555 Reasons to Rethink Health & Wellness

Understand health & wellness trends better than before

September 2025

NIQ

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Agenda

- **Why should I care?**
  - What are the macro pressures?
  - How is health and wellness faring amid these pressures?
    - Overall Trends and FMCG
- **How we measure these trends at NIQ?**
  - Understanding NIQ Product Insights
- **Going Deeper on Trends**
  - What trends are emerging?
  - What are the nuances of these trends?
    - What is driving growth and declines?
    - Common questions
- **Questions & Answers**

NIQ

Why should we care?

Macro Pressures

Pivotal Moment as the CPG Ecosystem Absorbs Multiple Transformational and Foundational Shocks

Cultural, Technological, Institutional, Financial, Political

Financially polarized consumers

Shift to telehealth

Chronic disease

Tariffs

Pop culture

SNAP/WIC

Globalization and localization

Clean label

Social media

Return to work mandates

Aging population

Sustainability

GLP-1 impact

AI

Growth of retail media

Personalization

Cannabis legalization

Make America Healthy Again

Shifting demographics

GenZ and GenAlpha

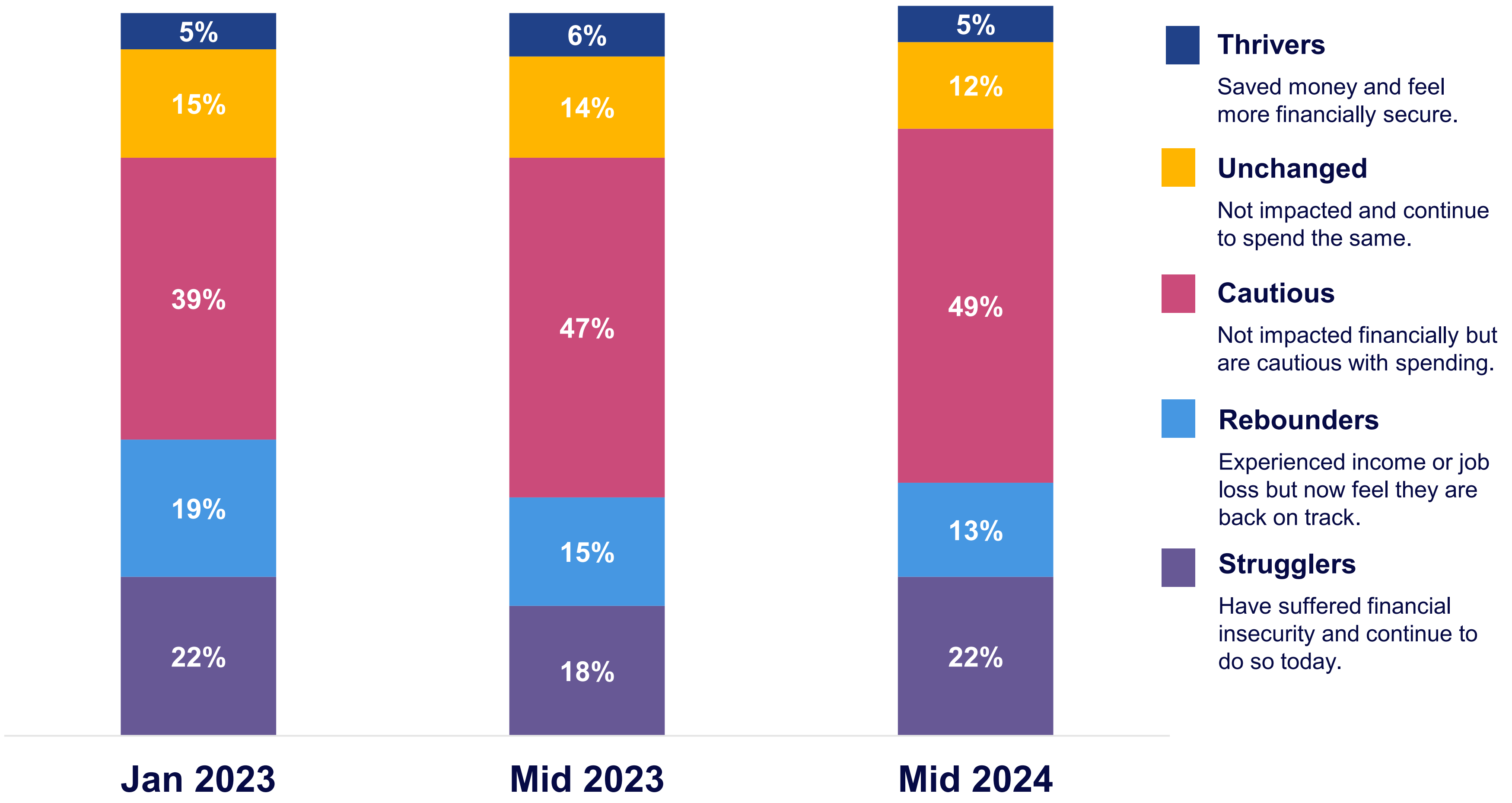
Better For™ mainstreaming

Rx to OTC

NIQ

The 2024 economic divide: 35% of Canadians remain vulnerable spenders

More consumers are being cautious with their spending as cost soar



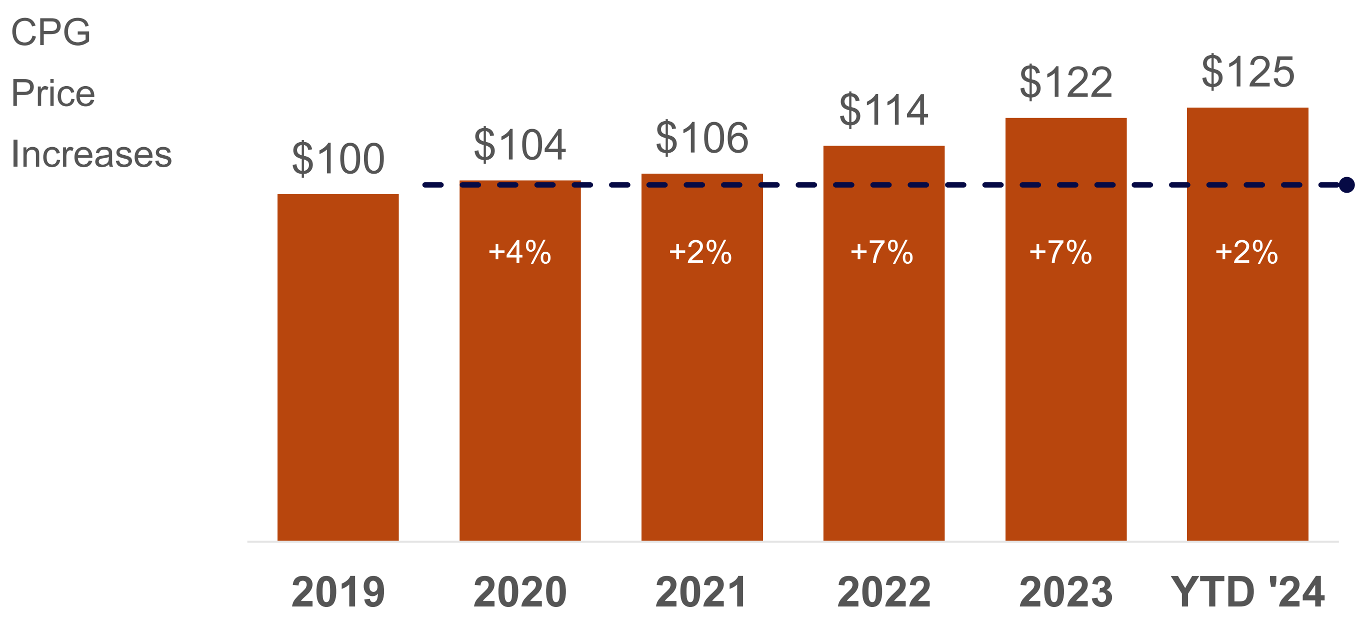
Food Bank usage is up **90%** compared to **2019**

NIQ

Source: NIQ 2024 Mid-Year Consumer Outlook, Canada, vs. Mid-2022 and Mid-2023 studies, excludes China. Q: Which of the following best describes how current events* of the last few years have impacted your overall household financial situation? *Note: Question phrased more specifically to COVID-19 impact in June 2022
Food Bank Canada March 2024.

Despite the slowed rate, accumulated impacts of inflation remain

Canada: $100 in 2019….



Consumers are spending 25%+ more than pre-pandemic

(U.S. 33% more)

Source: NielsenIQ, MarketTrack Canada All Channels Combined, Annual Periods YTD 30 weeks to July 27, 2024

