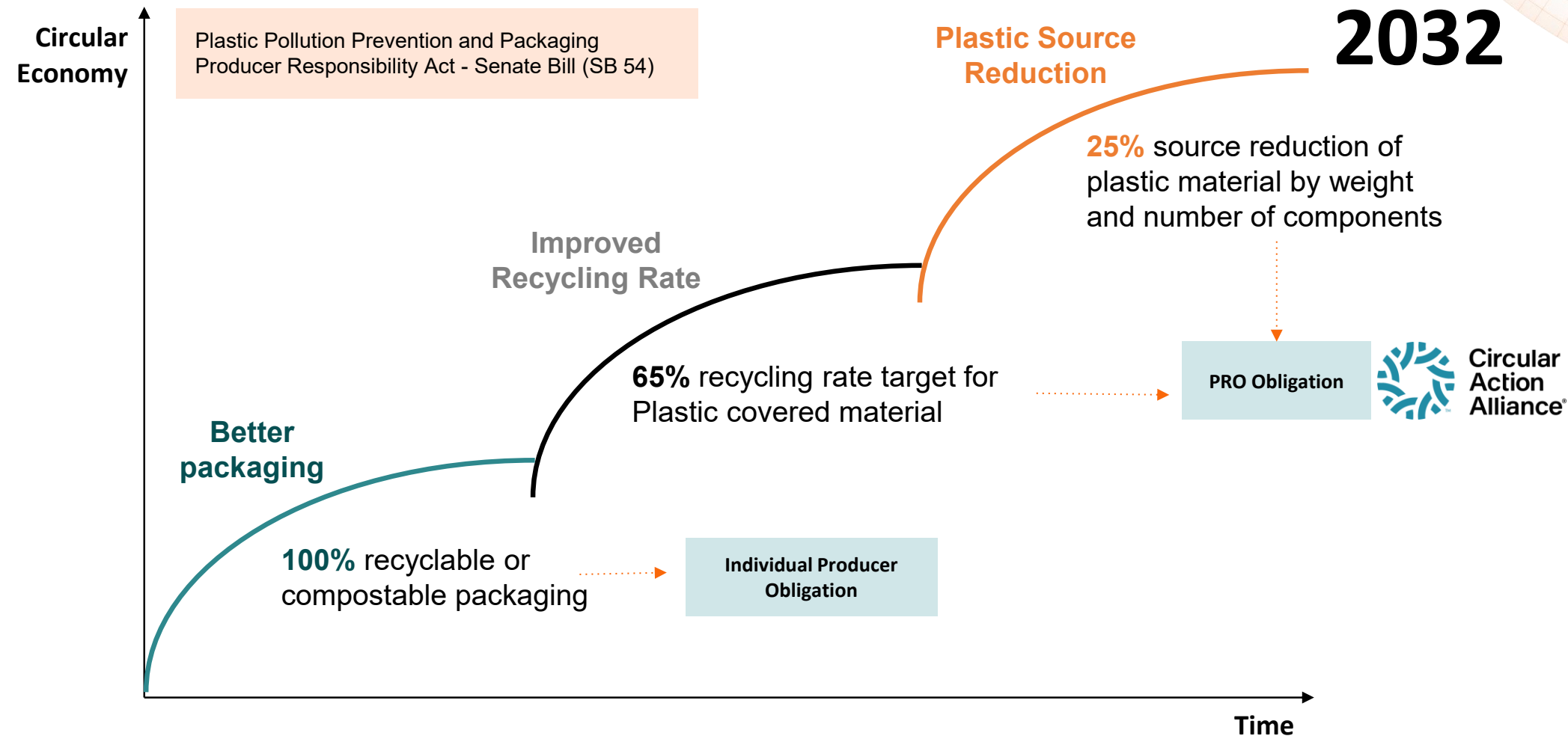
Program	2026 Report Date	Data Year	Type of 2026 Report	Program Period Covered by the Report
Oregon	May 31, 2026	CY 2025	Annual Supply Report	2027 Program
Colorado	May 31, 2026	CY 2025	Annual Supply Report	2027 Program
California	TBD (April 2026)	CY 2023	2023 Baseline Producer Report	Source Reduction
	August 1, 2026	N/A	Individual Source Reduction Plan	Source Reduction
	May 31, 2026	CY 2025	Annual Supply Report	2027 Program (& Early Fees)
Maine	TBD – Q3 2026	CY 2025	Start-up Report (e.g., total supply weight only)	Pre-Program (& Start-up Fees)
Minnesota	May 31, 2026	CY 2025	Simplified Supply Report	Pre-Program
Maryland	May 31, 2026	CY 2025	Simplified Supply Report	Pre-Program
Washington	May 31, 2026	CY 2025	Simplified Supply Report	Pre-Program

