A look ahead:
Wellness 2025

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NIQ

Housekeeping Notes

This webinar is being recorded!

Slides will be emailed out after the webinar!

NIQ

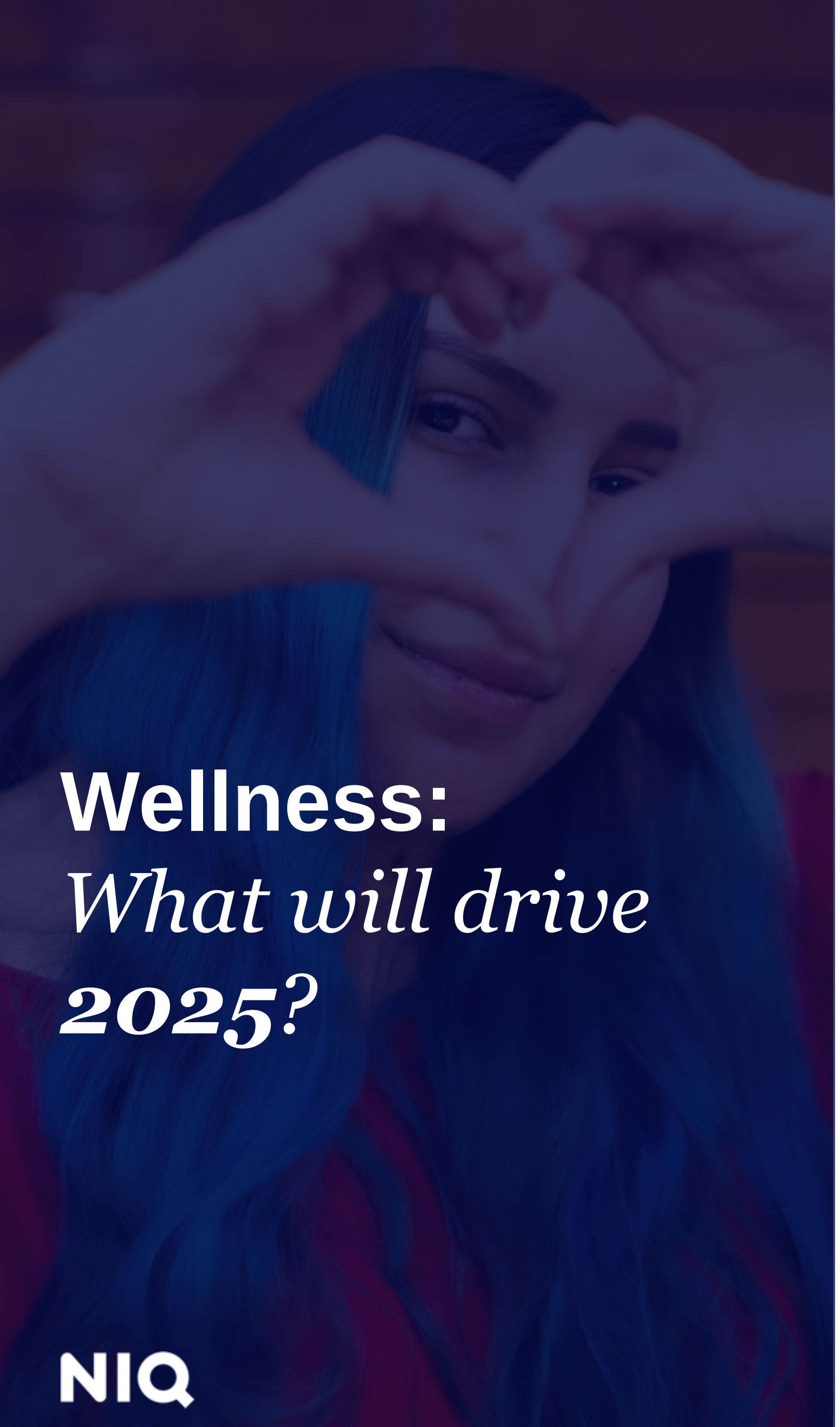
Upcoming Webinar

Breathing Easy: Trends and Insights in Upper Respiratory Health

Date: January 22, 2025

Time: 1:00 PM EST (45 minutes)

NIQ



Wellness:
What will drive ***2025?***

1. Understand how ***the landscape*** and the ***consumers are shifting around wellness***
2. What's next: ***emerging and growing health and need states*** impacting consumers
3. Explore two evolving wellness priorities: ***GLP-1 and mental health***
4. What's real in ***clean label and sustainability*** and what to prioritize in 2025
5. ***Trending ingredients*** - the good and challenging

Consumers are more *wellness-empowered* than ever, yet also *contradictory*, *confused* and sometimes *less loyal*

Bifurcated consumer illustrates wellness *inequities* and differing priorities

Wellness is *resilient* as consumers prioritize health

Wellness is *omnipresent* shifting focus from channels and products to *priorities* and *attributes*

Wellness will be front and center with the new administration

MAKE AMERICA HEALTHY AGAIN

FARM BILL

DGA Dietary Guidelines for Americans

TARIFFS?

USDA SNAP Supplemental Nutrition Assistance Program

Putting Healthy Food Within Reach

FDA's Updated "Healthy" Claim Definition

Nonprescription Drug Product with an Additional Condition for Nonprescription Use (ACNU)

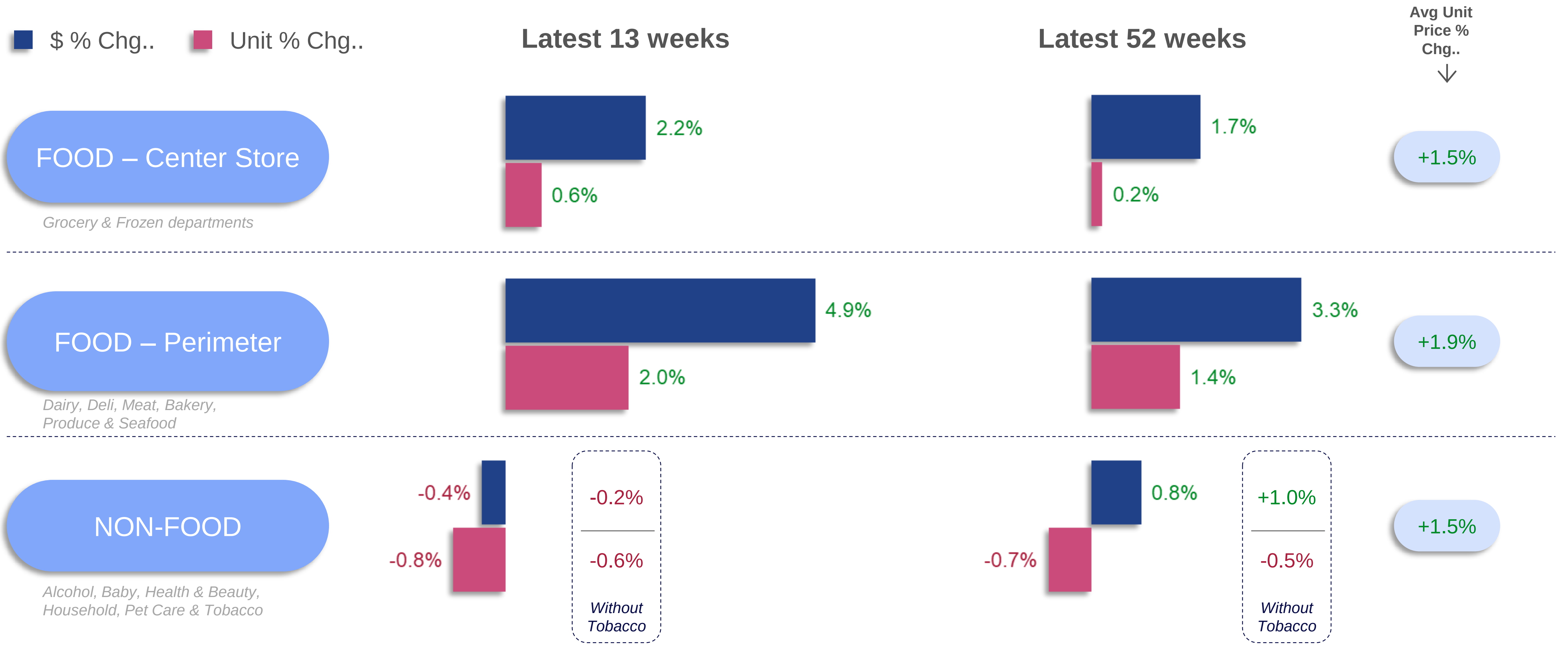
Modernization of Cosmetics Regulation Act of 2022 (MoCRA)

Food Safety Traceability

Ingredient bans?

Sales rebounding in the store, especially in the perimeter

Sales growth across the store

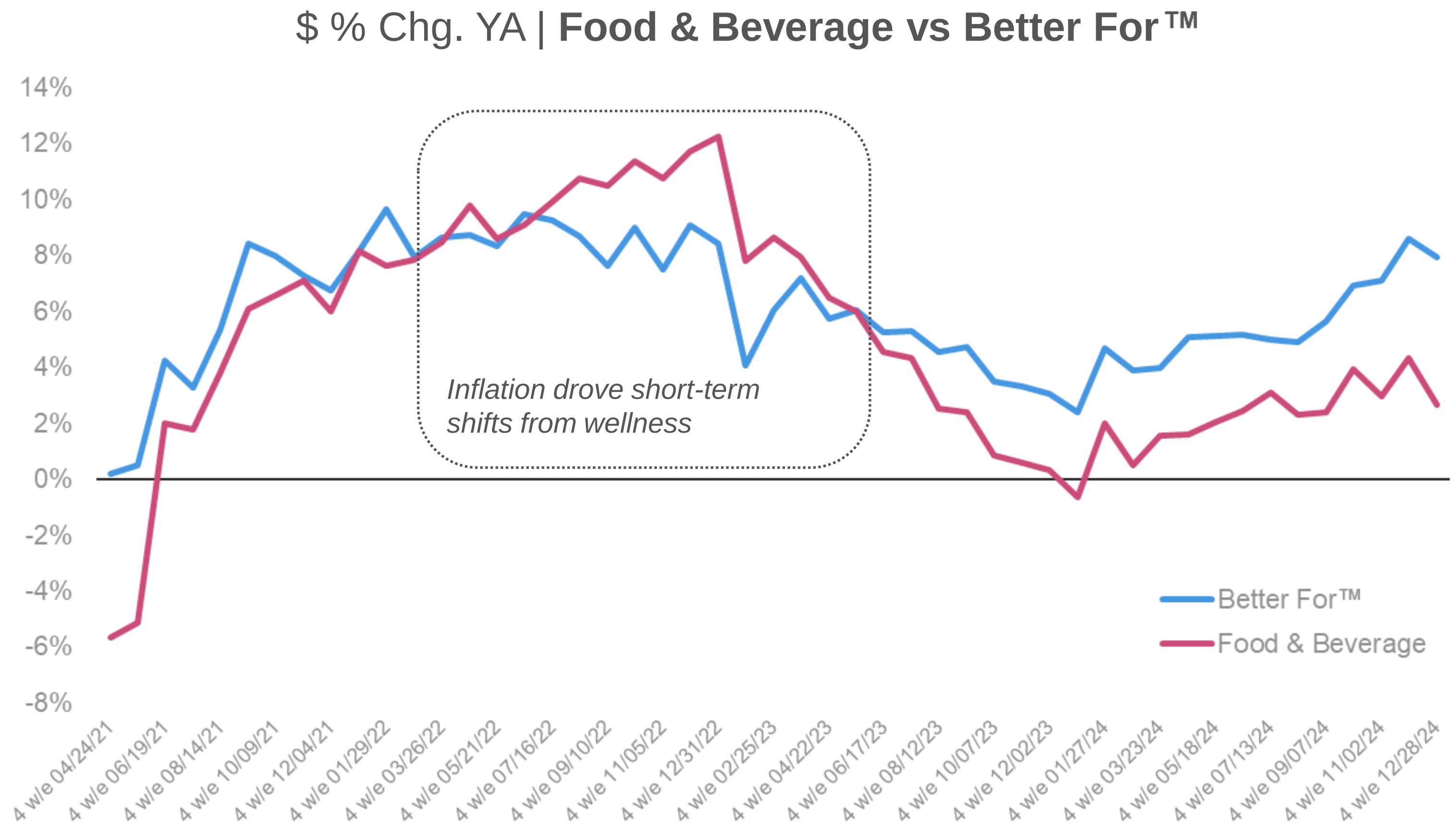


Source: NIQ, Retail Measurement Services; Total US xAOC; Total Store (includes Tobacco); $, Unit, and Avg Unit Price % change vs year ago; 52 week ending December 28, 2024

NIQ *Better For™*...

Better For™ is a bellwether of wellness trends

Wellness is *resilient* as consumers prioritize health



Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage vs Better For segment; $ % Change vs year ago; 4-week trended through week ending December 28, 2024

Technology empowering the consumer

Consumers are more *wellness-empowered*

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

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

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

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

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

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

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

Role of AI in supporting consumers and brands holds promise but will be evolving

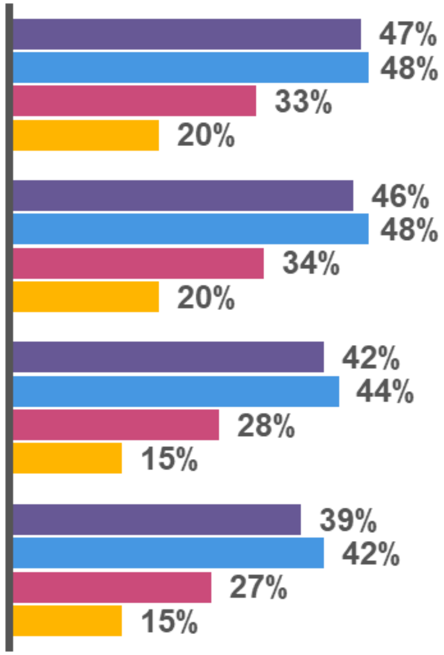
Consumers are more open to AI involvement in their shopping decisions, but generational variances are clear.

40% would accept a product recommendation from their AI assistant (e.g., Siri on iPhone, Amazon Alexa, etc..)

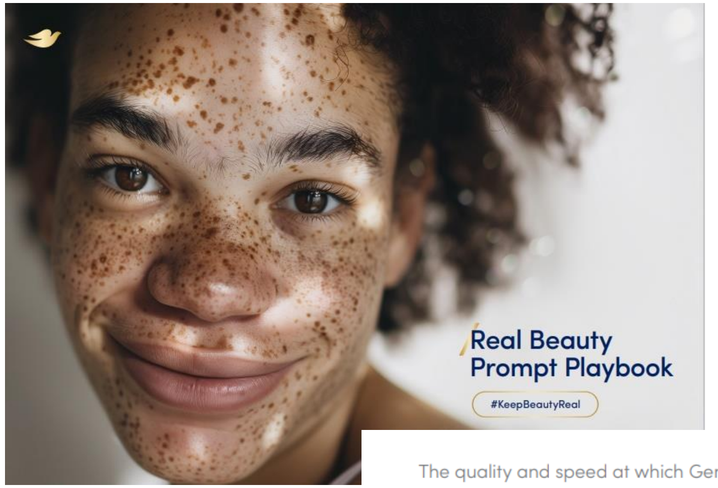
40% would leverage AI to automate and speed up their everyday shopping decisions

35% would allow 'smart' devices (e.g., fridge sensor) to automatically order new products when required

34% would purchase a product or service they have only examined or experienced through augmented reality or virtual reality



Gen Z | Millennials | Gen X | Boomers



[Keep Beauty Real Campaign | Dove]

The quality and speed at which GenAI tools can recreate lifelike images of people is astounding. However, its rate of improvement is so impressive that it raises ethical concerns regarding the way these tools are used and designed.

The core of the issue lies with AI and its inherent bias. Whether in the dataset used to train AI models or the language we use to describe beauty and appearance, there is always some form of bias influencing GenAI image output.

For this reason, when prompting to generate images of women and female identifying individuals, the results are often over-sexualised, lacking diversity, non-inclusive and a reflection of narrow definitions of beauty.

This is a problem that Dove aims to help solve.

Will AI-generated advertising disrupt the creative industry?

12 December 2024 , 5 mins read

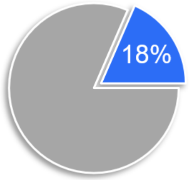
Link to article: Will AI-generated advertising disrupt the creative industry? - NIQ

Source: Mid-Year Consumer Outlook: Guide to 2025

Omni-Wellness: online and social shopping growth channels for wellness

Wellness is *omnipresent*

Online growth outpacing in-store by almost 3x rate



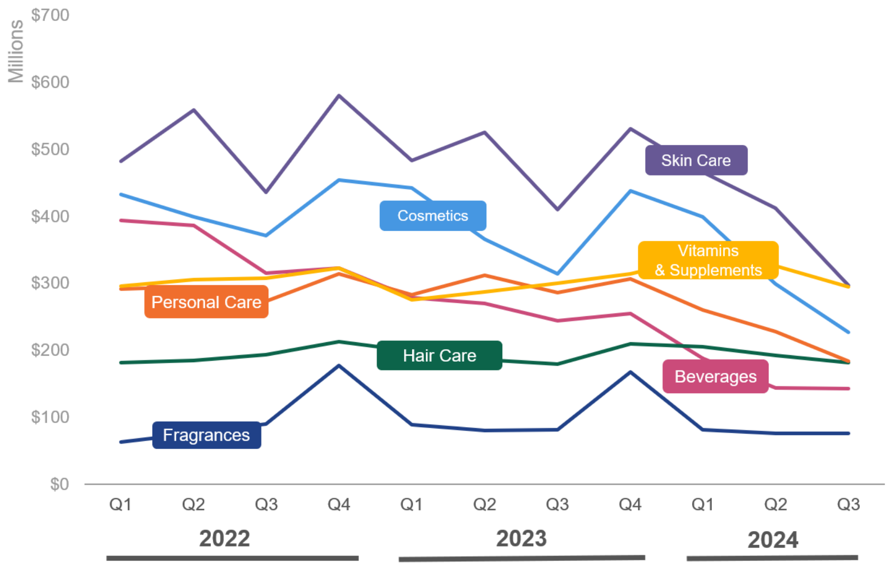
Online share of total CPG[1]

Online Share by department[1]		Sales growth[1] Online | In-Store
Baby Care	↑1 44.6%	+4% | +1%
Health & Beauty Care	↓1 44.4%	+15% | +2%
Pet Care	40.3%	+13% | -1%
Household Care	26.4%	+14% | +1%
Food	9.8%	+16% | +1%
Alcohol	5.2%	+8% | +1%

Almost 60% of vitamins, minerals and supplements are sold online

85% order from a pure play or online retailer for home delivery

Direct-to-Consumer fluctuates across wellness



55% purchase directly via social media or live stream platforms

TikTok Shop[2]

79% *of TikTok dollar sales are from health and beauty*

#8 *TikTok Shop is the Health and Beauty ecommerce retailer*

#23 *Food retailer*

Social selling has reduced the time through the marketing funnel **from days to seconds**

Source: NIQ, Omnisales; Total Omni US Market; Total CPG (excluding Floral and General Merchandise); $ Share of CPG, Sales change vs year ago; 52 weeks ending July 27, 2024; NielsenIQ eCommerce Panel, Latest 3 years ending November 2024; TikTok Shop, data ending 11/2024

NielsenIQ

Source: NIQ Spectra Data Version March 2024

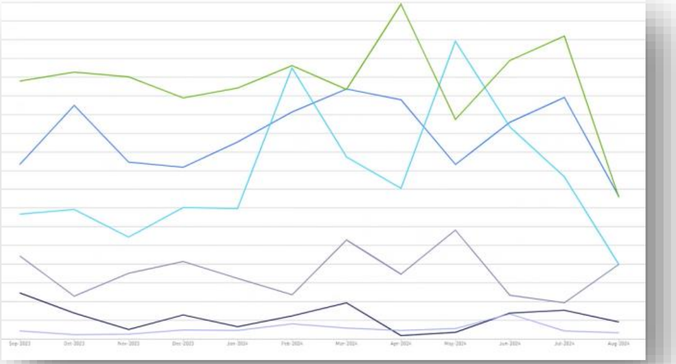
Caution: loyalty is more vulnerable

Consumers are *contradictory*, *confused* and sometimes *less loyal*

90%

of CPG searches on Amazon are unbranded

Fluctuation of top sports nutrition brands on TikTok

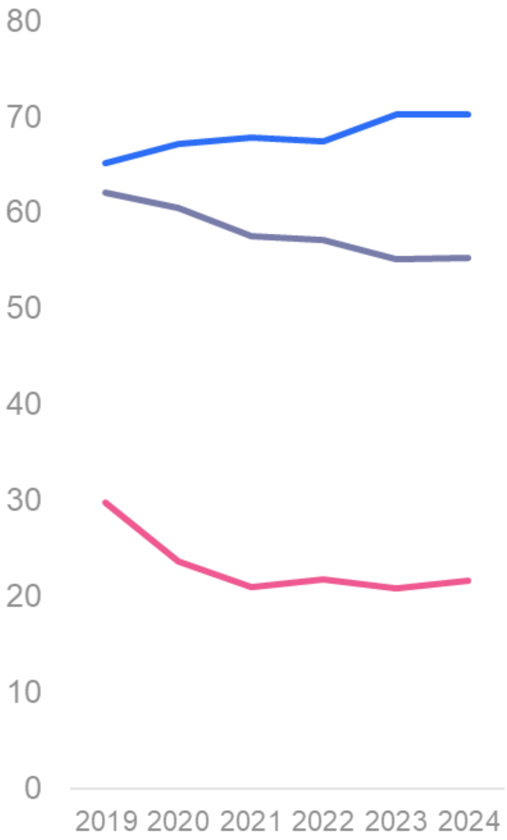


I struggle to find brands I ***can relate to*** (i.e., brands for my age, size, appearance, lifestyle, etc..)

