A Perspective on Wellness

Sherry Frey
NIQ, VP Wellness - Industry Leader

NielsenIQ

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4 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

NIQ

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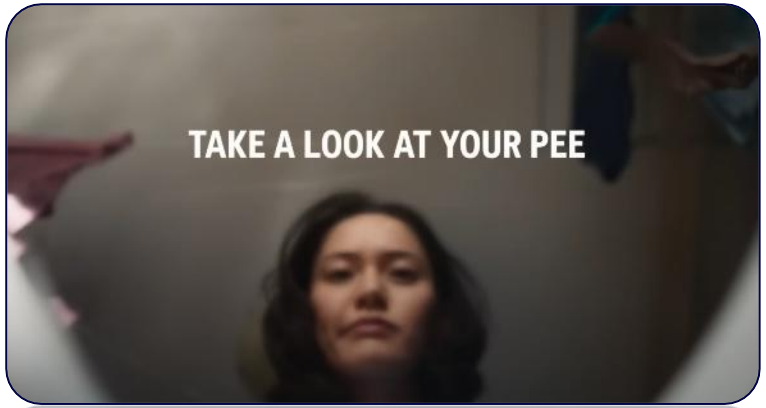
No longer niche, *health and wellness* is shifting a *cultural expectation*



SuperBowl 2026 Ads

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NielsenIQ

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 Sabores (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

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BAIN & COMPANY

2026 Insurgent Brands list

US Insurgent Brands criteria:

$35M+ *
Sales in tracked channels

>10x
Category growth

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Existing Insurgent Brands	New to the list in 2026
Food: ALOHA, JUNKLESS, JonnyPops, Magic Spoon, Van Leeuwen, Kodiak Cakes, Nature's Garden, Siete, Realgood Foods Co., purely elizabeth., MUSH, Legendary Foods, Bachan's, BUILT, Catalina Crunch, MadeGood, READY, Barebells, Dan-O's Seasoning, Carbone Fine Food, Chomps, Serenity Kids, Once Upon a Farm, Fatty Smoked Meat Sticks, izzio, Kettle & Fire, Graza, good culture, Goodles	deep Indian Kitchen, nutrail, Archer, Fruit Riot!, Amylu Foods, Organic Rancher, Chef Ramsay, Force of Nature, Solely, Lesser Evil, BeeMax, Amos, Joyride, Island Way, Zoup!, Lunchly, Drizzilicious
Non-Alcoholic Beverages: Olipop, Ghost, Black Rifle Coffee Company, Liquid Death Mountain Water, poppi, Remedy Organics, Fever-Tree, Bloom, Bizzy Cold Brew, Malk, Ryse	LMNT, nurri
Alcoholic Beverages: The Original Clubtails, BuzzBallz, Beatbox, Carbliss Hand Crafted Premium Cocktails, Athletic Brewing Co., Big Sipz Cocktails, Happy Dad Hard Seltzer, The Finnish Long Drink	Bonanza, Seaglass Wine Company, Garage Beer, Surfside
Beauty and Personal Care: Tree Hut, kitsch, Dr. Squatch, Guru Nanda, Dashing Diva, goodwipes, Starface, Odele, Byoma, Dude Wipes, Millie Moon, Gimme, eos, Vanicream, eva nyc, Bubble Skincare, Monday Haircare, Rascals, grin	Blue Lizard Australian Sunscreen, Good Molecules See a difference in your skin, Mando, Cora
Other: *Vitamin, minerals and supplements:* Sol ti, so good so you, vive organic, lemme, Botanic Tonics, Mary Ruth's, Physician's Choice, Force Factor; *Pet:* Jinx, TruRanch, Inaba; *Infant nutrition:* Kendamil, ByHeart; Scrub Daddy	GooseCreek Bath, Body & Home, humann, URO

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

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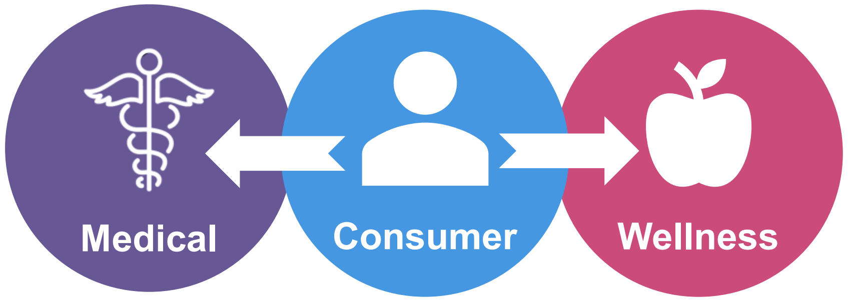
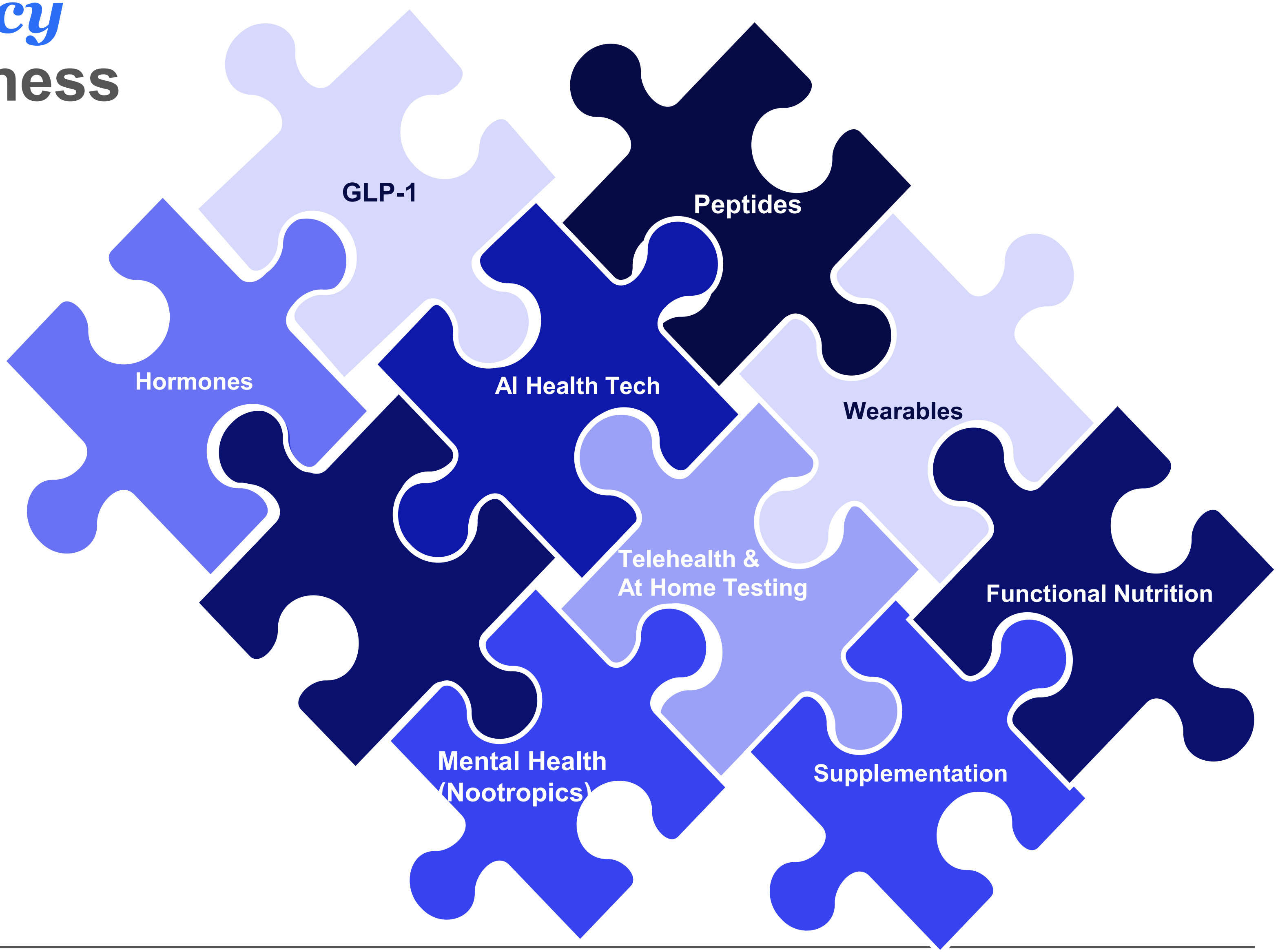
Consumers, not providers, *increasingly have agency* over their health and wellness





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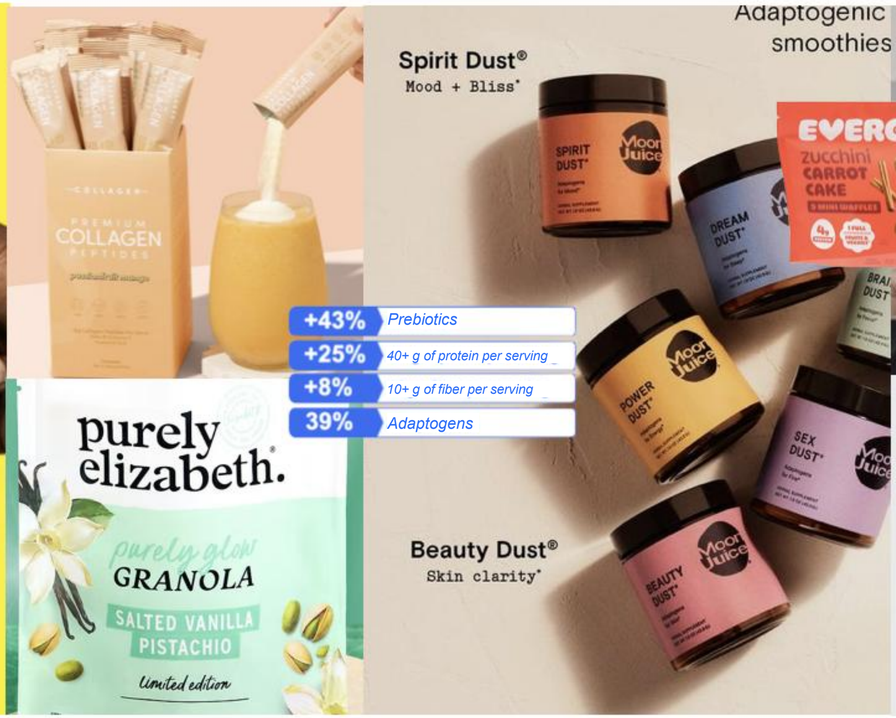
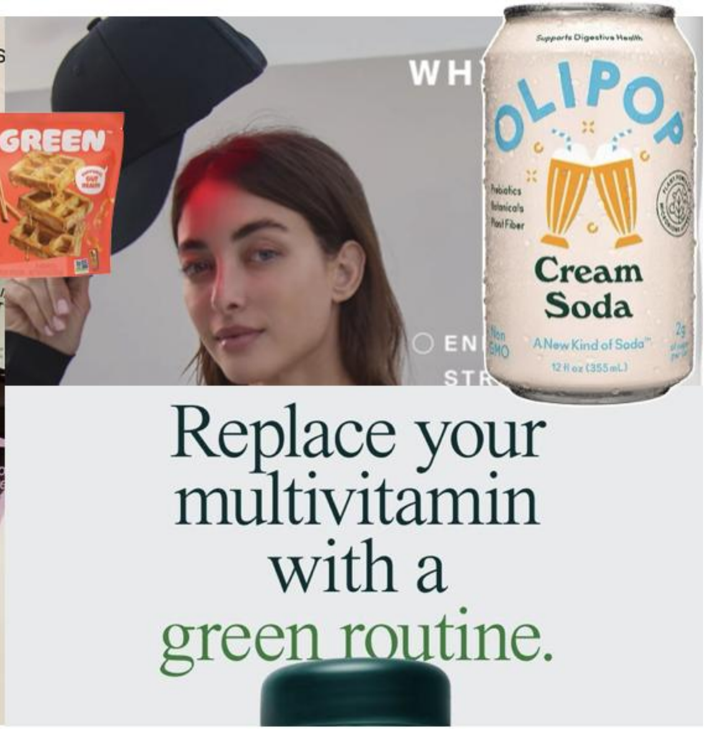
Wellness Shifting Dimensions

REMOVAL	ADDITION	OPTIMIZATION
*How wellness **borrowed** the codes*	*How wellness **blurred** the codes*	*How wellness is **integrating** the codes*





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

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

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

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

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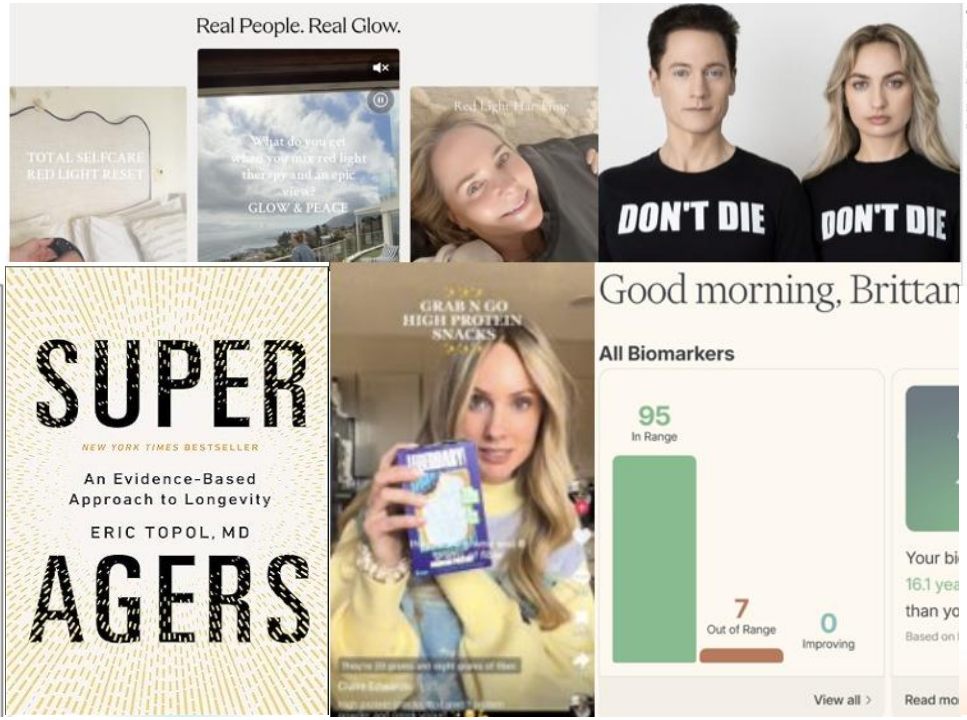
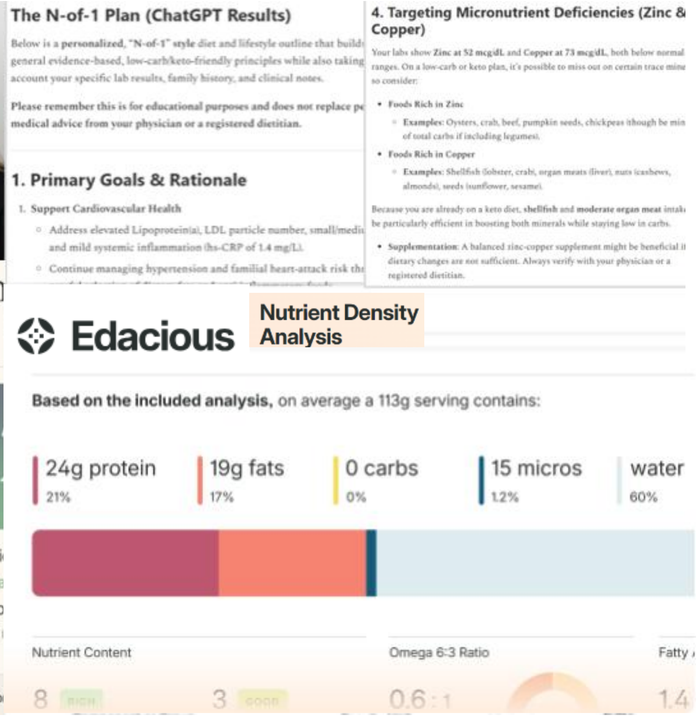
Wellness Shifting Dimensions

CERTIFED AUTHORITY	SOCIAL PROOF	CURATED VALIDATION
*How wellness **borrowed** the codes*	*How wellness **blurred** the codes*	*How wellness is **integrating** the codes*





Credibility demonstrated through organizations, certified advisors and government	Social media wellness becomes performance-driven and identity-based	Trust rebuilt through *data transparency and AI-enabled curation.* Proof points replace slogans; personalization becomes social capital

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

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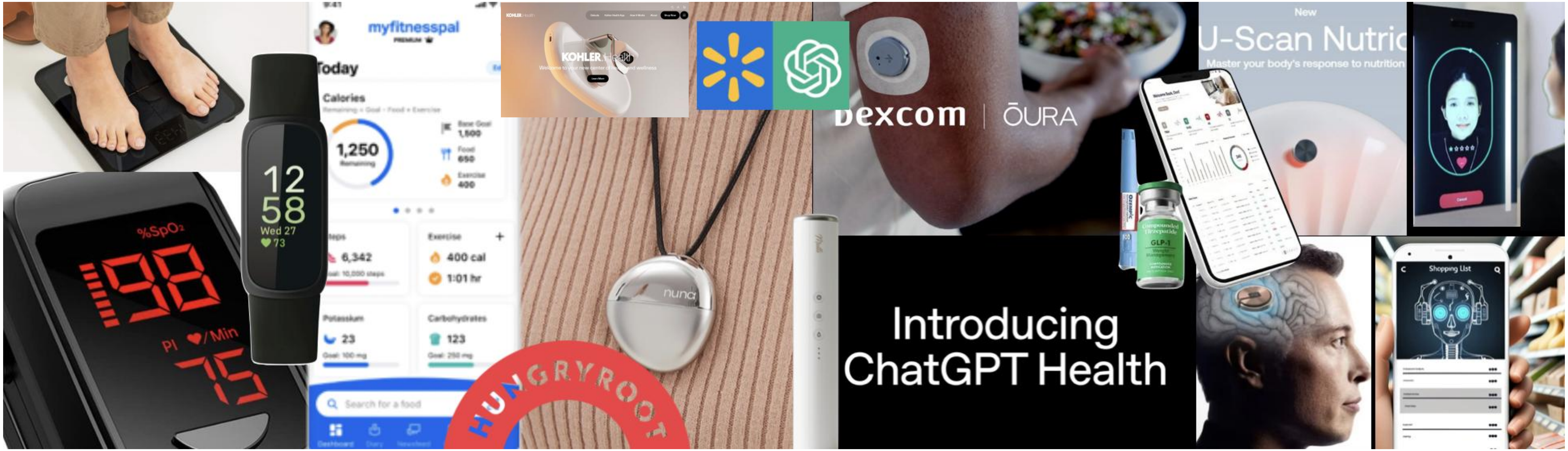
Wellness Shifting Dimensions

SIMPLISTIC SPECIFC	COMPANIONS	ECO-SYSTEMS
*How wellness **borrowed** the codes*	*How wellness **blurred** the codes*	*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

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

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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.

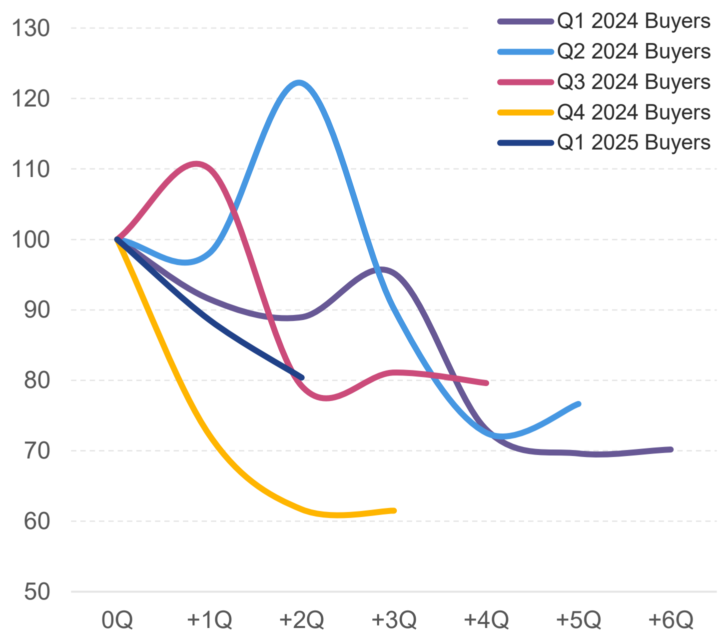
63% say “health-focused technology products are effective in helping my health and wellness”

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 BevAl

$ Sales in Subsequent Quarters



Top Selling Tech Wearables Brands on Amazon Prime Day 2025

By Sales

Apple
ŌURA
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

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

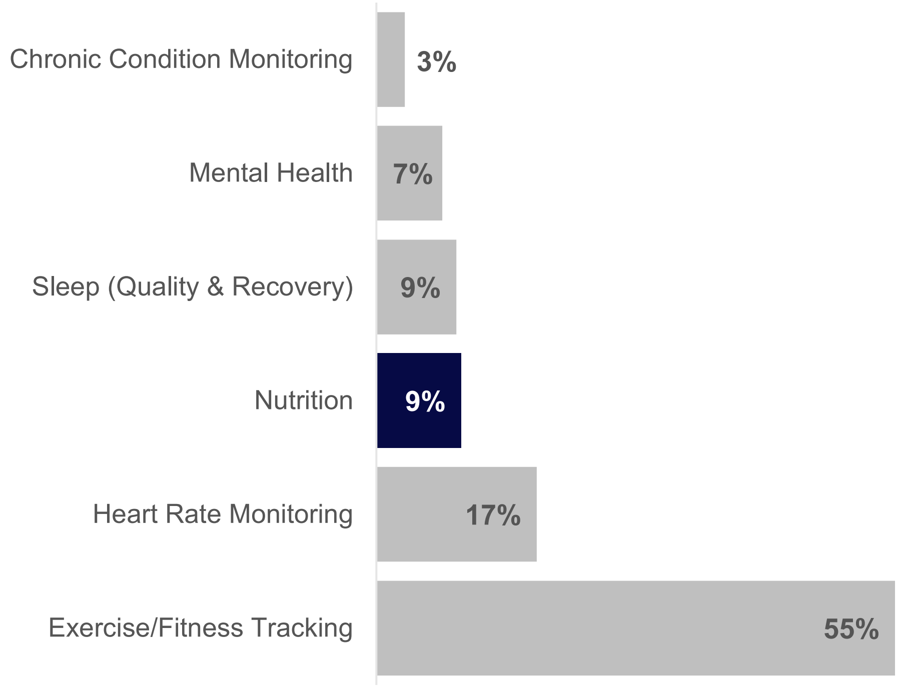
36%
of U.S. adults use a health wearable

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

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

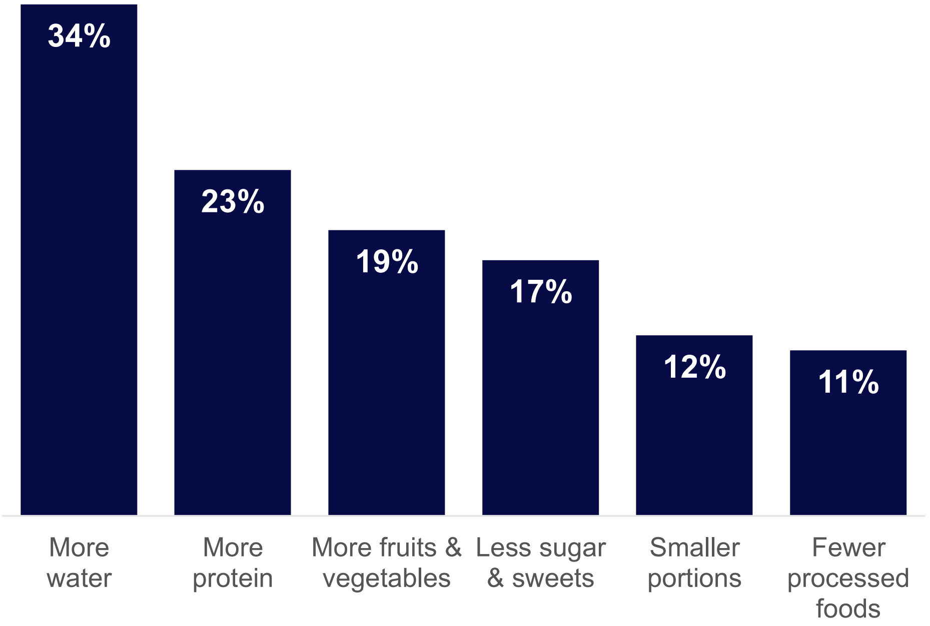
Nutrition is a low stated motivation for wearable use…