Upcoming fees & what to expect

Program	Report that informs 2026 Payment	Type of 2026 Payment	Program Year	Estimated Invoice Dates	What can I use to budget my 2026 fees/dues payments?
Oregon	- March 31, 2025 - CY2024 Data Annual Supply Report	Program Fees	2026	Jan & Jul, 2026 (Two 50% installments)	- Company's CY2024 Supply Data in OR - CAA 2026 OR Producer Fee Rate Schedule (available by end of Oct 2025)
Colorado	- July 31, 2025 - CY2024 Data Annual Supply Report	Program Dues	2026	Jan & Jul, 2026 (Two 50% installments)	- Company's CY2024 Supply Data in CO - CAA 2026 CO Producer Due Rate Schedule (posted in Producer Portal on Oct 13, 2025)
California	- May 31, 2026 - CY2025 Data Annual Supply Report	Early Fees	Pre-Program	Aug 2026 (One installment)	- Company's CY2025 Supply Data in CA - CAA CA Producer Early Fee Rate Schedule - Estimated Ranges (posted in Producer Portal on Sep 23, 2025)
Maine	TBD – Q3 2026	Start-up Fees	Pre-Program	TBD – Q4 2026	TBD, based on selection of Stewardship Organization (SO)

CAA selected as PRO
 PRO/SO not yet selected

California SB 54 Statute Requirements - Recap



What producers need to do now

2023 Baseline Final/ Re-Submission

- Estimated window: 30 days after regs finalized
- **This is your FINAL baseline**
- 30-day window to make corrections/submit data once regs are finalized
- Source reduction targets measured against this number

Due May 31, 2026

- Annual supply report (2025 data)
- **Annual source reduction reports (NEW)**
- Due BEFORE the ISR plan itself - more guidance awaited

De Minimis Exemptions

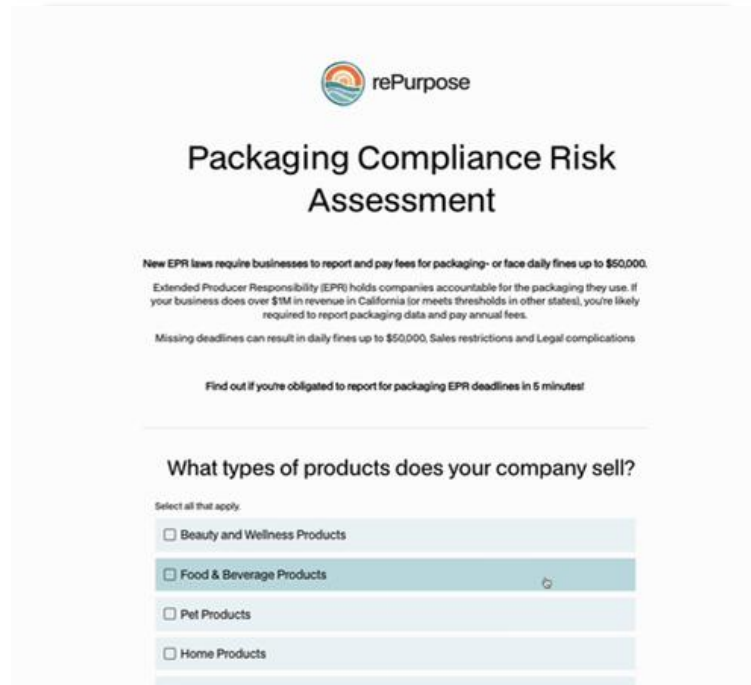
- TBD throughout the year
- Won't be finalized before re-submission OR source reduction plans
- **Report ALL materials. Assume no material specific de-minimis exemptions.**