Gen Z	Gen Y	Gen X	Boomers
18%	17%	14%	6%

Americans more open to private labels and less committed to name brands

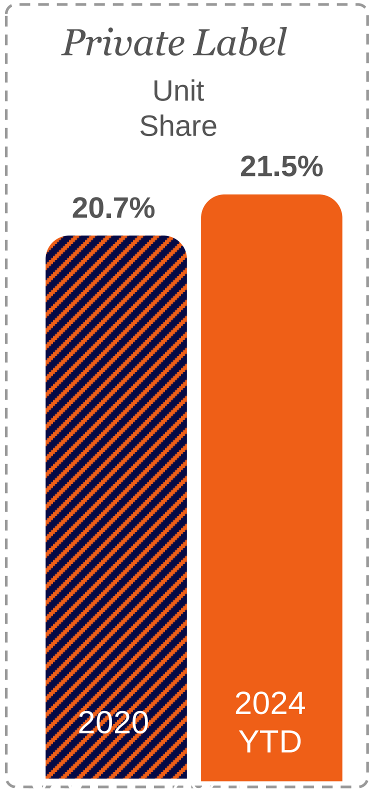
% who agree with the statement



70% agree
"If generic brands are on sale, I will purchase them over my normal name-brand,"
up 5 pts *from 2019*

56%
"I am loyal to my food brands and stick with them,"
down 6 pts *from 2019*

22%
"I only buy food items that are name-brand, not generic brands,"
down 8 pts *from 2019*



NIQ MRI-Simmons 2021-2014 Summer and 2019-2024 Fall; & GFK How Americans Eat - NIQ Consumer Life 2025 Food & Diet Report"; Source: NIQ, Retail Measurement Services; Total US xAOC; Total Store; Private Label $ and Unit share of Total Store; Calendar year 2020 vs 2024 YTD through August 10, 2024 (32 weeks); Source: NIQ Consumer Outlook 2024, US

Trust increasingly a challenge for consumers

Consumers are *contradictory*, *confused* and sometimes *less loyal*

I am more skeptical about which sources of information I can **trust**			
23%	26%	28%	40%
Gen Z	Gen Y	Gen X	Boomers

Whistleblowers flagged 300 scientific papers for retraction. Many journals ghosted them.

Science Insider, 1/2024

Online shopping has become a giant fake product machine.

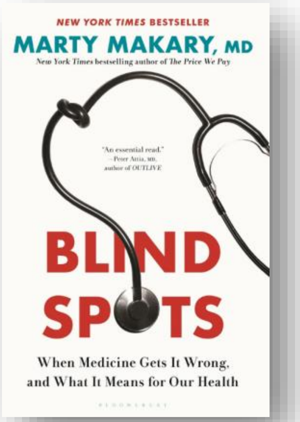
Bloomberg Businessweek, 6/2024

It's not just sunscreen. Toxic products line the drugstore shelves.

Bloomberg, 12/2024

NIQ MRI Simmons research on women:

- **Pharmaceutical Companies**: 83% feel that pharmaceutical companies prioritize profit over their health, and this sentiment is increasing.
- **Doctor Recommendations**: 57% worry that doctors recommend treatments based on financial incentives, and this concern is also growing.
- **Challenging Doctors**: 61% are willing to challenge their doctor's recommendations regarding their health.
- **Self-Research**: 64% research treatment options independently before consulting their doctor.
- **Trust in Medical Professionals**: 42% of people don't trust medical professionals and healthcare facilities to act in their best interest.



Sunrise 2027: meeting growing demands for product transparency, traceability and authentication

Source: NIQ Consumer Outlook 2024, US
NIQ MRI Simmons Consumer Study Fall 2024 and Trending Topics 2024 Q4studies

For more information: What is GS1 Sunrise 2027? | GS1 US

The Evolution of Customer Experience

88% say that it's important to create customer journeys that are seamless, personalized, and consistent, yet ***only 1/3 say*** their organization's customer journey is very consistent, personalized and seamless

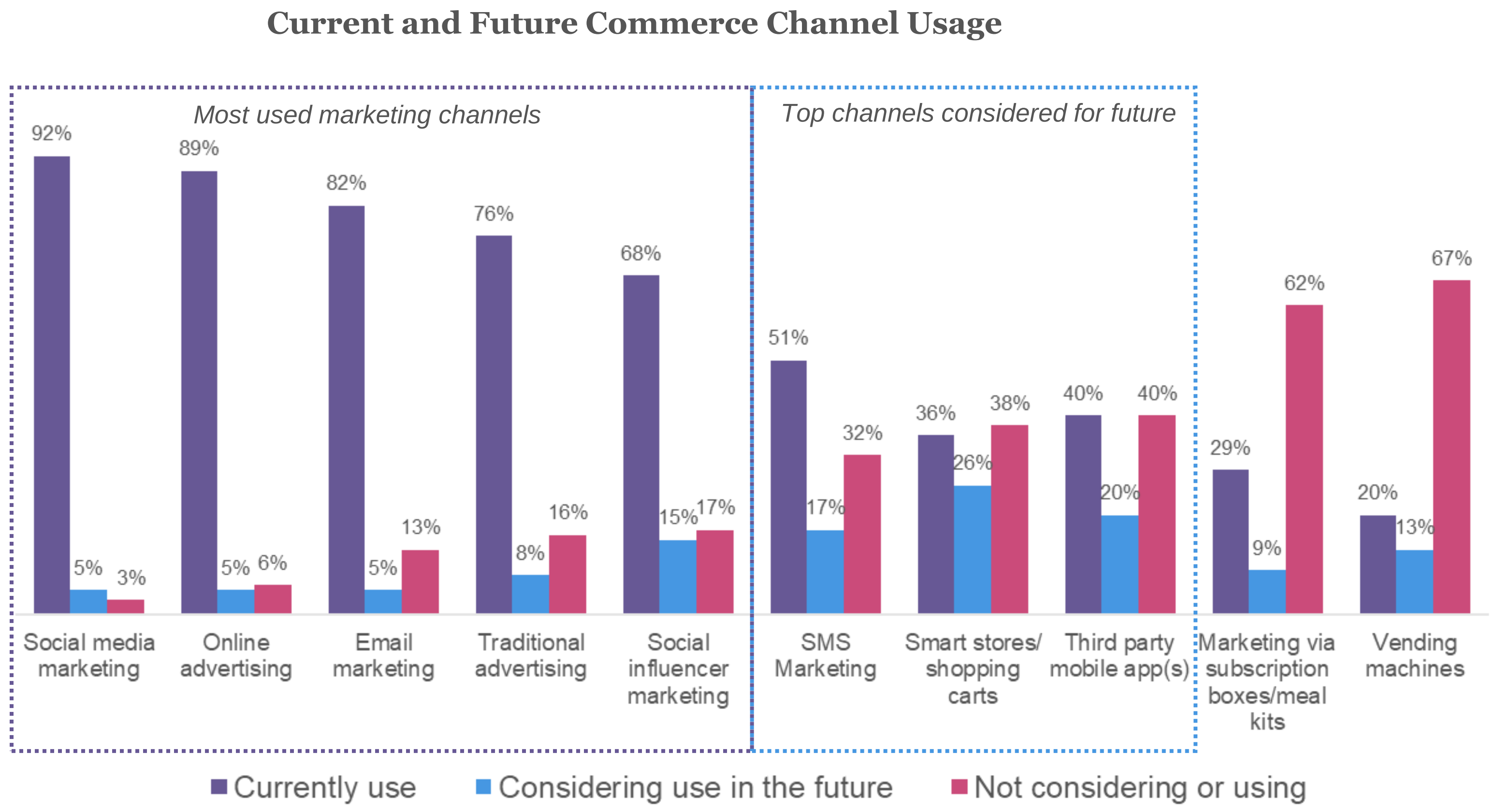
64% say that the ***rapid increase*** in consumer-facing channels is making it ***difficult to manage*** the customer journey

68% say that blind spots in customer journey data are having a ***negative impact*** within organization

Harvard Business Review

The challenge: creating seamless, personalized and consistent customer journey

Wellness is *omnipresent*

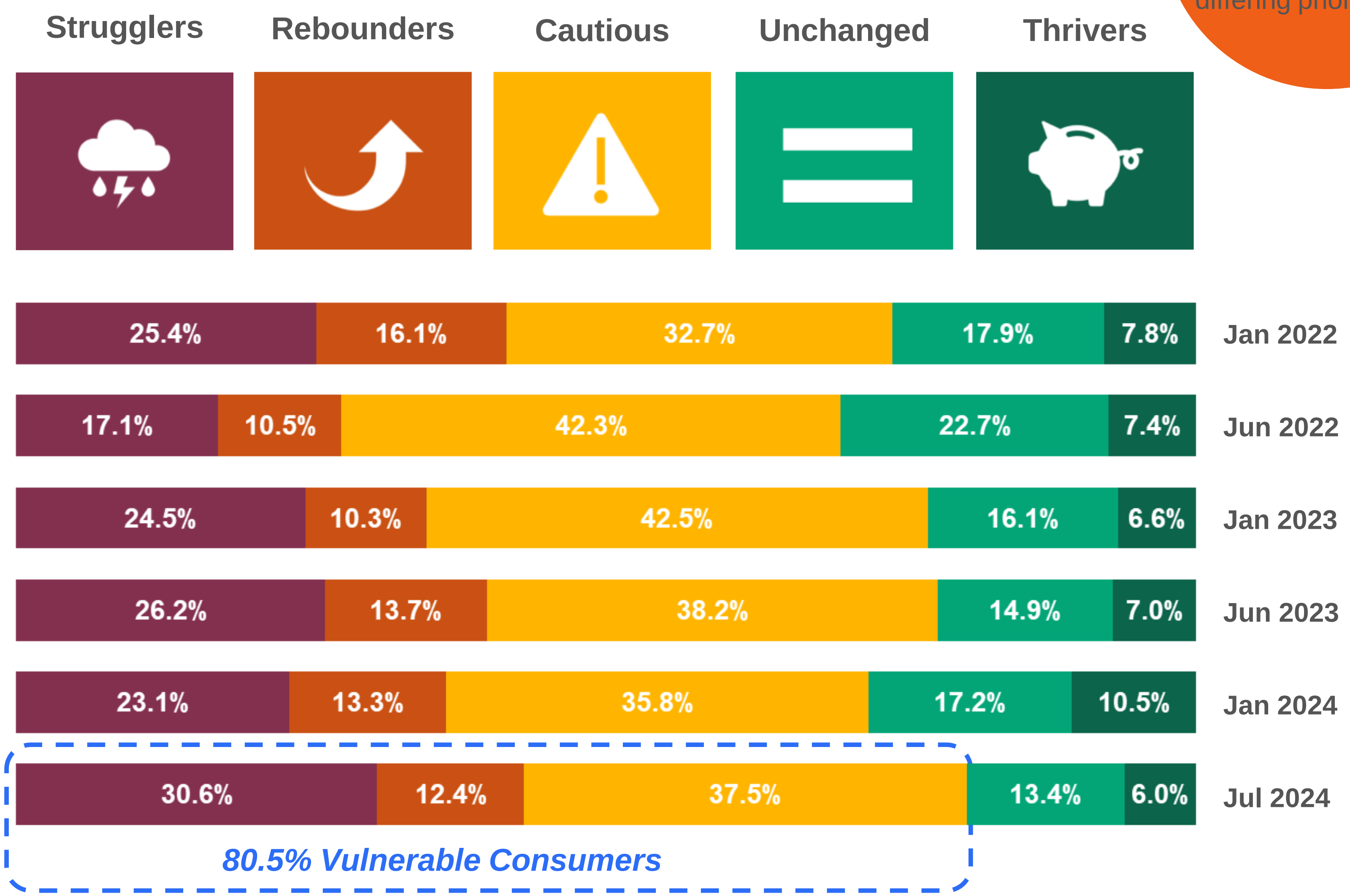


Link to Study: Get a Pulse on Next Gen Customer Journey Solutions - NIQ

The Evolution of Customer Experience, Harvard Business Review and NielsenIQ
Q. For each of the following commerce channels, select if your organization currently uses it, is considering using it, or neither. Base: 200-224 respondents, varies by segment.

The Economic Divide –
Tracking financial situations and responses

Bifurcated consumer illustrates wellness *inequities* and differing priorities

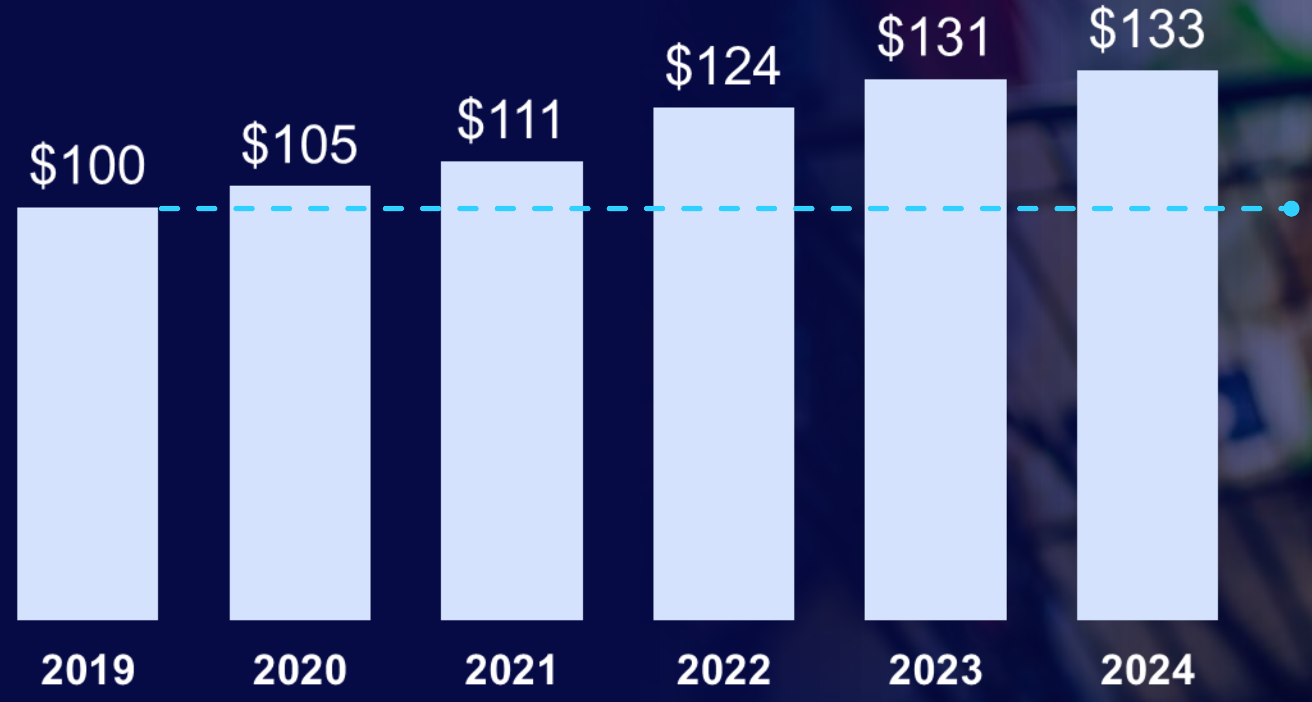


Source: NIQ Consumer Outlook Report, Jan 2022 to Jul 2024, US Market

Compounding inflation impacted some consumers more than others

Bifurcated consumer illustrates wellness *inequities* and differing priorities

$100 in 2019….



Over the last four years, *44% of the total store unit sales* have been lost from the lowest income households[2]

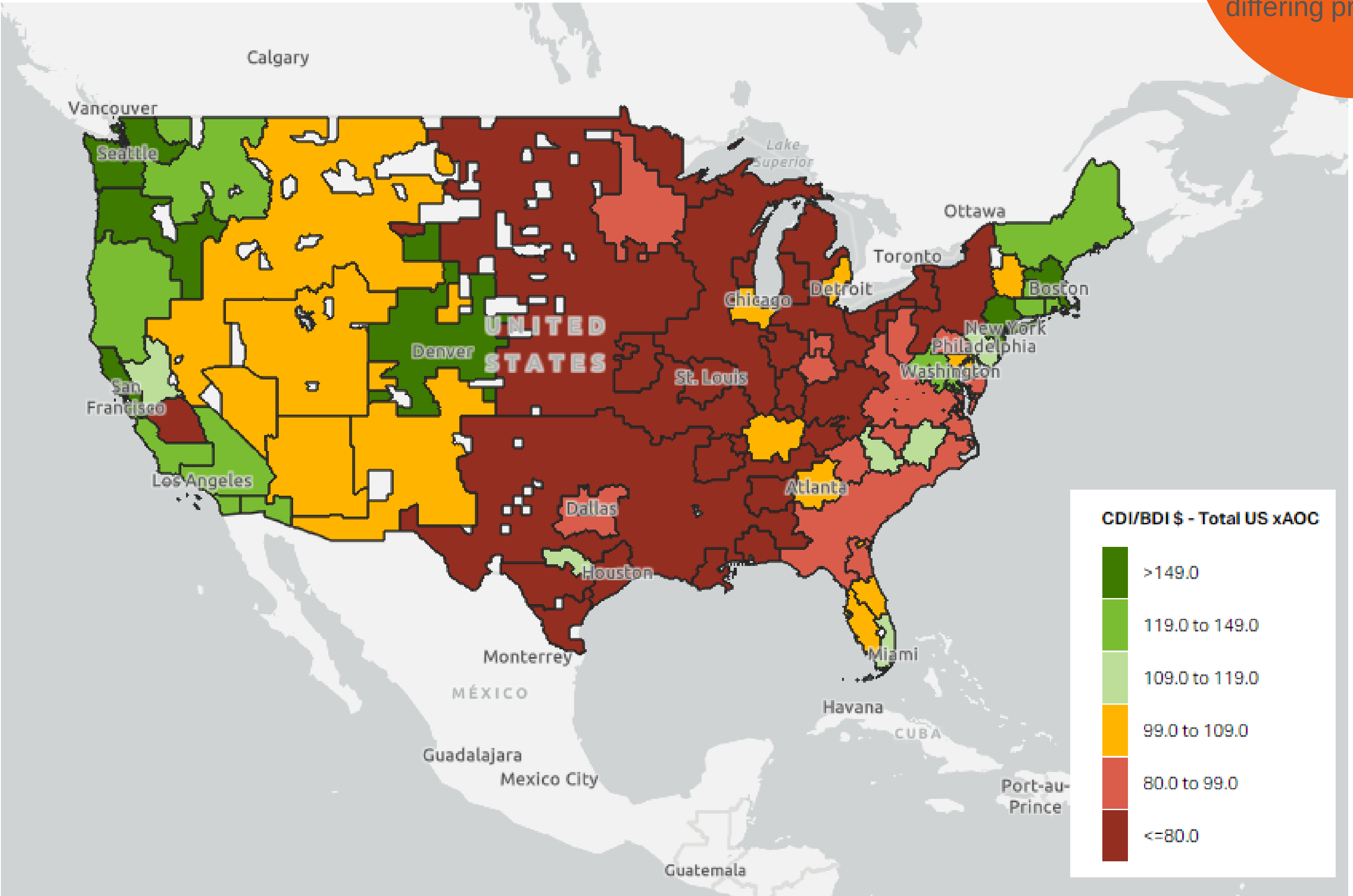
Source: NIQ, Retail Measurement Services; Total US xAOC; Total Store (all departments); Average unit price % change vs year ago; Trended over last 6 years through December 28, 2024
2 – NIQ, Homescan Panel; Total Outlets, Total US – Households with <$30K annual income; Total Store (all departments); Share of total Unit sales declines vs 4 years ago; 52 weeks ending December 28, 2024

NIQ

NIQ *Better For™...*

Bifurcated consumer illustrates wellness *inequities* and differing priorities

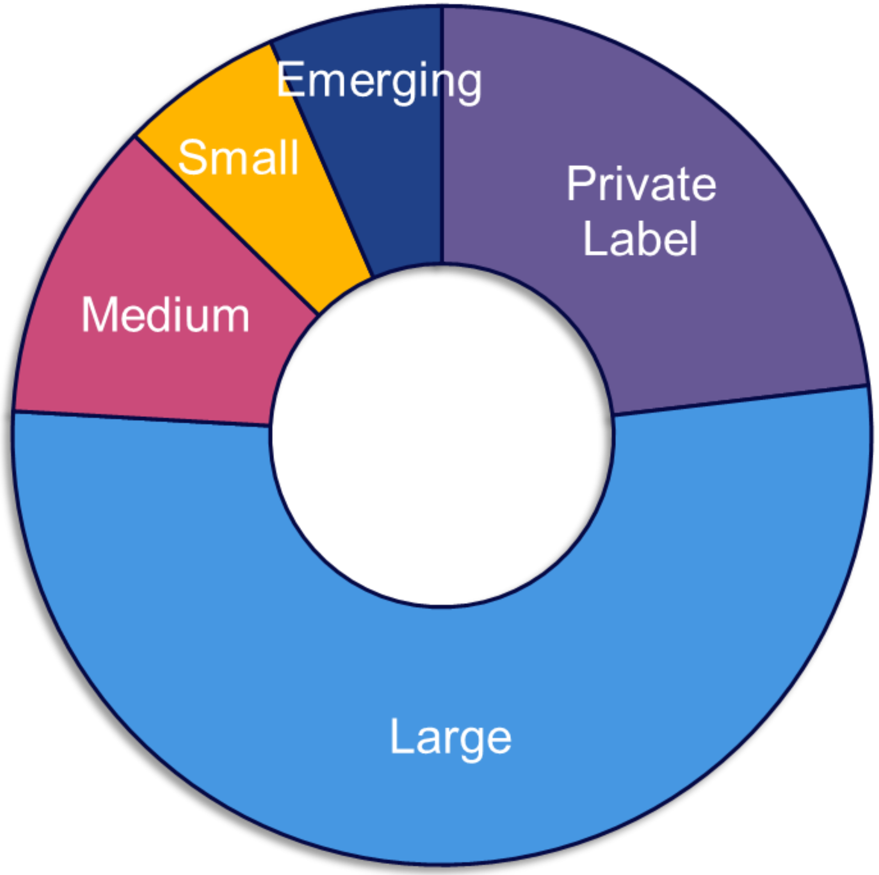
Better For™ indexes differently across the country



Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage vs Better For segment; $ % Change vs year ago; 4-week trended through week ending November 30, 2024