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



NIQ Bases Quick Question Omnibus, December 2025

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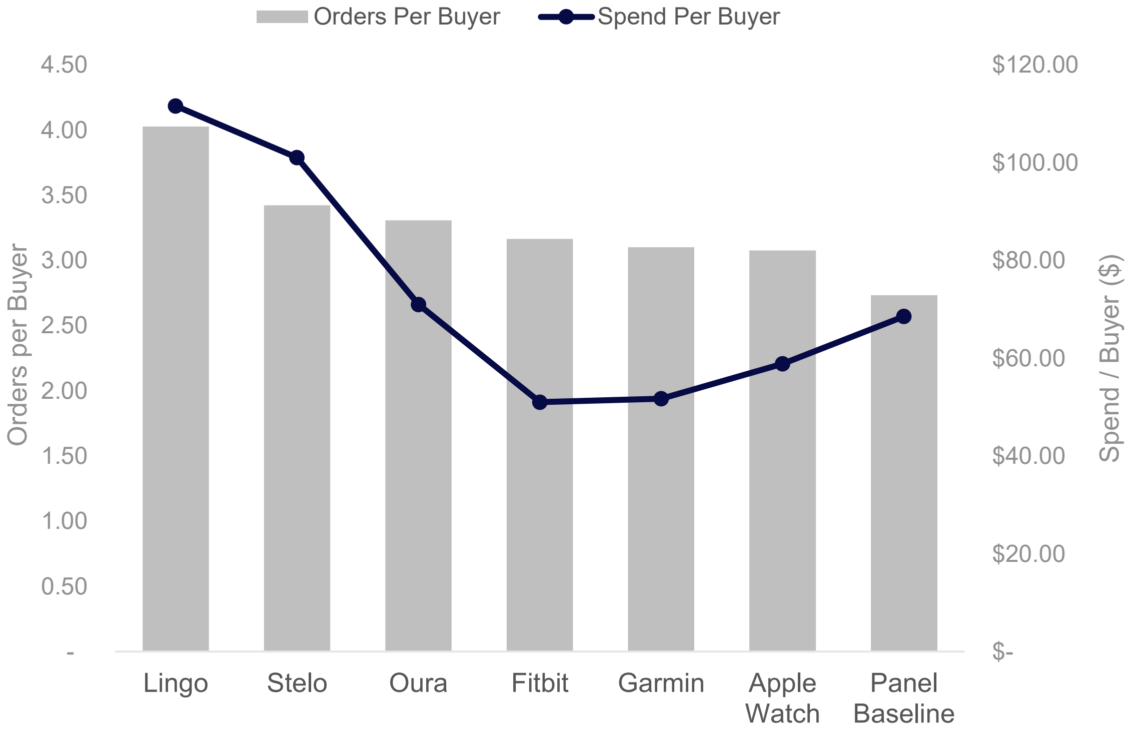
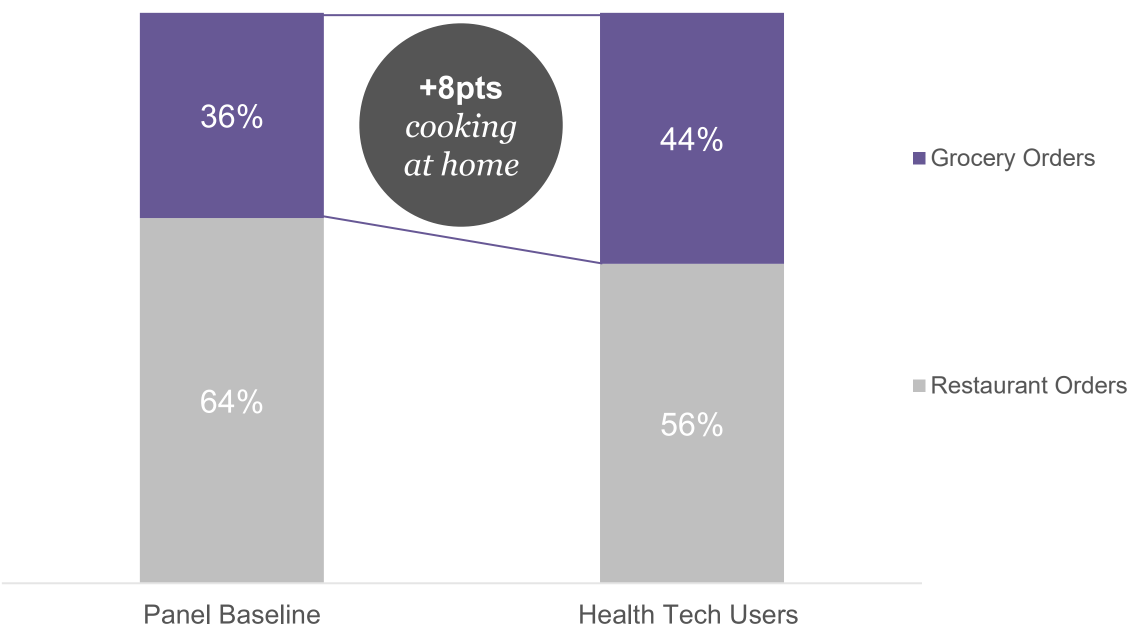
Wearable users focus on health and appear to *prioritize cooking at home* versus eating out

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.

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Redefining the healthcare experience

29%

have visited urgent care* in the L12M

+1.2pts

34%

when sick, would rather go to urgent care than visit the doctor's office

+1.7pts

59%

the quality of care you receive at an urgent care is equal to what you would get at a doctor's office

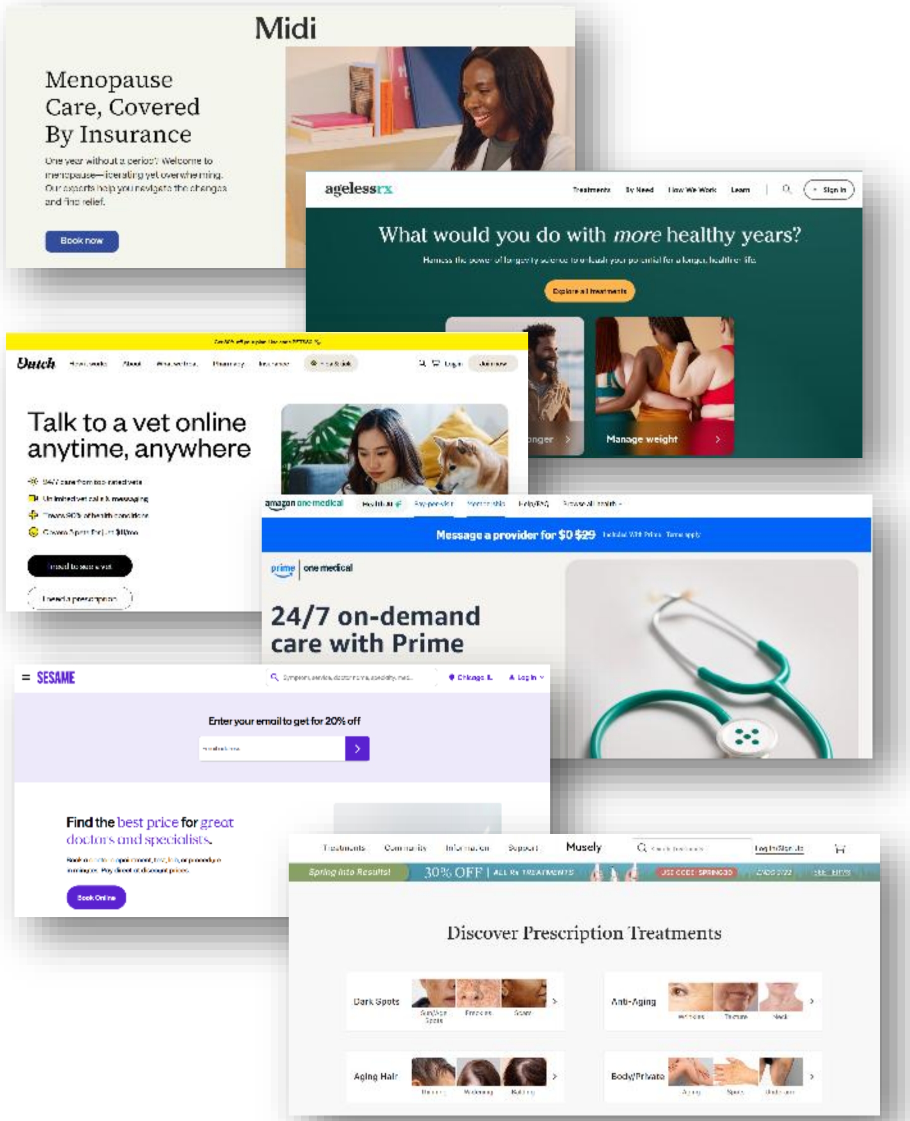
+3.1pts

47%

Urgent care centers are less expensive than a doctor's office

+2.5pts

29.1% accessed care virtually or via telehealth in L12M	+2.1pts
19%** very satisfied with most recent telehealth experience	+1.7pts
68.9% think telehealth is more convenient than in-person visit	+0.9pts



**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

**Please note 19% very satisfied with most recent telehealth is a correction from previously incorrect reported number

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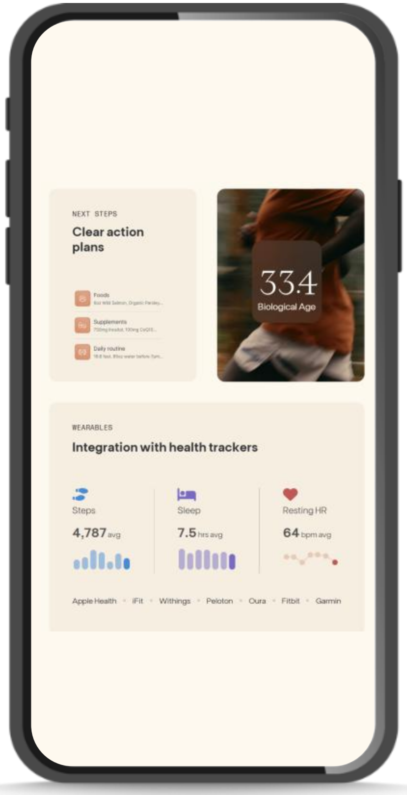
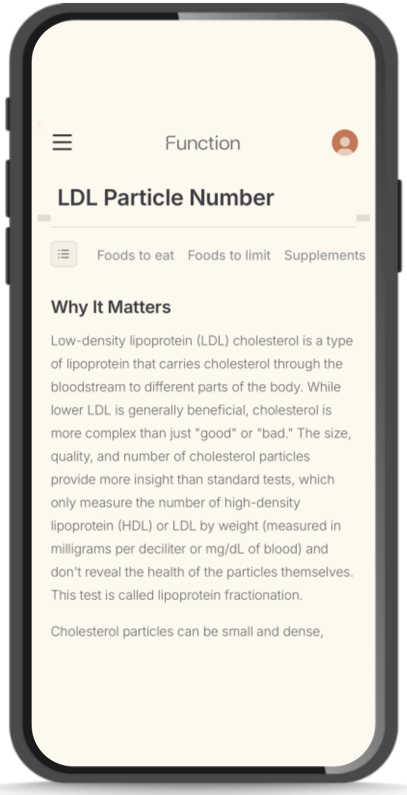
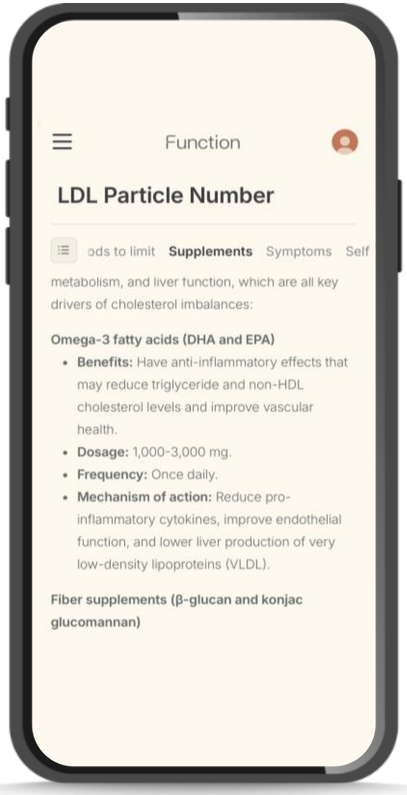
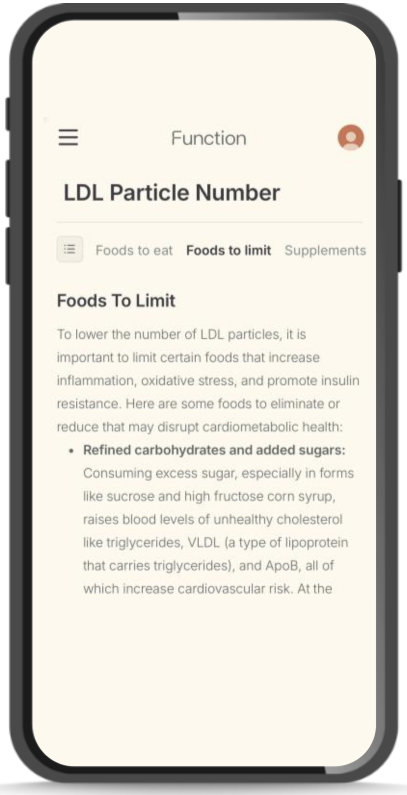
Depth of testing is now in consumer hands with specific recommendations









Consumers have choice

superpower | Quest | Mito | everlywell | EREWHON | Function

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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).

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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

Functional Inputs
"Nutrition, Supplementation, Personal Care and Medication"

Continuous measurement/Optimization

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

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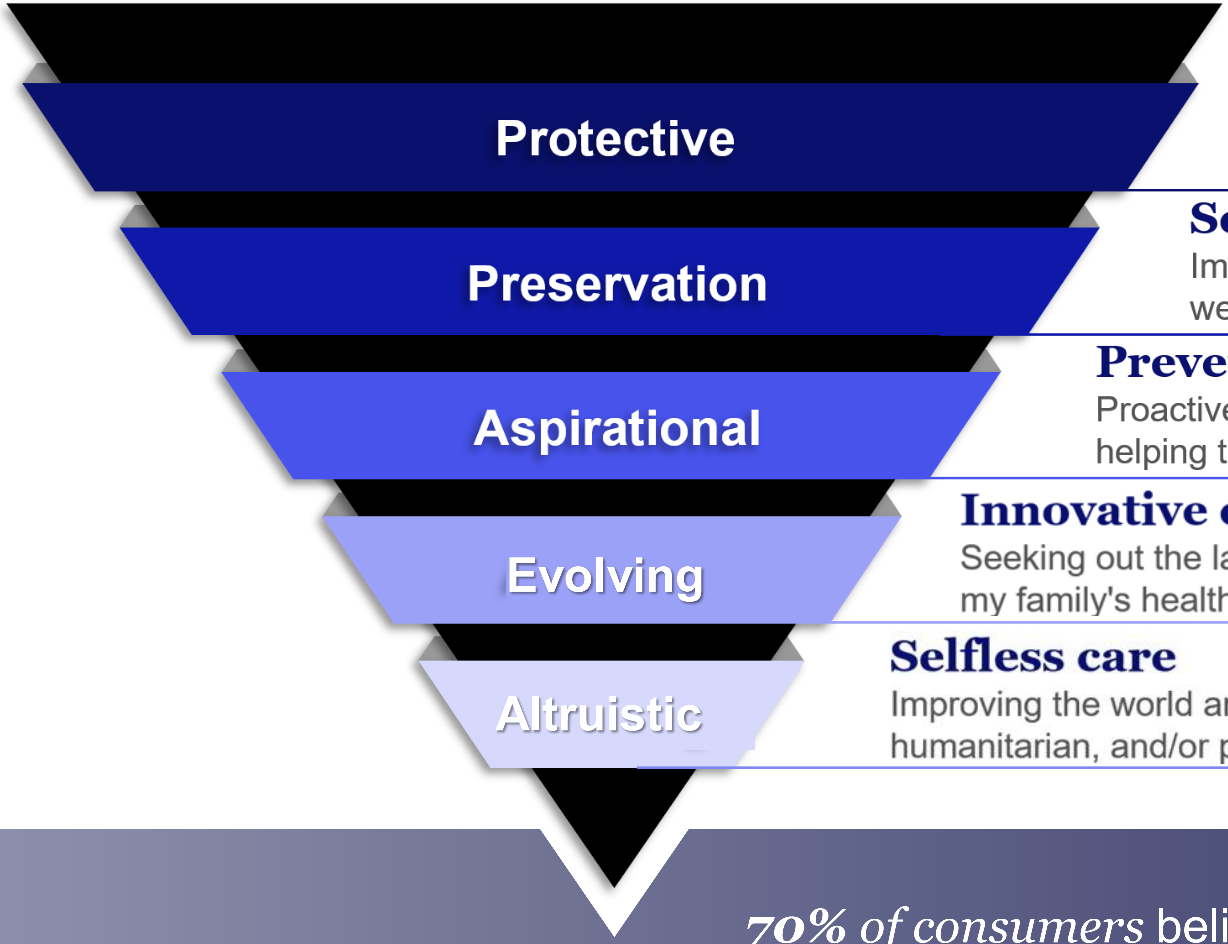
Consumer Hierarchy of Needs on Wellness



Urgent care
Protecting myself and/or my family members from immediate health threats

Self care
Improving my and/or my family's **current** physical or emotional wellbeing and connections

Preventative care
Proactive actions to achieve & maintain specific health goals, or helping to avoid ailments in the **long-term**

Innovative care
Seeking out the latest alternatives or developments to continuously meet my and/or my family's health & wellness goals

Selfless care
Improving the world around me by advocating for environmental, ethical, humanitarian, and/or philanthropic causes

70% of consumers believe they are *proactive* in managing their health

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

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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).

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*
- Expansion from weight loss to broader metabolic health

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.

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

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

Growth comes from reformulation, right-sizing and repositioning

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The convergence effect: categories and channels are blurring

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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?

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*

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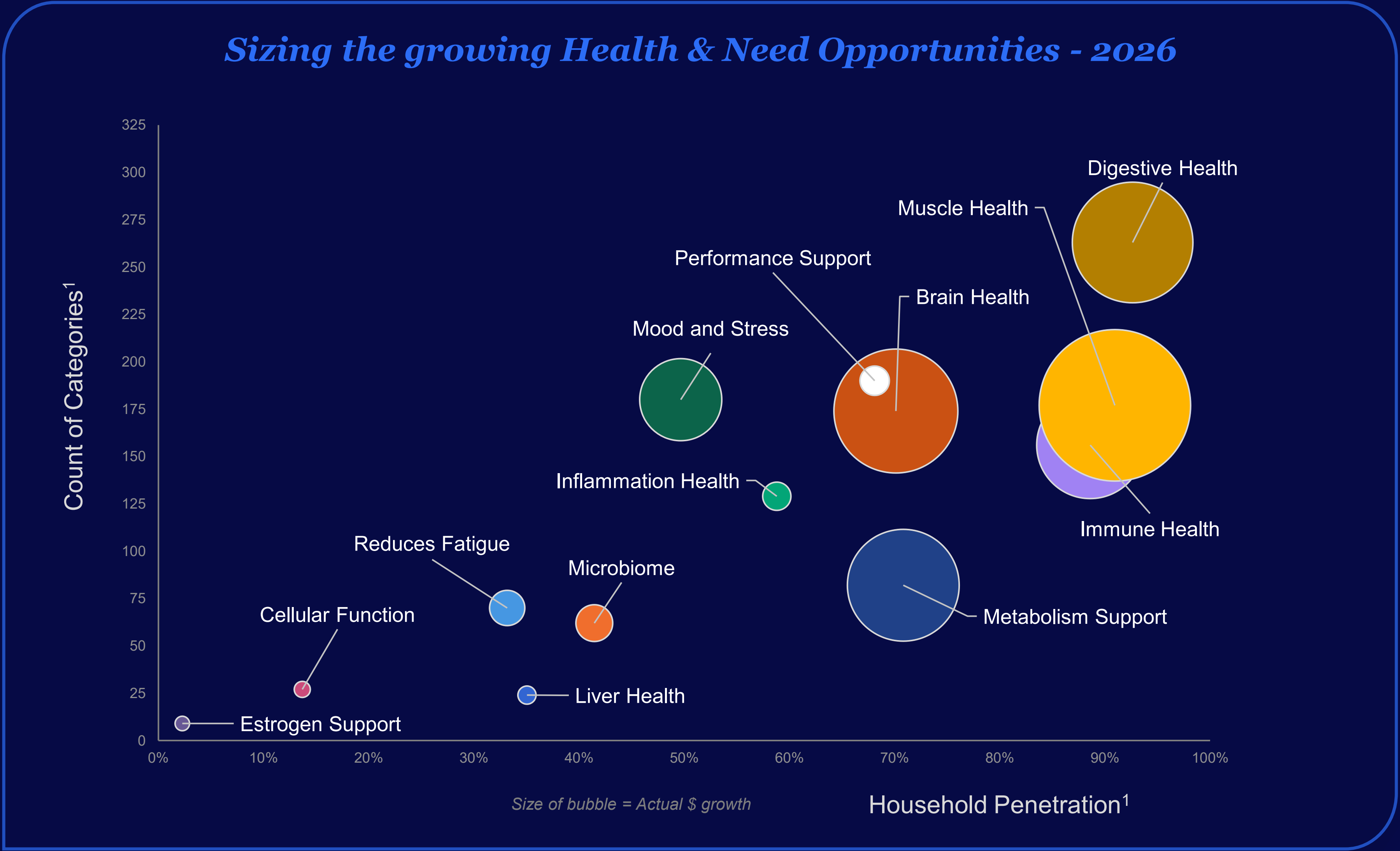
Health priorities continue to grow across the store



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

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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.