Source Reduction Plans

- Deadline TBD (no later than August 1st)
- CAA guidance available in producer portal
- First milestone: 10% reduction by Jan 2027
- **Quick win: PCR incorporation, elimination of unnecessary layers**

A snapshot of resources from rePurpose Global

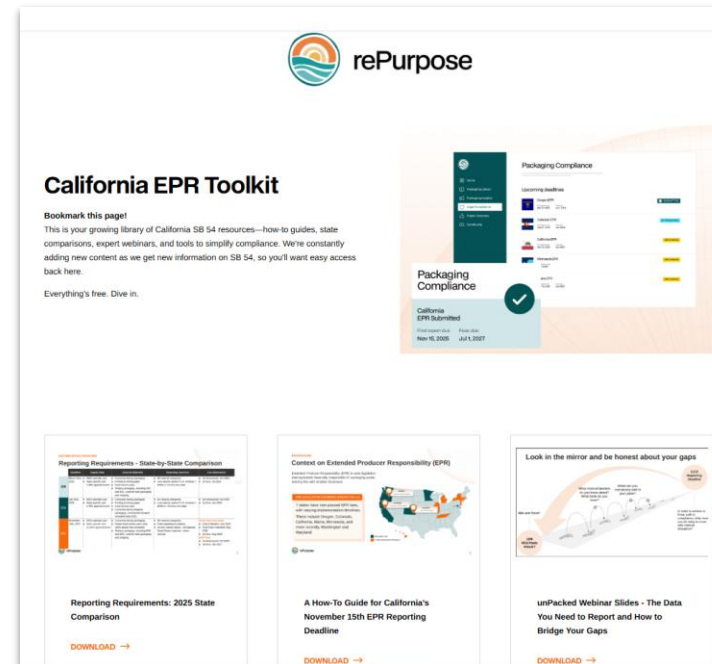
Liability Assessments



The image shows a web form titled "Packaging Compliance Risk Assessment" from rePurpose. It includes a rePurpose logo at the top. Below the title, there is a paragraph explaining that new EPR laws require businesses to report and pay fees for packaging, with fines up to \$50,000. It also mentions that Extended Producer Responsibility (EPR) holds companies accountable for the packaging they use. A section titled "What types of products does your company sell?" asks the user to select all that apply from a list: Beauty and Wellness Products, Food & Beverage Products (which is highlighted), Pet Products, and Home Products. At the bottom, there is a link to find out if the user is obligated to report for packaging EPR deadlines in 5 minutes.

<https://epr-survey.repurpose.global/#products>

Guides, eBooks and Toolkits



The image shows a web page titled "California EPR Toolkit" from rePurpose. It features a rePurpose logo at the top. The main heading is "California EPR Toolkit". Below it, there is a paragraph explaining that this is a growing library of California SB 54 resources, including guides, state comparisons, expert webinars, and tools to simplify compliance. A section titled "Packaging Compliance" shows a checklist with a green checkmark and a "Download" button. Below this, there are three sections: "Reporting Requirements - State-by-State Comparison", "Context on Extended Producer Responsibility (EPR)", and "Look in the mirror and be honest about your gaps". Each section has a "Download" button.