Large manufacturers make up most of Food & Beverage sales

Total Food & Beverage Sales | Size of Manufacturers



Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage; Total Food & Beverage $ sales by size of manufacturer; Latest 52 weeks ending September 7, 2024

Small manufacturers growing the most in Better For™ sales

	Better For™ Share of total $ sales	Better For™ 4yr CAGR
Private Label	9%	+4.4%
Large (>$1BN)	6%	+4.9%
Medium ($200MM to <$1BN)	17%	+8.5%
Small ($50MM to <$200MM)	26%	+10.4%
Emerging ($10K to <$50MM)	24%	+8.1%

Source: NIQ RMS – NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage; NIQ Better For Segment™; Better For™ $ share of Food & Beverage and 4yr $ CAGR; Latest 52 weeks ending September 7, 2024

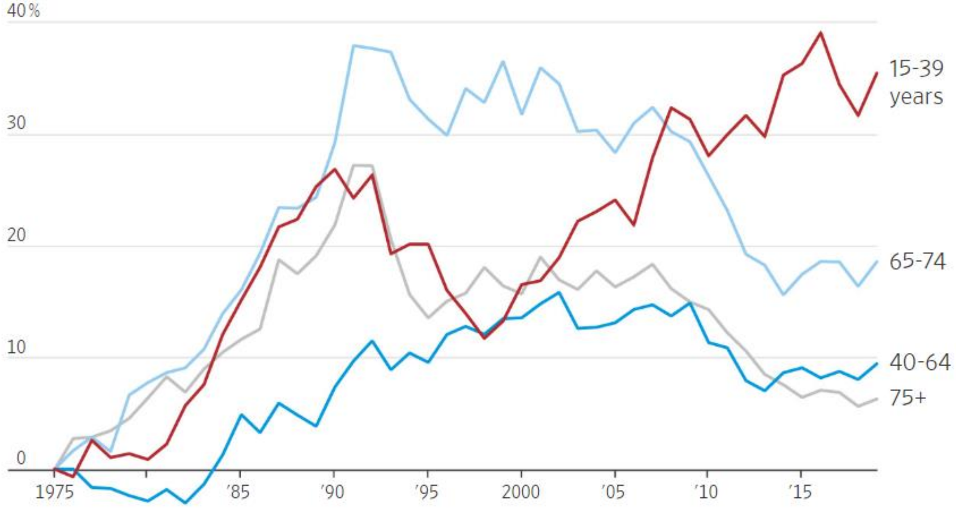
America's health continues to be challenged

Wellness focus on *priorities* and *attributes*

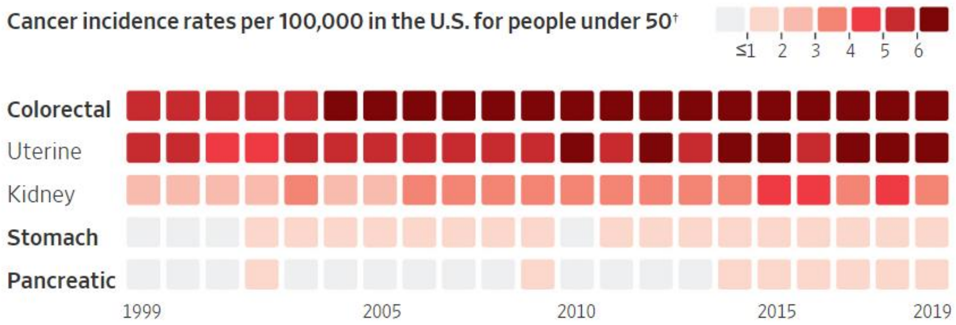
Age Factor

Gastrointestinal cancers have driven cancer rates higher for young people, while cancer rates have fallen for older adults in recent years

Cumulative change in new U.S. cancer case rates, by age*



Cancer incidence rates per 100,000 in the U.S. for people under 50†



*Based on incidence per 100,000; †Selection of fast-growing, prevalent cancers
Source: National Cancer Institute

Percent of household in NIQ Consumer Panel reporting conditions in 2024

40% Allergies (non-food)	20% Cholesterol problems	10% Hair loss	7% Other skin condition (skin rash, irritation, dermatitis)
34% Acid Reflux / GERD / Heartburn	16% Insomnia/Sleeplessness	9% Dry eye	7% Urinary incontinence / Overactive bladder
29% High Blood Pressure / Hypertension	15% Headache/Migraine	9% Attention deficit disorder / Hyperactivity	7% Pre-Diabetes
26% Joint/Neck/Back pain (not arthritis)	13% Diabetes – Type II	9% Eczema	7% Irritable bowel syndrome (IBS)
24% Imperfect vision	13% Headache/Chronic tension	9% Acne	6% Gum disease (gingivitis, inflammation, periodontitis)
24% Arthritis	11% Asthma	8% Menopause/Perimenopause	6% Restless leg syndrome (RLS)
23% Obesity/Overweight	11% Lactose intolerance	8% Upper respiratory illness (RSV, Coronavirus, COVID-19)	6% Eye disease (glaucoma, cataracts, macular degeneration)
22% Depression/Anxiety	11% Muscle, Musculoskeletal pain/Spasms	7% Allergies (food related)	5% Constipation (chronic)

Source: NIQ Annual Shopper Health Study, 2024, Q. Below is a list of health-related conditions / ailments. Please read the list carefully and then select the condition(s) that anyone in your household, including yourself, has experienced during the past 6 months. Please select all that apply

NielsenIQ Annual Shopper Health Study, 2024
National Cancer Institute

Unique and sometimes overlapping priorities across generations

Animal welfare-related
- Cruelty Free, Humane

Social responsibility
- Ethical, B-Corp, fair trade

Clean label
- Free from aluminum, parabens, phthalates & sulfates, artificial fragrance
- Natural ingredients

Health needs
- Brain & eye health, hair/skin/nails, mood & stress
- Immune system health, microbiome

All of Gen Z but to lesser degree

Highest indexing group for
- "Provides energy"
- Pregnancy and lactation support
- Reusable packaging

Highest indexing group for
- Consuming ***Better For™*** foods and organic overall

Sustainable packaging
- Less packaging
- Sustainable packaging

Health & need states
- Cellular function
- Cardiovascular health
- Joint health
- Heart health

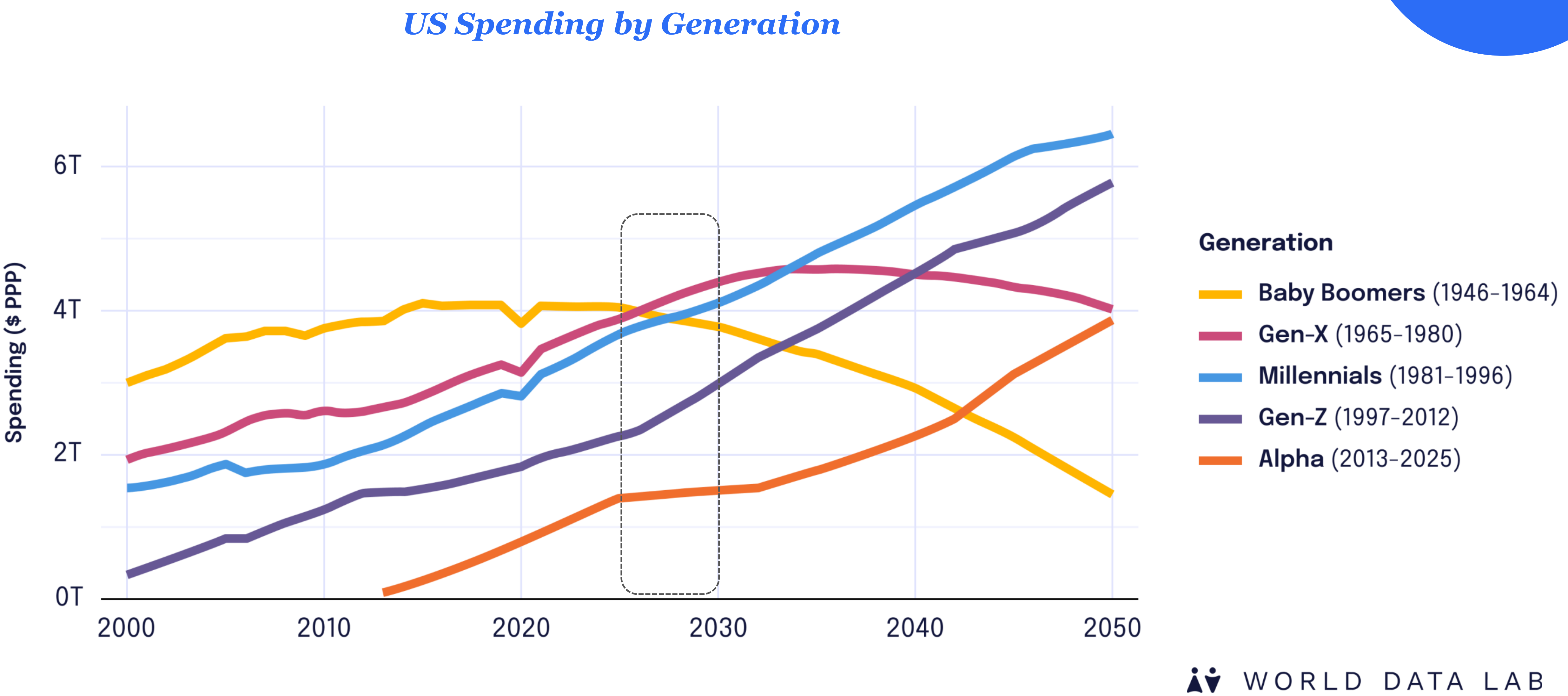
Environmental sustainability
- Low emissions
- Reduced carbon impact

Health & need states
(Even greater degree than Boomers)
- Cellular function
- Cardiovascular health
- Joint health
- Heart health
- Mood supplements

Source: NIQ Homescan Panel; Total US; Generational cohort demographics; NIQ Product Insight powered by Label Insight; $ share index; 52 weeks ending January 27, 2024

Critical shifts in generational spending will occur in the next five years

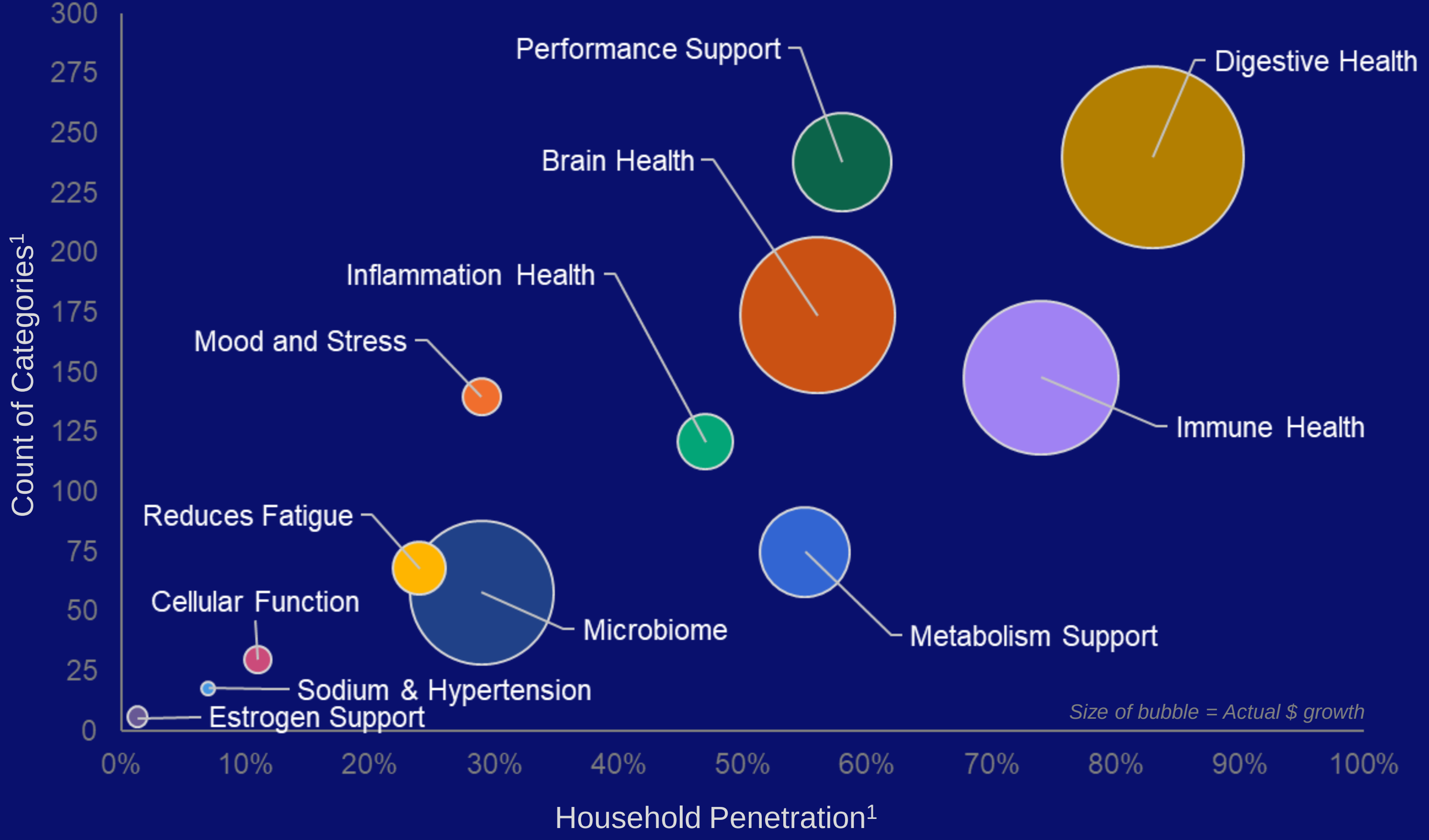
Wellness focus on *priorities* and *attributes*



Consumers indicating their top health priorities across the store

Wellness focus on *priorities* and *attributes*

Sizing the growing Health & Need States



Functional Beverages[2]

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

Top claims in Pet Care[2]

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

Vitamins, Minerals, Supplements[2]

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

**Supplements sub category*

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

Consumers exploring alternatives, new and old

Wellness focus on *priorities* and *attributes*

MRI Simmons research on women

44% prefer ***alternative medicines*** over traditional ones, and 60% believe herbal supplements are effective

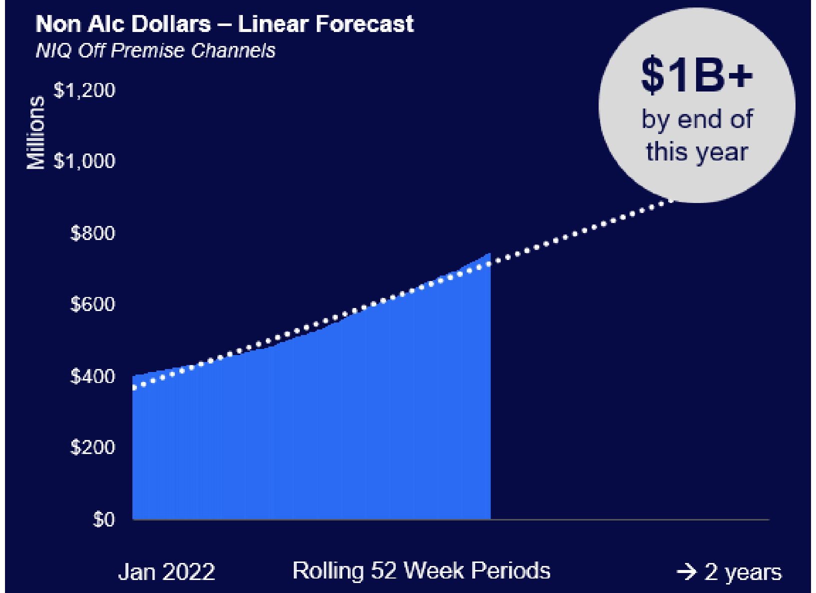
45% trust ***homeopathic medicine***

56% are incorporating more ***alternative medical care*** into their lives over traditional care

+6%	Ayurvedic Group
+11%	Adaptogens
+9%	Nootropics
+8%	Traditional Chinese Medicine
+6%	Ancient grains

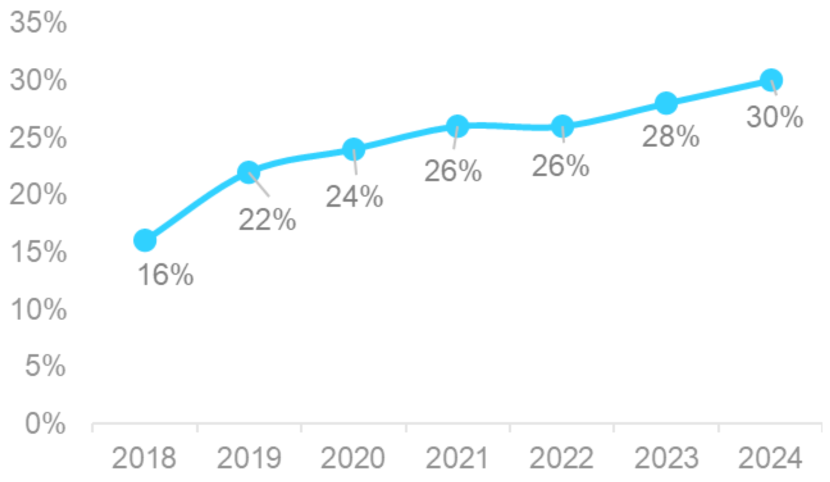
$ % change 4Y CAGR

Where is Non Alcohol headed?



93% of Non Alc buyers **are purchasing Alcohol**-containing Beer, Wine, or Spirits

Cannabis* Consumption Among Total Population



48% of cannabis consumed in the last 12 months was ***marijuana only***

22% of women have ***reduced alcohol*** consumption in favor of cannabis, up 4% from two years ago

MRI Simmons MRI-Simmons 2024 Fall Study and the Alternative Medical Care is sourced: MRI-Simmons 2024 Q4 Trending Topics Study.
MRI Simmons Cannabis Study: Indexed to the average Adult Age 18+; Base: Total Population, *Base: Cannabis Consumers; Cannabis: marijuana and CBD
Source: NielsenIQ Omnishopper Panel on Demand, US ALC – Integrated (21+ Only) Database; L52 WE 11/02/2024, Total Outlets, Total US;
NIQ Discover Integrated Database; Scan Off Premise Channels (xAOC+Conv+Liquor Open State); L52 weeks ending 07/20/2024

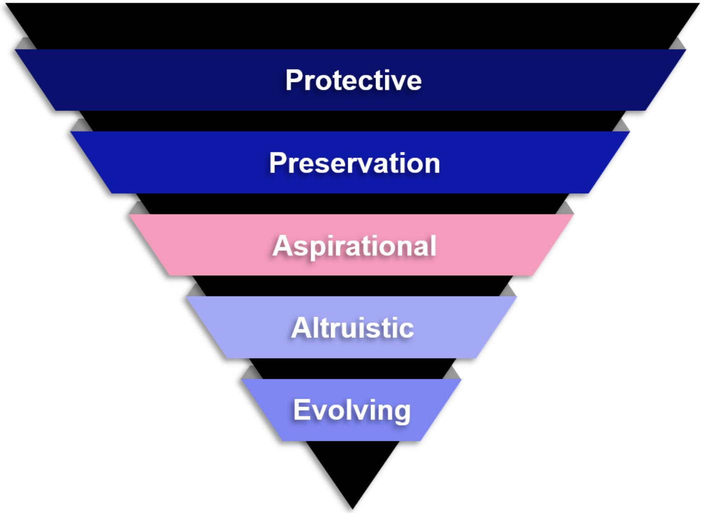
Broadening perspectives of wellness priorities blurs lines across the store

From biome health across the store to the evolving expression of calm and hydration to *augmenting* health span

Wellness focus on *priorities* and *attributes*

+17%	Microbiome
+6%	Probiotic
+6%	Prebiotic
+7%	Postbiotics

$ % change 4Y CAGR



Gen Alpha is seeing faster rates of growth for facial skin care categories

+10%	Electrolytes
+4%	Melatonin

Source: NielsenIQ Omnishopper Panel Total US Latest 52 weeks ending 4/20/2024,

Contradictions and shifting perceptions

Consumers *contradictory, confused* and sometimes *less loyal*

Shifting nicotine consumption

Processed food paradox

Only 1 in 10 adults meet fruit and vegetable intake recommendations

1.5-2 cups fruits and 2-3 cups vegetables daily

Is alcohol bad for me?

What's a good fat?

Are food additives bad?

Role of DEI

Body positivity v. skinny culture

Center for Disease Control/Dietary Guidelines

The new weight loss paradigm

Treatment and management has shifted over time

How did members treat or manage their obesity/overweight condition?