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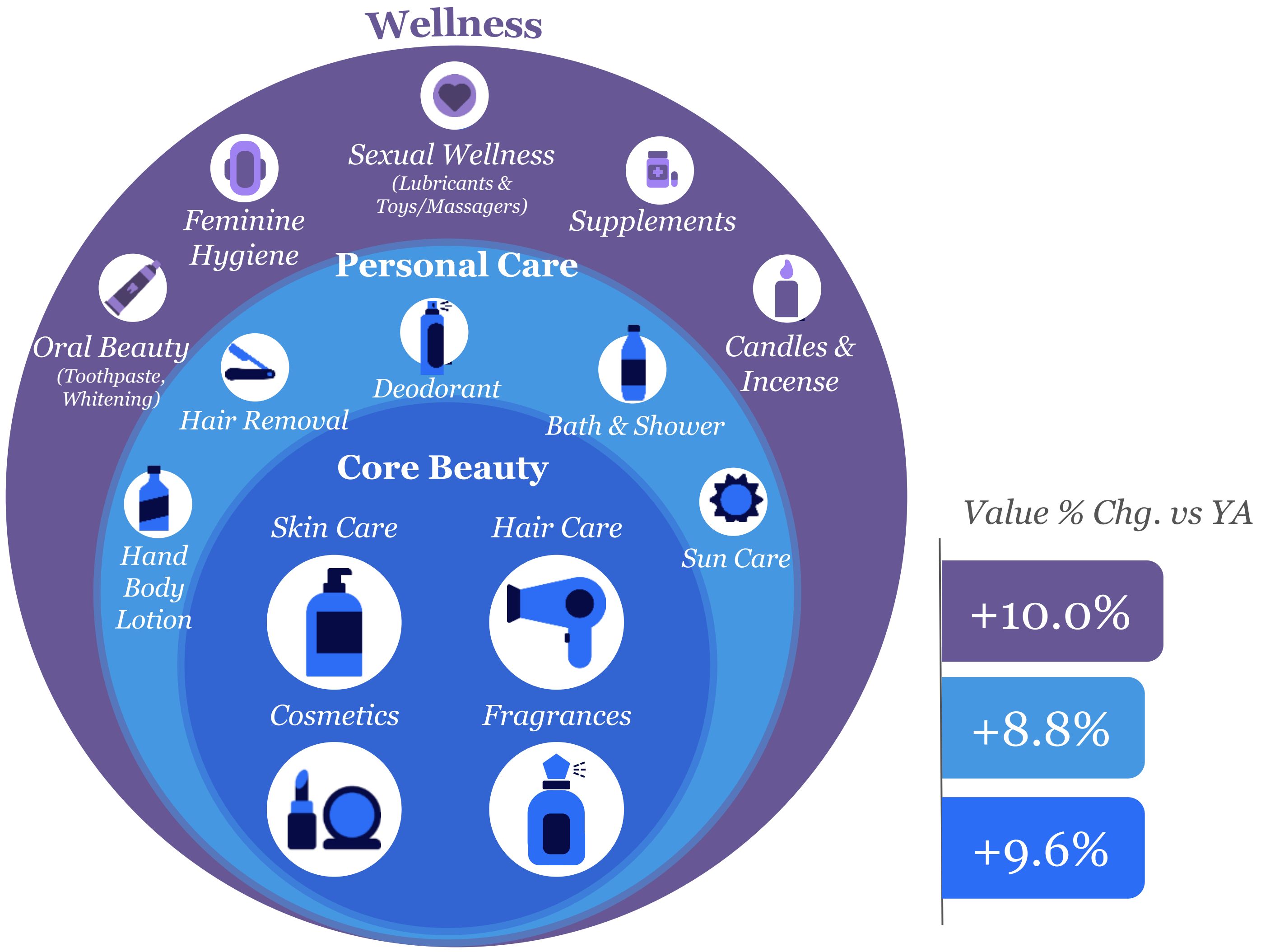
Beauty Within a Wider Wellness Ritual



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

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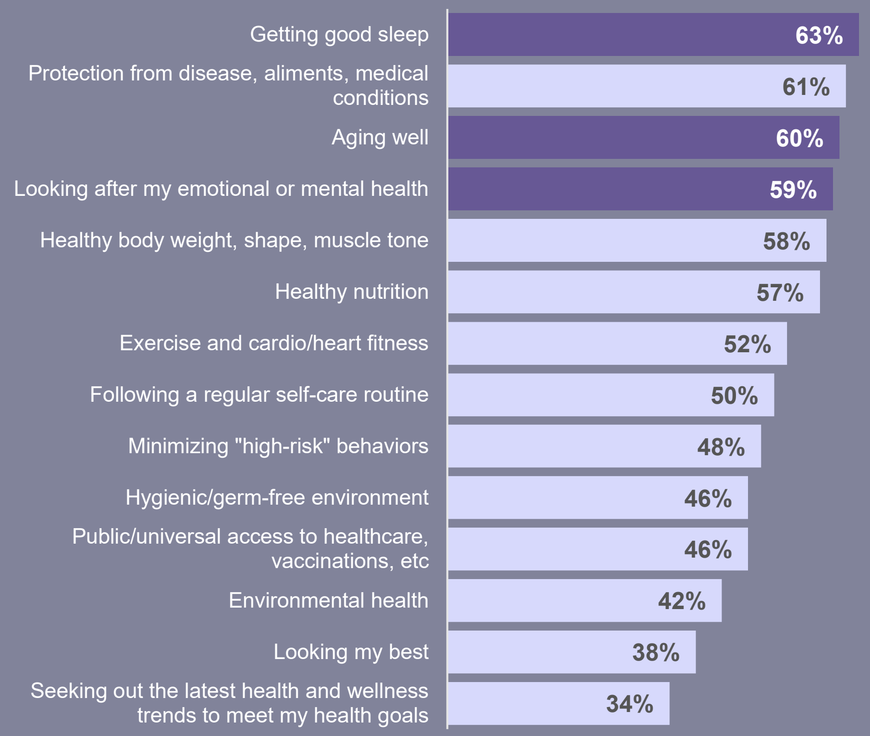
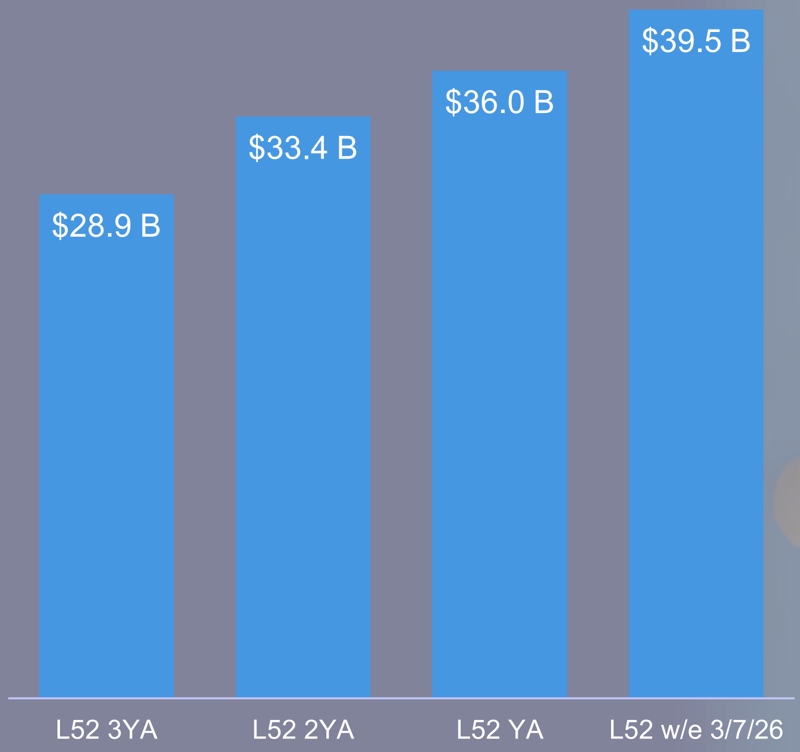
Consumers continue to prioritize brain health, cognitive function and mental health

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

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

Growing Functional Beverage Attributes

Nootropic Ingredients
+$2.8B
+14.2%

Provides Energy
+$2.7B
+13.9%

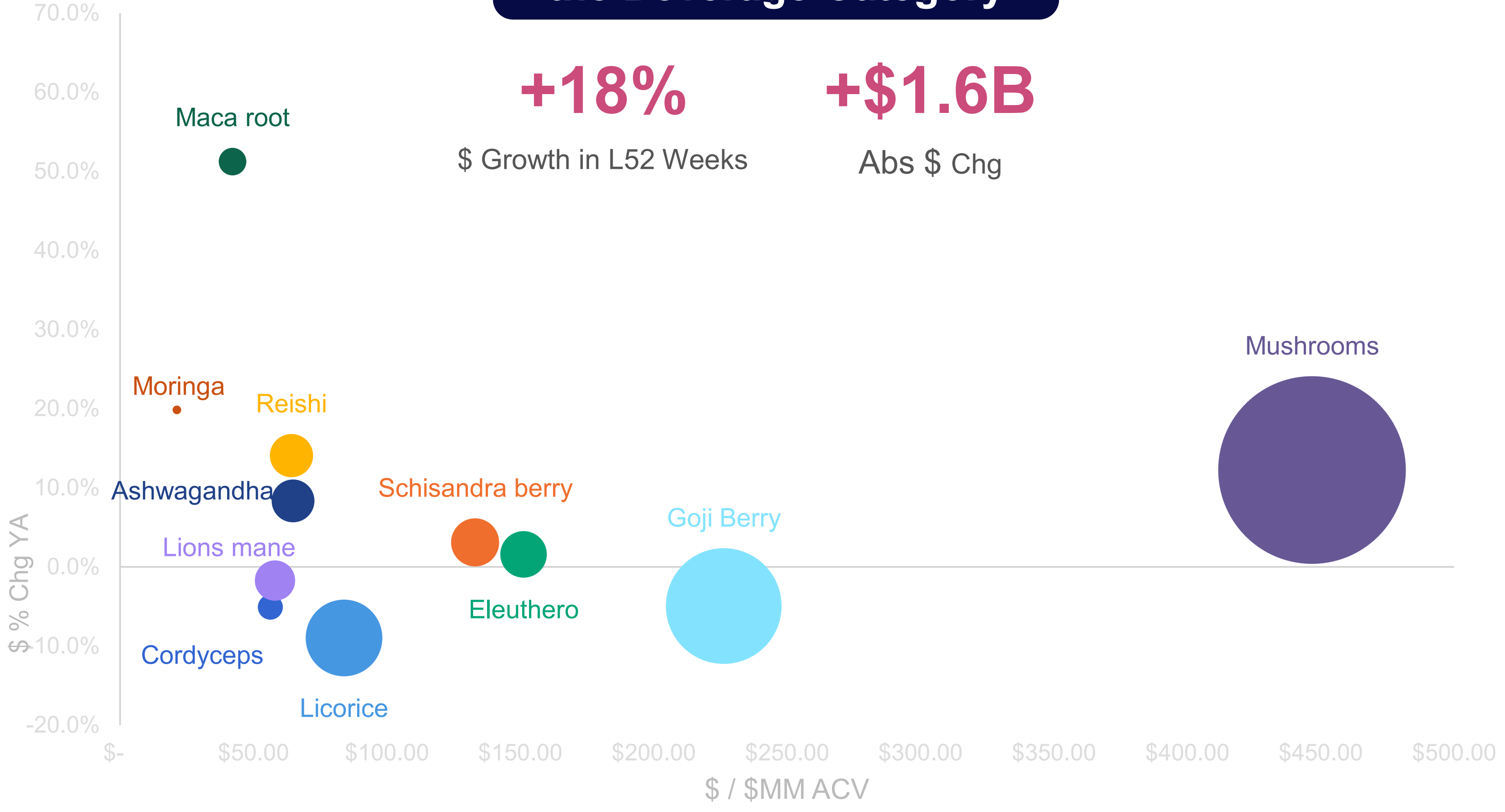
Contains Adaptogens
+$1.6B
+18.0%

Mood & Stress Support
+$0.3B
+222%

Adaptogens Trend across the Beverage Category

+18%
$ Growth in L52 Weeks

+$1.6B
Abs $ Chg



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

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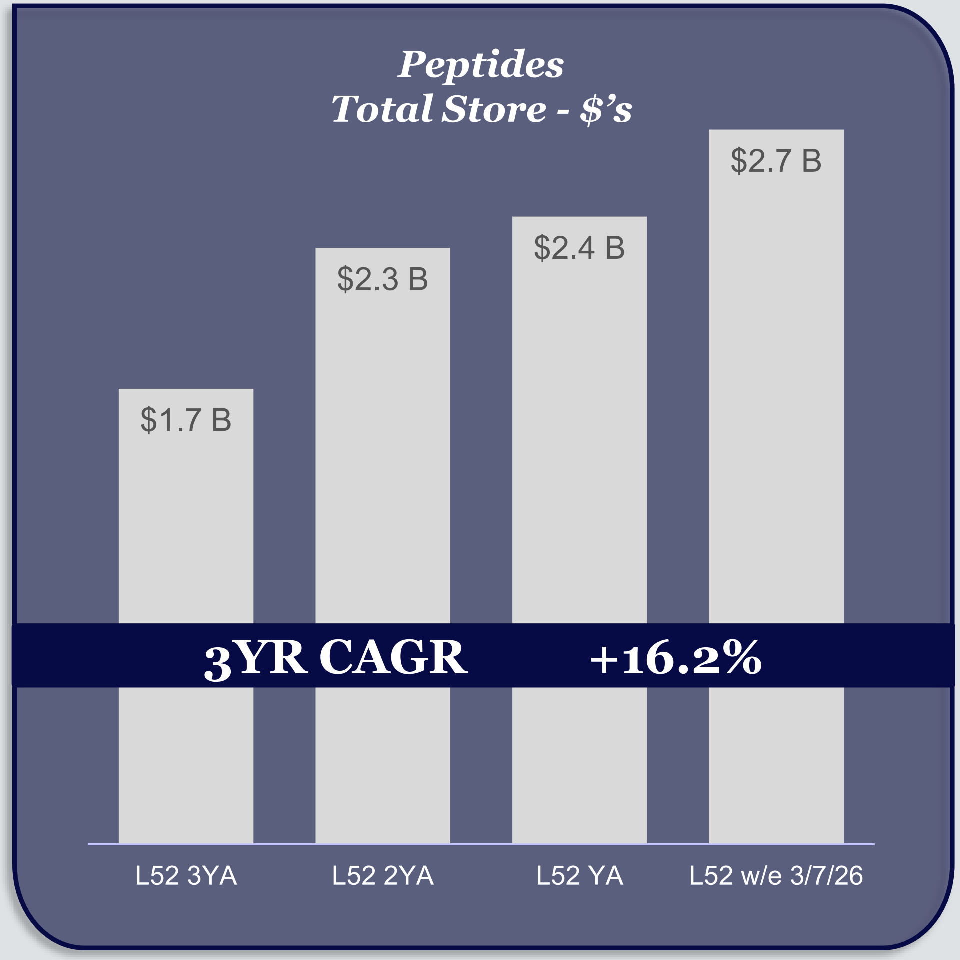
Peptides surge across categories, driven by Health & Beauty and Pet



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

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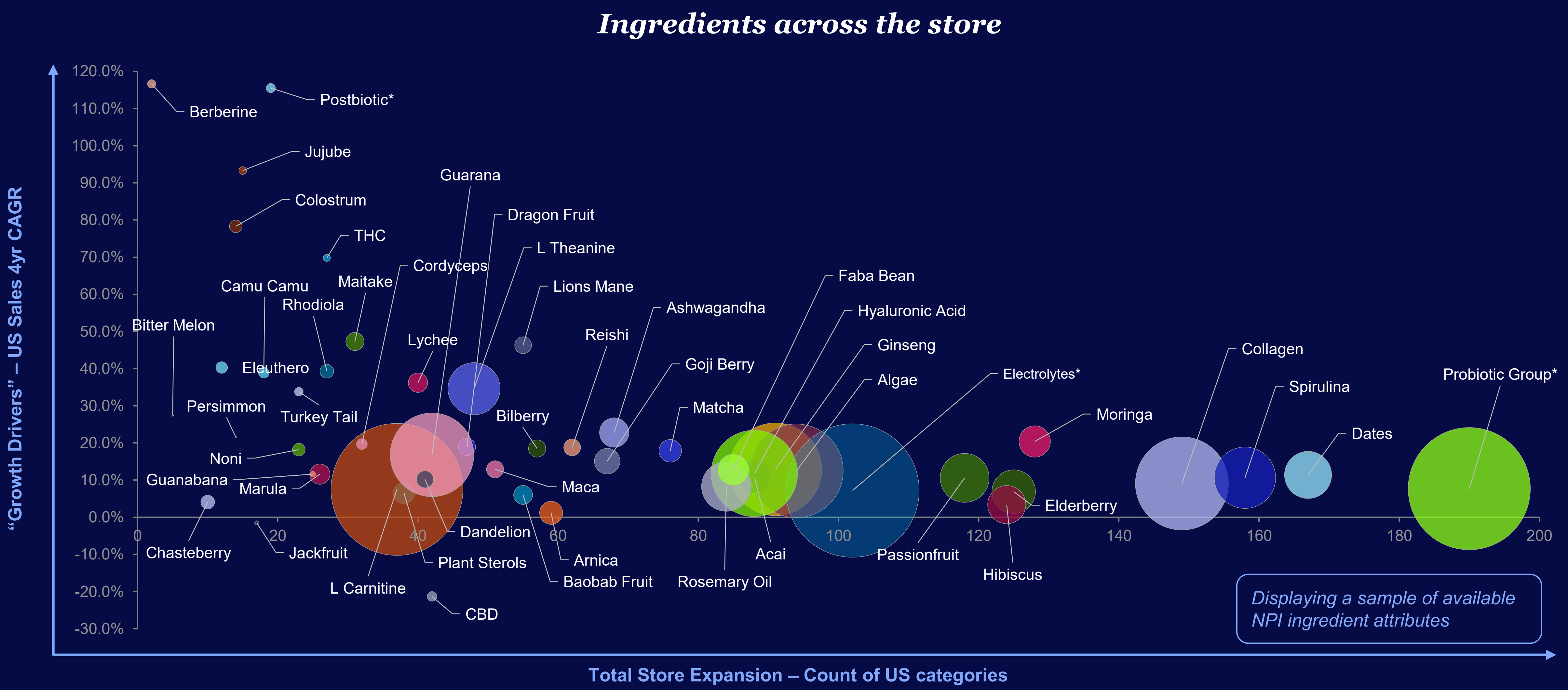
Ingredient growth across the store indicates blurring of lines of function and botanicals



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

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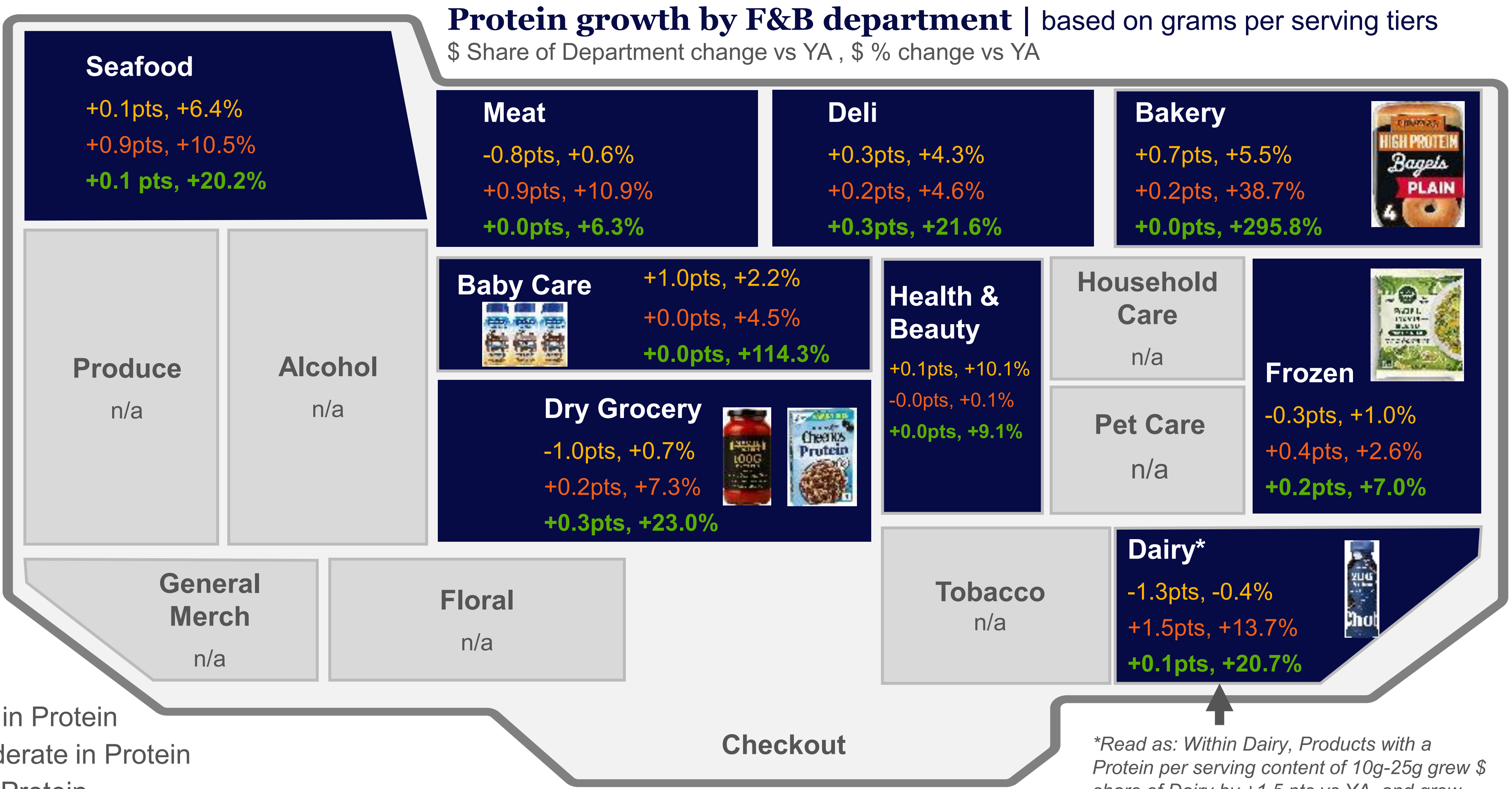
Protein's growth is ubiquitous across the store

60%

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



1g-10g – Light in Protein
10g-25g – Moderate in Protein
>25g – High in Protein

**Read as: Within Dairy, Products with a Protein per serving content of 10g-25g grew $ share of Dairy by +1.5 pts vs YA, and grew +13.7% in $ vs YA*

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

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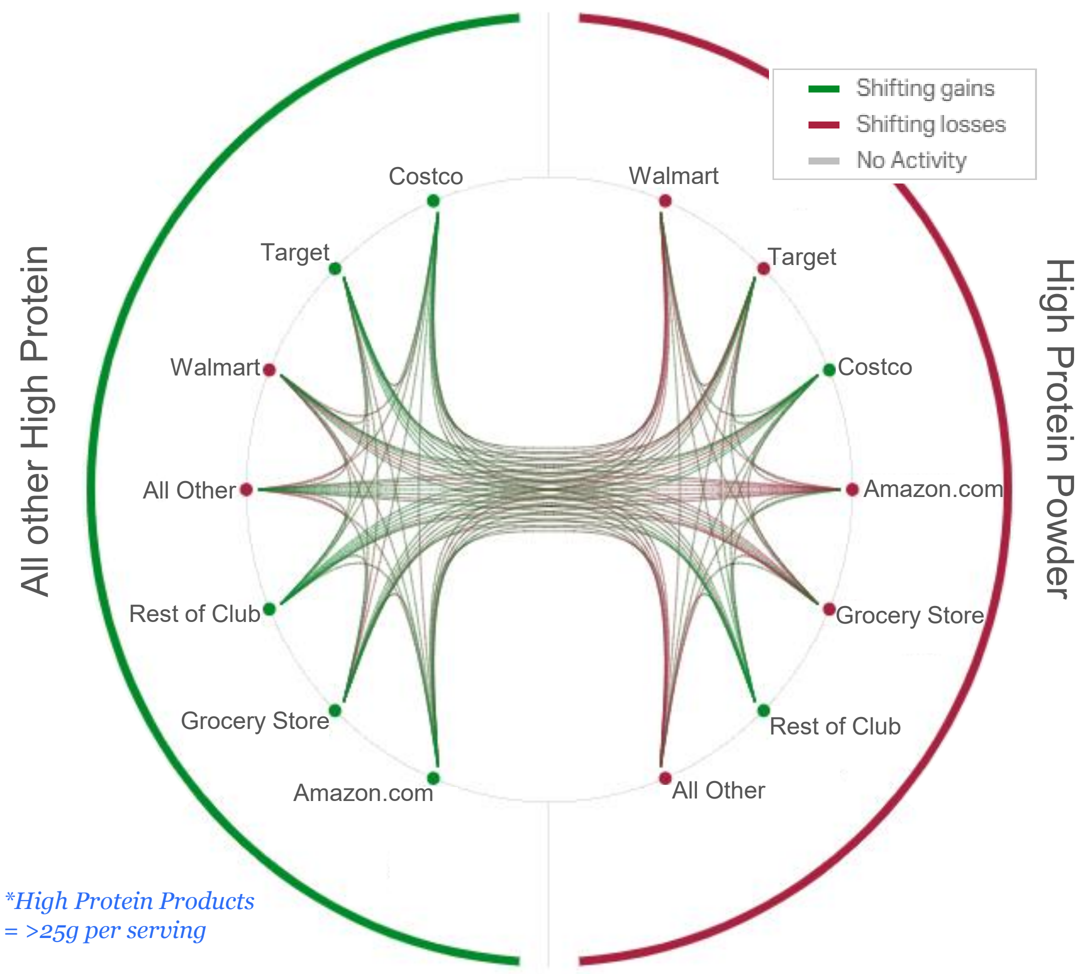
Protein prioritization creating shifting across the store and across channels

Super Shifting Analysis of *High Protein Powder* vs *All Other High Protein* products and channels[1]