25%

of Canadians say their household finances will worsen by the end of 2025

23%
Global

30%

of Canadians say their household finances will improve by the end of 2025

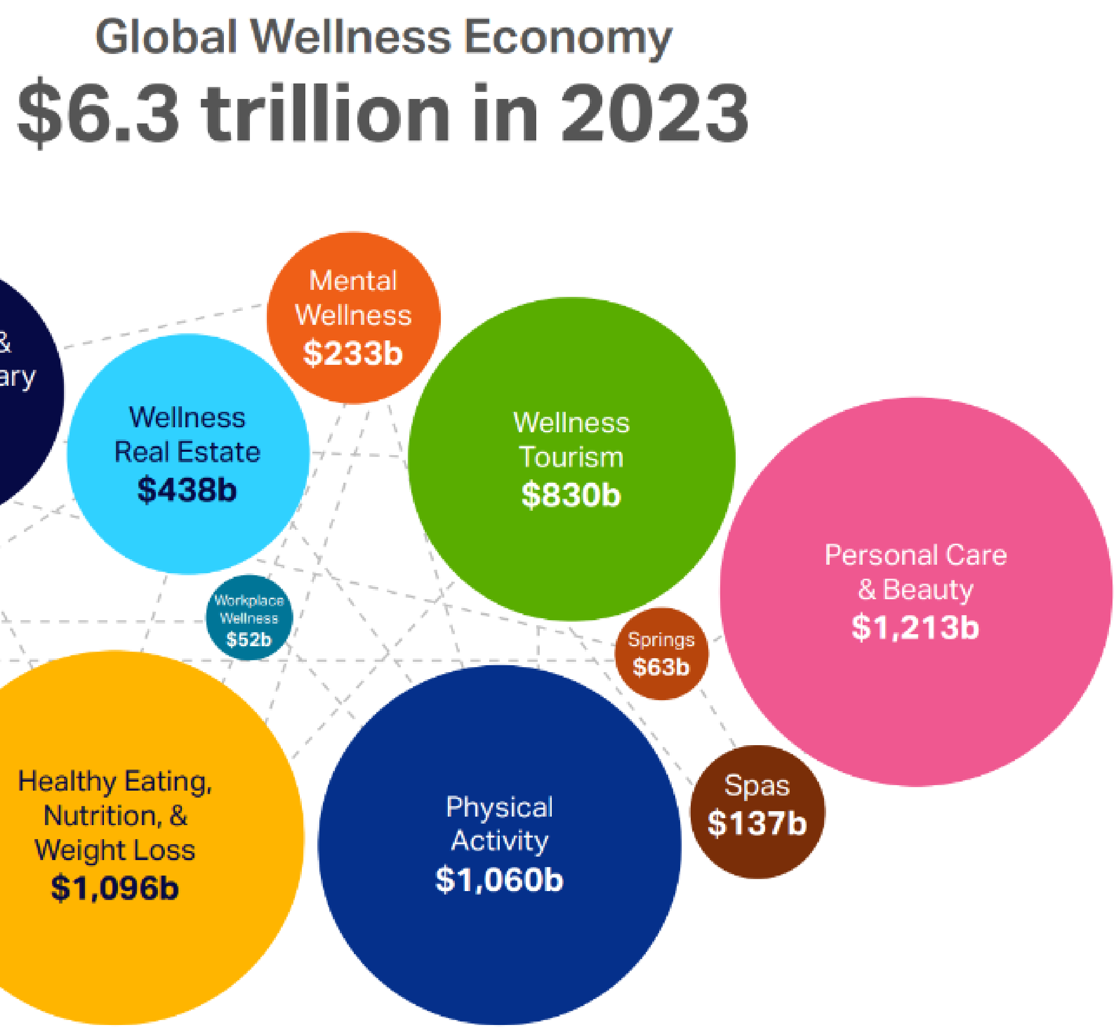
46%
Global

Source: Étude NIQ, Finding Harmony on the Shelf – Outlook on Private Label and Branded Products, mai 2025

Driving Health & Wellness in a Challenging Environment

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

In 2023, the global wellness economy stood at $6.3 trillion (USD). Today, it is 26% larger than pre-pandemic. By 2028, it will reach nearly $9 trillion.



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

19%

of Canadians say they are happy with their current H&W and don't feel the need to actively improve it

52%

of Canadians say they are taking active steps to improve their H&W

26%

of Canadians say they are not satisfied with their current H&W and don't feel they are doing enough to improve it

Source: NielsenIQ Canada, 2024 Health & Wellness Survey

49% of Canadian consumers consider themselves Health-Conscious Buyers

Segments – By attitude towards food packaging (%)
Canada

16%	35%	29%	7%	13%
Convenience Seekers: I like packaged foods because they are convenient and fit my busy lifestyle, regardless of their healthiness	**Casual Consumers:** I consume packaged foods occasionally and don't have strong preferences regarding healthiness or convenience.	**Health-Conscious:** I prioritize healthiness over convenience, so I carefully check labels and opt for packaged foods with minimal additives	**Wellness-Focused:** I prefer packaged foods that are specifically marketed as healthy options, such as those labeled as organic, natural.	**Eco-Health Advocates:** I actively avoid packaged foods due to concerns about their healthiness and environmental impact