Percent of households self-reporting how they treat/manage obesity/overweight condition

	2016	2018	2020	2022	2023	2024	
Diet	64	62	61	56	55	55	▼ 9 pts (since 2016)
Exercise	58	56	53	52	51	51	▼ 7 pts
Did not treat/manage	23	22	23	25	26	24	▲ 1 pts
Vitamins	15	14	14	15	14	14	▼ 1 pts
Prescription and or OTC net	8	8	8	8	12	15	▲ 7 pts
Prescription medication(s)/products	4	5	5	5	9	13	▲ 9 pts
Supplements (e.g. herbal, fish oil etc..)	11	11	11	11	12	11	No change
Non-prescription/over-the-counter product(s)	4	4	4	4	3	3	▼ 1 pts

Weight management supplements are down -10% in sales over the last four years, however, ***berberine***, which went viral on many social media platforms, ***up 438% in the last year***[1]

Source: NIQ Health Shopper Survey, 2016 to 2024; Q. What influenced the decision for you/your household member to treat or manage the [ailment] in the ways mentioned? Select all that apply.
1 – Source: NIQ, Retail Measurement Services; Total US xAOC; Total Supplements; $ % Change vs year ago; 52 week ending June 15, 2024

Today's GLP-1 Players

- GLP-1s work through multiple pathways, influencing ***hunger*** and ***taste perception***, making them more effective than many past AOMs

- **NIQ consumer panel research**
  - ***Ozempic*** has largest share of GLP-1 users followed by
  - ***Mounjaro***
  - ***Trulicity***
  - ***Wegovy***
  - ***Generic/Compound***

	DOSAGE	DOSAGE FORM	APPROVED FOR	WHO CAN TAKE IT?	OTHER BENEFITS
Ozempic (SEMAGLUTIDE)	1 WEEKLY		TYPE 2 DIABETES	ADULTS	HEART, KIDNEYS, WEIGHT LOSS
Rybelsus (SEMAGLUTIDE)	1 DAILY		TYPE 2 DIABETES	ADULTS	WEIGHT LOSS
Wegovy (SEMAGLUTIDE)	1 WEEKLY		WEIGHT LOSS	12+ KIDS + ADULTS	N/A
Trulicity (DULAGLUTIDE)	1 WEEKLY		TYPE 2 DIABETES	10+ KIDS + ADULTS	HEART, KIDNEYS, WEIGHT LOSS
Victoza (LIRAGLUTIDE)	1 DAILY		TYPE 2 DIABETES	10+ KIDS + ADULTS	HEART, KIDNEYS, WEIGHT LOSS
Saxenda (LIRAGLUTIDE)	1 DAILY		WEIGHT LOSS	12+ KIDS + ADULTS	N/A
Byetta (EXENATIDE)	2 DAILY		TYPE 2 DIABETES	ADULTS	WEIGHT LOSS
Bydureon BCise (EXENATIDE)	1 WEEKLY		TYPE 2 DIABETES	10+ KIDS + ADULTS	WEIGHT LOSS
Mounjaro (TIRZEPATIDE)	1 WEEKLY		TYPE 2 DIABETES	ADULTS	WEIGHT LOSS

GoodRx Health

What's next…

An Ozempic rival is getting closer to market — and it's hurting Novo Nordisk and Eli Lilly stock *Stock in Viking Therapeutics, the maker of the new treatment, soared almost 40% - Quartz, July 25, 2024*

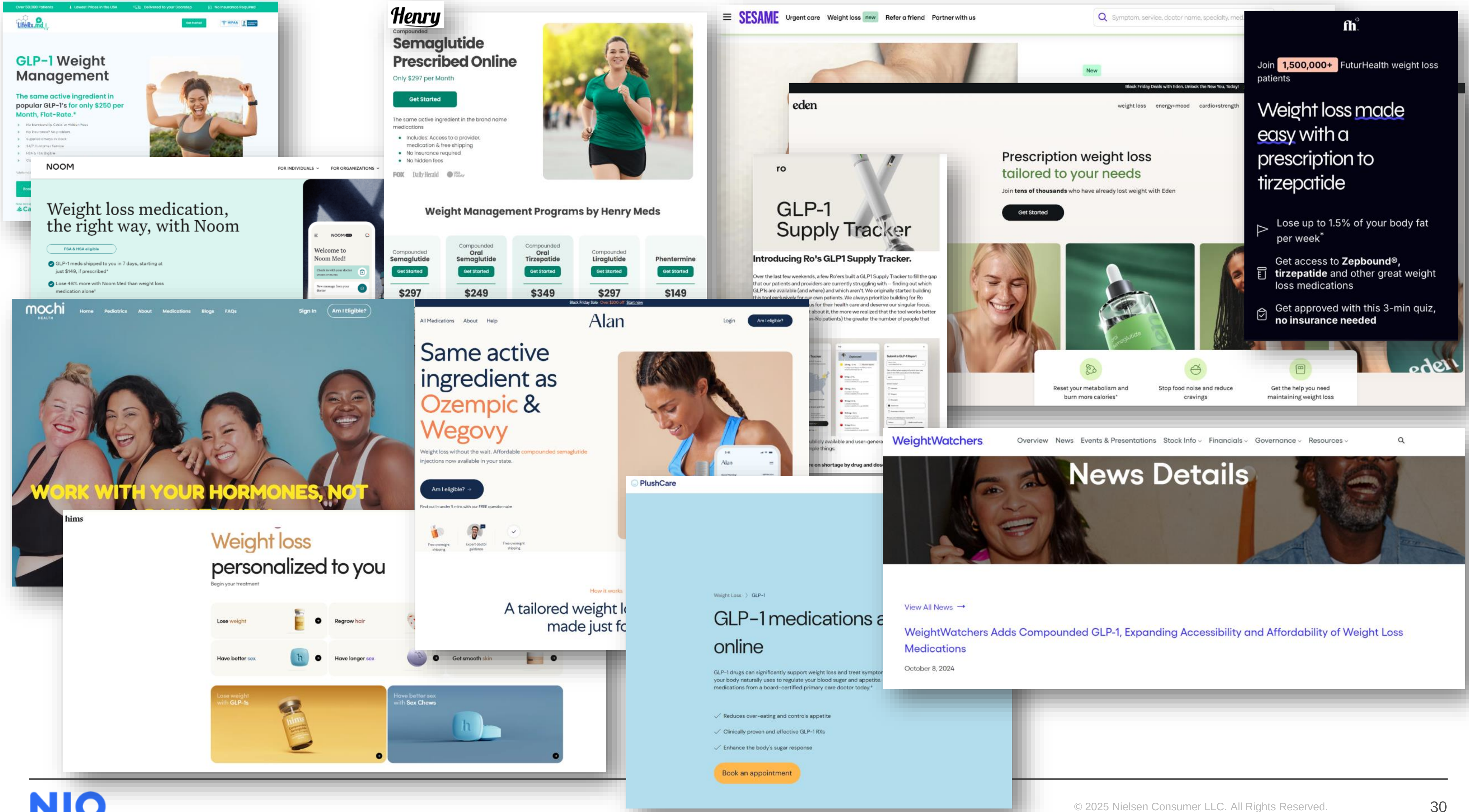
AstraZeneca Says Obesity Pill Shows Minimal Side Effects in Early Trial *– WSJ, Nov 4 2024*

A new stronger Ozempic is coming. Here's what to know; *Novo Nordisk revealed more about CagriSema, its potential successor to the weight loss drug Ozempic – Quartz, Nov 6 2024*

Amgen's weight-loss drug fails to impress in study; shares plunge – Reuters, Nov 26. 2024

➔ Zepbound, (TIRZEPATIDE), approved 2023,weight loss, SBQ weekly

Source: GoodRx, NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024)


GLP-1 Weight Management
The same active ingredient in popular GLP-1's for only $250 per Month, Flat-Rate.*
Henry
Compounded
Semaglutide Prescribed Online
Only $297 per Month
Get Started
The same active ingredient in the brand name medications
Includes: Access to a provider, medication & free shipping
No insurance required
No hidden fees
Weight Management Programs by Henry Meds
Compounded Semaglutide $297
Compounded Oral Semaglutide $249
Compounded Oral Tirzepatide $349
Compounded Liraglutide $297
Phentermine $149
SESAME
Urgent care
Weight loss
Refer a friend
Partner with us
eden
Prescription weight loss
tailored to your needs
Join tens of thousands who have already lost weight with Eden
Get Started
Reset your metabolism and burn more calories*
Stop food noise and reduce cravings
Get the help you need maintaining weight loss
Join 1,500,000+ FuturHealth weight loss patients
Weight loss made easy with a prescription to tirzepatide
Lose up to 1.5% of your body fat per week*
Get access to Zepbound®, tirzepatide and other great weight loss medications
Get approved with this 3-min quiz, no insurance needed
NOOM
Weight loss medication, the right way, with Noom
FSA & HSA eligible
GLP-1 meds shipped to you in 7 days, starting at just $149, if prescribed*
Lose 48% more with Noom Med than weight loss medication alone*
ro
GLP-1 Supply Tracker
Introducing Ro's GLP1 Supply Tracker.
mochi
WORK WITH YOUR HORMONES, NOT
Alan
Same active ingredient as Ozempic & Wegovy
Weight loss without the wait. Affordable compounded semaglutide injections now available in your state.
Am I eligible?
A tailored weight l
made just fo
hims
Weight loss personalized to you
Lose weight
Regrow hair
Have better sex
Have longer sex
Get smooth skin
Lose weight with GLP-1s
Have better sex with Sex Chews
PlushCare
GLP-1 medications a
online
GLP-1 drugs can significantly support weight loss and treat symptom your body naturally uses to regulate your blood sugar and appetite. medications from a board-certified primary care doctor today.*
Reduces over-eating and controls appetite
Clinically proven and effective GLP-1 RXs
Enhance the body's sugar response
Book an appointment
WeightWatchers
Overview
News
Events & Presentations
Stock Info
Financials
Governance
Resources
News Details
View All News
WeightWatchers Adds Compounded GLP-1, Expanding Accessibility and Affordability of Weight Loss Medications
October 8, 2024

NIQ approach to understanding GLP-1 impact

Since 2016, NielsenIQ tracks health conditions annually in our **NIQ Health Shopper Survey**

Nov/Dec 2023 **GLP-1 Survey**	February/March 2024 **GLP-1 Survey**	August/Sept 2024 **GLP-1 Survey**

Management Science Associates, Inc.

Partnership with **Management Science Associates** to measure electronic medical records (MSA has a multi-patented de-identification and matching technology; HIPAA compliant)

- **National consumer purchase panel data**
  - Approximately **330,000 lives**
- **Lab test results (e.g., HbA1C and cholesterol)**
  - Approximately **200 million lives**
- **Electronic health records (e.g., GLP-1 Medications)**
  - Approximately **80 million lives**
- **Client first party data**

Varying consumer need states create distinct GLP1 user groups

GLP-1 consumer varies based on usage; newest GLP-1 weight loss users trending younger

GLP-1 Only Diabetes

58% age 55-74
(Index 163)

81% have no children
(Index 116)

36% HH income <$50K
(Index 107)

GLP-1 for Weight Loss

23.4% age 45-54
(Index 139)

21% kids aged 6-17
(Index 116)

29% HH income $150K+
(Index 143)

GLP-1 for Weight Loss, Started 1-3 months ago

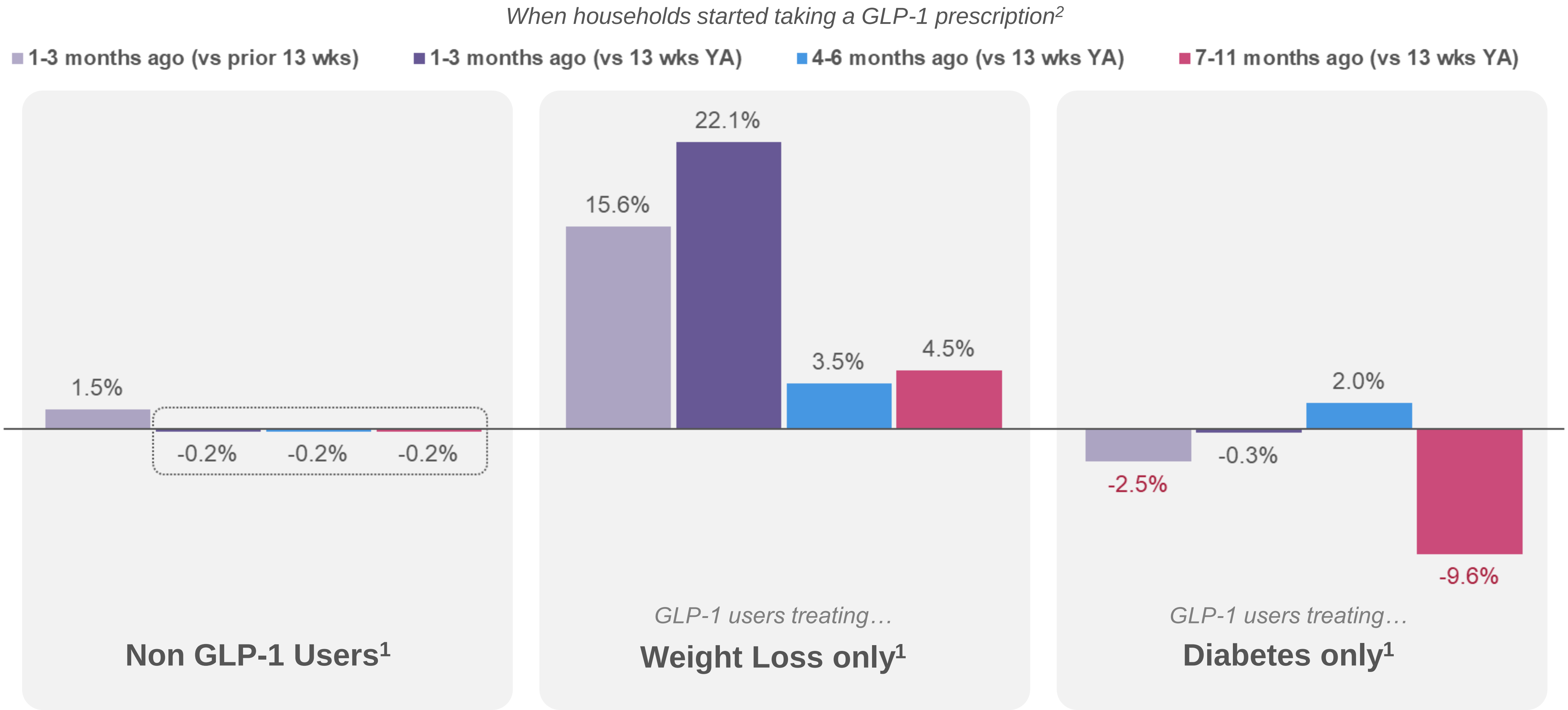
Trending younger with younger children with income under $100K

Source: NielsenIQ, Spectra – Homescan, 2024 Census Household base; Consumer profile demographics; NIQ GLP-1 Survey (Aug/Sep 2024) buyer groups

NIQ

GLP-1 users for weight loss tend to spend more in the store, especially early in journey

TOTAL STORE | Unit Volume % Chg.. by *GLP-1 User Group*



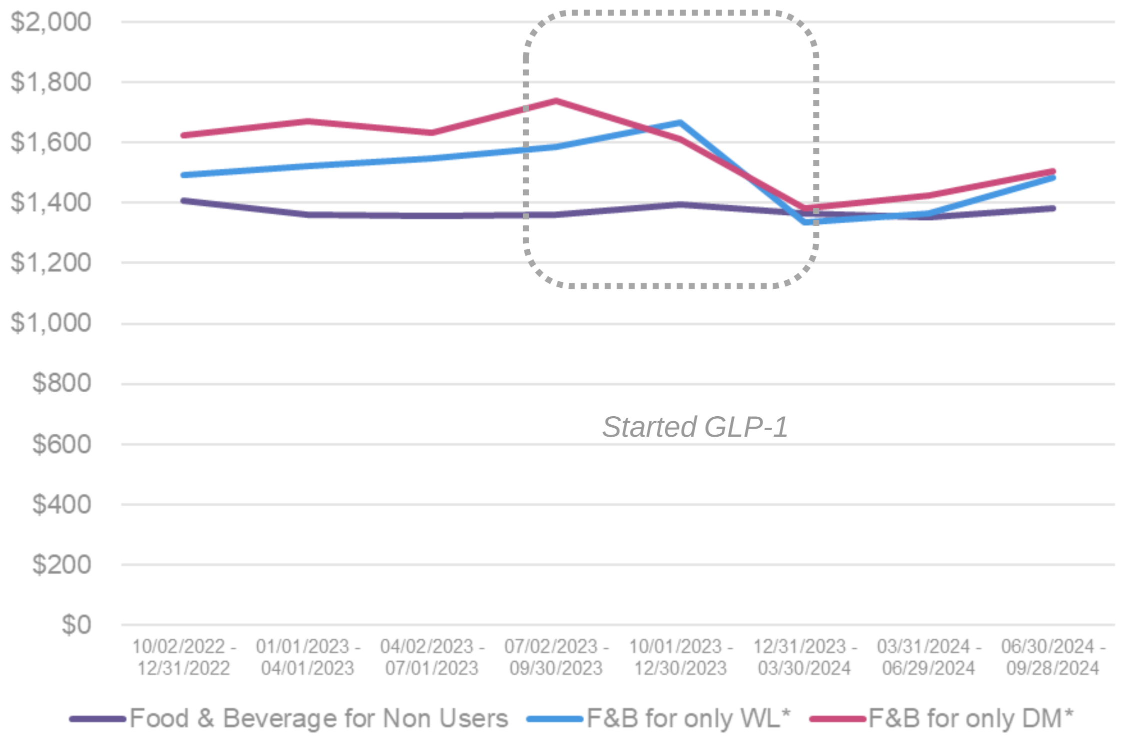
Source: NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024); Total US; Total Outlets; Total Store (excluding General Merchandise and Tobacco); Unit % Change, 13 weeks ending September 28, 2024
1 – Q11. What are you/others in your household using/used the prescription injection to treat? Please select all that apply.
2 – Q12. When did the first person in your household start using one of these prescription injections for the first time? (and currently using the injections)

Over time, shopping behavior shifts across categories

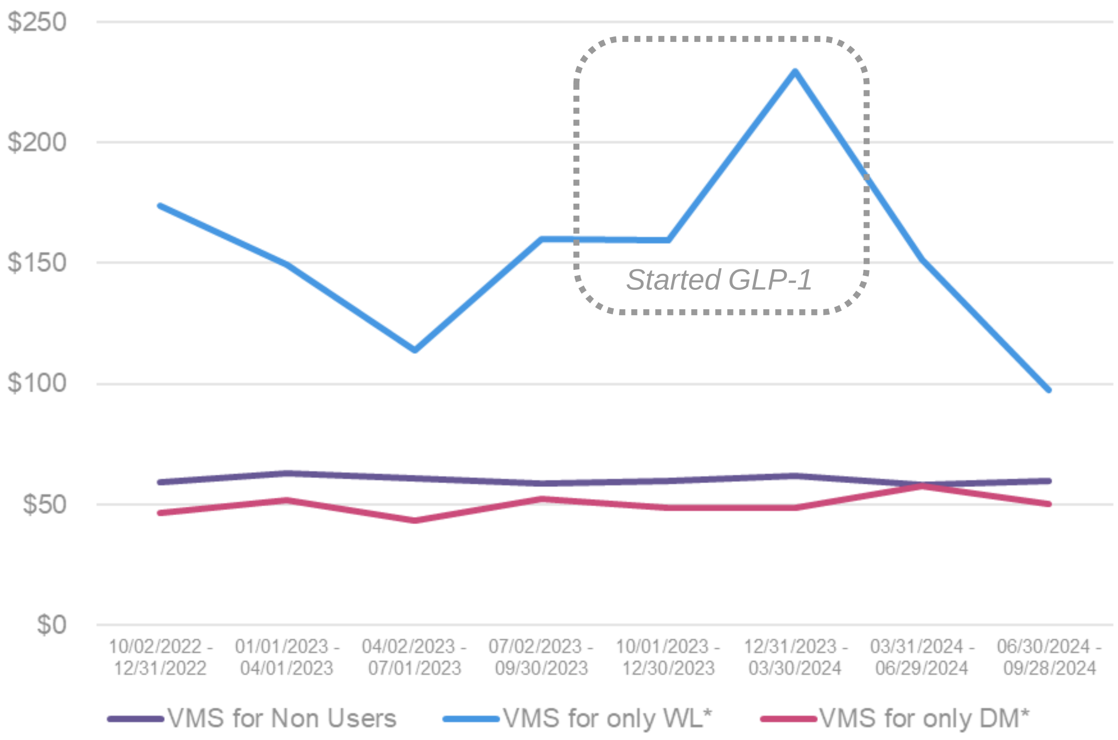
GLP-1 Buyers (started 7-11 months ago) compared to Non-Users

Buy rate ($/buyer) trended over last two years

Food and Beverage



Vitamins and Supplements

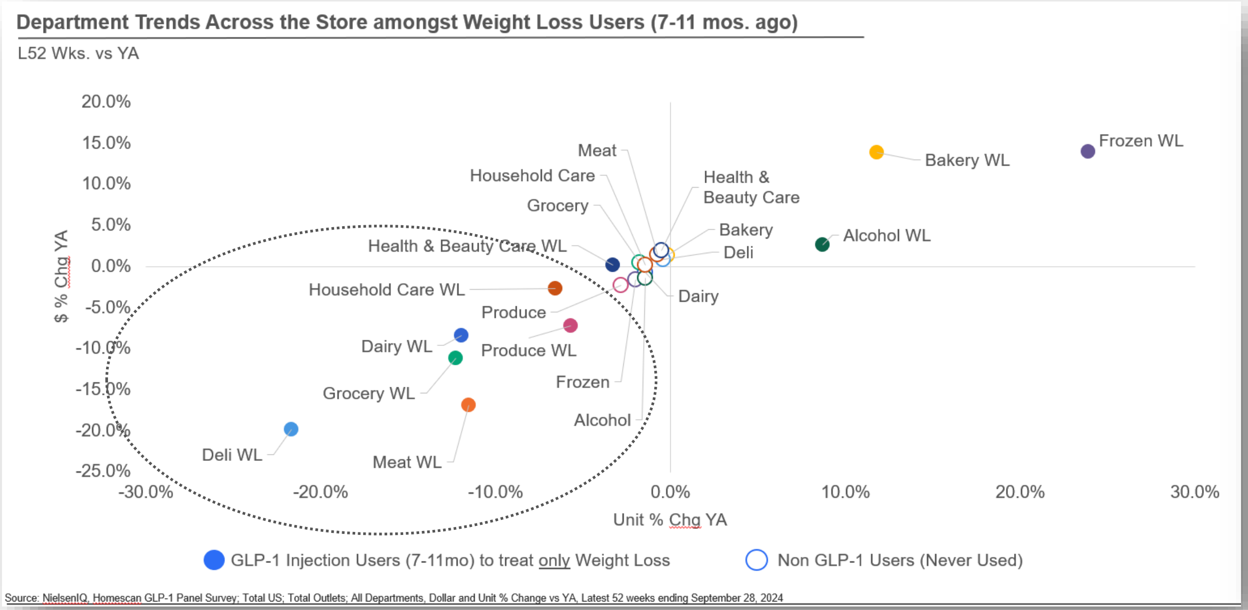


*WL = Weight Loss; DM = Diabetes Management

Source: NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024); Total US; Total Outlets; Food & Beverage vs Vitamins, Minerals & Supplements; Unit % Change; Quarterly periods through 13 weeks ending September 28, 2024