**High Protein Products = >25g per serving*

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

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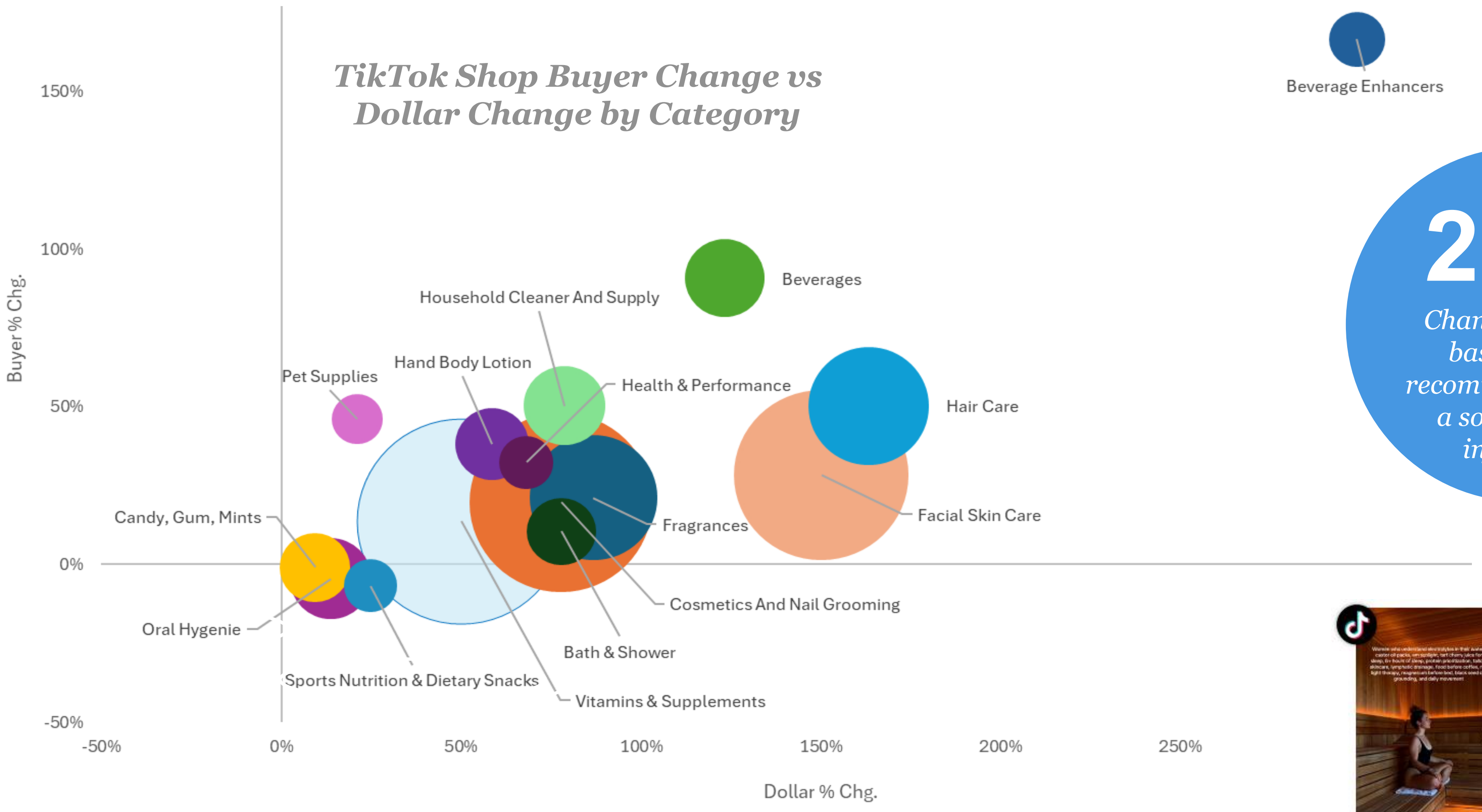
Health and wellness typically sells well on TikTok shop



Bubble Size = Dollar Volume

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

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

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Equity, access and the cost paradox

NielsenIQ

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Cost is top barrier of health

Top barriers hindering healthier life choices

Global

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

US

- **55%** Cost
- **31%** Motivation
- **25%** Availability
- **22%** Trust
- **17%** Time

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

Bayer // United States

Community

Take Care, Now: Improving Access to Health and Nutrition in Farm and Rural Communities

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

NIQ Global Wellness Report 2025, US v Global; MRI Simmons 2025

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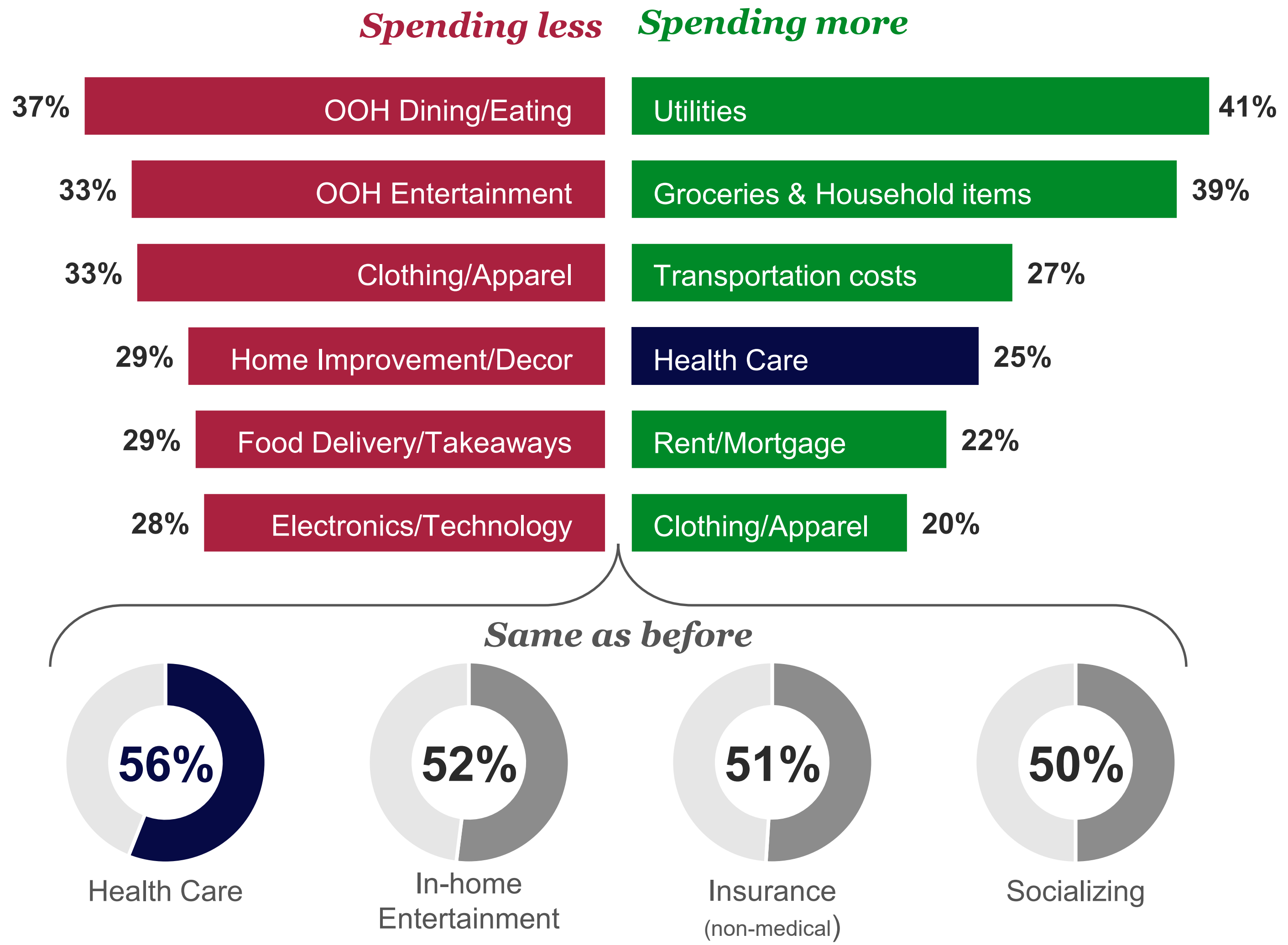
2026 wallet intentions reinforce the idea of a cautious mindset

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



38%

of consumers agree:

"I take *proactive measures to look after my health* to prevent issues in the future"

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

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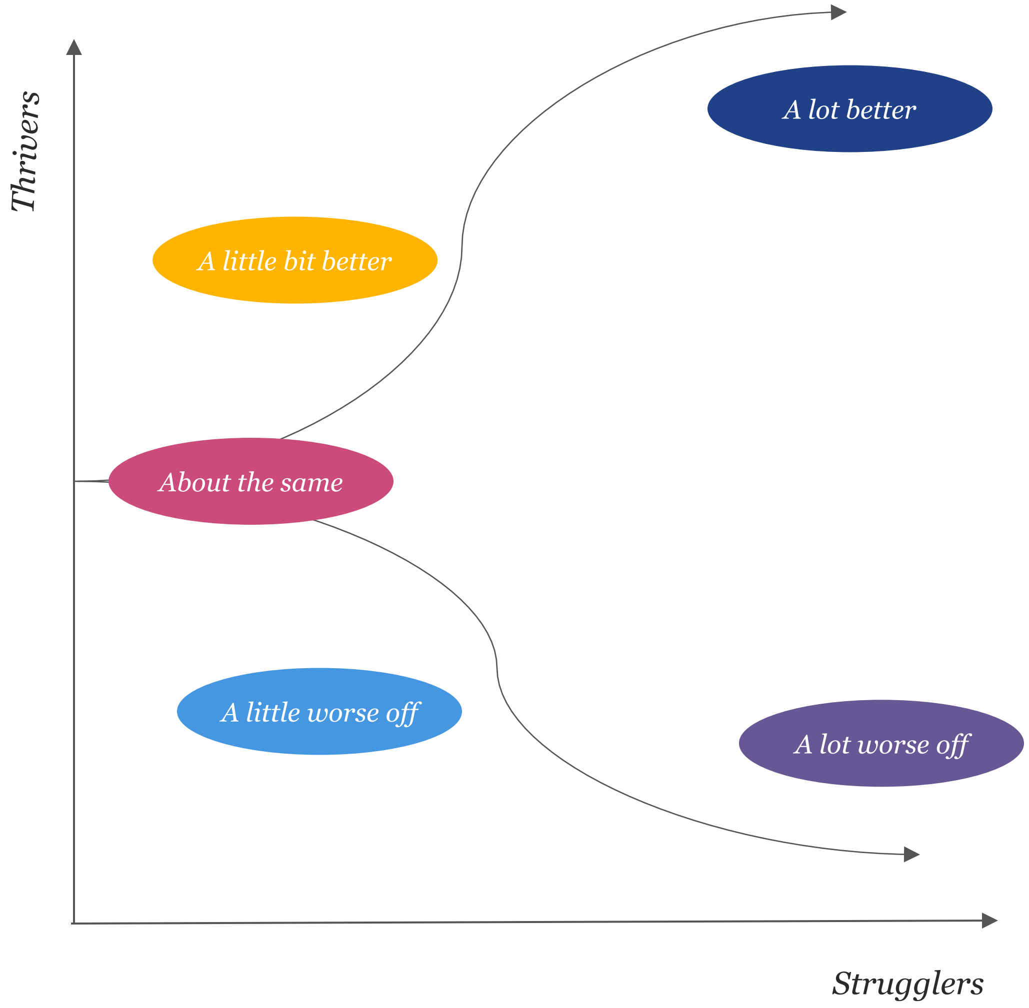
Value seeking and premium seeking will both accelerate in the K shaped economy



AP

"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

WILLIAM & MARY

"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

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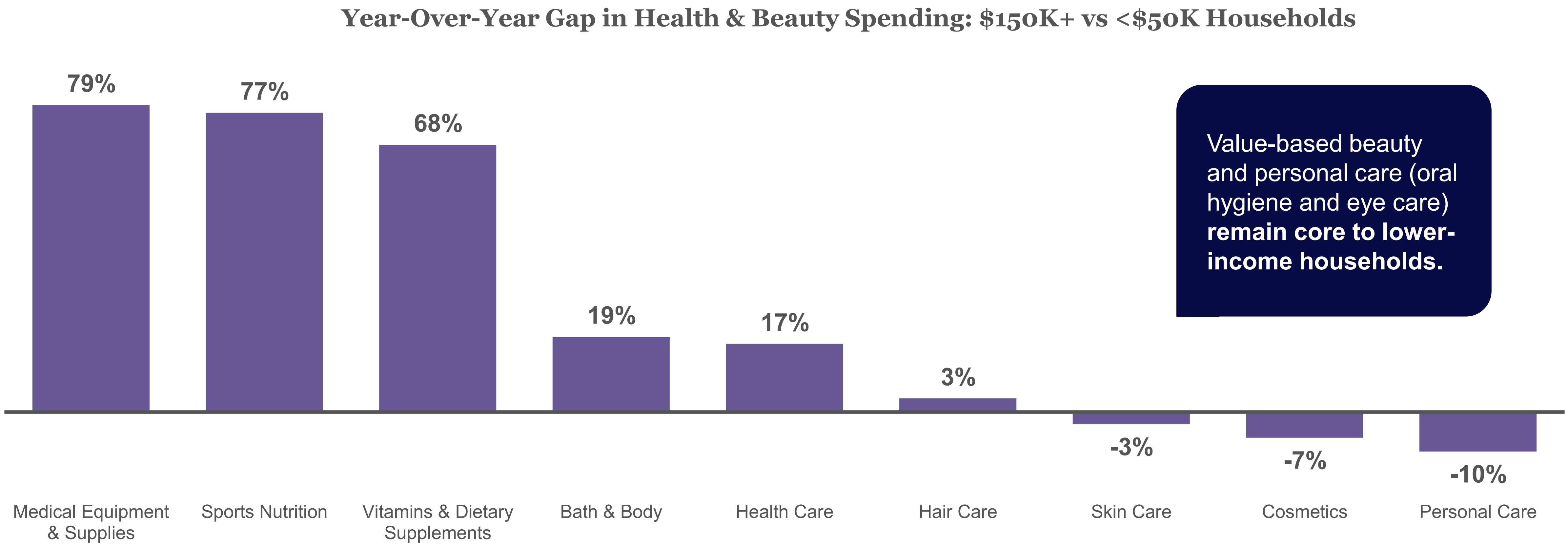
Income Divide Sharpest in Health & Beauty Care Categories



Value-based beauty and personal care (oral hygiene and eye care) **remain core to lower-income households.**

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

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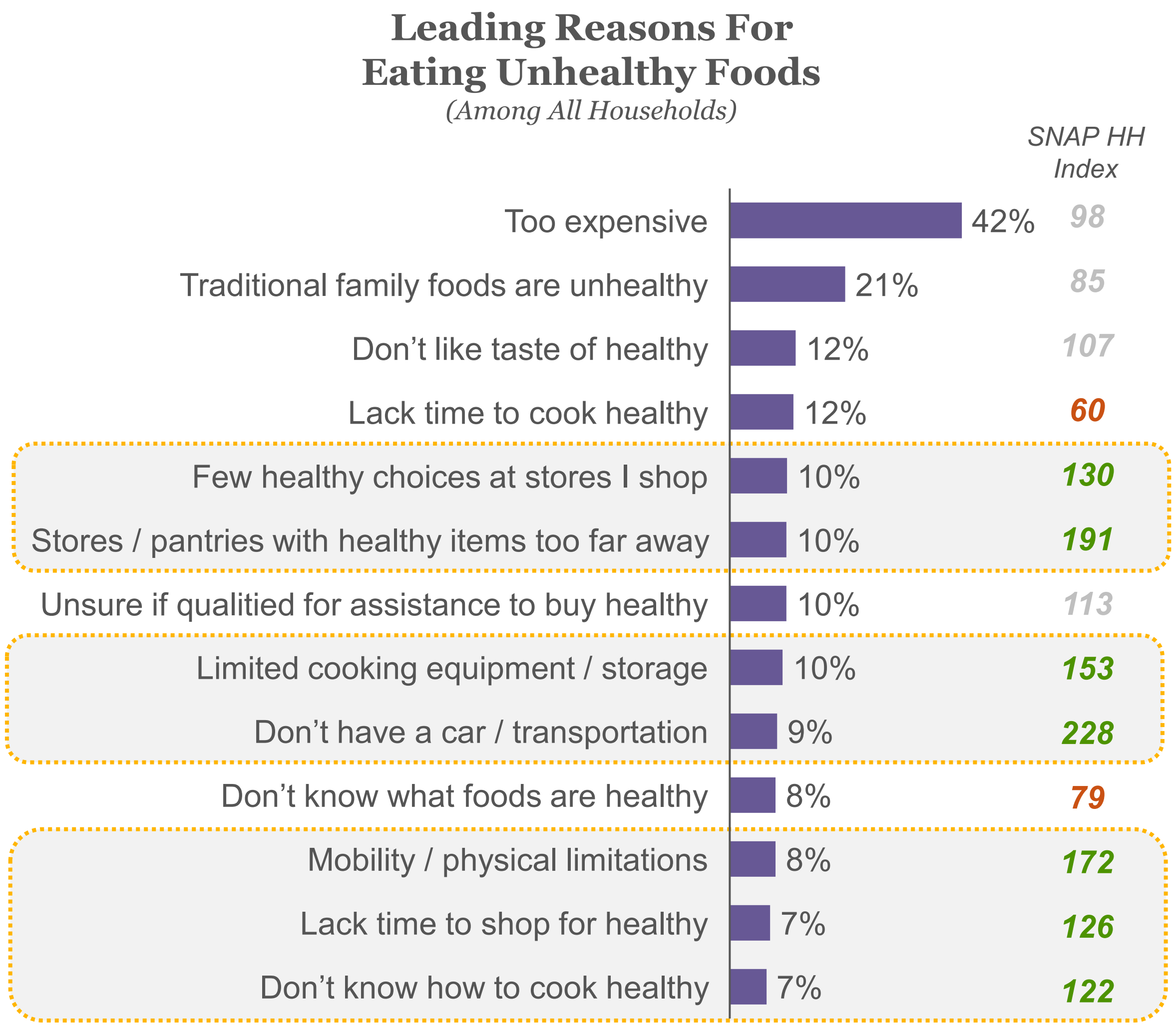
Cost is the leading barrier to eating healthy



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

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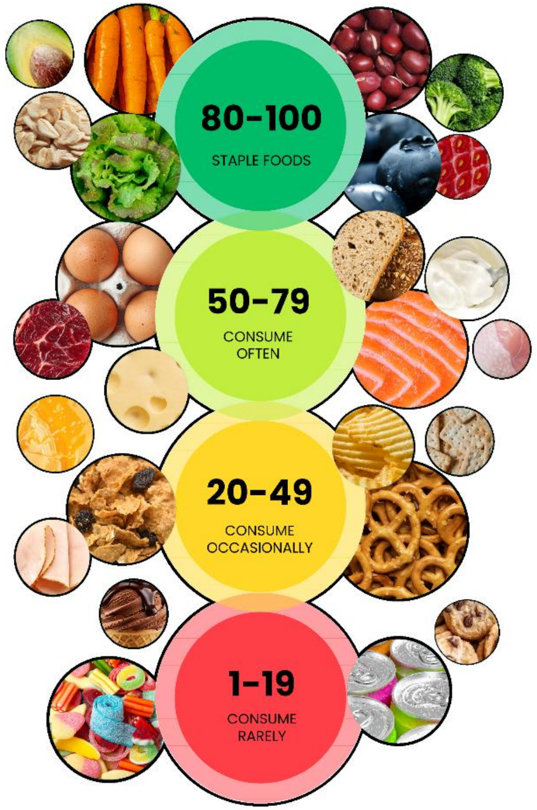
We are not where we want to be from a health standpoint and not all households face the same challenges to healthy shopping



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

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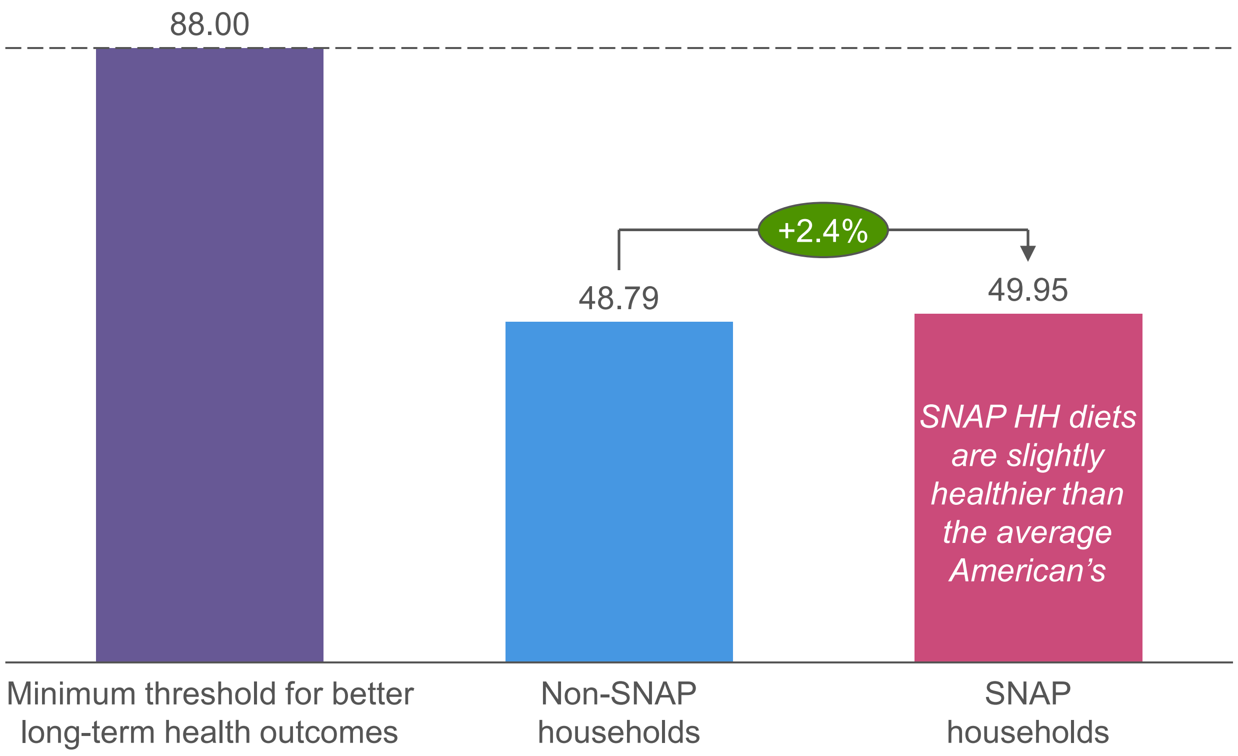
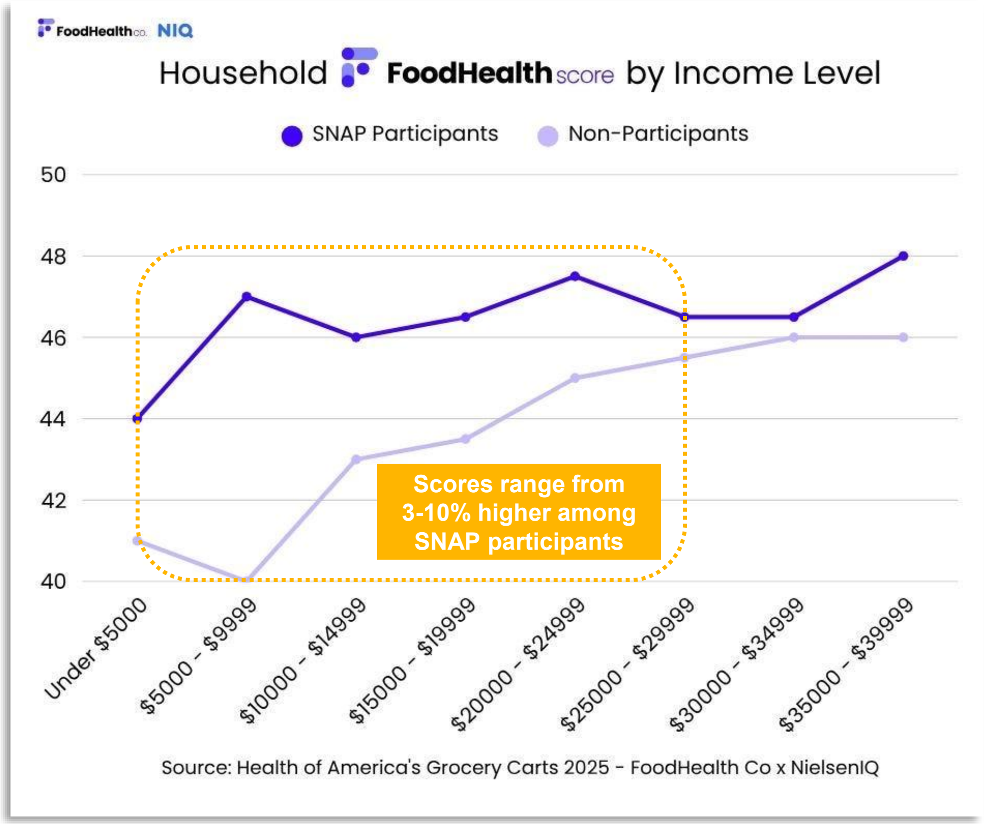
SNAP households are not the wellness problem, access is

