

The Growing
Impact of ***Food
Allergies,
Intolerances,
and
Sensitivities***

Key Findings

1

Dairy, Peanuts, And Gluten Are The Most Common Reactive Ingredients

The #1 and #2 allergies reported by one-third of allergy-affected households are Dairy and Peanut. The most common intolerances are Lactose Intolerance and Gluten Sensitivity.

2

Younger Generations Are Leading Growth In Allergen Foods

Gen Z indexes highest for the top 2 reported allergies (Dairy and Peanut) as well as for Lactose Intolerance. Gen Z's spending power is expected to grow to \$12 trillion by 2030 – making them the largest generation in terms of spending.

3

Households With Food Allergies Tend To Follow More Health-Focused Diets In General

Households with food allergies & intolerances over-index in purchasing products that are Clean Label, Better For, Organic, Vegan, etc.

4

The Number of Allergen-Free Items Has Dropped in Recent Years

Availability is one of the greatest concerns regarding allergen and intolerance management. The number of Allergen-Free UPCs selling have declined over the past four years, reducing selection variety despite ongoing consumer interest.

5

Allergen-Free Products Command a Price Premium

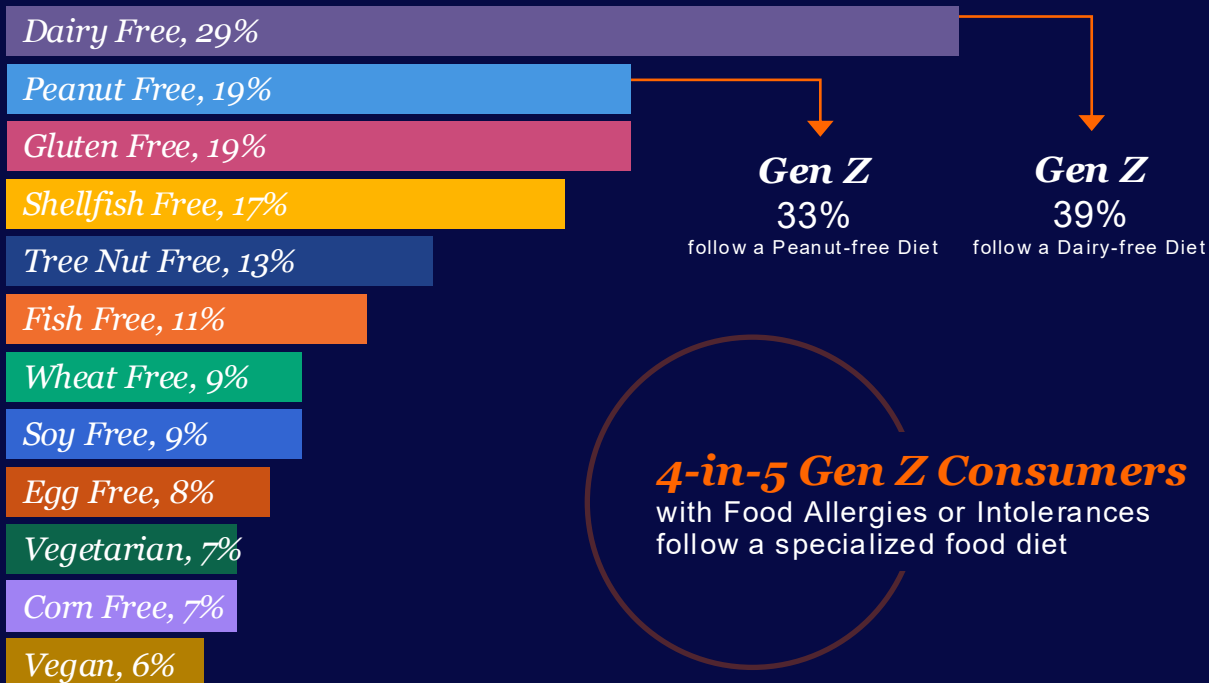
Allergen-Free products – especially those without wheat, soy, fish, shellfish, or milk – carry a price premium. Even so, they're currently growing faster than allergen-containing items, but cost remains the greatest concern regarding allergen management.



Gen Z Indexes High In Allergies and Intolerances

- ✓ **Dairy Free**, **Peanut Free**, and **Gluten Free** are the top allergen diets followed in households.
- ✓ **Gen Z** reports the highest rates of dairy and peanut allergies, as well as lactose intolerance, among all groups surveyed.