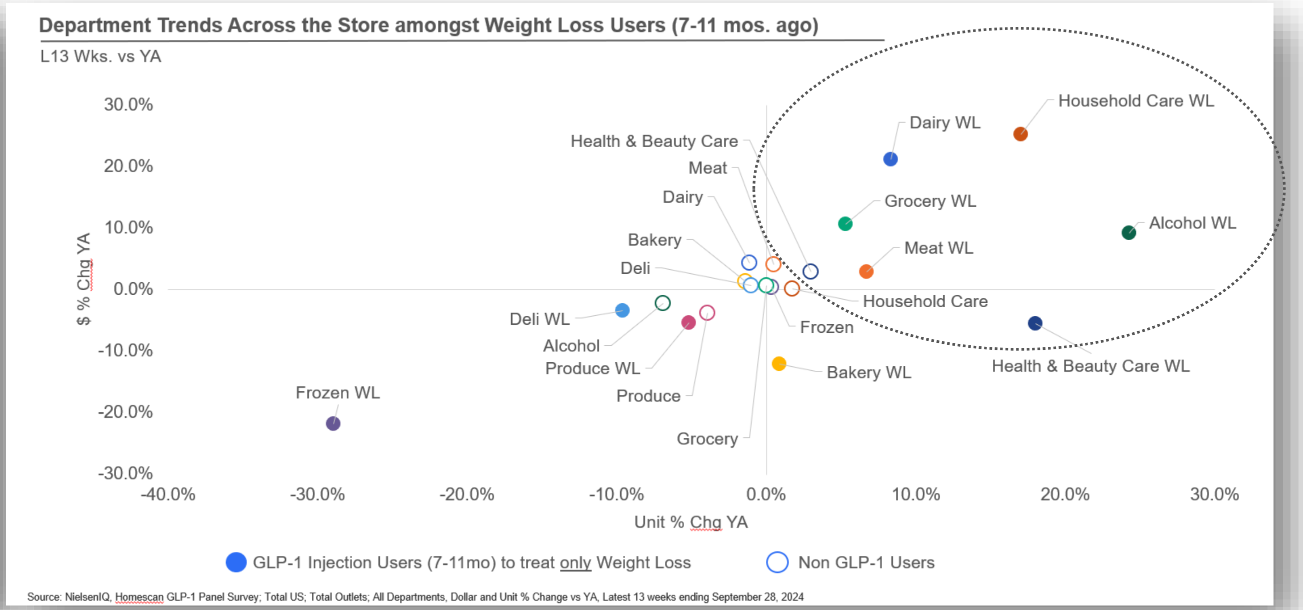
A look at the shifting behavior of those GLP-1 weight loss shoppers on 7-11 months

52 weeks



Decreases across the board, except for increases in frozen, bakery and alcohol

Latest 13 weeks



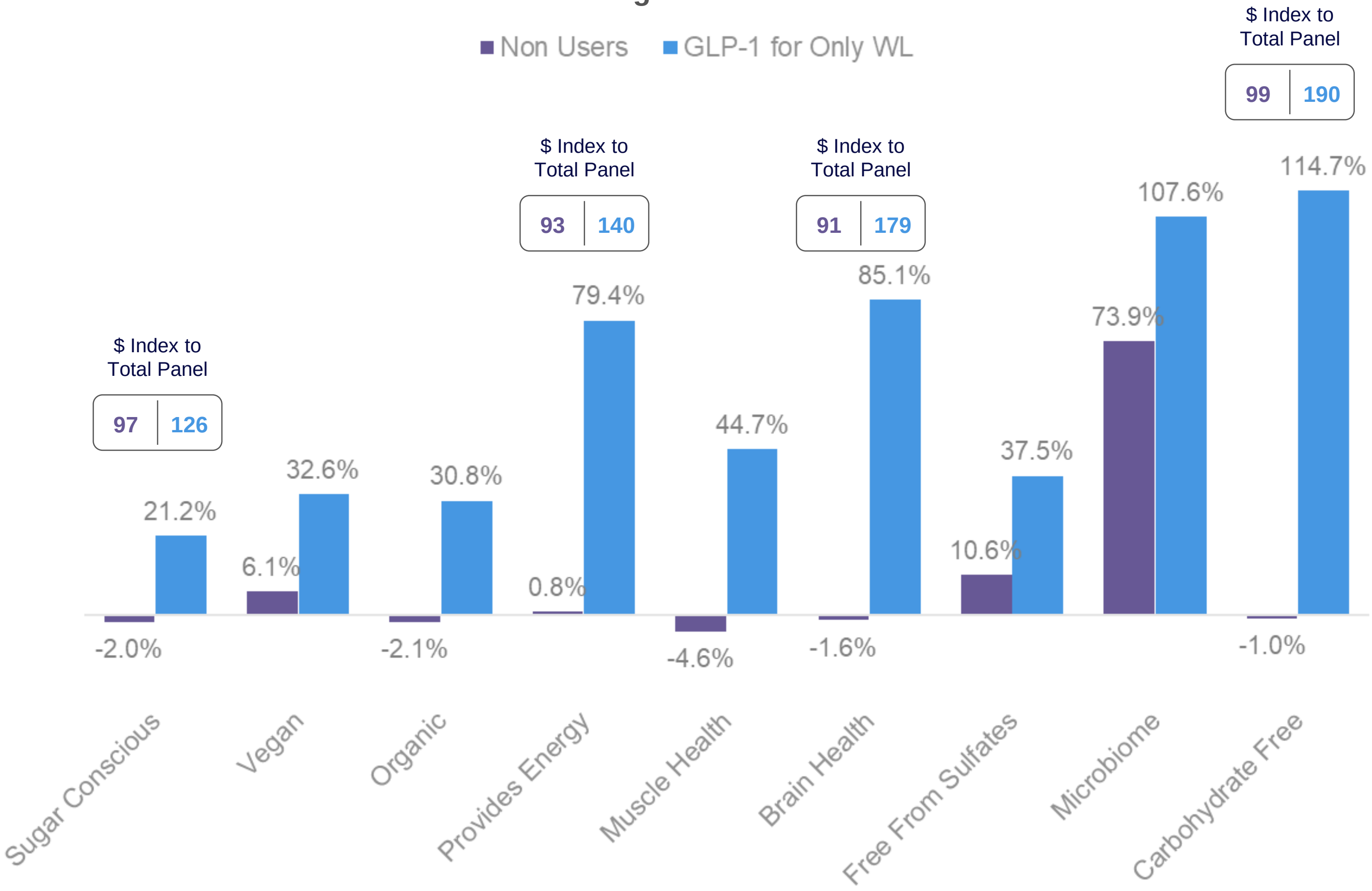
Decreases in frozen, produce, deli in latest 13 weeks versus year ago

*Survey respondents who stated that someone in their household began taking any of the GLP-1 injection prescriptions 7-11 months ago, with the purpose of only treating weight loss
Source: NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024); Total US; Total Outlets; Total Store (excluding General Merchandise and Tobacco), Dollar and Unit % Change vs YA, 52 vs 13 weeks ending September 28, 2024

GLP-1 weight loss shoppers seem to be increasingly intentional

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

Growth of GLP-1 Weight Loss versus Non Rx users



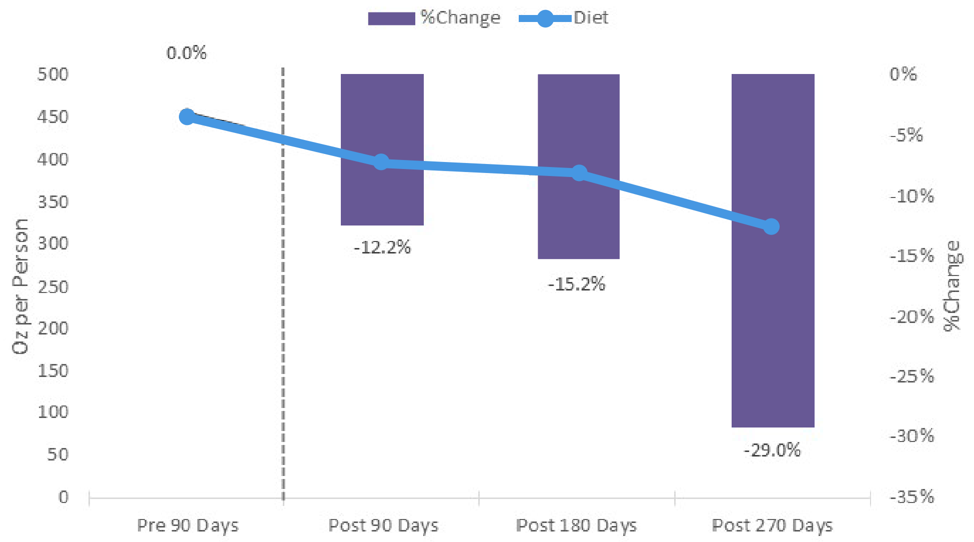
Some attributes GLP-1 weight loss users showing stronger growth

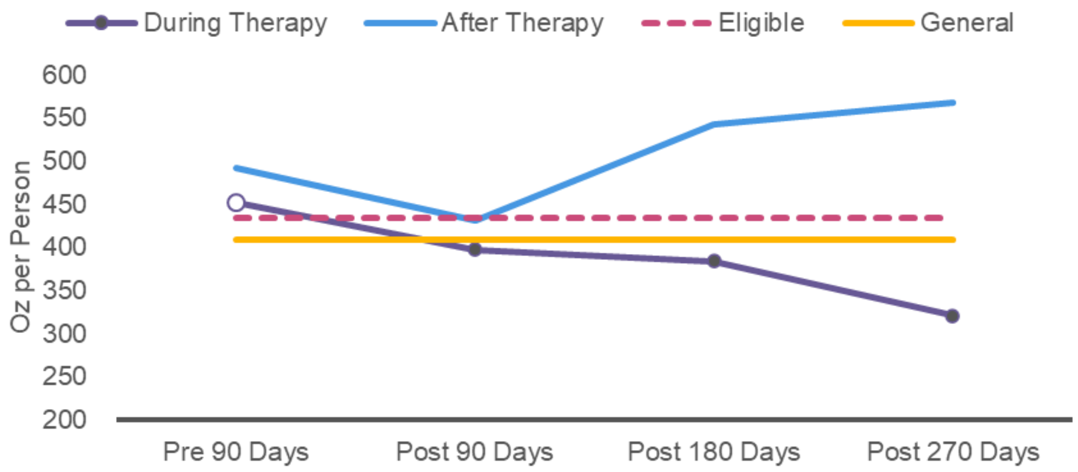
- *Immune health*
- *Joint health*
- *Muscle health*
- *Osteoporosis*
- *Bone Health*
- *Digestive Health*
- *Hair, Skin Nail support*
- *Clinically tested*
- *Free from aluminum*
- *Free from antibiotics, hormones*
- *Free from high fructose corn syrup*
- *Free from artificial colors, flavors, fragrances, ingredients*
- *Free from parabens and phthalates*
- *Free from sulfates*

- *Natural, natural flavors*
- *Calorie conscious, fat conscious*
- *Sodium conscious (especially very low sodium)*
- *Contains added sugar*
- *Nutrient dense*
- *Antioxidants stated*
- *Paleo*
- *Non-GMO*
- *Plant-based*
- *Free from gluten*
- *Excellent and good source of protein*

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

GLP-1 Impact on Diet Soft Drinks



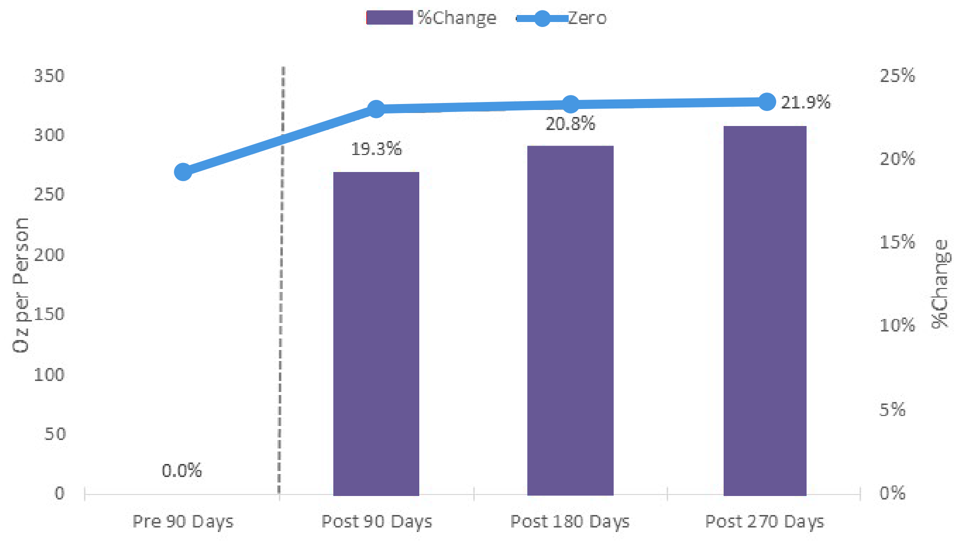


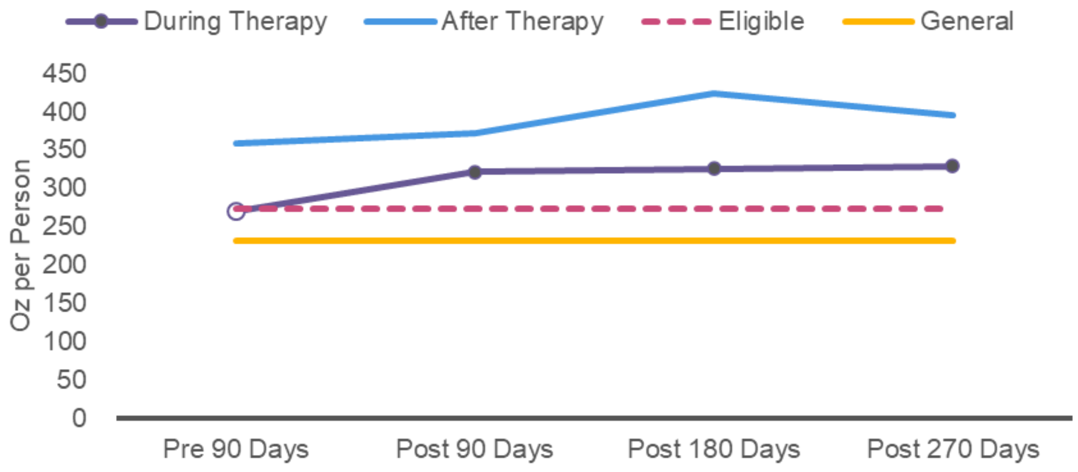
-18.8%
Avg Vol Chg.

Consistent decrease in consumption during therapy

After therapy, consumption increases after 90 days

GLP-1 Impact on Zero Soft Drinks





20.7%
Avg Vol Chg.

Consistent increase in consumption during and after therapy

After therapy consumption is higher than consumption during therapy

For more information on MSA/NIQ reporting, please contact:
Hannah Polk @hannah.polk@nielseniq.com
Steve Gongaware@msa.com

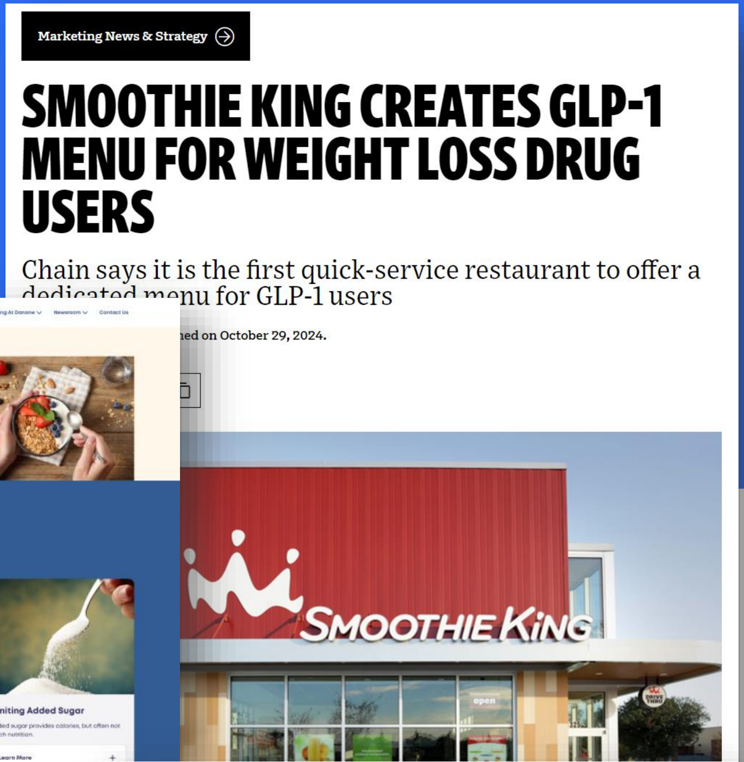
Pathways

1. As prevention: without or before GLP-1s
2. Onboarding/companion products
3. Off-boarding/step-down/after GLP-1


SEP 18, 2024

Vital Pursuit Hits Shelves Nationwide as First-to-Market Nestlé Brand Designed for GLP-1 Users

Introducing a line of delicious, high protein meals with essential nutrients; Vital Pursuit lands at national retailers to provide dietary support for GLP-1 users and consumers focused on weight management


Marketing News & Strategy

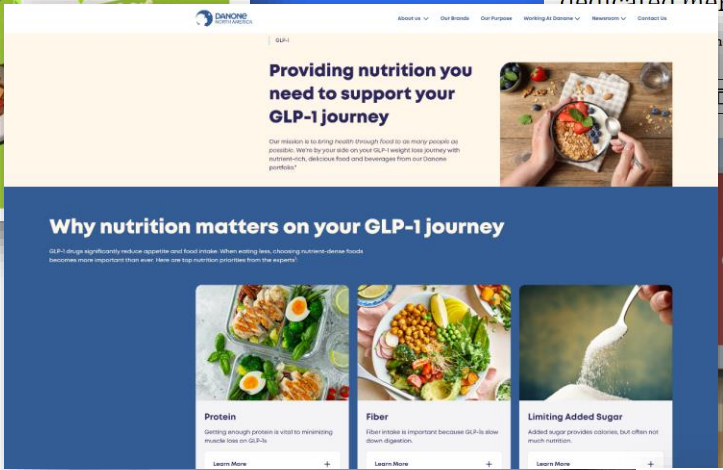
SMOOTHIE KING CREATES GLP-1 MENU FOR WEIGHT LOSS DRUG USERS

Chain says it is the first quick-service restaurant to offer a dedicated menu for GLP-1 users

...ed on October 29, 2024.

Smoothie King

Smooth... drug us...

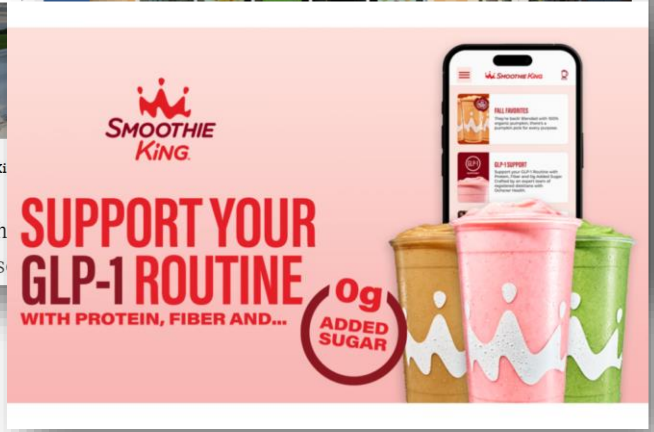

Providing nutrition you need to support your GLP-1 journey

Why nutrition matters on your GLP-1 journey

Protein

Fiber

Limiting Added Sugar



Even with increased health attention, Americans enjoy much sugar and sodium

27% of Food & Bev Sales are over 10g of ***added sugar*** *per serving**

American Heart Association *recommends no more than 36g per day (men) and 25g (women)*

5-7.5g per serving ***+6% vs YA***
Sugar Conscious ***+3% vs YA***

25% of Food & Bev Sales are over 300mg of ***sodium*** *per serving* (12% over 500mg)*

FDA *– 2,300 mg per day*
AHA *– 1,500 mg per day*

50-100mg per serving **+4% vs YA**
Sodium Conscious ***+3%***

Kirin Electric Salt Spoon

+7%

Foods with ***excellent source of protein***

Must contain at least 20% of the Daily Reference Value (DRV) per reference amount customarily consumed (RACC)

>25g protein per serving +10% vs YA

+3%

Foods qualified as ***"carbohydrate conscious"***

5% growth

Foods qualified as ***"nutrient dense"***

12% growth

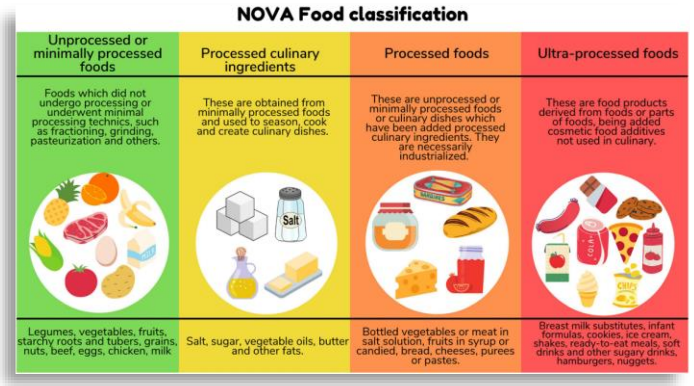
7.5-10g of ***fiber*** *per serving*

FDA recommends 28 grams of fiber per day for adults on a 2,000-calorie diet

**Based on Food & Beverage products that include a Nutrition Facts Panel (NFP) label on package*

Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage; $ Share of Food & Beverage, $ % change vs year ago; 52 weeks ending November 30, 2024

The challenge and confusion around processing



THE WALL STREET JOURNAL.