FoodHealth Scores
Non-SNAP VS. SNAP Households



FoodHealth Scores
Normalized By Income Levels



[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

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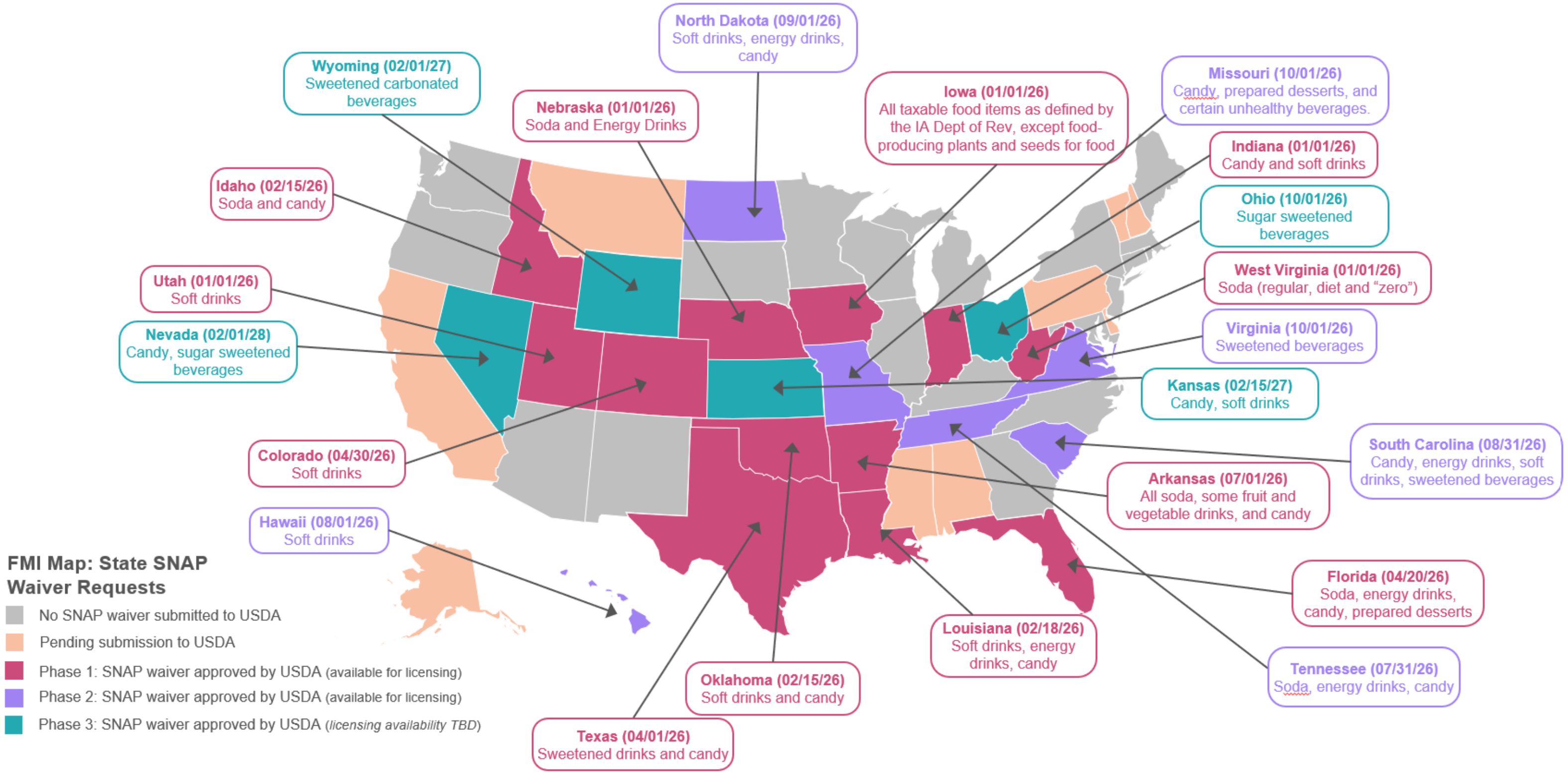
State-level SNAP restrictions taking effect and having impact

SNAP USDA Supplemental Nutrition Assistance Program
Putting Healthy Food Within Reach

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



NIQ Discover + Product Insights, Latest 52 Weeks WE 02/07/26, 12 states: AR, CO, FL, ID, IN, IA, LA, NE, OK, TX, UT, WV

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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

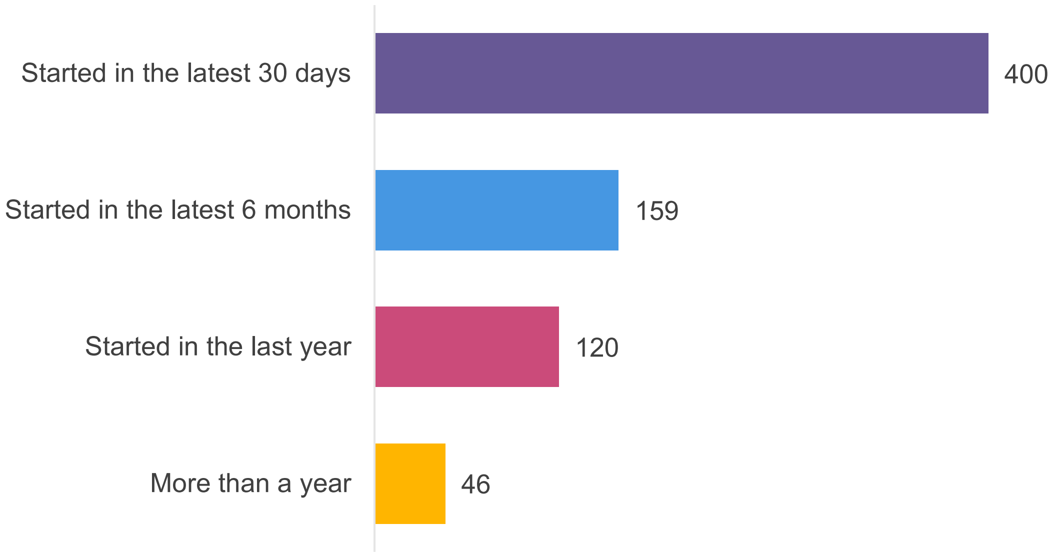
37% of SNAP households use a health wearable

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

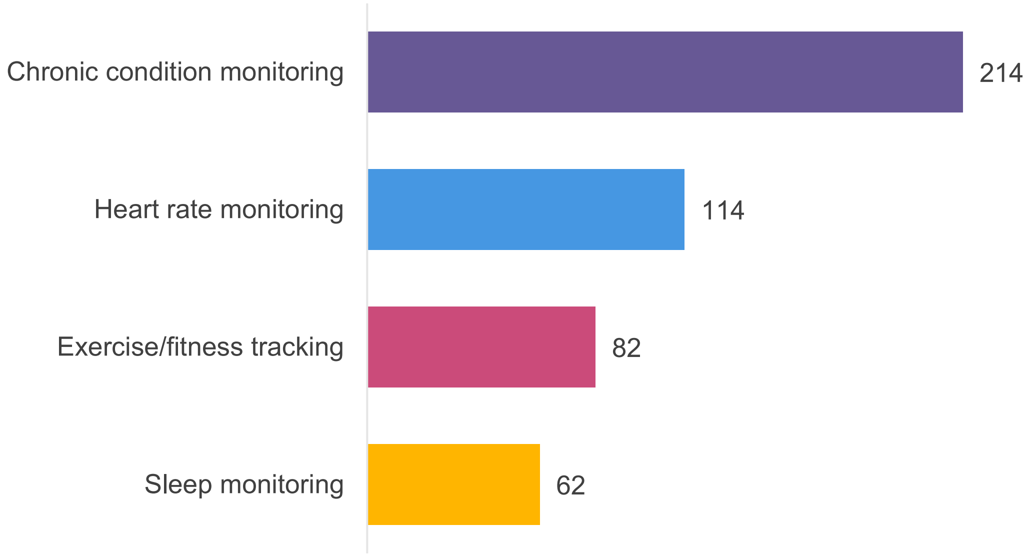
Wearable adoption among SNAP users is recent and accelerating

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]



NielsenIQ BASES Omnibus, December 2025

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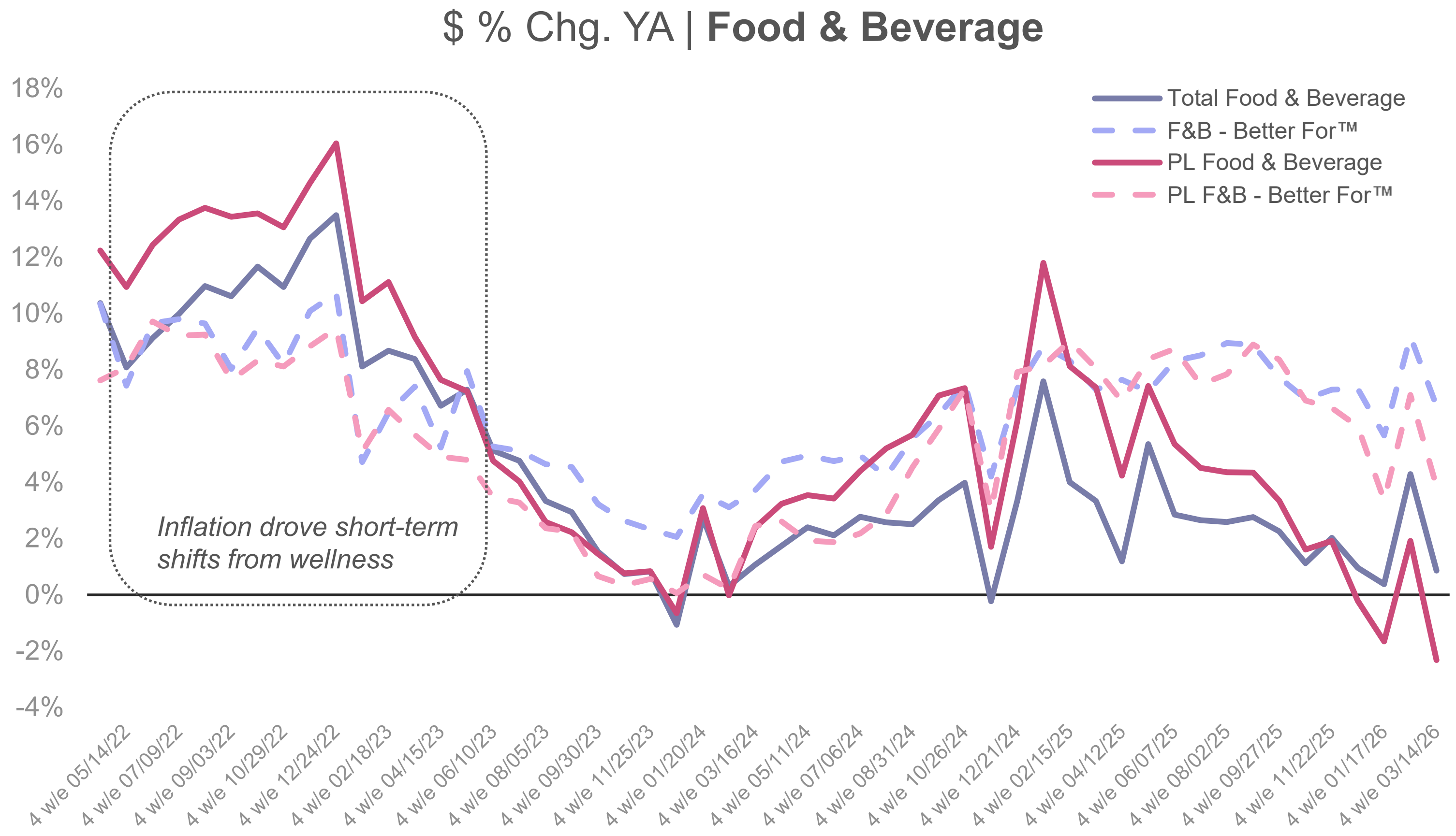
NIQ *Better For™...*

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)

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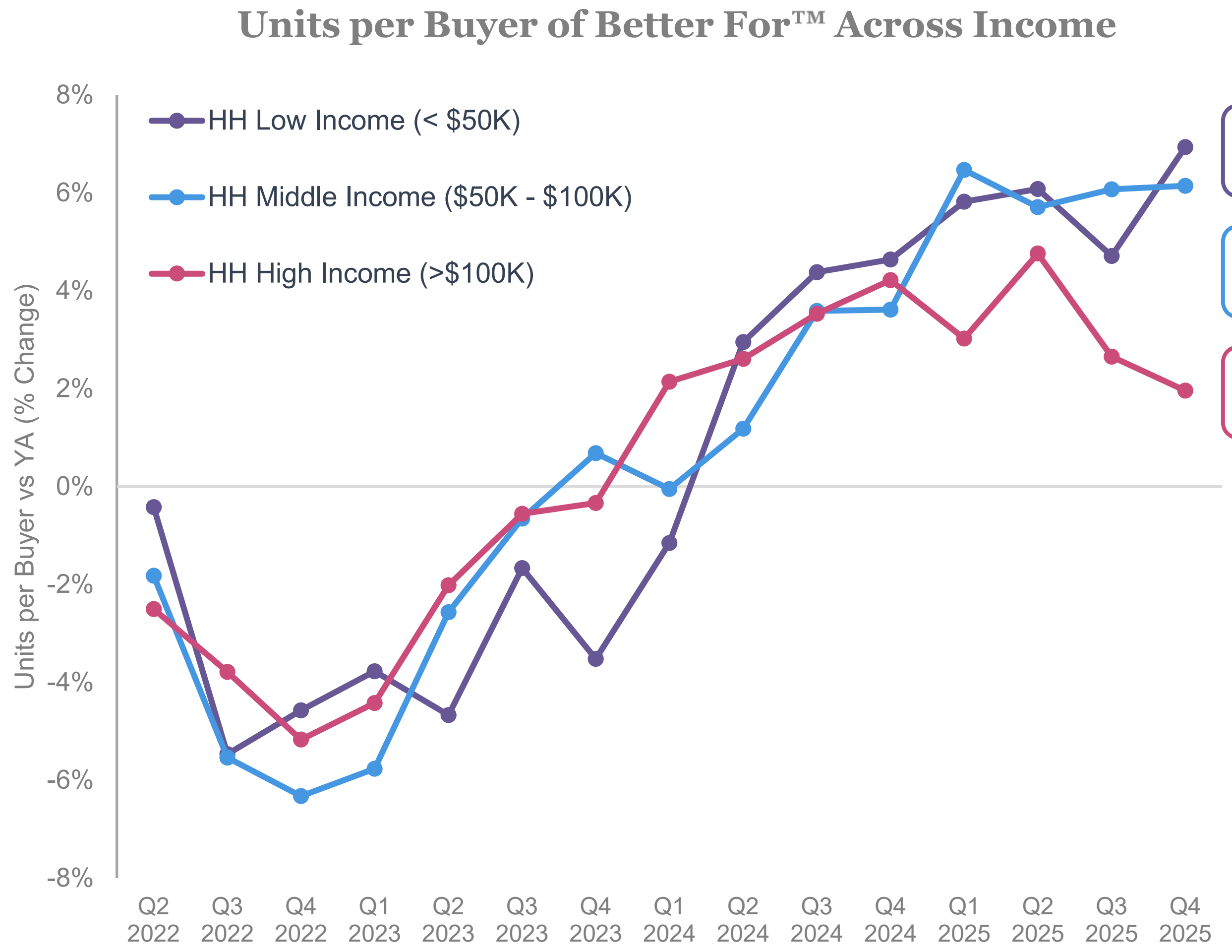
While Better For™ tends to index higher income, strongest recent growth coming from low and medium-income consumers



21% of Better For™ sales

26% of Better For™ sales

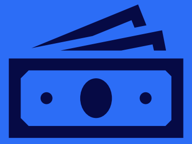
53% of Better For™ sales

The *heavy* Better For™ consumers are…

Collage 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™

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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

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How do you define “good value” when purchasing groceries?	Gen Z	Millennial
The product’s ingredients or sourcing practices are transparent and clear	123	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

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

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Trust is now required to even compete and directly determines conversion

NielsenIQ

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Emerging perspective on healthcare

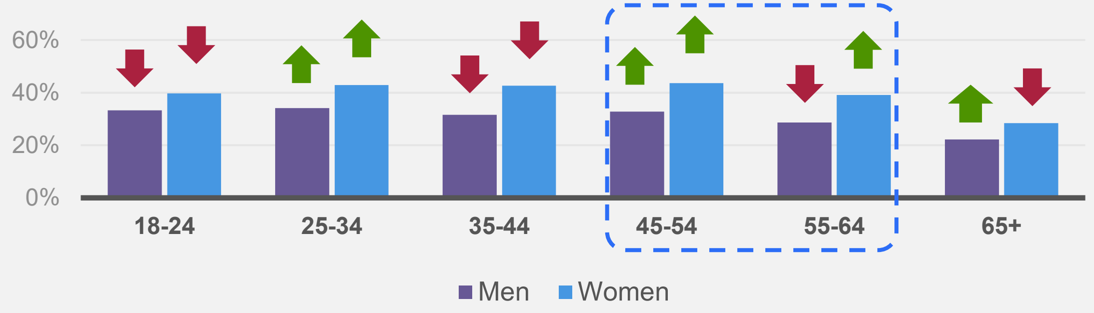
Driven by differing views on treatments, supplements, types of practitioners, access

Direction of arrow reflects change vs. YA

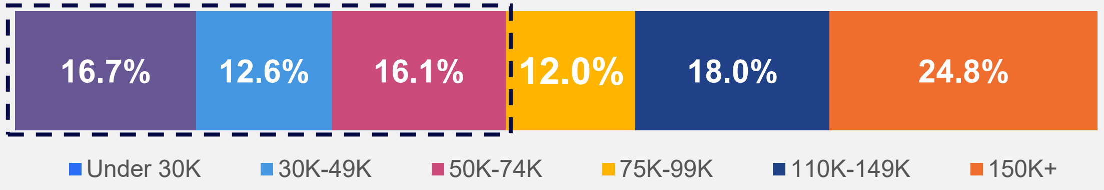
Alternative Healthcare Consumer

~ 34% of Adults ⬇

~30% of men
~39% of women



Household Income



Hard working and Middle Rural, Countrysides, Cities & Outskirts

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.

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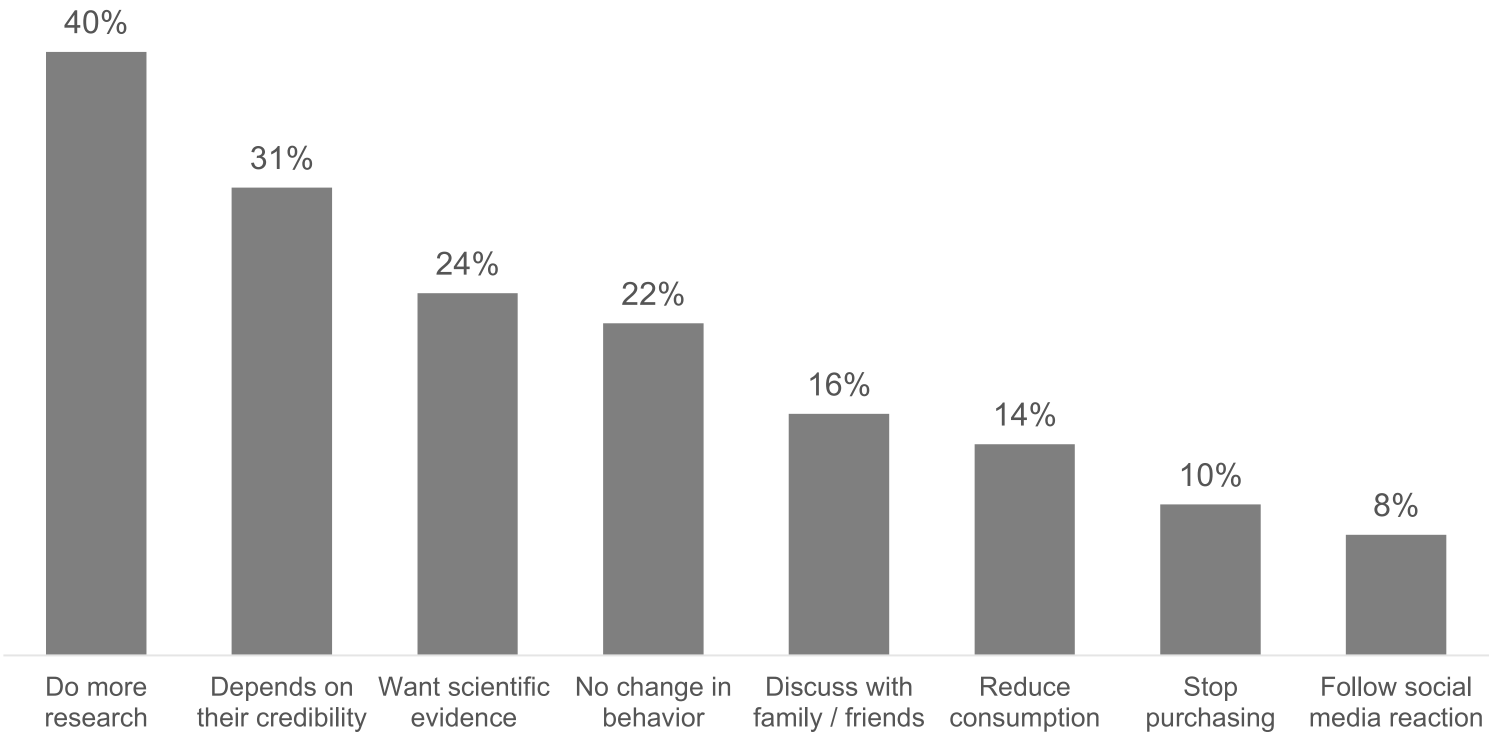
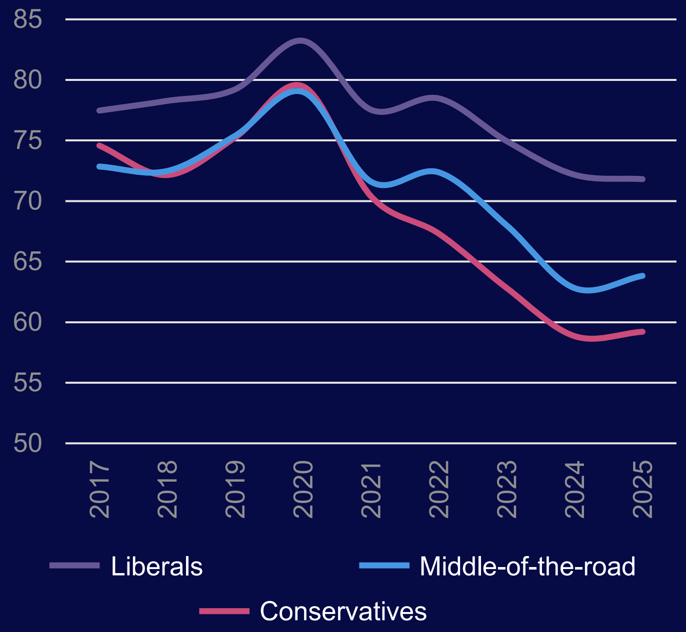
Growing skepticism is reshaping health decisions in America

Typical response when a government official raises health concerns about a product or ingredient[1]



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*



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

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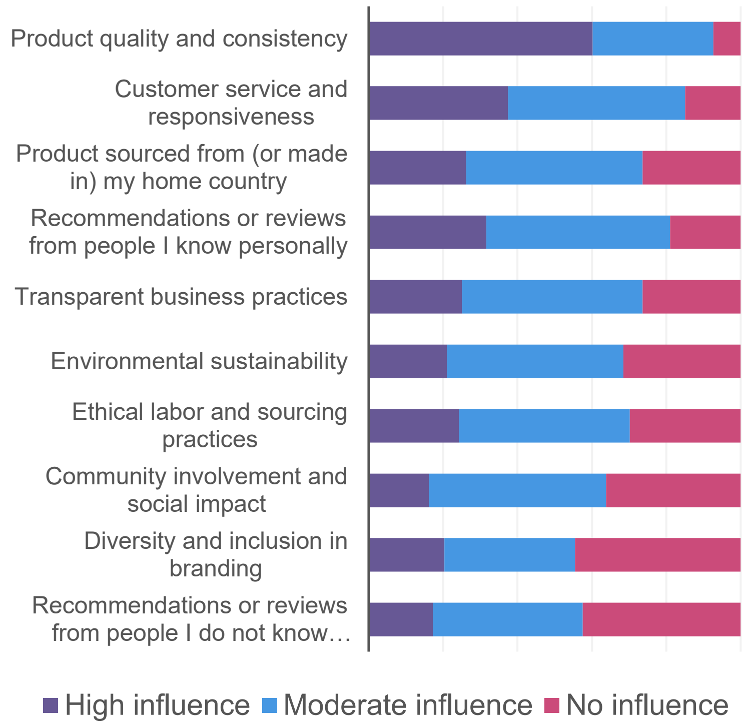
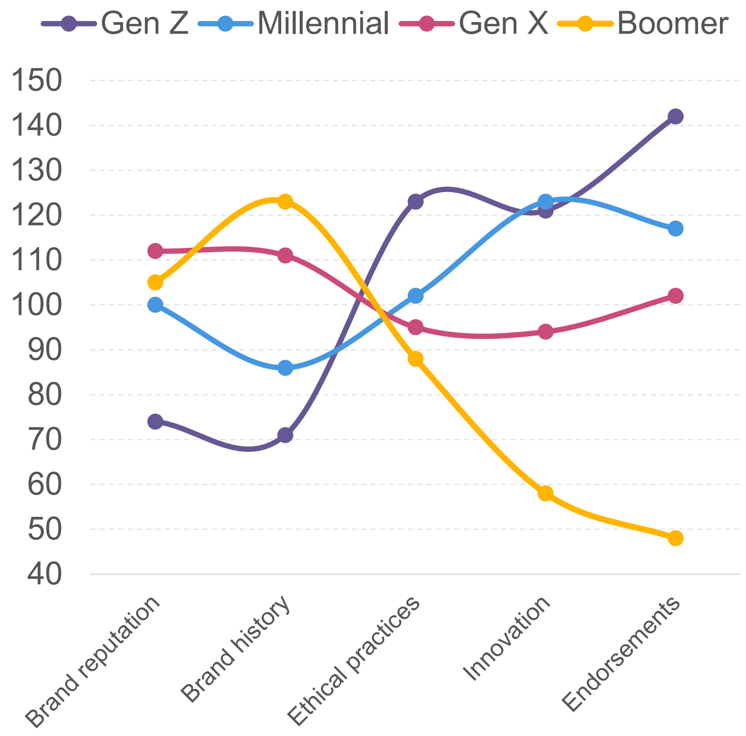
97% of consumers say trusting the brand they're buying from is very or somewhat important.