Types of Diets Followed in Households

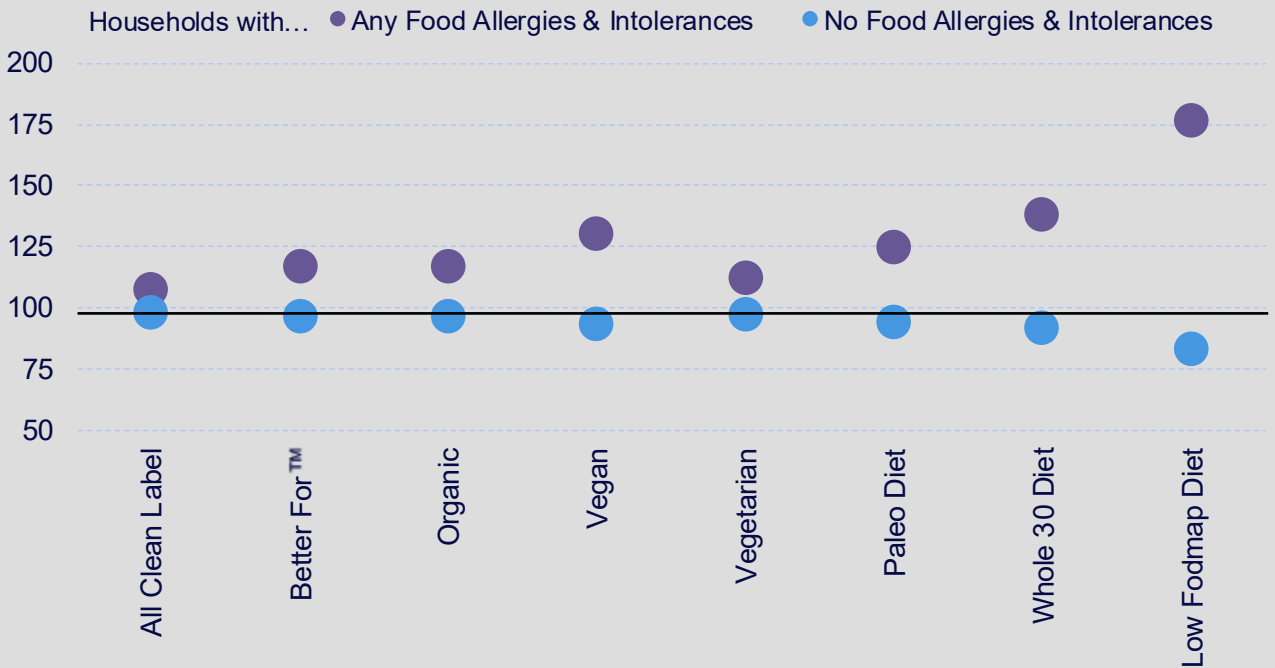


"Gen Z households with allergies are more likely to seek out or avoid brands based on trust. Providing transparent, clear, and thorough labeling is essential to earn loyalty from these concerned shoppers who cannot afford buying mistakes."

- Kathy Risch, SVP, Shopper Insights & Thought Leadership, Acosta Group

Households With Food Allergies Are More Careful to Follow Specific Diets or Healthy Eating

\$ Share Index vs. \$ Share of Food & Beverage



Households with food allergies **spend 16% more on Food & Beverage** than households without food allergies

40% more on Better For™
32% more on Organic

Dollars per buyer



NielsenIQ Homescan Panel; Health Shopper Survey – Households with Ailments; Product Insight stated claims, 52 weeks ending December 27, 2025

Challenges in Food Allergy or Intolerance Management

- ✓ Cost and Availability are amongst the two greatest concerns regarding allergen and intolerance management.
- ✓ **55%** of Gen X surveyed noted cost as a key concern, while **33%** of Millennials surveyed noted stress and anxiety as a key concern.

Household Dietary Concerns



Acosta Group Shopper Community Survey April 2025



"As a registered dietitian, I understand how overwhelming food allergies can be. Clear, straightforward labeling is essential so people don't have to worry about hidden ingredients. When manufacturers make allergen information easy to find, it strengthens trust and helps consumers feel safer in the grocery aisle." - **Hannah Polk, Registered Dietician, NIQ**

The Number of Allergen-Free Items Has Dropped

Allergen-Free UPCs have declined over the past four years, reducing the selection variety despite ongoing consumer interest – most notably for **Gluten Free** offerings.