World Business U.S. Politics Economy Tech Markets & Finance Opinion Arts L

HEALTH | WELLNESS

Are Some Ultra-Processed Foods OK? New Study Has Answers

Researchers are digging into exactly what can make packaged food unhealthy

By *Andrea Petersen* Follow

Jan. 7, 2025 5:30 am ET

EXECUTIVE DEPARTMENT
STATE OF CALIFORNIA

EXECUTIVE ORDER N-1-25

WHEREAS emerging scientific evidence has linked "ultra-processed foods" to increased health risks, including some cardiovascular conditions, certain cancers, diabetes, and other health problems; and

WHEREAS ultra-processed foods are generally characterized as industrial formulations of chemically modified substances extracted from foods, along with additives to enhance taste, texture, appearance, and durability, with minimal to no inclusion of whole foods, with the following among common examples that are linked to negative health outcomes: packaged snacks, chips, crackers, cookies, candy, sugary beverages, and highly processed meats like hot dogs and lunch meat; and

WHEREAS experts have estimated that more than 10,000 chemicals are currently authorized for use in the United States as food or color additives or ingredients, while just over 300 food additives are currently authorized for use in the European Union; and

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

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

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

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

And

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

Products eligible for this attribute cannot make organic certification claims.

Top 10 categories for *"ultra-processed"*

1. Prepared Foods
2. Salty Snacks
3. Desserts
4. Candy, Gum, Mints
5. Cookies and Crackers
6. Processed Meat
7. Cereal and Granola
8. Sweet Snacks
9. Cheese
10. Bread

-1% and -2% in ultra-processed units over the last year and 4 year CAGR

45% of the lost ultra-processed units came from declines in consumers under $30K in household income over last four years

MRI Simmons Health & Wellness Study

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

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

Closing thoughts and upcoming webinars

GLP-1 is creating a catalyzing moment in health; shift in the conversation around obesity

Trends shifting and will continue to shift with marketplace dynamic of GLP-1 drug innovations, compounding pharmacies, legislation, funding,
new consumers trying drugs and lapsing

The opportunity to support consumers throughout their health journey opens doors for product and retail innovation

GLP-1: What you Know, Don't Know and How to Prepare

With retailmediaIQ, Kearny, ThinkBlue

February 5, 1pm ET

The GLP-1 Opportunity: Designing CPG to Thrive in this New Era

With Sosland Publication and Bay State Milling

February 12, noon ET

Mental health and the mind body connection

As mental health is increasingly part of consumer priorities, brands are responding

#23

According to the 2024 World Happiness Report, the US has dropped out of the **top 20** for the first time the report's history.

22%

NIQ Health Shopper Study households reporting depression or anxiety[2]

Newsweek

Outgoing Surgeon General Warns of 'Spiritual Crisis' in Last Message to US

Published Jan 08, 2025 at 6:25 AM EST | Updated Jan 08, 2025 at 11:54 AM EST

SXSW Building Brands in the Unhappiness Era

Mood & stress support stated claim[1]

+33% Footcare	**+65%** Beverages	**+55%** Diet & Nutrition	**+20%** Pet Food

MRI Simmons women research

- **Mental Well-Being**: 65% frequently seek products or services to improve their mental well-being, a 33% increase from 2022.
- **Mental Health Importance**: 94% believe that taking care of mental health is crucial for overall wellness, up 46% from 2022.

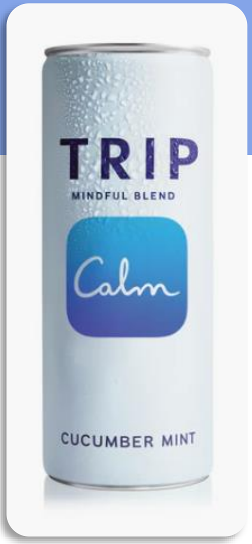
1 – Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; Personal Care categories; $ % Change vs year ago; 52 weeks ending 11/30/2024
2 – 2024 Health Shopper Survey
3 – MRI Simmons

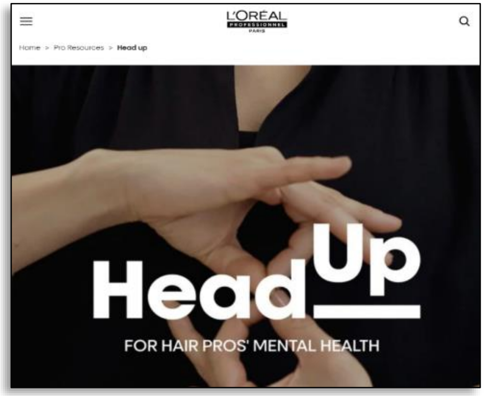
Mental health and joy are driving consumer engagement

+98% All Nootropics ingredients* sales growth within Vitamins & Supplements vs year ago[1]

+37% Ashwagandha 4yr CAGR. Has expanded to 65 categories and generates $300M of revenue[2]

469B TikTok views of ASMR videos[3]



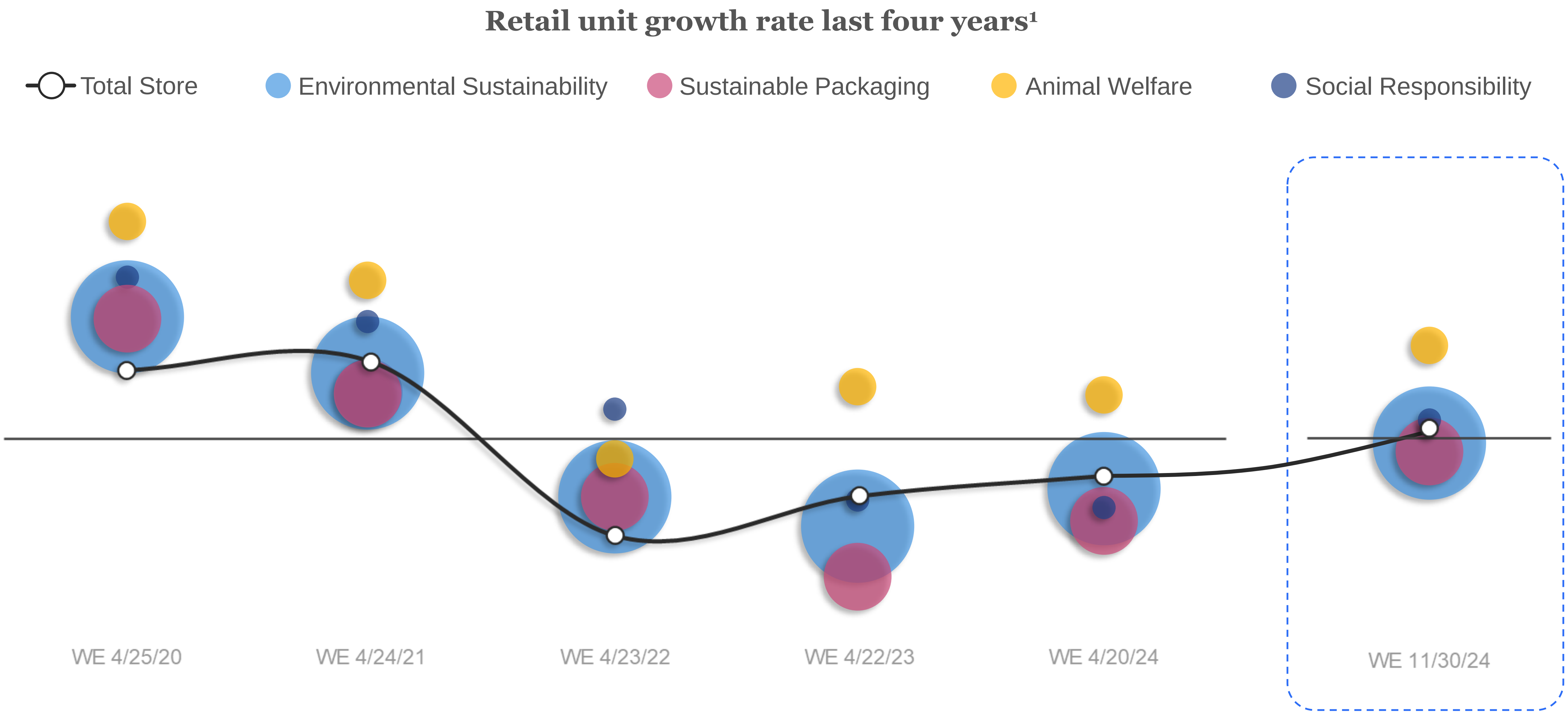


NUTRAFOL | headspace

1 – NIQ, Retail Measurement Services, NIQ Product Insight, powered by Label Insight, Total US xAOC; PI All Nootroptics Qualified attribute in Vitamins & Supplements; $ % change vs year ago; 52 weeks ending August 10, 2024
2 – 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 April 20, 2024
3 – Tik Tok search #asmr

Sustainability: What’s next?

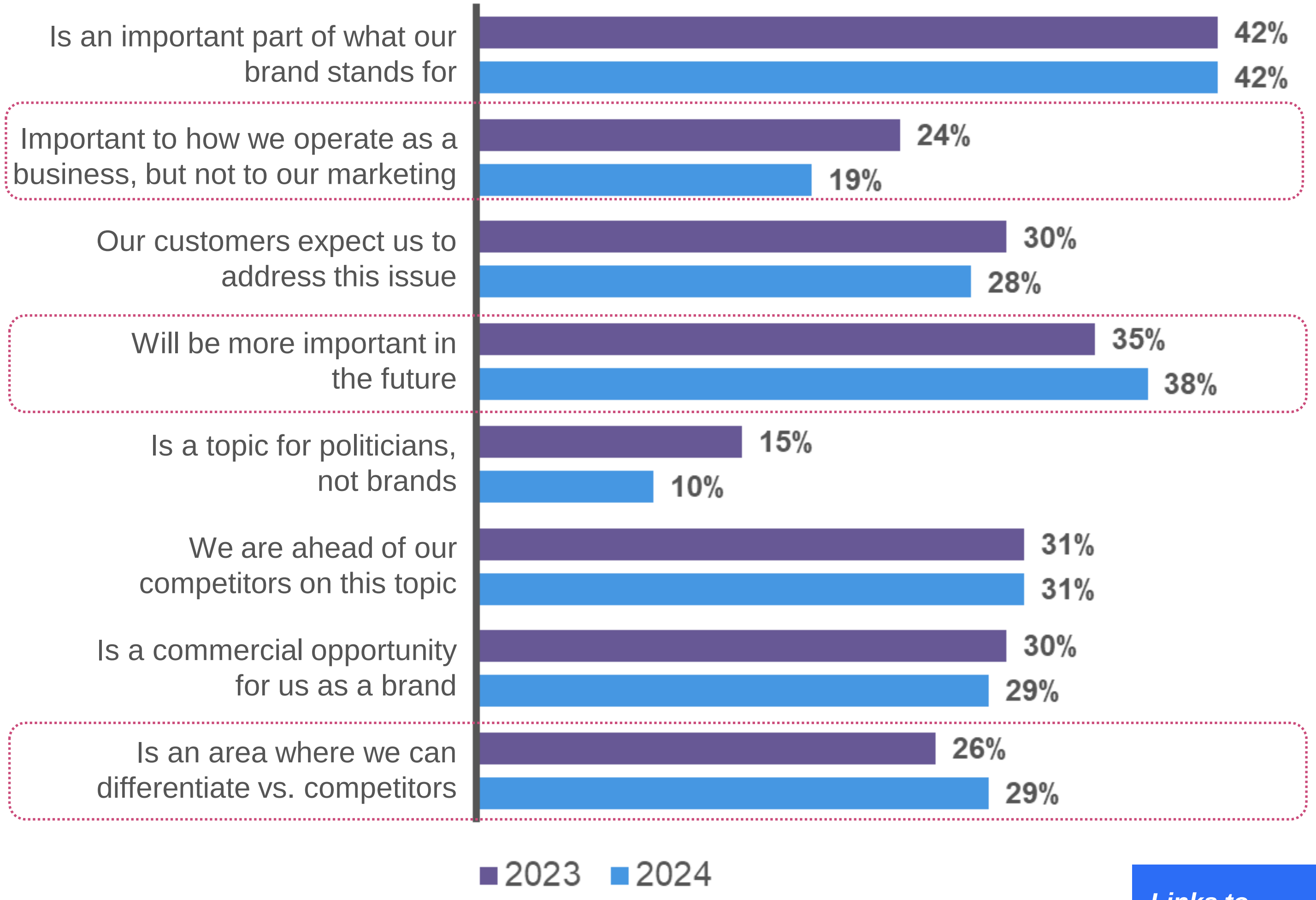
Sustainability sales have seen shifts over the last four years



1 – Source: NielsenIQ Retail Measurement Services, NIQ Product Insight, powered by Label Insight, Total US xAOC; Total Store; Units % change year over year, through 52 weeks ending November 30, 2024

Priorities around sustainability continue to shift

NIQ CMO Survey: Sustainability



IMPACT
Progressive GROCER AWARDS
HONORING EXCELLENCE

NielsenIQ received the 2024 Progressive Grocer Impact Award in the category of Educational Support/Learning Advancement. This prestigious recognition highlights our commitment to environmental, social, and governance (ESG) initiatives, and our dedication to making a positive impact in the food and consumables industry.

Brands with >50% of sales from products with sustainability-related claims achieve repeat rates of up to 34%

NIQ CMO Survey 2023/2024, 2023 Business Case for Sustainability report, NIQ/McKinsey & Co

Links to Studies:

[NIQ Releases 2025 CMO Outlook Report - NIQ]

[Consumers care about sustainability—and back it up with their wallets - NIQ]

Green Gauge® US Segmentation: The Marketer's view of Sustainability

General stability in segment sizes, with increases in the share of the Glamour Green segment; displays a population increasingly thinking about and concerned with sustainability

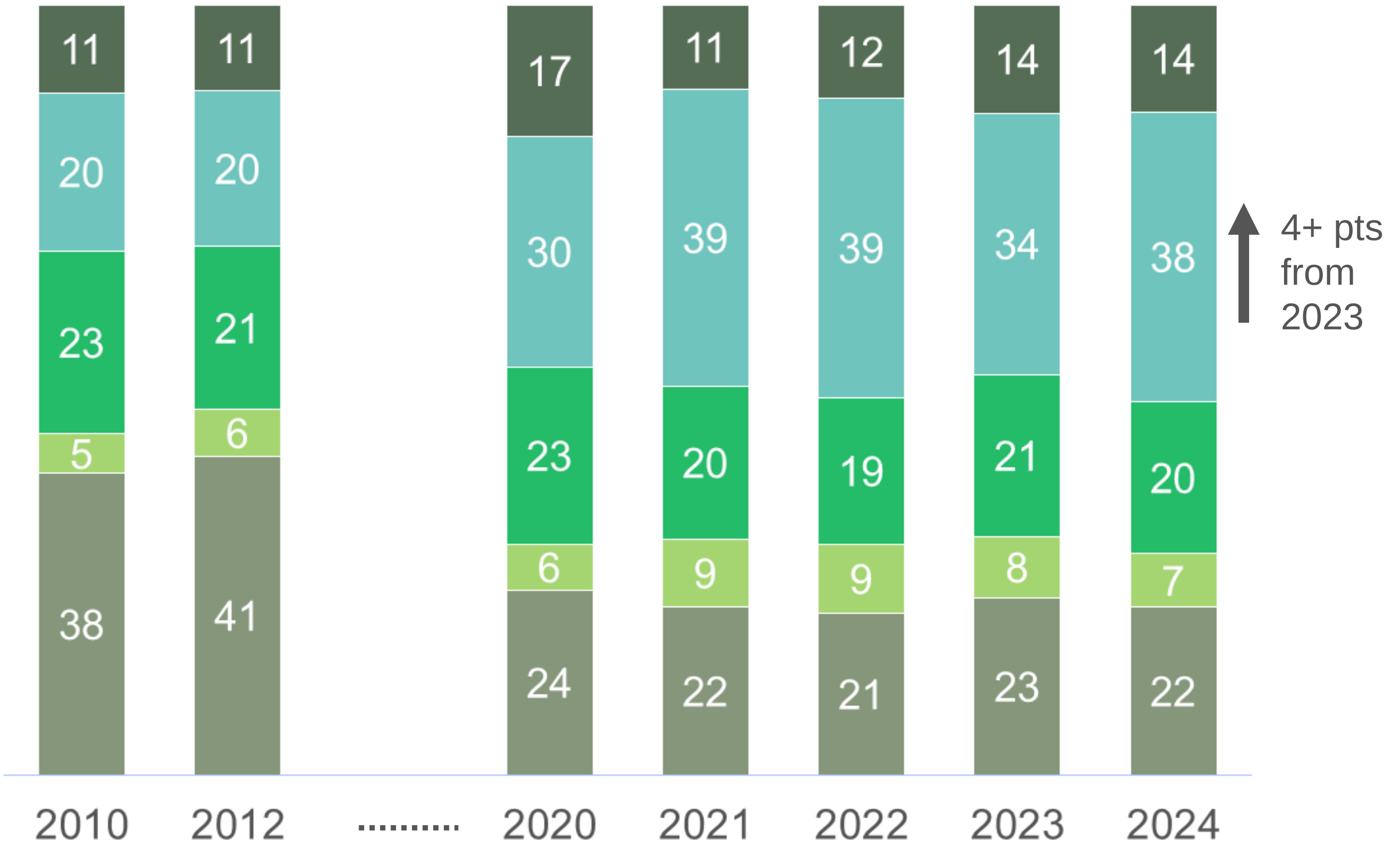
GREEN inDeed — The most ***genuinely active*** in environmental thought and action

Glamour GREEN — Considers green behavior as a ***badge of honor/status symbol*** – eager to showcase eco-friendly behaviors and purchases

Carbon CULTURED — ***Pro-environmental attitudes***, but focus mostly on the "***easy***" ***behaviors***

GREEN In Need — Holds ***pro-environmental attitudes***, but lack the tools to translate them to behaviors

JADED — ***Skeptical and cynical***, but still engages in ***low-effort*** environmental behaviors



Green Gauge® Report
Consumer Life Global 2024 and previous (US filter)

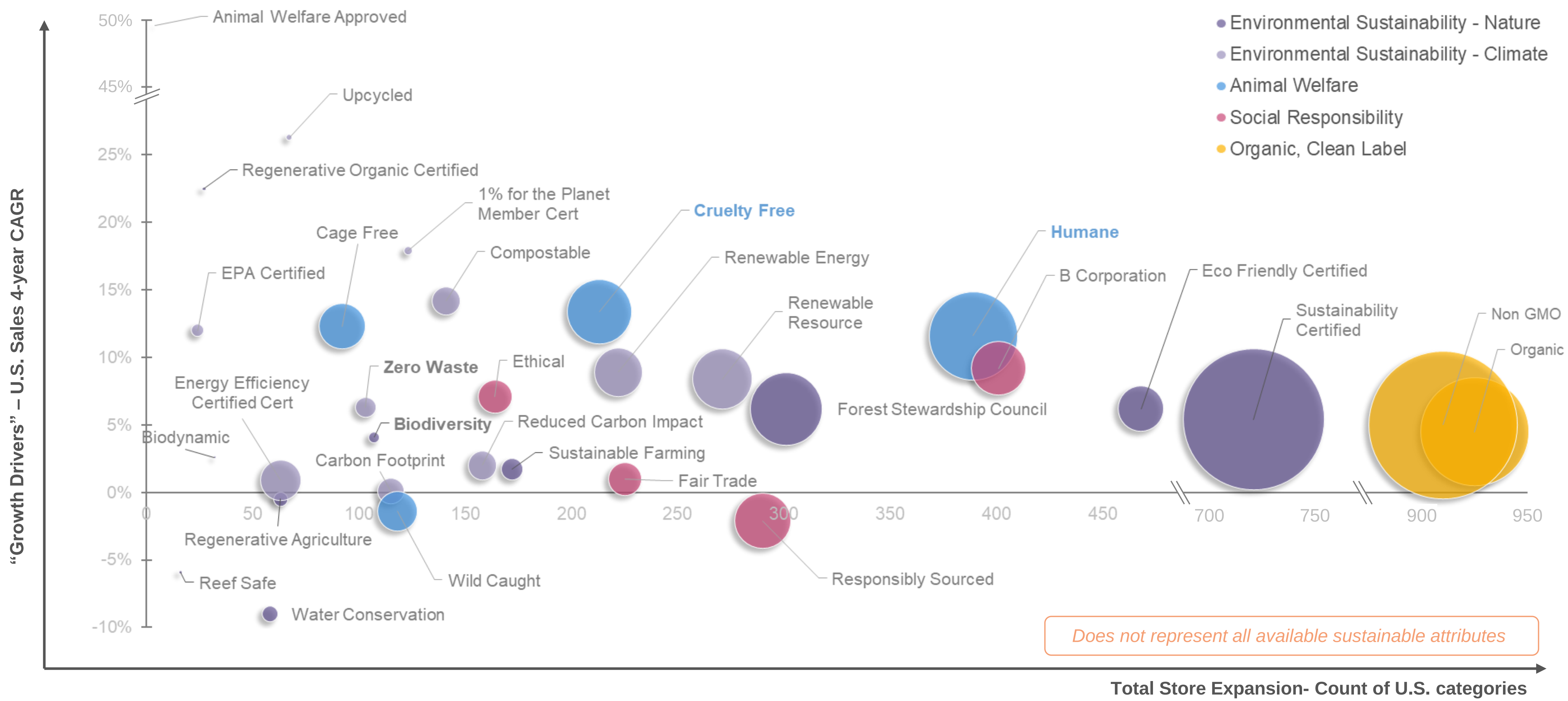
Green Gauge Consumer Segmentation

For more information on Green Gauge, please contact:

Tim.Kenyon@nielseniq.com

Please click here for the video

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 xAOC ; Total Store; Count of categories, 4-year $ CAGR; 52 weeks ending November 30, 2024; Regen Organic Certified v. 3YCAGR

Claim shifts indicate changes in company and consumer priorities

Claims that saw the biggest *decline in categories* across the store*

- Farm raised
- Environmentally friendly
- Sustainability claim
- Free from BPA
- Bamboo
- Pasture raised
- Fair trade
- Family farmed
- Less emissions
- Carbon footprint
- Free range
- 100% Recycled Paperboard

Claims that saw the biggest *growth in categories* across the store*

- Eco friendly certified
- Drop off recycle
- B-Corp certified
- Women-owned
- Recyclable
- Regenerative agriculture
- Renewable energy
- Sustainable forestry initiative certified sourcing
- Compostable
- Upcycled
- Plastic-free
- Recycled packaging content
- Sustainability certified

Source: FMI 2023 Transparency Report. Q21: How do you determine whether or not a brand or manufacturer is being transparent?
*Decline and growth in number of categories; Source: NIQ, Retail Measurement Services, NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Store; # of Categories selling change vs year ago; 52 weeks ending November 30, 2024

NIQ

Waste increasingly prioritized by consumers

Are consumers rethinking consumption?