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

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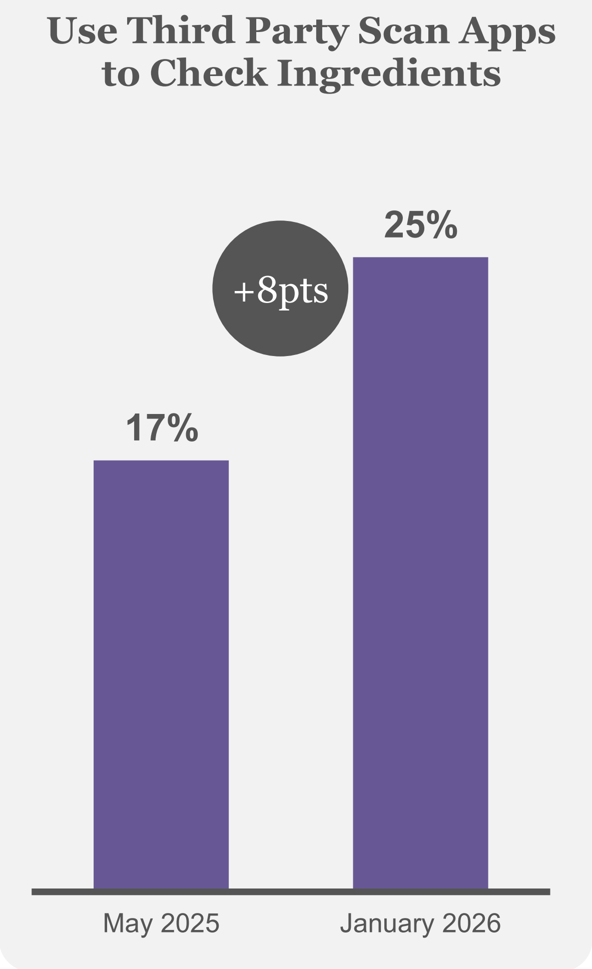
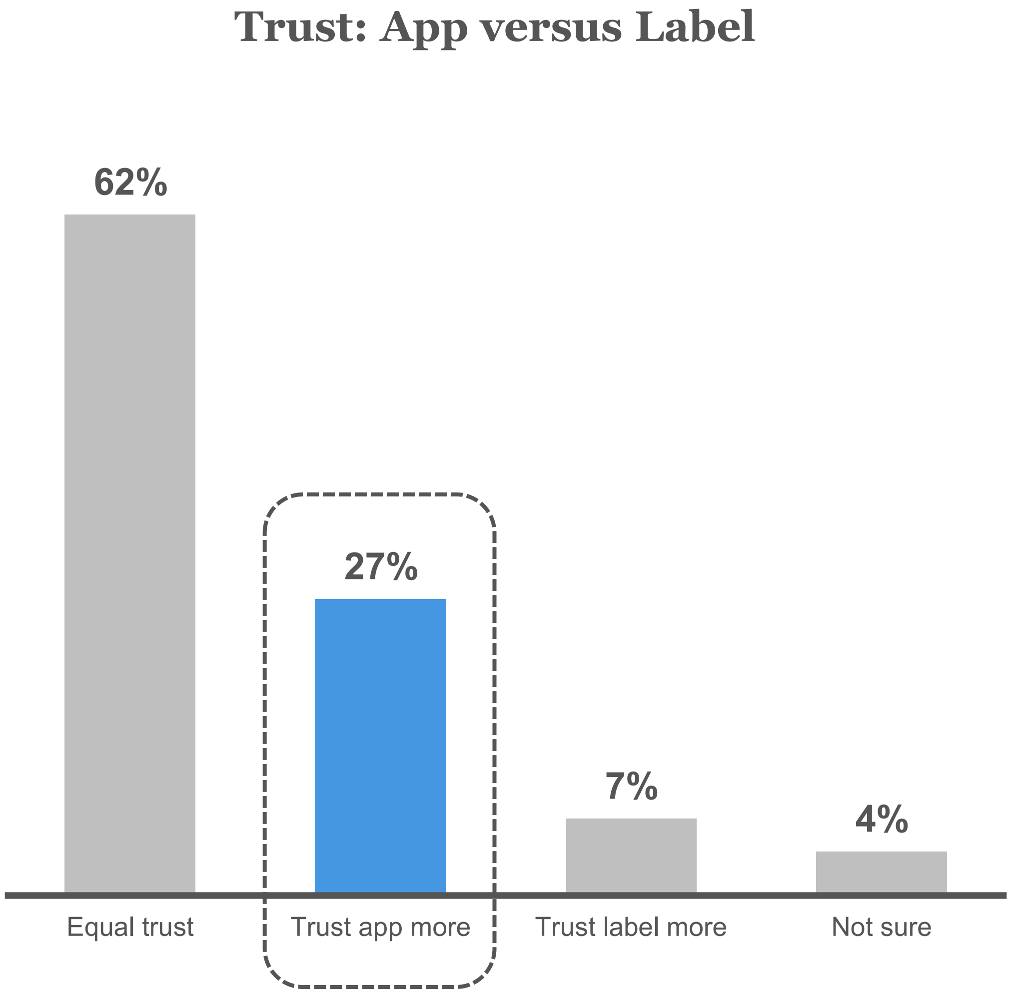
Consumer usage and trust in scanning apps increasing





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

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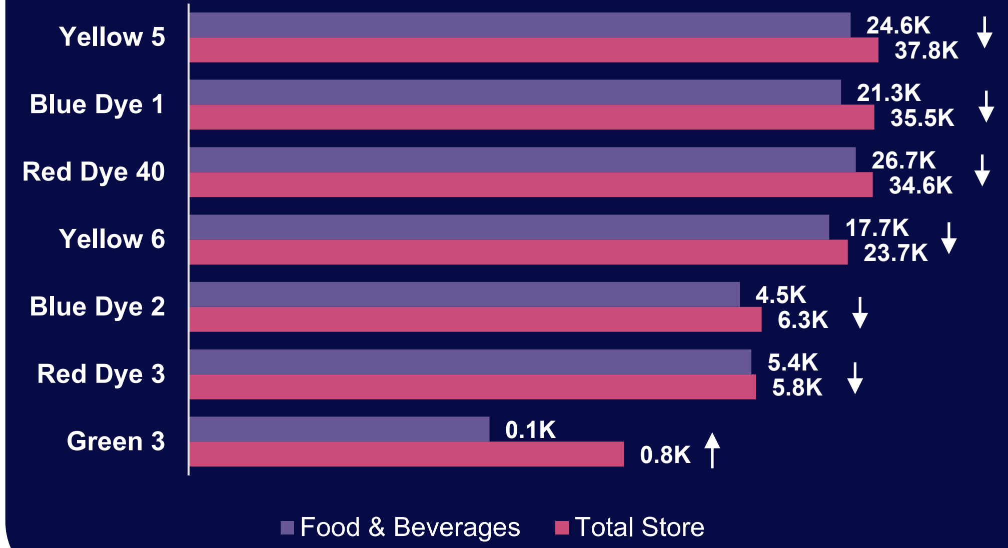
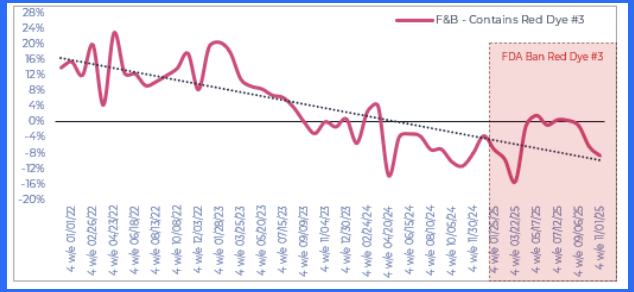
Rapidly changing regulatory environment is accelerating focus in key areas and we're seeing increasing consumer ingredient literacy

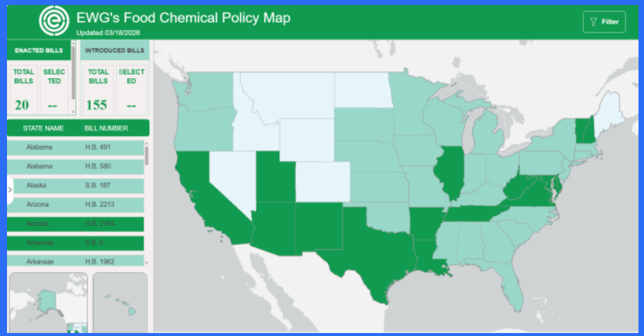
NIQ Product Insights:
Artificial color additives[2]
# of items

68% of consumers support a ban of petroleum-based synthetic dyes in food and beverage products

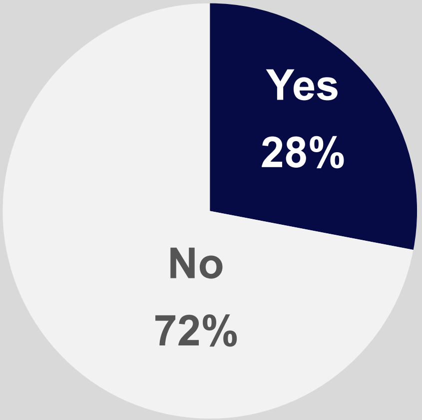


Sales of Red Dye #3





Do you actively avoid consuming seed oils?



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

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Clean is now the baseline, functional is where value comes

Beauty

Total Beauty & Personal Care
$66.5B

Free From Parabens
$25.6B GAP

Free From Parabens + Sulfates
$26.3B GAP

Free From Parabens + Sulfates + Phthalates *$11.9B GAP*

Clean Beauty*
$12.4B GAP

NPI Beauty *On-Pack Claims vs Ingredient Analysis GAP*

Laundry Care

In laundry care, consumers want calm on top of cleanliness. Consumers are looking for clean that calms concerns for the planet and delights senses.

NPI Laundry Care *On-Pack Claims*

Total Laundry Care
$20.7B

Sustainability Certified
$2.7B

Plant Based
$292M

All Natural Ingredients
$69.2M

Aromatherapy
$43M

Clean Label +5.8%

Total Store +2.9%

% $ Change

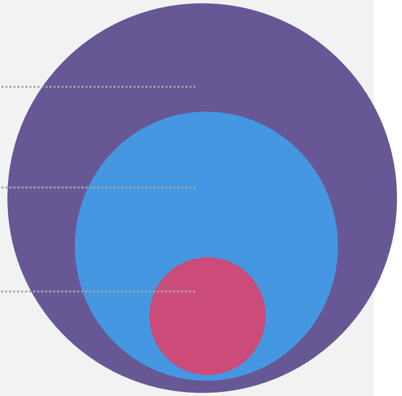
Clean + Functional = Value

Non-Alcoholic Beverages

Free from Artificial Colors
$9.4B
+5.5%

+Adaptogens
$1.3B
+39.6%

+Free from Artificial Sweeteners
$6.7M
+55.6%



Beverage Alcohol

“**Raising the Bar:** You deserve to know what’s in your alcohol.

Our mission is to redefine the industry standard and raise the bar for ingredient transparency and integrity in alcohol. Every ingredient considered. Every additive disclosed. Every label held accountable.

Transparency isn’t a trend. It’s a promise. No compromises. Just alcohol, done right.”

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

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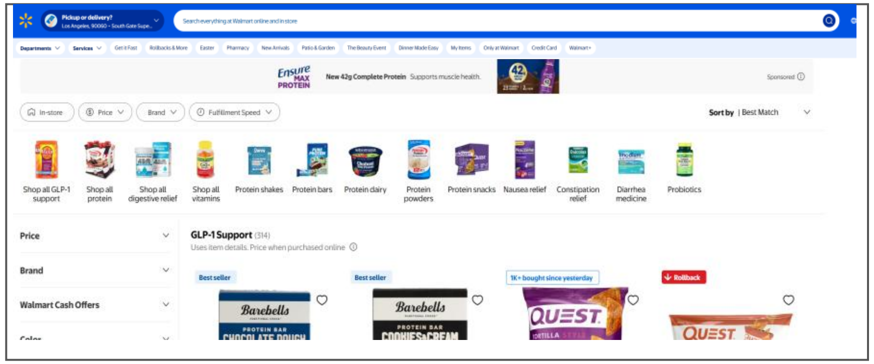
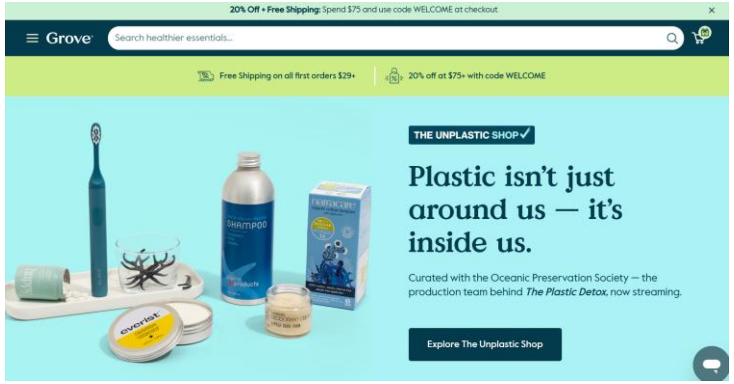
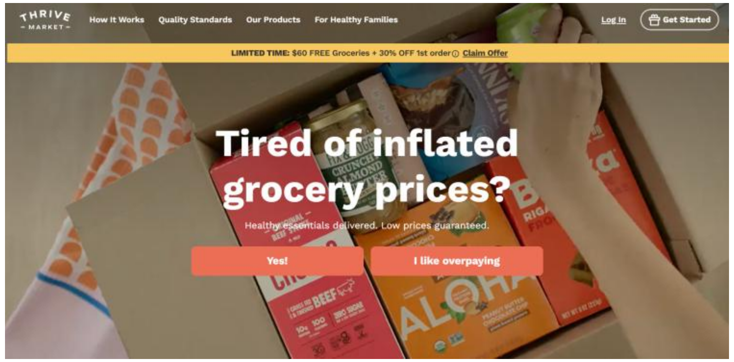
Retailers increasingly *curating for transparency* and consumer priorities

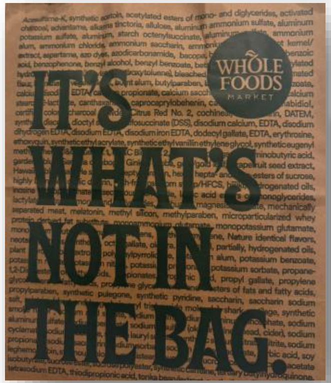
Amazon Compliance Testing for Dietary Supplements and Cosmetics

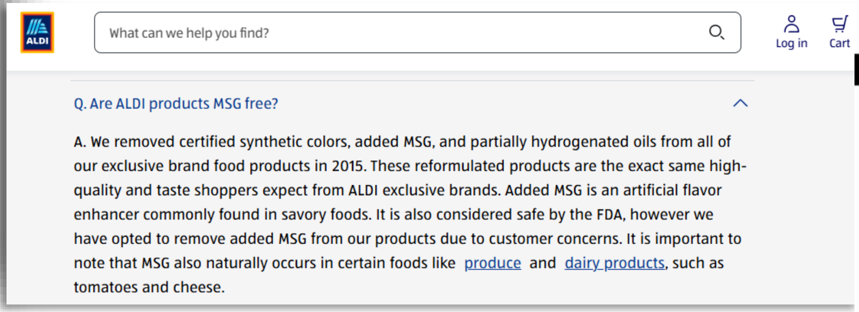


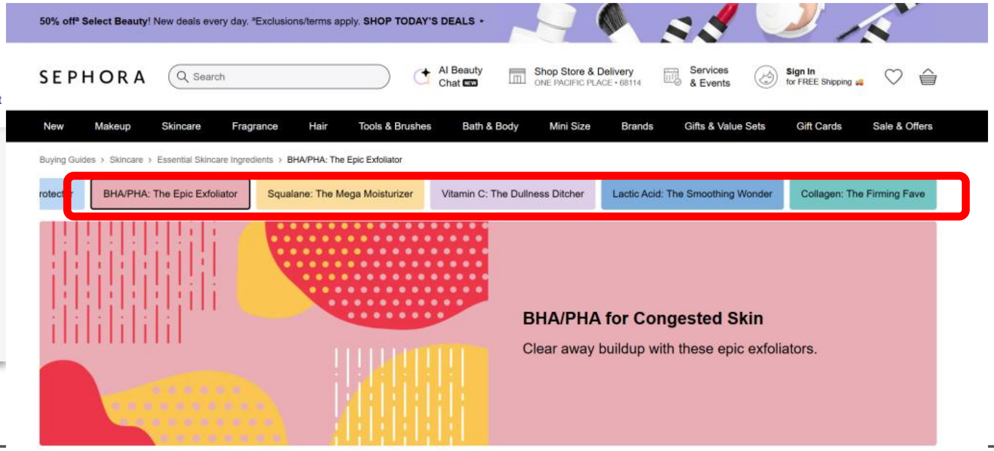


HUNGRYROOT









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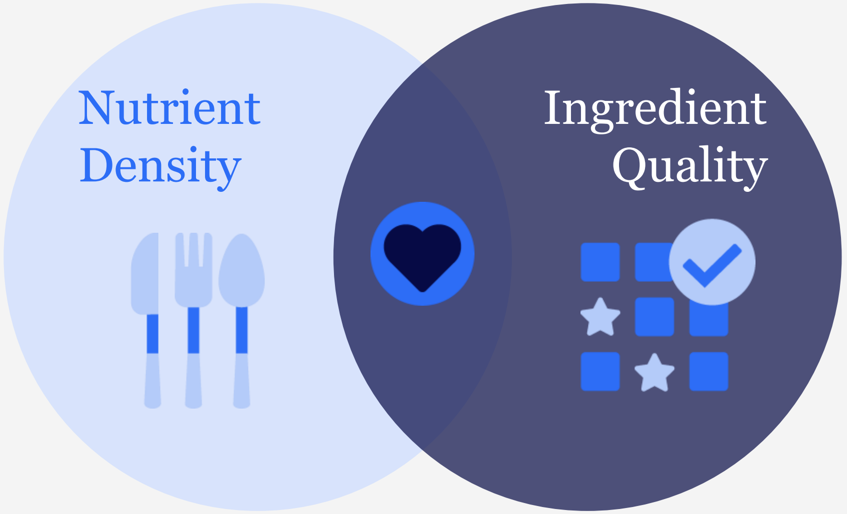
The metrics are shifting: from calories or single macros to nutrient density + ingredient quality



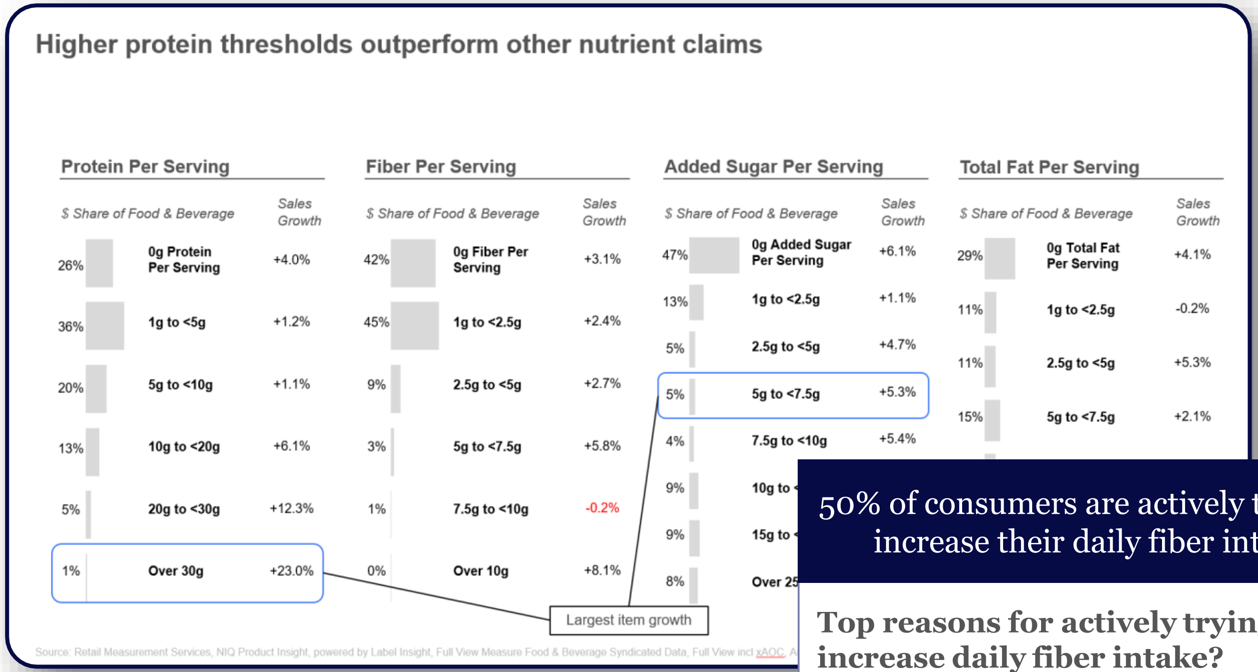
Nutrient Density Score

Beneficial Nutrients (Protein, Fiber, Unsaturated Fat, Potassium)

Nutrients to Limit (Added Sugar, Sodium, Saturated Fat, Trans Fat, Cholesterol)

Ingredient Quality Measure (IQm)

Type, quality and preparation of ingredients beyond what nutrient numbers capture



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

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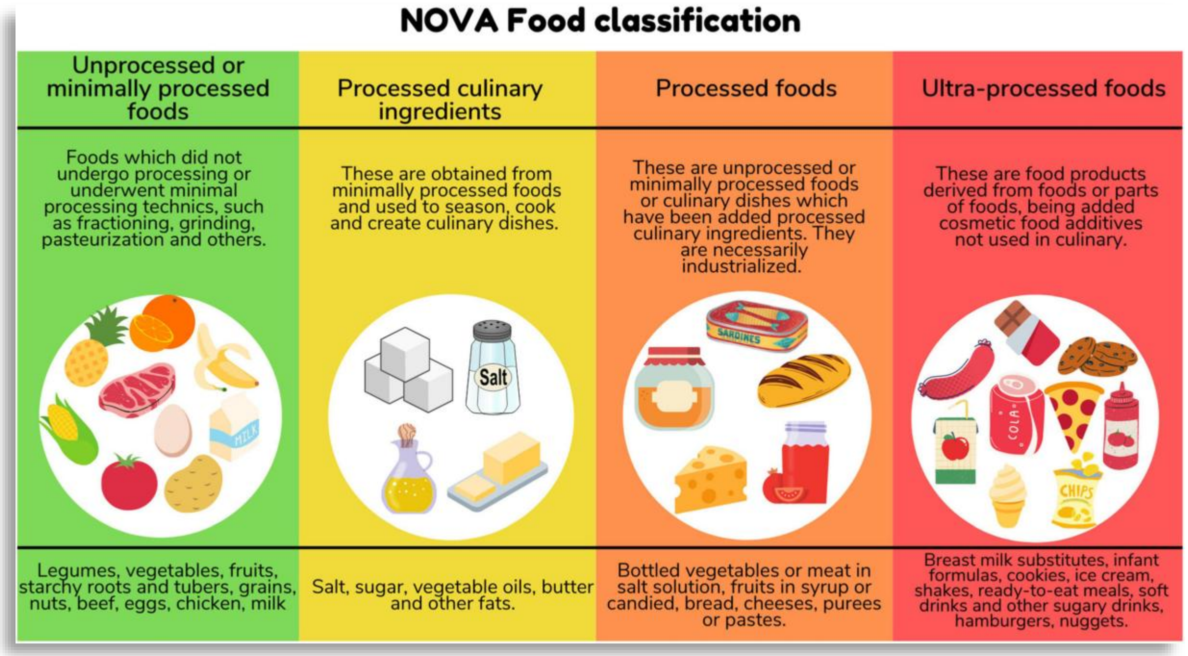
New Research: From Classification To Context: Ultra-Processed Foods, Nutrient Density & Real-World Food Choices

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]



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.