<https://www.repurpose.global/resources/guides>

Detailed Educational Webinars

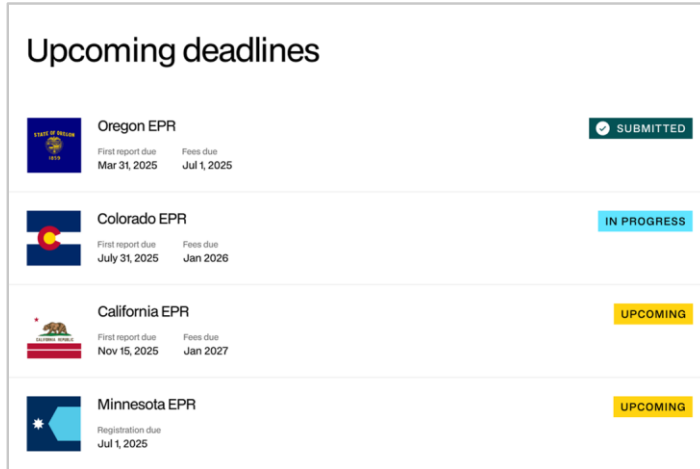


The image shows a webinar series titled "unPACKED: An EPR Compliance Series for Brands and Manufacturers" from rePurpose. It features a rePurpose logo at the top. The main heading is "unPACKED: An EPR Compliance Series for Brands and Manufacturers". Below it, there is a paragraph explaining that rePurpose compliance experts and special guests from CAA will be presenting. A list of three webinars is shown, each with a date and a title: "OCT 6 California EPR Compliance", "OCT 27 Truth in Labeling (SB 343)", and "NOV 10 Understanding 2026 Fees".

<https://www.repurpose.global/resources/webinars>

Get Started in 3 Easy Steps

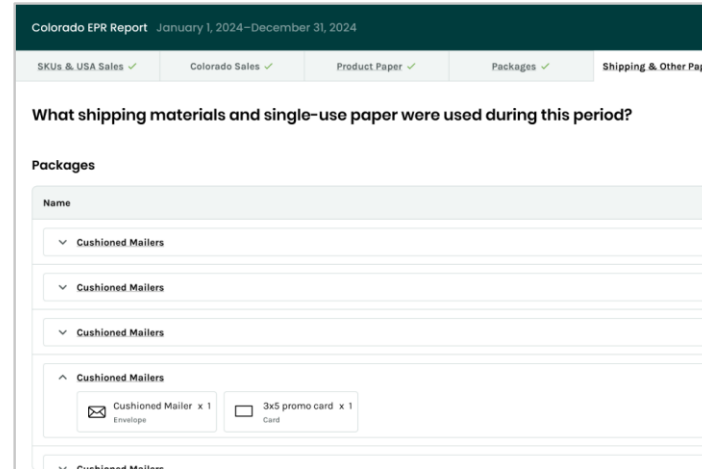
We simplify every step of compliance so you avoid fines and stay ahead



STEP 1

Track deadlines in real-time

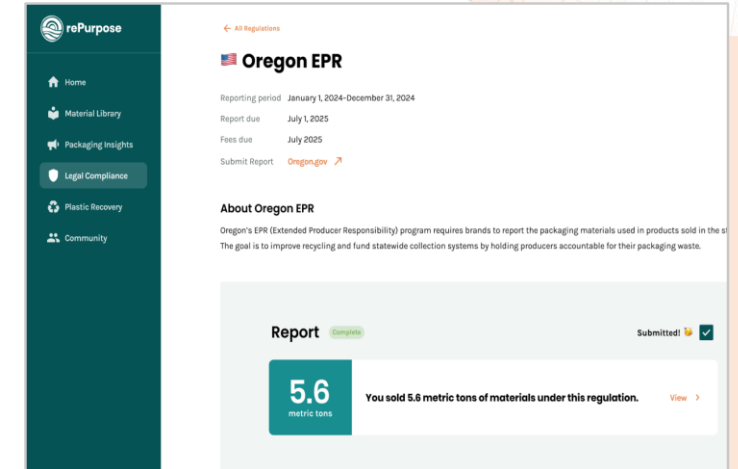
Our team works with you to gather the necessary info and helps plug data gaps



STEP 2

Automate data compilation

We help you get the right data, then our system categorizes materials and calculates fees



STEP 3

Generate reports & submit

You save time, avoid unnecessary costs, and stay ahead by forecasting future EPR fees



The leading Packaging Sustainability & Compliance platform for consumer companies. Enabling companies to navigate packaging regulations complexity with confidence.

Contact us:

 sales-team@repurpose.global

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