FOOD&WINE
FOOD DRINK RESTAURANTS NEWS TRAVEL ABOUT US SUBSCRIBE

NEWS > FOOD NEWS

California Just Became the First State to Ban Sell-By Dates

A "sell-by" date probably doesn't mean what you think it does.

By Merlyn Miller | Published on October 4, 2024

Milkadamia Organic Oat Milk Sheets

#underconsumption

Top categories with "*zero waste*" claims

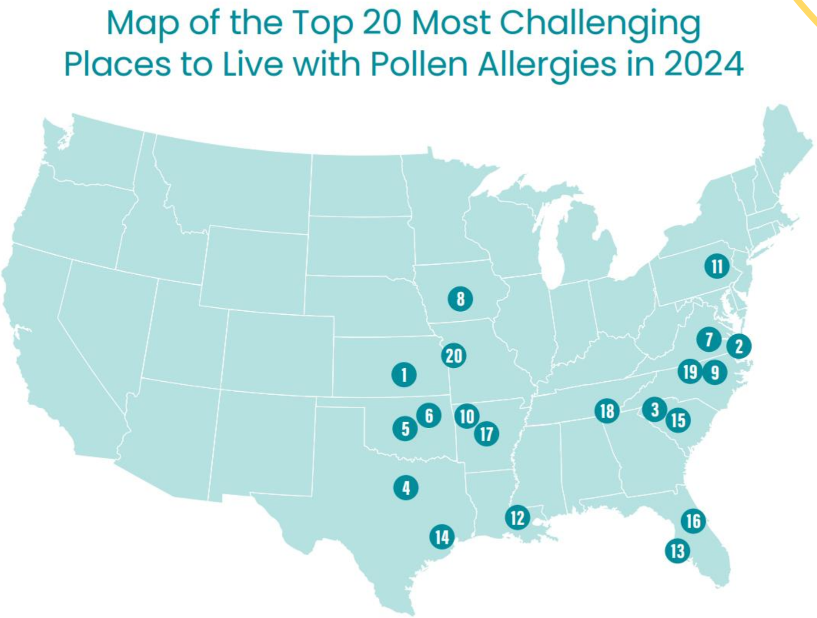
- Pet Food
- Oral Hygiene
- Packaged Tea
- Beer/Cider Seltzers

Source: NIQ Retail Measurement Services, NIQ Product Insight—powered by Label Insight, PI Zero Waste Stated, Total US xAOC ; Total Store; $ Volume; 52 weeks ending November 30, 2024

Climate change impact on allergies

Importance of biodiversity

Today, all types of allergies affect over 30% of adults and 40% of kids in the US. According to a study in 2012, pollen levels are expected to double by 2040. Pollen-producing male trees – they're all around us. Many parks and backyards are surrounded by pollen-laden male-only trees based on the recommendation of a 1949 USDA report that they should be planted instead of female trees, which give off no pollen. but more female trees can make a better outside for all.



Top categories with "***biodiversity***" claims

- Cookies and crackers
- Sugar and Sweeteners
- Diet & Nutrition
- Packaged Tea
- Packaged Coffee

Source: NIQ Retail Measurement Services, NIQ Product Insight—powered by Label Insight, PI Biodiversity Stated, Total US xAOC ; Total Store; $ Volume; 52 weeks ending November 30, 2024

Weather increasingly climate wakeup call

- *Weather volatility is the **most impactful climate related risk** that consumer businesses face today*
    - *Surprisingly, weather is the least understood, least measured, and least acted upon factor affecting business performance*
- *The weather is **more volatile** today than ever before*
    - *The U.S. experiences a 'billion dollar' weather disaster every three weeks today, compared to once every 4 months in the 1980s*

planalytics

WEATHER-DRIVEN DEMAND ANALYTICS *powered by NIQ*

Q1 2025 v LY

SPF	**TOTAL US**	**+1.4%**	SALADS	**TOTAL US**	**+0.2%**	FRESH MEAT	**TOTAL US**	**+0.2%**
	Los Angeles	+10.1%		Los Angeles	+1.3%		Minneapolis	+1.1%
	Dallas	-2.4%		New York City	+0.5%		Philadelphia	+0.5%
	Raleigh	-6.2%		Tampa	-0.6%		Kansas City	-1.0%
HBL	**TOTAL US**	**+1.2%**	ALLERGY	**TOTAL US**	**-0.3%**	COUGH/ COLD	**TOTAL US**	**+0.2%**
	New York City	+3.2%		San Diego	+2.2%		Phoenix	+1.0%
	San Francisco	+1.2%		Chicago	-1.3%		Seattle	-0.8%
	Austin	-0.9%		Houston	-1.9%		St. Louis	-0.9%
PRODUCE	**TOTAL US**	**+0.2%**	COCONUT WATER	**TOTAL US**	**-0.1%**	SPIKED SELTZER	**TOTAL US**	**-1.5%**
	Las Vegas	+0.7%		San Diego	+2.4%		Austin	+2.3%
	Boston	+0.3%		Kansas City	+0.5%		Tampa	+1.3%
	Indianapolis	-0.3%		Denver	-3.1%		Nashville	-4.9%

Weather Data

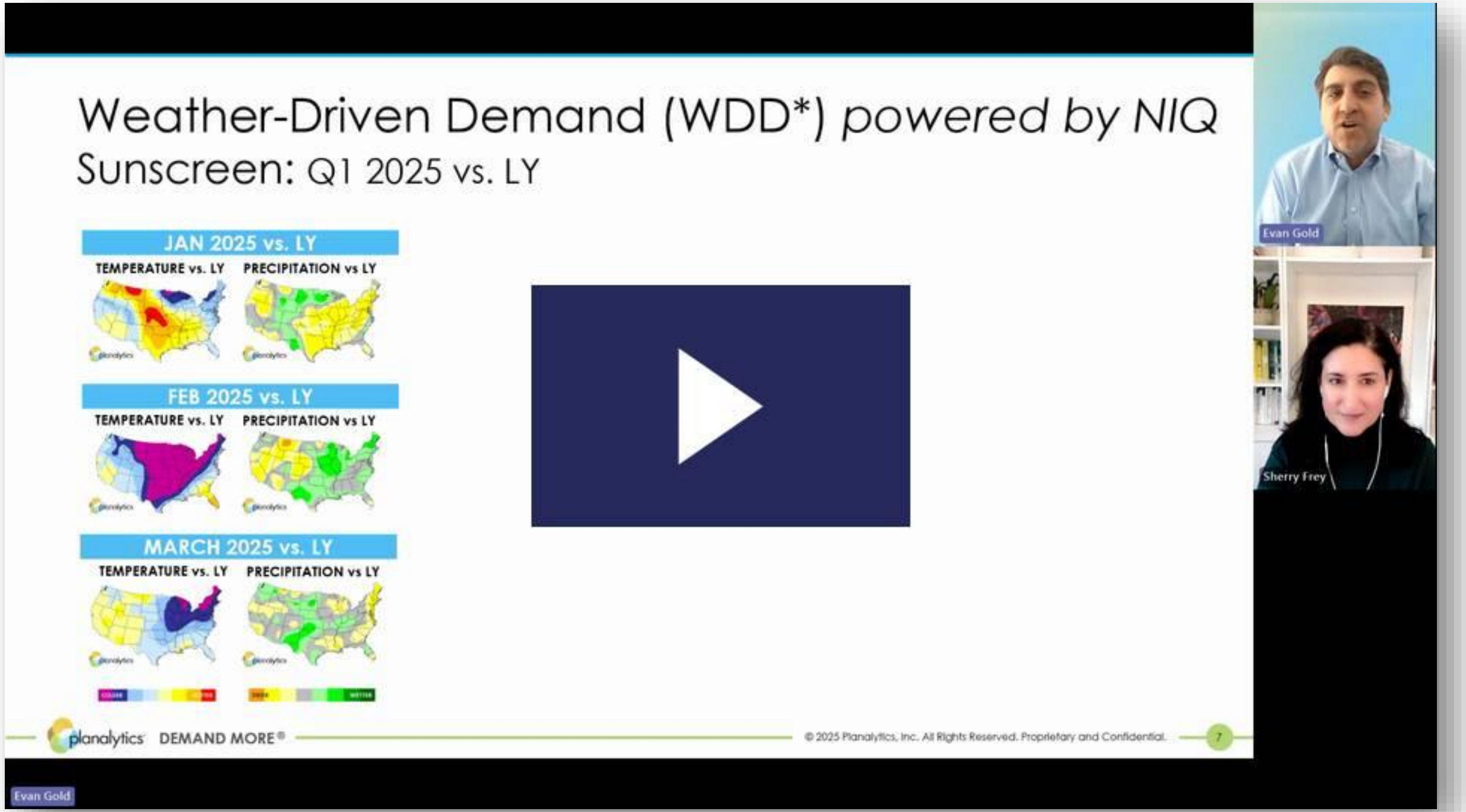
+

Weather Analytics

Sales Forecasting *Waste Reduction* *Inventory Management* *Marketing* *Financial Reporting*

NIQ

Weather-driven demand analytics – Powered by NIQ



[Please click here for the video]

Contact the team for further details

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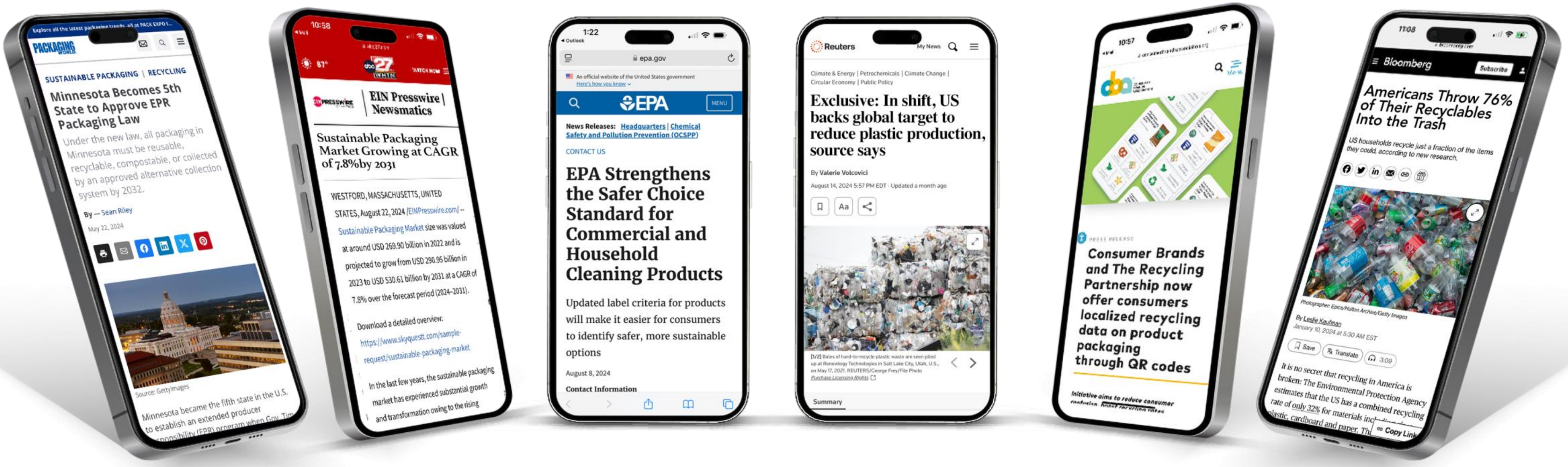
Government initiatives meet growing consumer sustainability concerns



SUSTAINABLE PACKAGING COALITION®

10 States have introduced legislation on EPR for packaging in 2024

5 EPR for packaging bills have passed in the U.S.

SPC https://epr.sustainablepackaging.org/

The amount of sustainable packaging differs significantly across categories

	RTE Cereal	Dog Food
Total category	$9.7 Billion	$26 Billion
% of sustainable packaging claims	57%	2%
Number of observed claims	75	162
Number of manufacturers making a sustainable packaging claims	67	73

Dataset: NielsenIQ Retail Measurement, NielsenIQ Product Insight, powered by Label Insight | US NIQ Total Store excluding Fresh - 445 - Weekly (Synd) | 52 weeks, W/E 8/10/2024
Dataset: NielsenIQ Retail Measurement, NielsenIQ Product Insight, powered by Label Insight | US NIQ Total Store Inc Fresh - 444 - Monthly (Synd) | 52 weeks, W/E 1/27/24

NIQ

Brands are evaluating state challenges, exploring simplification

The Spectrum of Sustainability Claims:

Dry Dog Food Packaging

Total 162 observed claims for dog food

Examples of 58 claims on dry dog food packaging

Recyclable • Made With Recycled Materials • Please Recycle This Paperboard Carton • This Package Can Be Recycled • BPA Free • Please Recycle • Recycle Me Please • Bag Made With Up To 30 Percent Plant Based Plastic • Recyclable Bag • Ecologically Friendly Bag • USDA Certified Biobased Product Package 30 Percent • Recycle If Clean And Dry • USDA Certified Biobased Product Package 44 Percent • USDA Certified Biobased Product Packaging 30 Percent • Minimum 20 Percent Post Consumer Recycled Content • Sustainable Packaging • Resealable • Recycle Where Facilities Exist • Recyclable Pack • 100 Percent Recycled Plastic • Degradable Sustainable Packaging • Ecologically Friendly Packaging • Bag Made With 30 Percent Minimum Recycled Material • 40 Percent Post Consumer Recycled Material • 100 Percent Compostable Packaging • Recycled Plastic Packaging • Recyclable Container • Terracycle • Sustainable Forestry Initiative • 25 Percent Recycled Plastic • Plant Bag • SFI Certified Sourcing • Green Partnerships • Eco Friendly • Made With Post Consumer Recycled Materials • This Box Made With Partial Post Consumer Recycled Material • Susta Pak • Bio Flex • Ecologically Sustainable • Earth First PLA Film Ingeo • 35 Percent PCR • Sustainable Forestry Initiative Certified Sourcing • Pouch Is Made From 13 Percent Recycled Plastic • 10 Percent Recycled Material • Degradable • 96 Percent Of This Pckg Md Rnwbl Mtrls • Made With 50 Percent Wind Energy • Recycle If Clean And Dry Store Drop Off Plastic Bag • Recycle If Clean And Dry Store Drop Off Plastic Pouch • Recyclable Where Facilities Exist • Certified Earth Friendly • Rcycl Prgrm Ths Pckg May Not Exst Yr Ar • Protective Atmosphere • Love Your Planet • Originative Sourcing • Please Dispose Of Thoughtfully • Good For Earth • Earth Friendly

- *Clear Claims and Instructions*
- *Partially Clear Claims and Instructions*
- *Unclear Claims and Instructions*

Sales by Sustainable Packaging Claims by US State

Top 5 $ contributors of sustainable packaging claims across all states

BREAKFAST SANDWICHES		
Texas	6.91%	57.09%
New York	5.41%	55.32%
California	4.43%	44.38%
Florida	4.35%	39.44%
North Carolina	2.77%	61.50%
Louisiana	1.40%	66.07%
ENERGY BEVERAGES		
California	18.70%	0.04%
New York	7.78%	0.03%
Florida	7.05%	0.02%
Texas	2.73%	0.01%
North Carolina	2.70%	0.01%
Louisiana	0.51%	0.01%
GREEK YOGURT		
New York	17.42%	15.59%
California	5.22%	13.99%
Florida	4.54%	18.13%
Texas	4.21%	19.36%
Pennsylvania	3.14%	19.46%
Louisiana	0.36%	14.30%
RTE CEREAL		
New York	14.07%	56.55%
California	5.26%	51.69%
Texas	4.75%	53.47%
Florida	4.05%	55.16%
Pennsylvania	2.67%	57.20%
Louisiana	0.70%	54.90%

Example: within total sustainable packaging claims across all states in Breakfast Sandwiches, Texas contributes 6.91%

Top 5 states sorted on sustainable packaging claims contribution within total state sales only

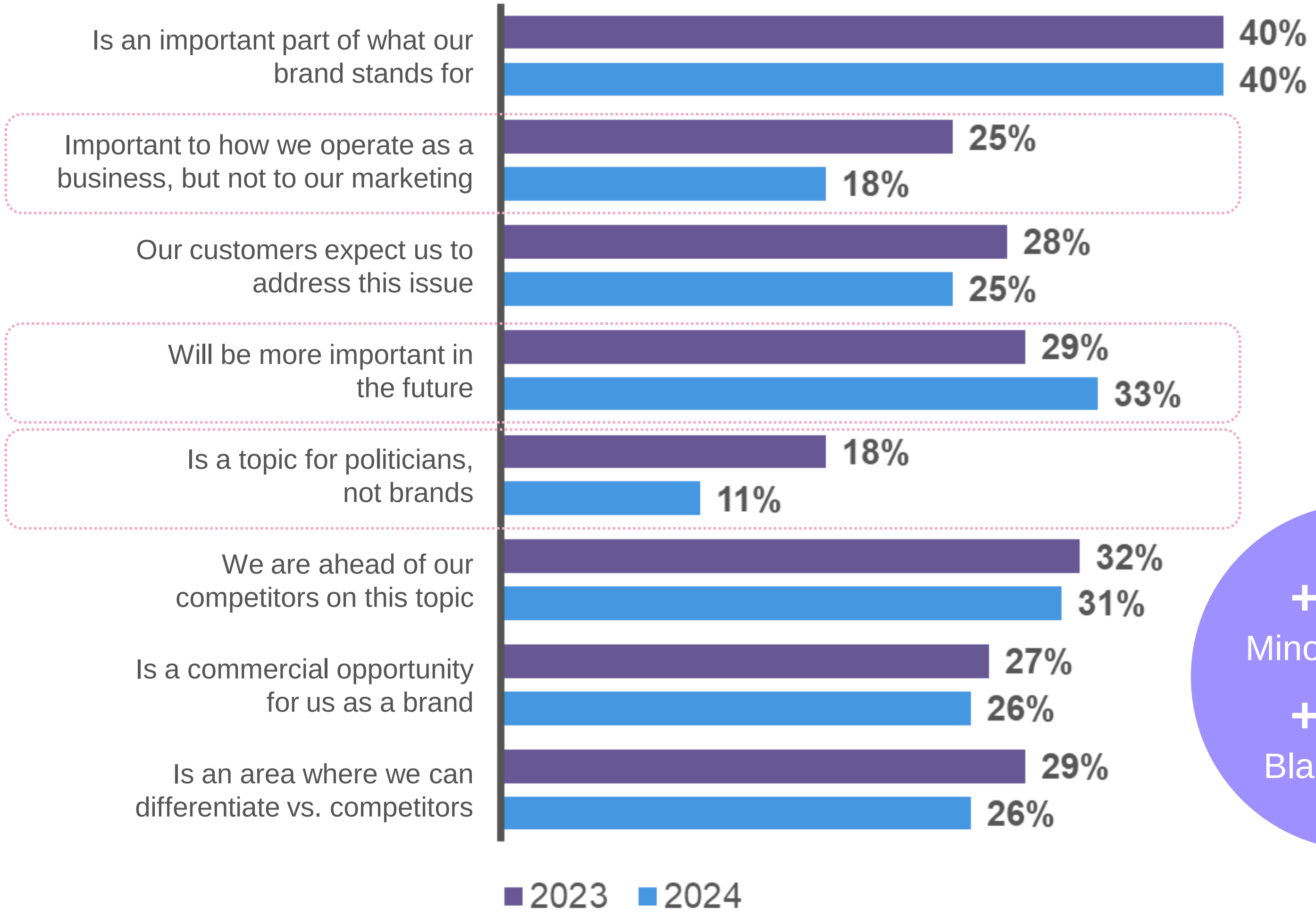
BREAKFAST SANDWICHES		
Iowa	0.23%	73.87%
Minnesota	0.87%	68.12%
Nebraska	0.13%	68.01%
Maryland	1.27%	67.47%
Louisiana	1.40%	66.07%
ENERGY BEVERAGES		
Minnesota	1.61%	0.07%
Maryland	1.12%	0.06%
Connecticut	0.54%	0.05%
California	18.70%	0.04%
Utah	0.27%	0.04%
Louisiana	0.51%	0.01%
GREEK YOGURT		
Maryland	1.46%	19.71%
Pennsylvania	3.14%	19.46%
Texas	4.21%	19.36%
New Jersey	2.52%	18.39%
Florida	4.54%	18.13%
Louisiana	0.36%	14.30%
RTE CEREAL		
Iowa	0.24%	63.94%
Nebraska	0.11%	60.10%
West Virginia	0.09%	59.12%
Michigan	2.14%	58.67%
Wisconsin	1.02%	57.72%
Louisiana	0.70%	54.90%

Example: Within total Iowa sales for breakfast sandwiches, 73.87% of these sales make sustainable packaging claims

NIQ

The future of diversity, equity and inclusion…

NIQ CMO Survey: DEI



41% of consumers would purchase a product that values and supports social equality or supports at-risk communities or minorities

+10%*
Minority-owned

+79%*
Black-owned

2022 NIQ study found…

+13 pts

Faster growth for independent CPG companies with stronger consumer diversity[1]

NIQ

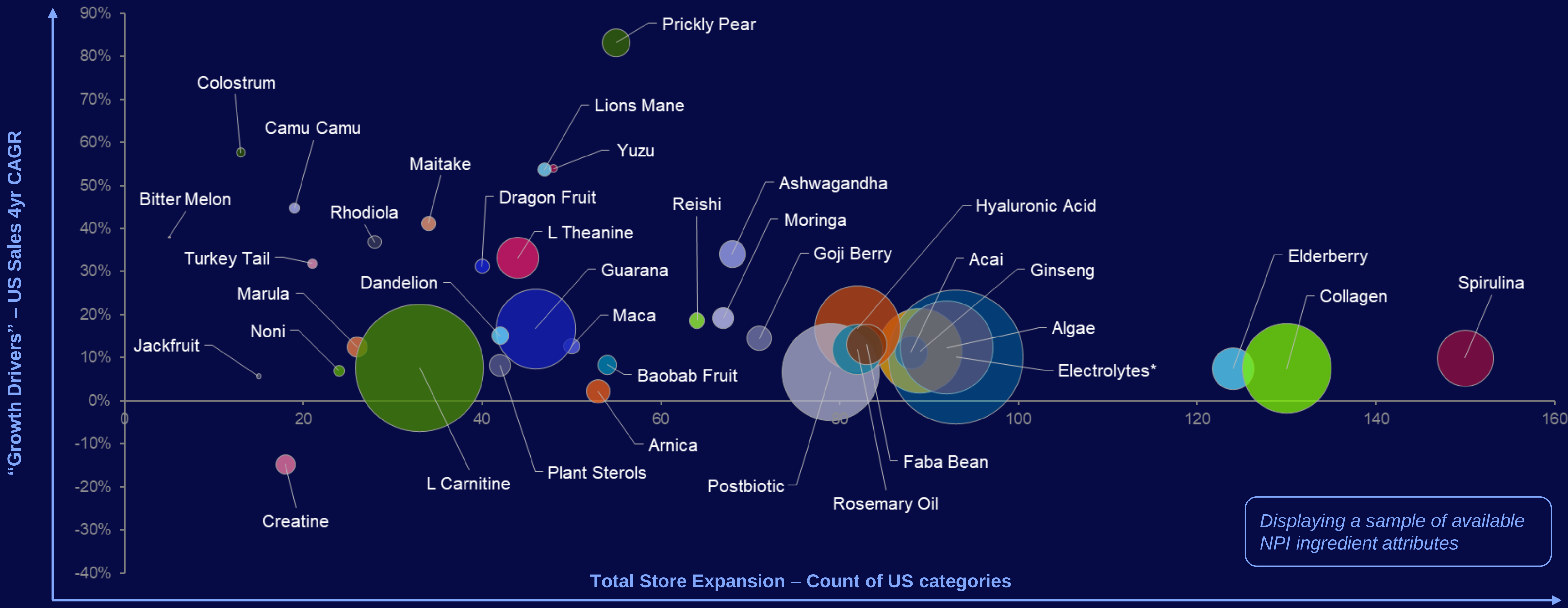
Link to Study: NIQ Releases 2025 CMO Outlook Report - NIQ

NIQ CMO Survey 2023/2024, NIQ 2024 Consumer Outlook
1 – 2023 NielsenIQ Study on performance of small/independent companies compared to larger established brands; leveraging Spectra 2022 Consumer profile in combination with NielsenIQ Retail Measurement Services, Total Store; Total US xAOC; 52 weeks ending August 27, 2022 vs 2 years ago
* Source: NIQ, Retail Measurement Services, NIQ Product Insight, powered by Label Insight, Total US xAOC; Total Store; 4-yr CAGR ($); 52 weeks ending November 30, 2024

Trending ingredients: the good and the challenged

Ingredient growth illustrates functionality shifts

Ingredients across the store



Displaying a sample of available NPI ingredient attributes

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 November 2, 2024*

Increased focus on specific food ingredients


The New York Times

What to Know About the 4 Food Additives Banned by California

The chemicals, found in everything from candy corn to sodas to tortillas, have been linked to a number of serious health issues.