NIQ International Food Information Council

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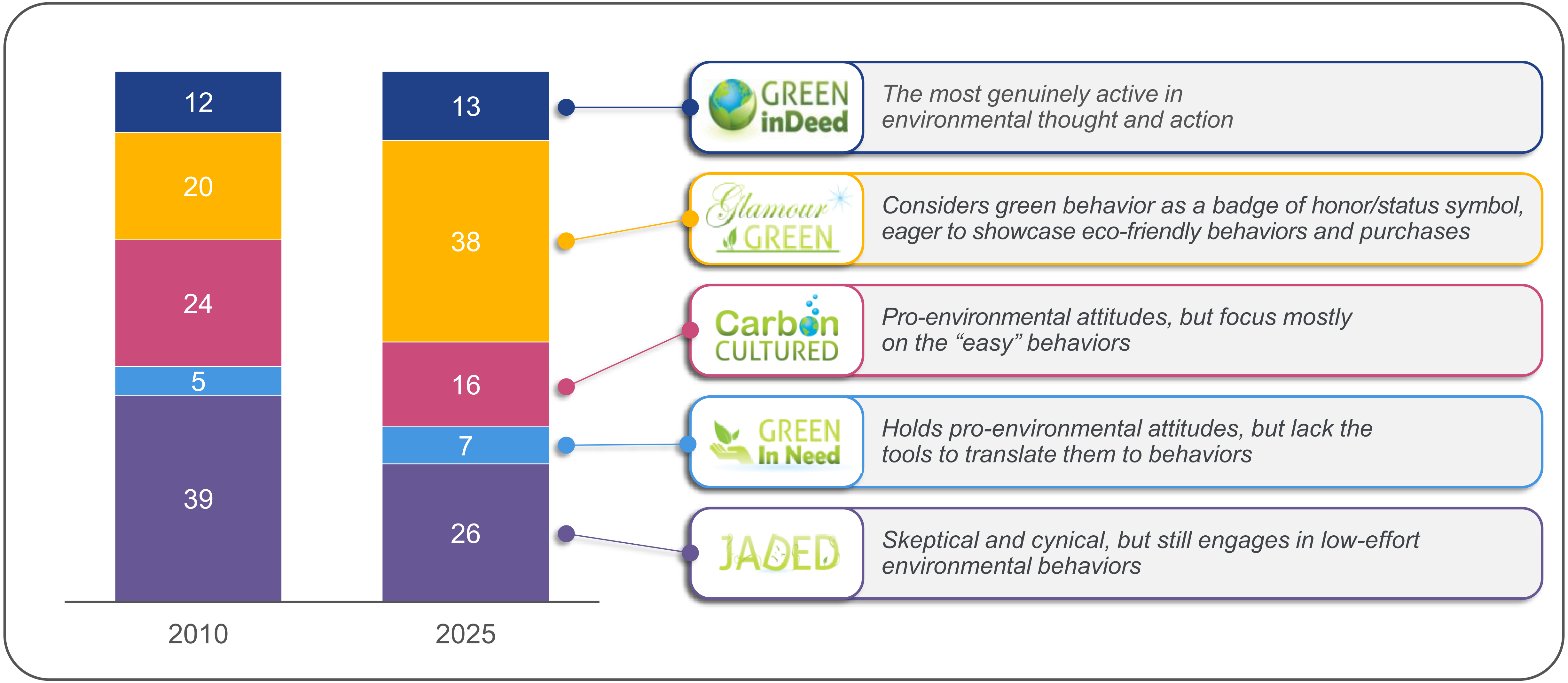
Consumers have different priorities and actions around conscious buying



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

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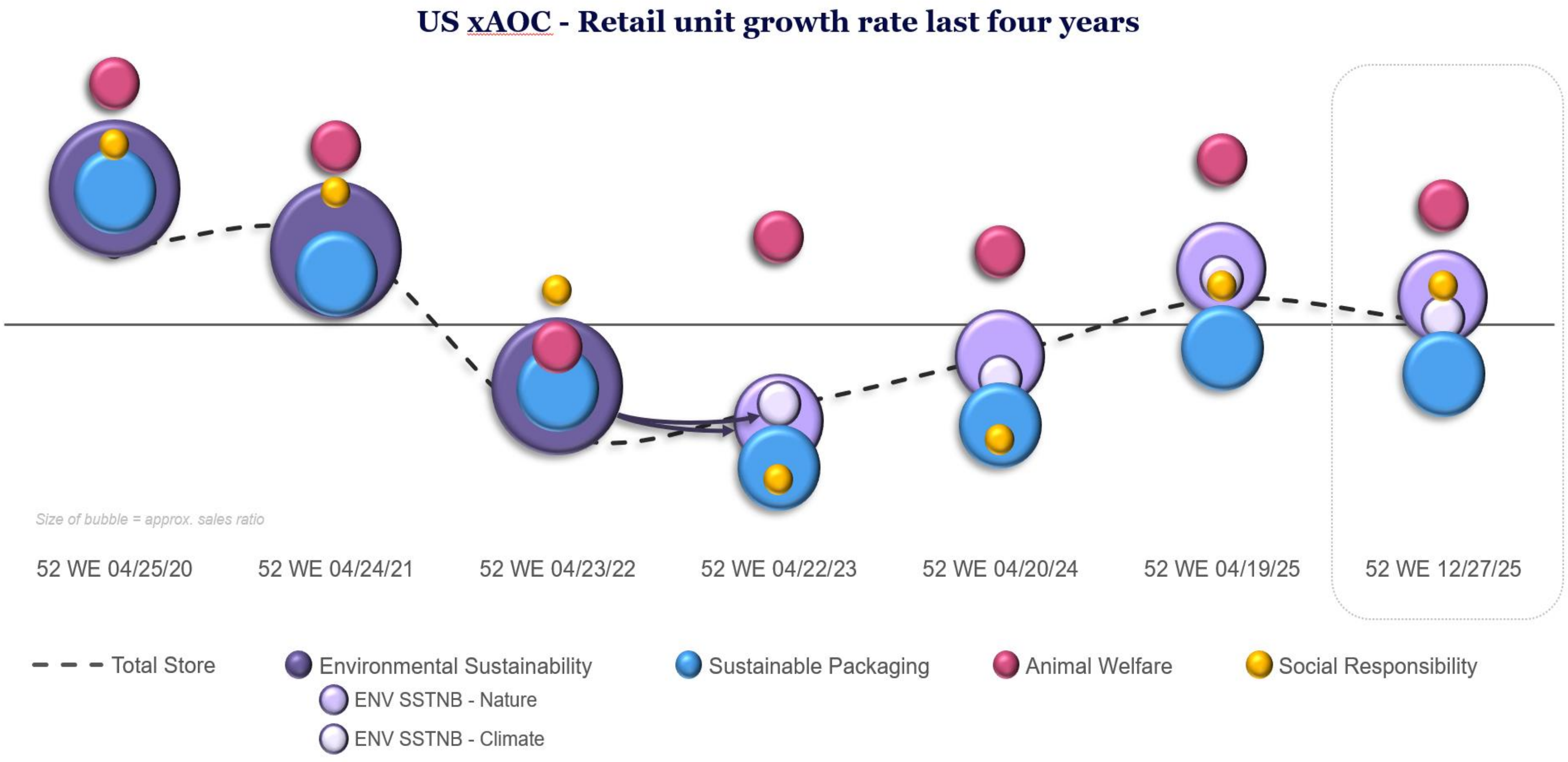
Is *conscious buying more resilient* than expected?



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).

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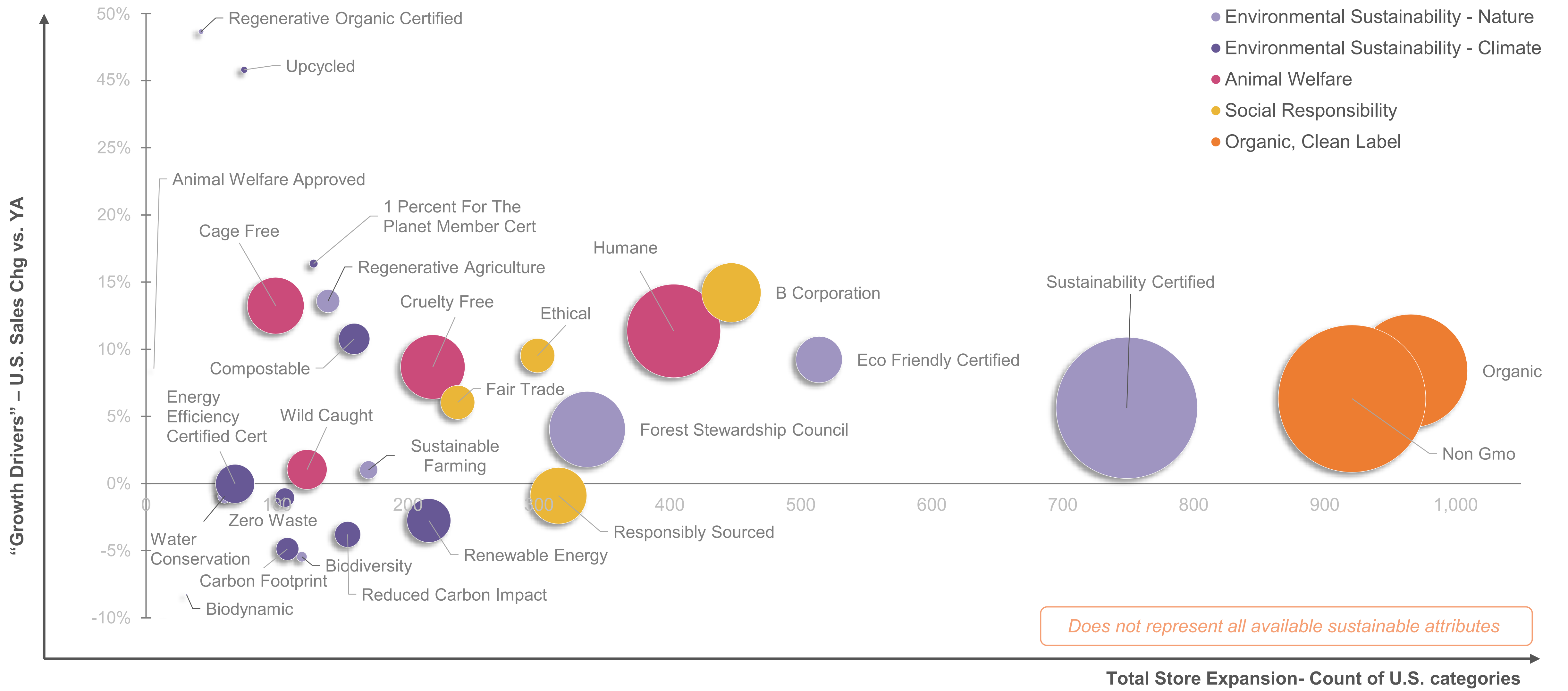
Consumers continue to find sustainability attributes aligned with their values



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

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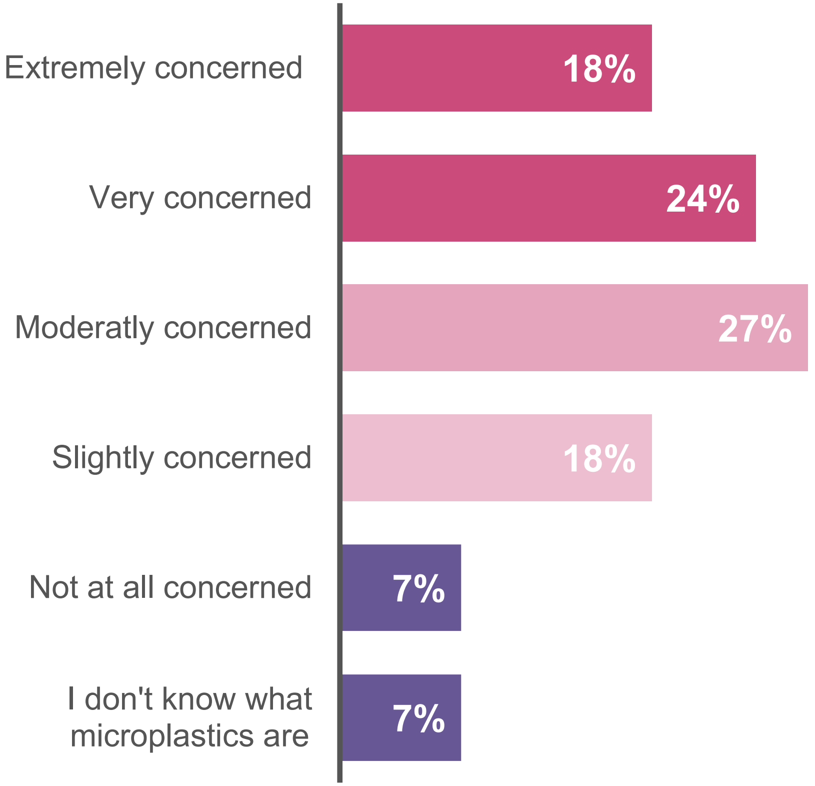
Packaging consistently at top of consumer priorities with many concerns about microplastics

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***

NIQ BASES Omnibus March 2026, Full View + Costco Product Insights, data ending January 2026, NIQ BASES Omnibus May 2025

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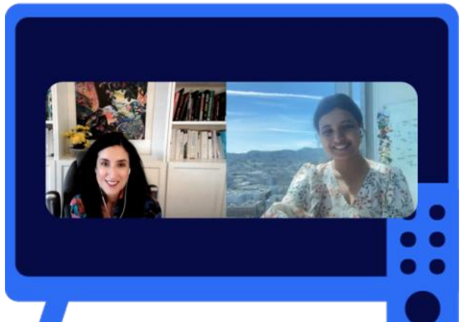
Extended Producer Responsibility

- **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.



[Click to watch]

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

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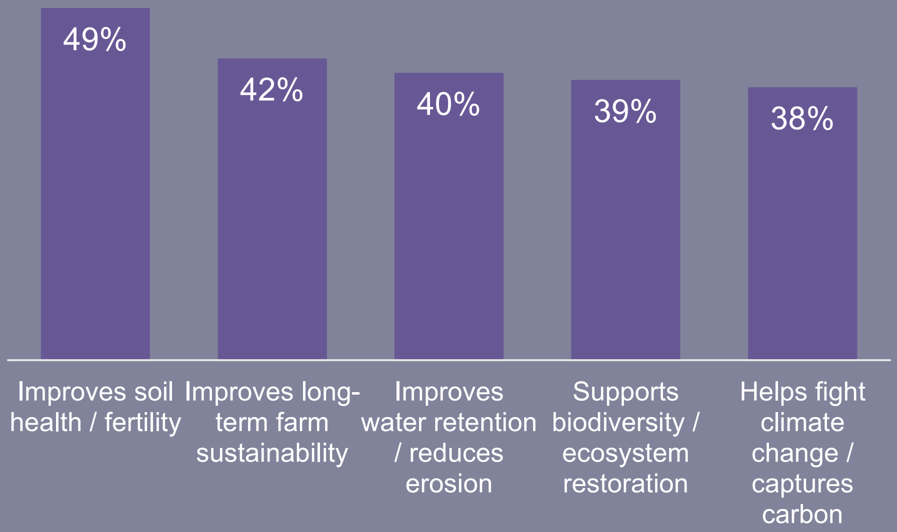
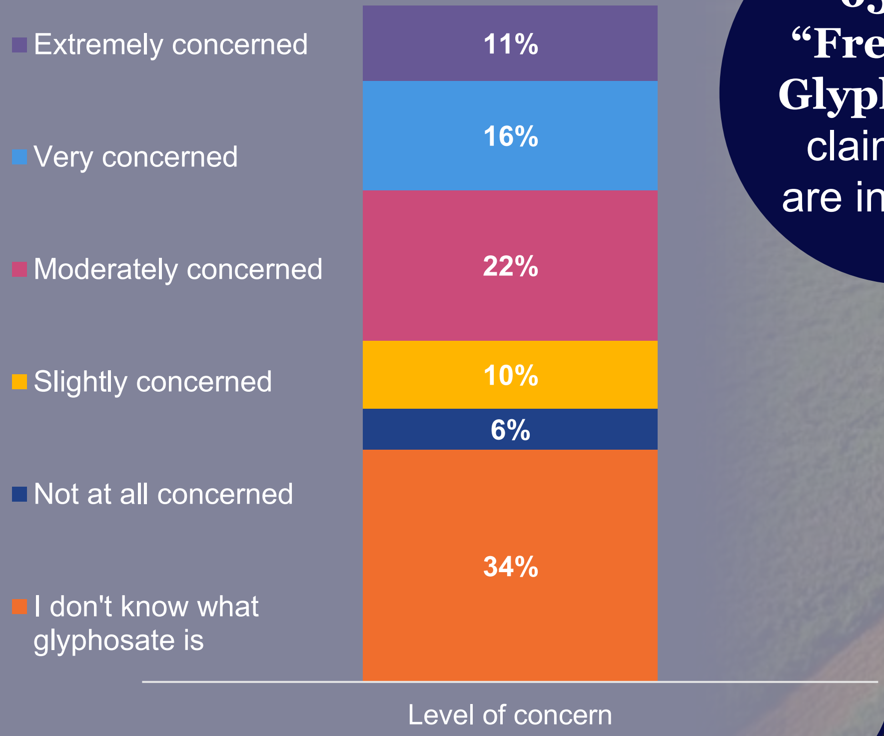
Consumers increasingly paying attention to agricultural practices

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

NIQ BASES Omnibus, NIQ NPI Full View measurement, ending 1/24/2026

NIQ

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The biggest wellness risk isn't regulation, it's irrelevance. *Make America Healthy Again, dye bans, SNAP restrictions are not 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.*

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***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.*

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The curated future of wellness

NielsenIQ

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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

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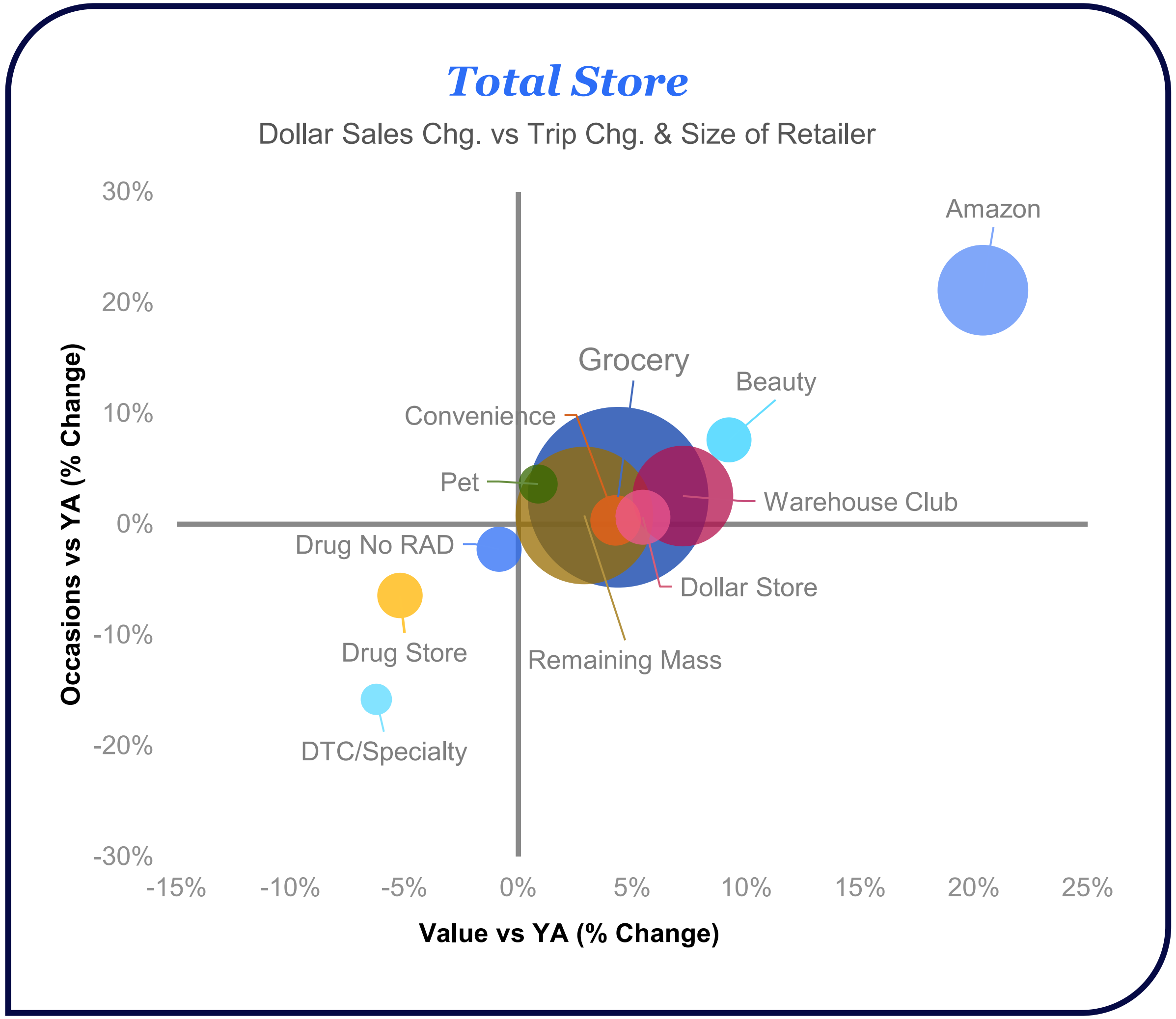
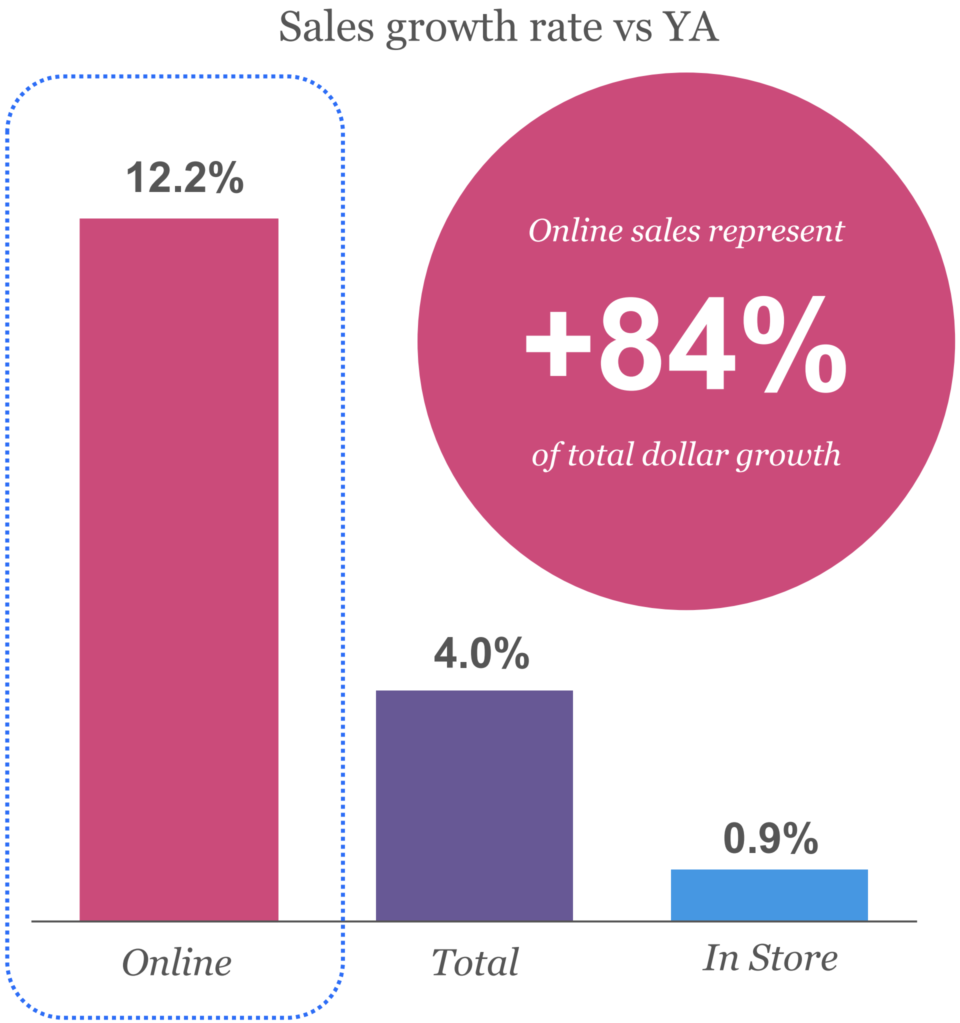
Channels are shifting and products are chosen online before consumers ever step foot in a store or click add to a cart