UPCs of Selling Change vs. 4YA



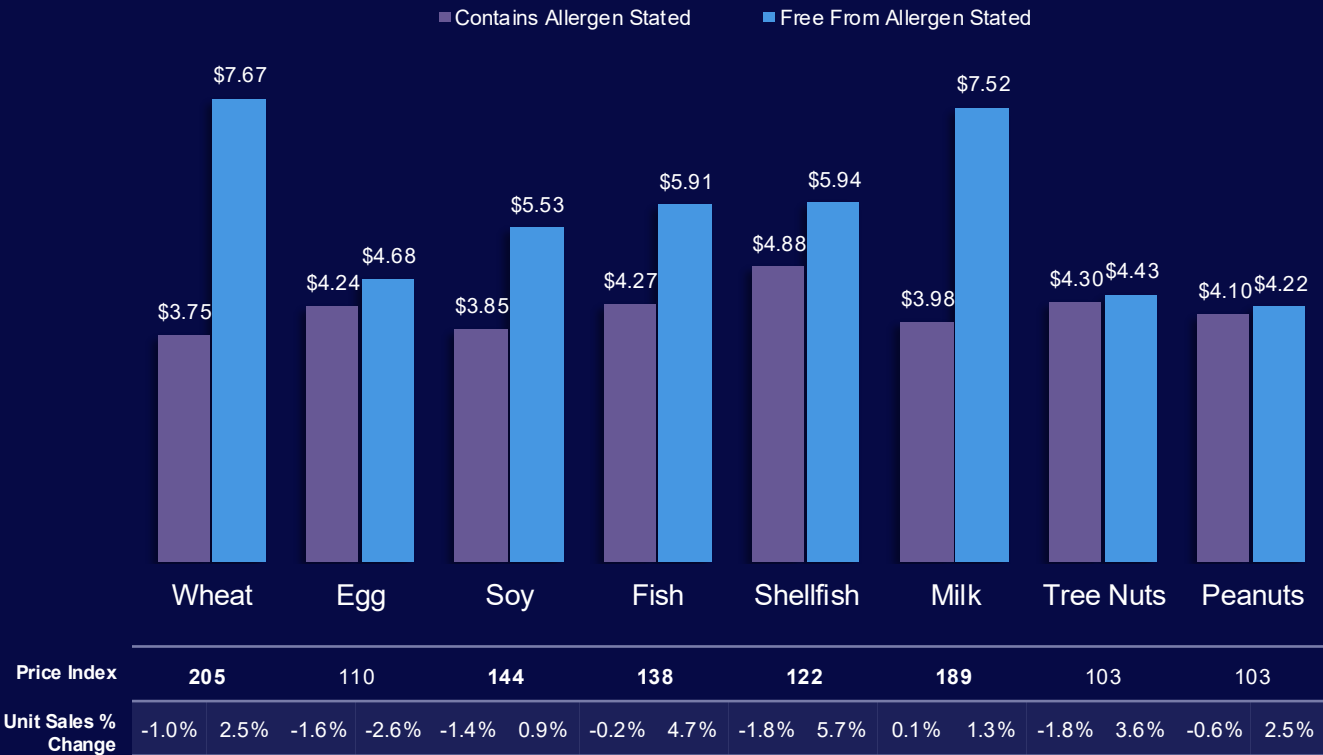
NielsenIQ Discover, Product Insight, 52 weeks ending December 27, 2025

Consumers Pay a Price Premium for Allergen-Free Products



- ✓ Allergen-free products—especially those without **wheat, soy, fish, shellfish, or milk**—often cost more, yet they’re growing faster than items containing these allergens.
- ✓ Consumers are actively seeking and willing to pay a premium for options that help them avoid severe-reaction ingredients.

Average Unit Price – Contains Allergens vs. Free From Allergens



NielsenIQ Discover, Product Insight, 52 weeks ending December 27, 2025

Consumers Turn Most to Medical Professionals, Product Websites, and Friends/Family for Food Allergy Guidance



46%

Medical
Professionals

38%

Product
Website

29%

Friends /
Family

25%

Social
Media

25%

Retailer
Website

23%

In-Store
Advertising

20%

Media
Advertising

10%

Retailer
App

Gen X and Boomers were amongst those that seek out medical professions most

Gen Z leverages the product website or retailer website most

Gen Z and Millennials leverage social media most

Methodology:

Acosta Shopper research for this study was conducted March 28-April 10, 2025, with 598 members of Acosta Group's proprietary Shopper Community in households with food or beverage allergies and/or intolerances. Acosta Group's Shopper Community is comprised of over 40,000 demographically diverse shoppers across the U.S. and is the company's proprietary community for survey engagement.

NIQ Product Insight examines ingredient lists, warning statements, label claims, and certifications to determine the inherent attributes of each item. These advanced attributes are then combined with market measurement and panel data to uncover trends and insights across categories and demographic groups

Acosta Group Shopper Community Survey April 2025