By Dana G. Smith

Oct. 18, 2023

Food Additives Potential Bans Impact

Red Dye #40 – ~23K items

Red Dye #3 – 5K items

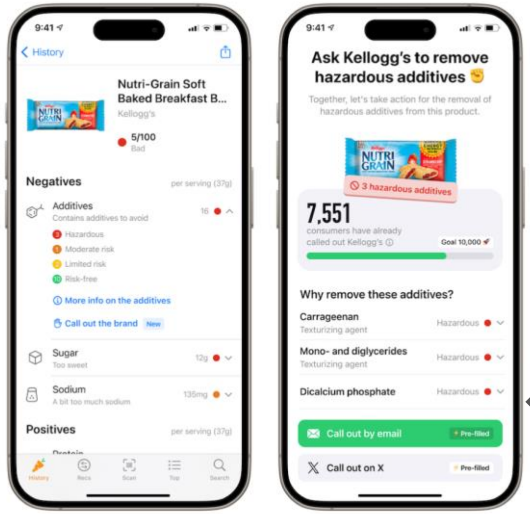
Brominated Vegetable Oil ~300 items

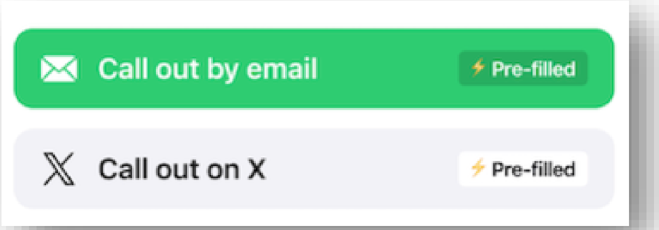
Propyl Paraben ~ 250 items

Potassium Bromate ~500 items

Titanium Dioxide ~ 7K items

High Fructose Corn Syrup ~ 26K items





Yuka

Top categories in sales

Red Dye 3

1. Desserts (22% share)
2. Candy, Gum, Mints (16%)
3. Cookies and Crackers (12%)
4. Diet and Nutrition (11%)
5. Sweet Snacks (11%)

Red Dye 40

1. Candy, Gum, Mints (27%)
2. Beverages (17%)
3. Salty Snacks (14%)
4. Desserts (8%)
5. Sweet Snacks (6%)

Propyl Paraben

1. Sweet Snacks (46% share)
2. Wraps and Tortilla shells (23%)
3. Baking supplies (14%)
4. Salty Snacks (5%)
5. Prepared Foods (5%)

Potassium Bromate

1. Prepared foods (45% share)
2. Rolls and Buns (13%)
3. Cookies & Crackers (10%)
4. Pizza (10%)
5. Bread (9%)

Titanium Dioxide

1. Sweet Snacks (29% share)
2. Prepared Foods (17%)
3. Candy, Gum, Mints (15%)
4. Desserts (7%)
5. Pizza (6%)

High Fructose Corn Syrup

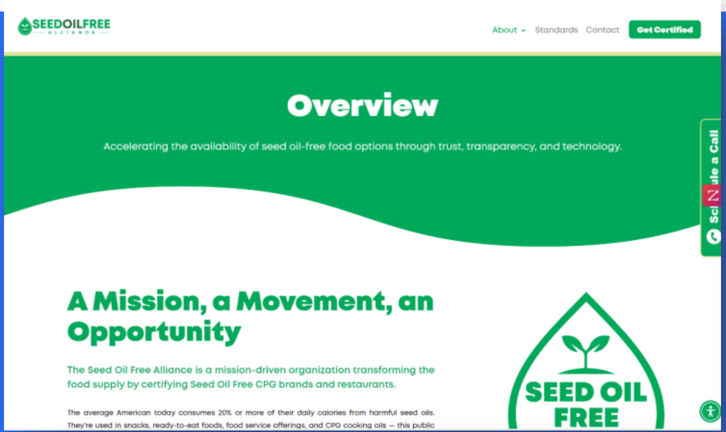
1. Beverages (48% share)
2. Cookies and Crackers (10%)
3. Desserts (8%)
4. Prepared Foods (5%)
5. Condiments (3%)

Bromated Vegetable Oil

1. Beverages (99.9% share)

Source: NIQ Retail Measurement Services, NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage; $ Share, Number of UPCs selling impacted; Total US xAOC, Total Food & Beverage; 52 weeks ending December 28, 2024
1 - FMI and NIQ 2023 Transparency Report

Emerging Seed Oil Conversation

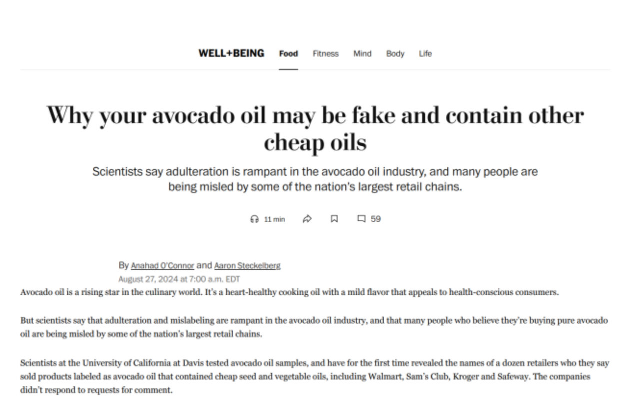


Harmful Seed Oils are...

The following seed oils are designated as "Harmful Seed Oils" and are disallowed ingredients for Seed Oil Free Certification purposes:

- Soybean oil
- Corn oil
- Canola (rapeseed) oil
- Sunflower oil
- Peanut oil
- Grapeseed oil
- Safflower oil
- Rice bran oil
- Cottonseed oil
- Flaxseed oil

Harmful seed oils are high in omega-6 linoleic acid or other polyunsaturated fats and are also highly refined. Today, a growing number of companies are replacing harmful seed oils with healthier oils and fats to honor the preferences of health-conscious consumers.



WELL+BEING Food Fitness Mind Body Life

Why your avocado oil may be fake and contain other cheap oils

Scientists say adulteration is rampant in the avocado oil industry, and many people are being misled by some of the nation's largest retail chains.

11 min 59

By Anahad O'Connor and Aaron Steckelberg
August 27, 2024 at 7:00 a.m. EDT

Avocado oil is a rising star in the culinary world. It's a heart-healthy cooking oil with a mild flavor that appeals to health-conscious consumers.

But scientists say that adulteration and mislabeling are rampant in the avocado oil industry, and that many people who believe they're buying pure avocado oil are being misled by some of the nation's largest retail chains.

Scientists at the University of California at Davis tested avocado oil samples, and have for the first time revealed the names of a dozen retailers who they say sold products labeled as avocado oil that contained cheap seed and vegetable oils, including Walmart, Sam's Club, Kroger and Safeway. The companies didn't respond to requests for comment.

NIQ Product Insights:

Seed Oils F&B Ingredients

44K – soybean oil
31K items – canola oil
25K – sunflower
4K – peanut oil
4K – safflower
172 – flaxseed oil

Lard sales +9%

Butter sales +5%

Source: NIQ Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage, 8/2024 and 12/2024

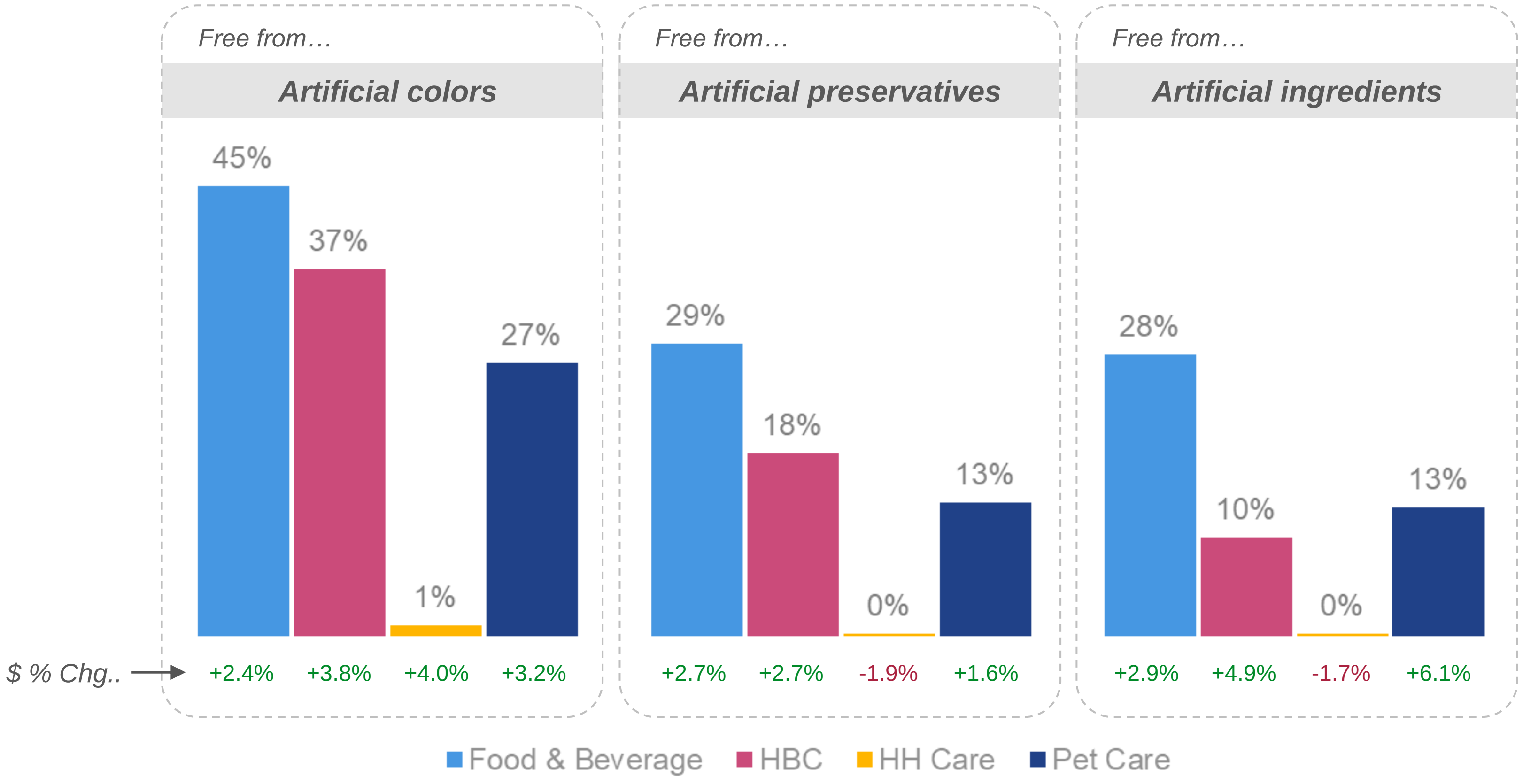
We're watching…

Free from Palm oil
Free from carrageenan stated
Free from BPA-certified
Free from chemicals stated
Free from additives stated
Free from petroleum stated
Free from propylene glycol stated
Free from BPA certified
Free from aluminum
Free from polyethylene glycol stated
Free from grain stated
Free from pesticide
Free from antibiotics
Free from RBST
Free from hormones
Free from artificial ingredients

NIQ

Continued evolution of clean label across store

Share of department[2]



Qualified attributes = derived from the ingredient label on package

2 – Source: NIQ, Retail Measurement Services, NIQ Product Insight, powered by Label Insight, Total US xAOC; Total Store; $ Share of Department, $ % change vs year ago; 52 weeks ending December 28, 2024

NIQ BASES

Breakthrough Innovation 2024

North America

Bloom Greens & Superfoods
USA

CHOMPS
USA

Downy® Rinse & Refresh™
USA

e.l.f. Halo Glow Liquid Filter
USA

Feastables Chocolate
USA

Just for Men 1-Day Beard & Brow Color
USA

Kristin Ess Hair
USA

Liberté Dessert Collection
Canada

Liquid Death
USA

Lumē Deodorant
USA

Magic Spoon® Protein Cereal
USA

Mighty Patch
USA

Modelo Oro
USA

Olay Skincare Body Wash
USA

OLIPOP
USA

PrettyLitter
Canada

Rascals™
USA

Simply Spiked
USA

TEMPTATIONS™ Dry Cat Food
USA

The Most OREO OREO
USA

Trü Frü
USA

Two Good™
Canada

Lessons learned from this year's winners

Flipping the nutritionals to redefine stagnant categories

Offering innovative products with a competitive advantage, often through technology

Leveraging influencers can drive big outcomes, but the right personality is key

Maximizing the right distribution strategy for the brand & launch

NIQ BASES
Breakthrough Innovation
2024

Watch Now

[NielsenIQ BASES - The Global Breakthrough Innovation Report]

The 2025 NIQ Founders Pitch Slam is coming soon!

Applications open February 3th – March 29th, 2025

The 3rd annual NIQ Founders Pitch Slam will bring together some of the **most innovative and transformative** emerging CPG brands, challenging an elite set of founders to pitch their companies to industry insiders and business leaders as they vie for a first-place award of more than $700k including a **$50,000 cash prize** and in-kind prizes.

<u>Entry criteria</u>

- Have an **annual revenue not to exceed $20 million** in US$ in qualifying departments
- Products must currently be **available for U.S. sale**
- You must be available to participate in the **Virtual Pitch semi-finals on May 1, 2025**
- You must be available to attend the NIQ C360 conference in Hollywood, FL, for the **Live Pitch session on June 2-5^{h} (all expenses paid)**

Learn more at niq.com/pitchslam

NIQ

Past NIQ Pitch Slam Finalists

DAILY CRUNCH™

TRUE MADE FOODS

Lemongrass FARMS

Jasběrry®

TEA DROPS®

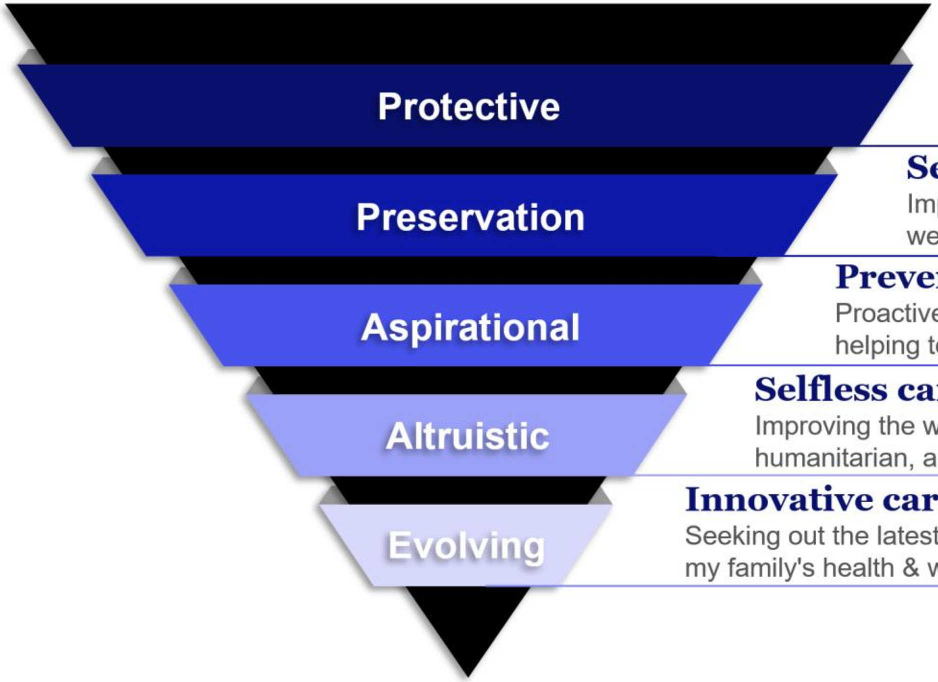
Root & Splendor®

JIMINY'S®

HAPPY PETS, HEALTHY PLANET

SAYSO

What we didn't cover today…



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**

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

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

NIQ Global Wellness Report
coming Q2 2025

Topics including…

- *Shifting requirements around women's health, especially reproductive health and performance*
- *Evolution of healthy aging and role of caregivers*
- *Protein-ization of the store and the new drivers of growth*
- *Allergies: food and beyond*
- *Food as medicine and challenge of health inequities*
- *Changing nutrition of our food*
- *Sleep: who needs it?*

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™*
- *GLP-1 survey + Homescan panel + Management Science Associates*
- *Health Ailment survey + Homescan panel*
- **Discover** – *Omnishopper*
- **BASES** *Innovation & Quick Survey*
- **Discover** – *Retail Measurement Services (RMS)*

NIQ

Where are you on the Product Attribution maturity curve?

Business Focus: Internal → External

Trend Spotting & Tracking

- Which attributes/trends are growing, declining and why?
- What is my market share of various attributes?
- What adjacent or close in attributes could be next in my category?

Consumer Understanding

- Are there consumer whitespace opportunities at the attribute level?
- Which attributes drive buying rate and consumer loyalty?
- What attributes can aid in developing household penetration?

Advanced Analytics

- Which emerging attributes are most important to consumers in my category?
- Is there additional pricing power behind developing attributes?
- Which attributes are forecasted to drive brand and category growth?
- What role do various attributes play in driving category incrementality?

Activate

- How would customers respond to various attribute claims represented alongside innovation?
- How can I leverage product attributes to further develop and win with my retailer customers?
- How can I leverage product attribute to attract and expand audiences via media targeting initiatives?

Fundamental Understanding

Mindset

Activate through Innovation and Targeting

Scan here for one Free Product Insight report

Exclusive Offer for Today's Webinar Registrants

NIQ

Free Product Insight Offer for What's Next in Wellness Attendees:

All What's Next in Wellness attendees eligible for one free Product Insight report for one brand or category reporting on volumetric trends for up to 5 customer Product Insight attributes.

Description	**Total US xAOC**						
Description	Latest 52 Wks						
Description	$	$ % Chg YA	Units	Units % Chg YA	%ACV	%ACV Chg YA	$ Share- Category
Category	$	$ % Chg YA	Units	Units % Chg YA	%ACV	%ACV Chg YA	$ Share- Category
Trend 1	$	$ % Chg YA	Units	Units % Chg YA	%ACV	%ACV Chg YA	$ Share- Category
Trend 2	$	$ % Chg YA	Units	Units % Chg YA	%ACV	%ACV Chg YA	$ Share- Category
Trend 3	$	$ % Chg YA	Units	Units % Chg YA	%ACV	%ACV Chg YA	$ Share- Category
Trend 4	$	$ % Chg YA	Units	Units % Chg YA	%ACV	%ACV Chg YA	$ Share- Category
Trend 5	$	$ % Chg YA	Units	Units % Chg YA	%ACV	%ACV Chg YA	$ Share- Category

Offer Criteria:

- One report per organization requested
- One Brand or Category report Dollars, Dollar Change, Units, Unit Change, Distribution and distribution change provided
- One report as referenced above or up to $5k in value credit. Can be applied to larger ad hoc data or NielsenIQ Product Insight Data subscription
- **Offer valid through 6/30/2025**

We deliver the *Full View*,

the world's most **complete** and **clear** understanding of consumer buying behavior that reveals new pathways to growth.