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

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

84%

Would be likely to purchase a product if the retailer **made it easy on their website or app to compare key product attributes**

65%

Find it helpful when a retailer **suggests products based on their previous purchases or preferences**

58%

Are comfortable with a digital shopping platform making product suggestions

51%

Would be interested in using tools powered by Artificial Intelligence (AI) to **help manage their household shopping in the future**

40%

Are comfortable with a digital shopping platform **making purchase decisions for them**

Source: NIQ Global Consumer Outlook Jul-25

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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

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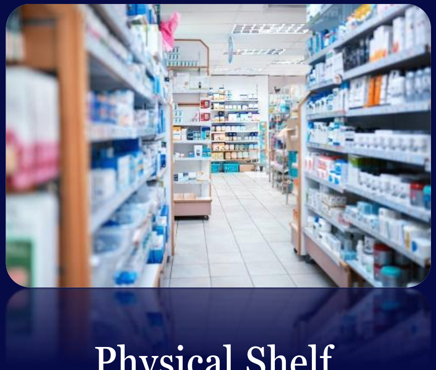
AI has the potential to transform shelf strategy

A new, even more challenging competitive environment

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

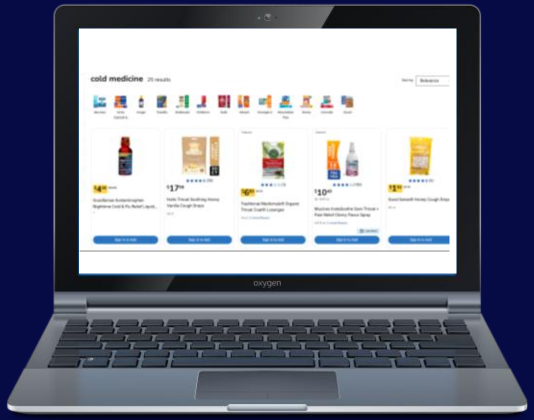
As AI agents take over discovery and replenishment, brands that don't structure product data, claims and benefits for machine interpretation will disappear from the consideration set – no matter how strong their shelf presence once was. It will also change the game on discoverability, leveling the playing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

Number of visible SKUs



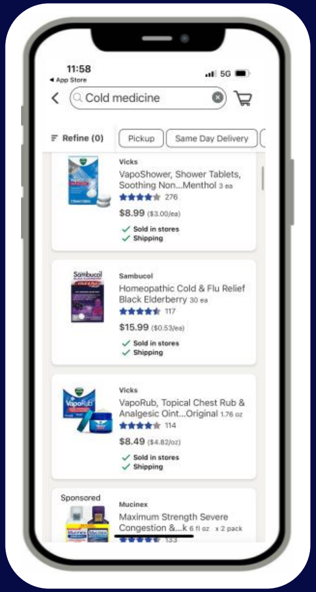
Physical Shelf

50+ SKUs



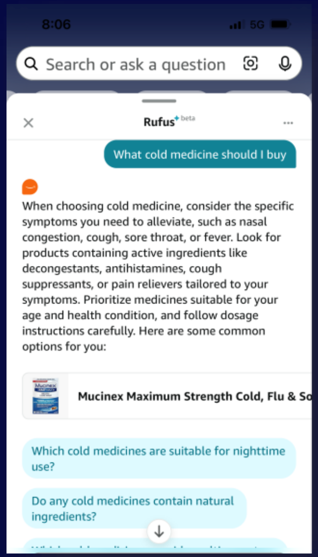
Digital Shelf

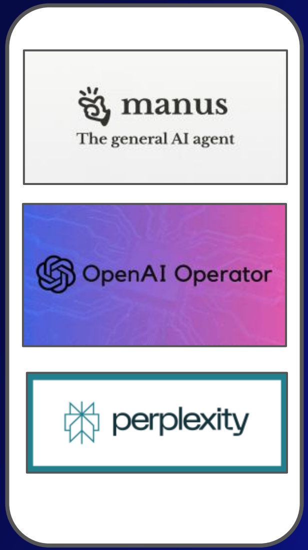
5+ SKUs



Mobile Shelf

4+ SKUs





AI Controlled Shelf

1-2 SKUs

Digital Maturity

Source: NIQ Digital Shelf

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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

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

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)

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

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

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

"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

"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

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

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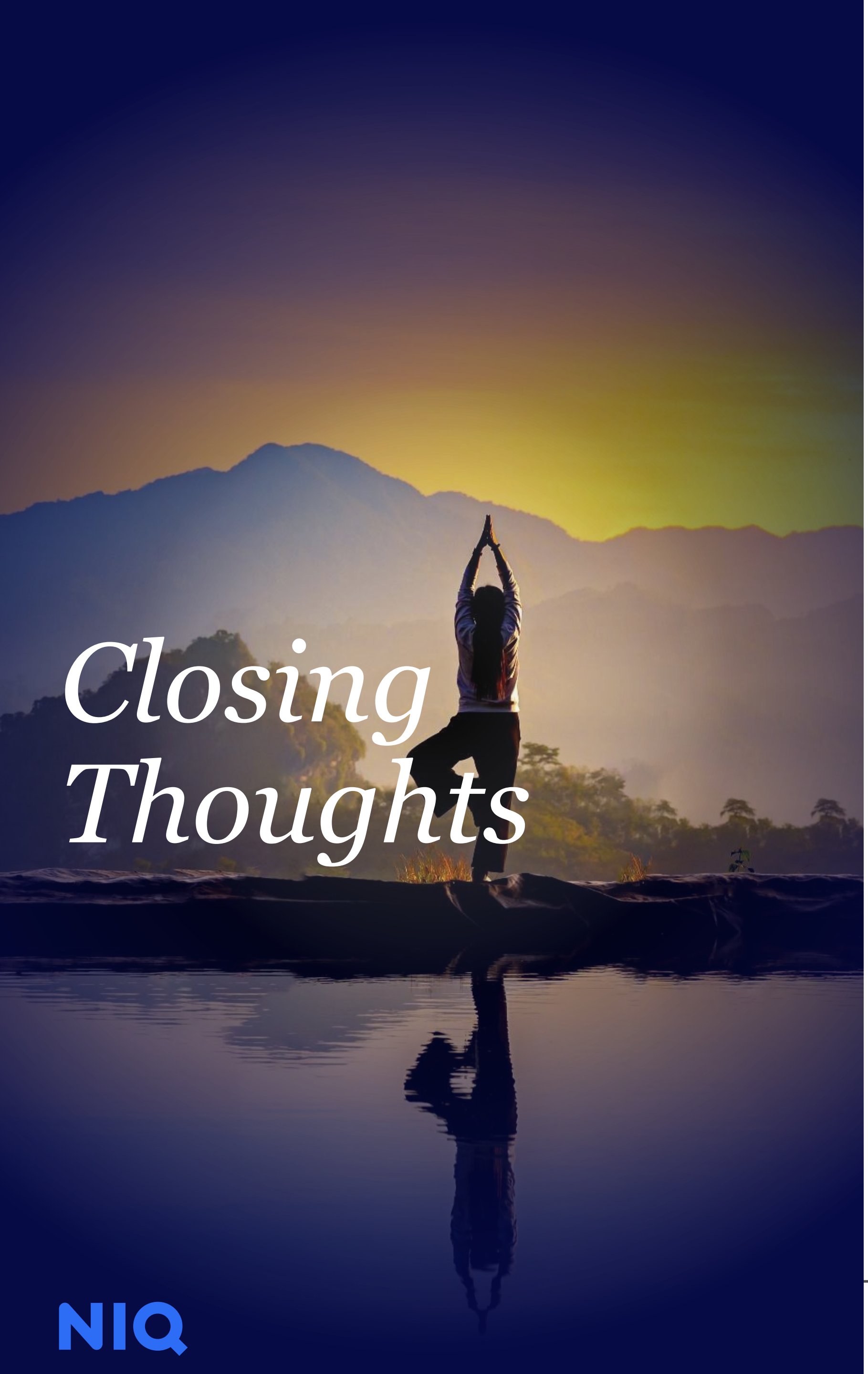

Closing Thoughts

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

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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)*

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Thank you!

Sherry Frey
NIQ, VP Wellness - Industry Leader

NielsenIQ

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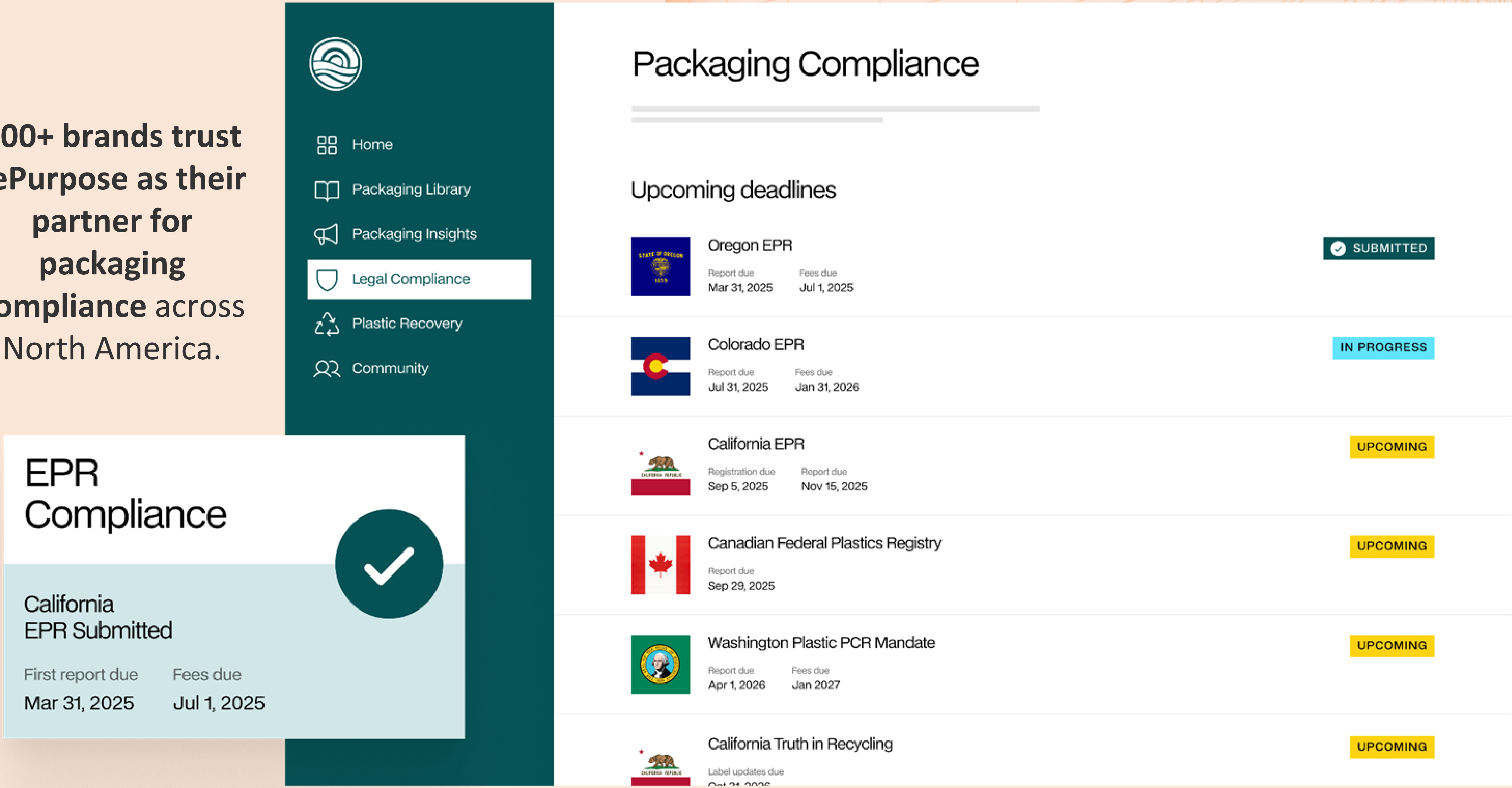
EPR in 2026: What's Changed, What's Coming, and How to Prepare

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



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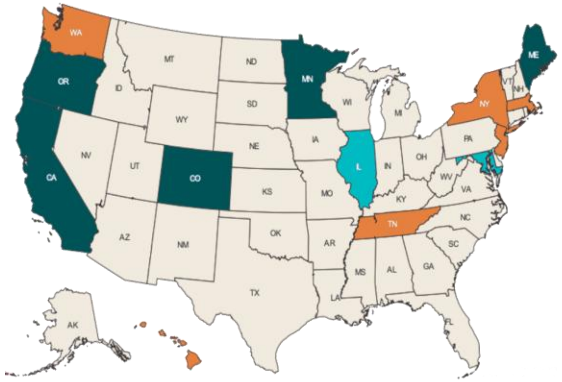
The Foundations: At a glance - Who's involved in EPR?

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.

Circular Action Alliance

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

Walmart
Tom's of Maine
e.l.f. eyes lips face
CLIF
saie
BURT'S BEES TRUE TO NATURE
EARTH ANIMAL

US Packaging Policy: Pulse Check

EPR OVERVIEW

- **7 states** have active EPR laws
    - Oregon
    - Colorado
    - California
    - Maryland
    - Maine
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    - Washington
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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

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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

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Upcoming fees & what to expect

Circular Action Alliance

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

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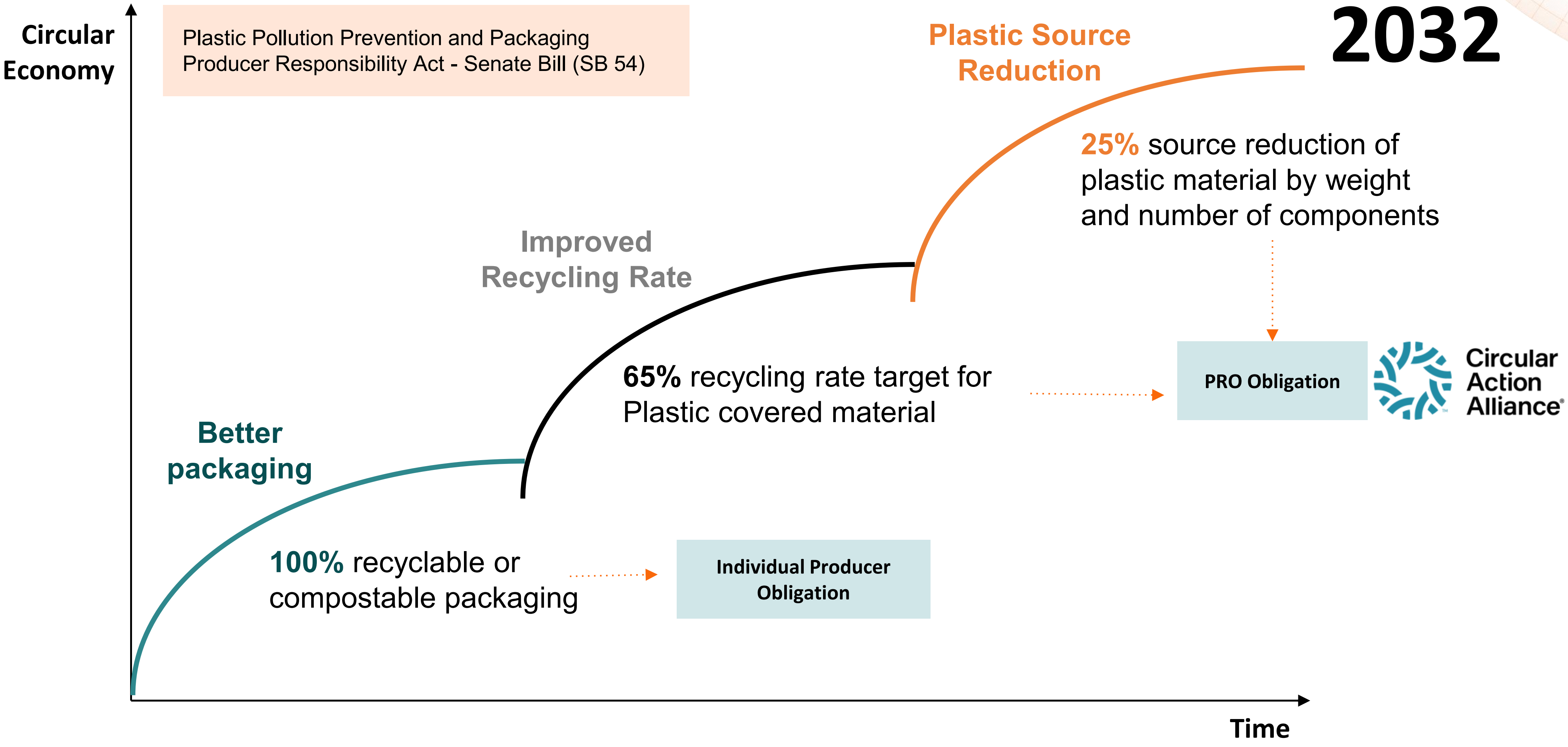
California SB 54 Statue Requirements - Recap



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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**

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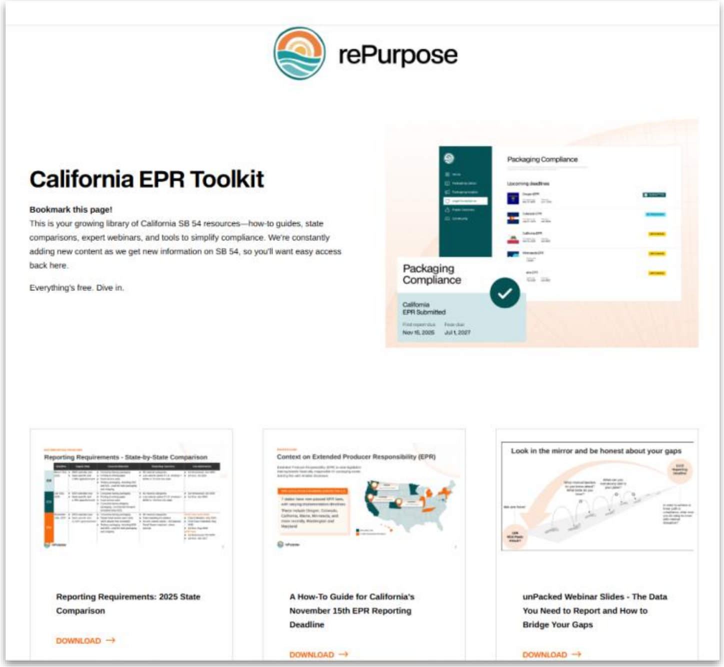
A snapshot of resources from rePurpose Global

Liability Assessments	Guides, eBooks and Toolkits	Detailed Educational Webinars

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

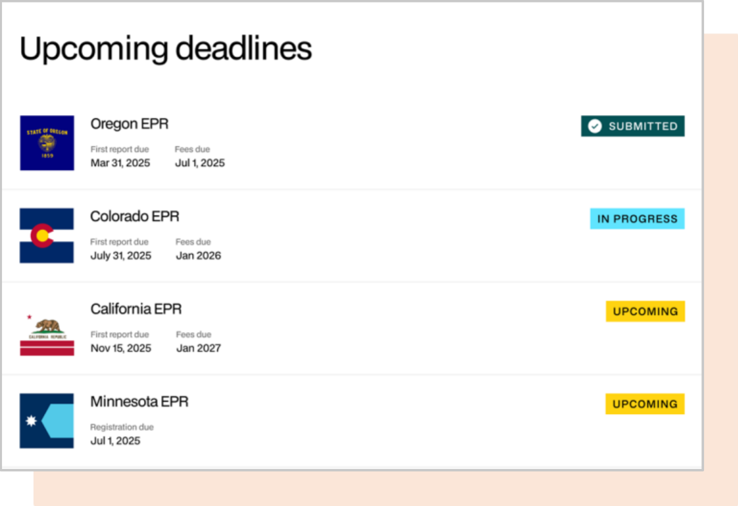


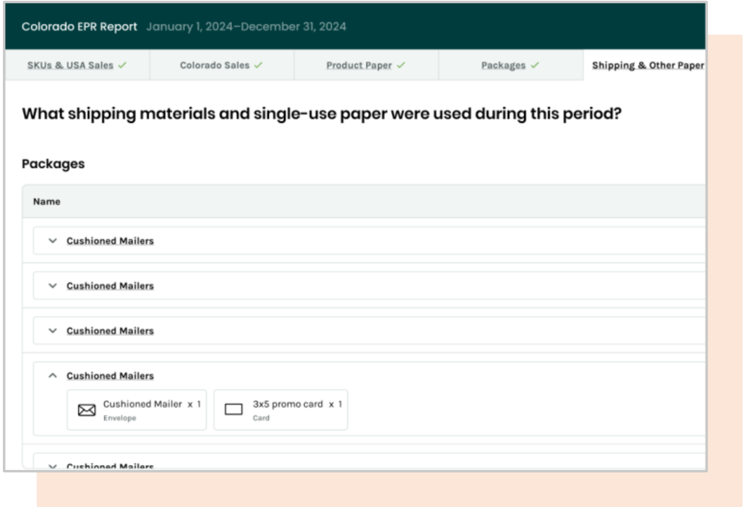
https://www.repurpose.global/resources/guides

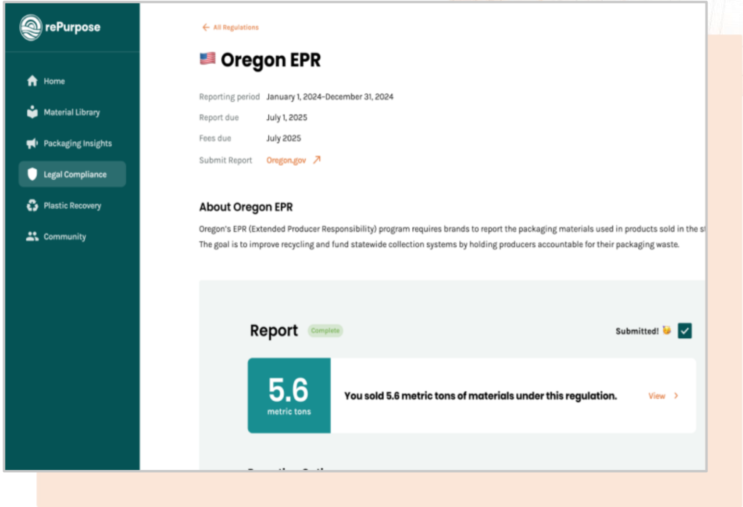
https://www.repurpose.global/resources/webinars

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

rePurpose

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

Contact us: sales-team@repurpose.global

Follow us on: repurpose.global | /repurposeglobal | /repurpose_global | /company/repurposeglobal/