Source: NielsenIQ PanelView | Food and beverage label content syndicated survey
Q3NEW0. How do you feel about packaged food products in terms of healthiness and convenience? | BASE: Total respondents, n=5295

Global trend: Health-related technology

Shaping the future

47%
of Canadians say health-focused technology products are effective in helping their H&W

31%
of Canadians "definitely" prefer tech products that offer extra health features vs ones that do not

40%
of Canadians would share select personal health information in return for smarter, more personalized recommendations

40%
of Canadians consumers are likely to accept a recommendation from an AI assistant

47%
Global

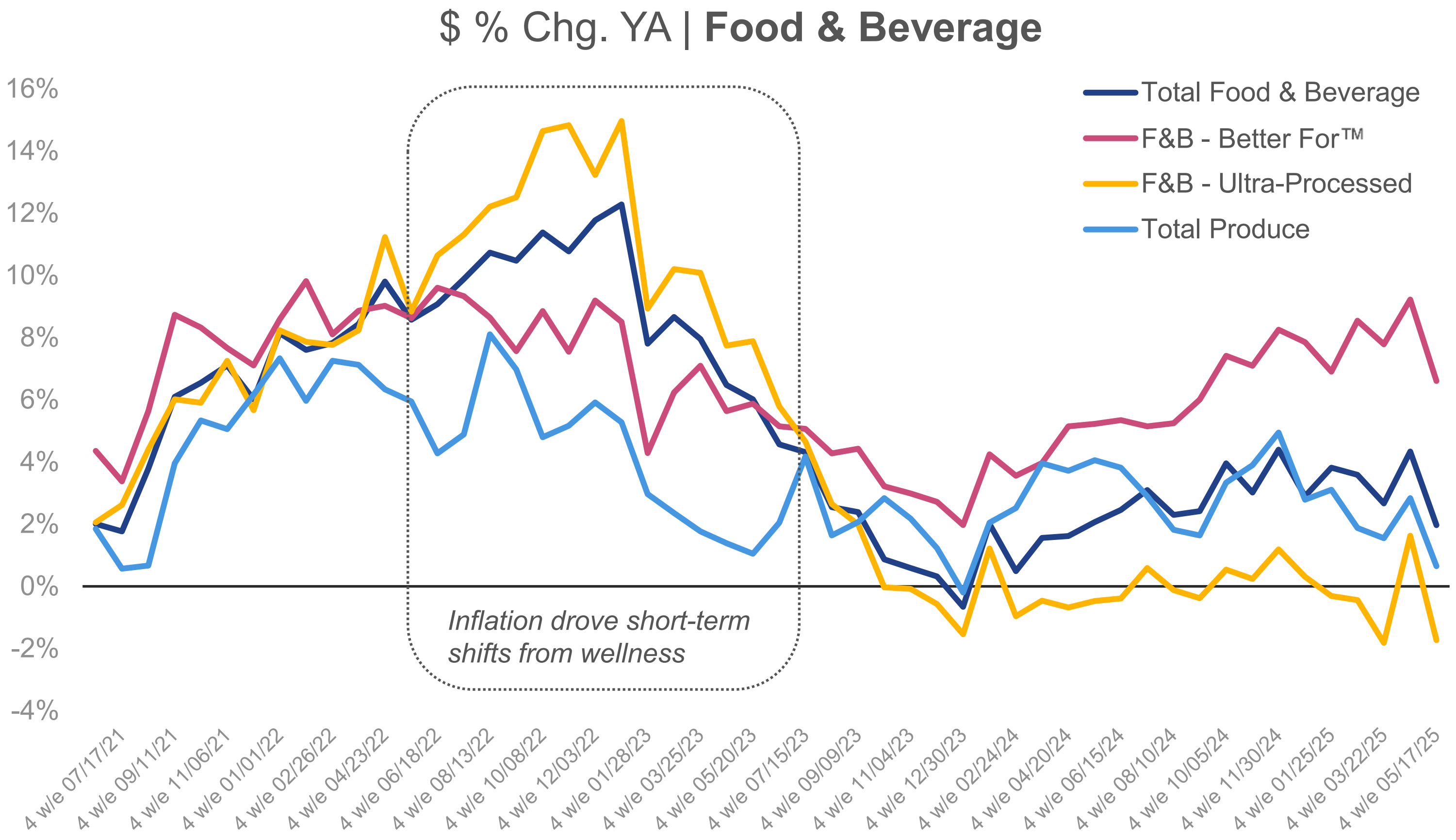
Sources: NIQ's 2025 Global Health & Wellness survey – Canadian, NIQ 2025 Private Label & Branded Products Report 2025 Survey

NIQ

What’s the opportunity in FMCG?

NIQ *Better For*™…

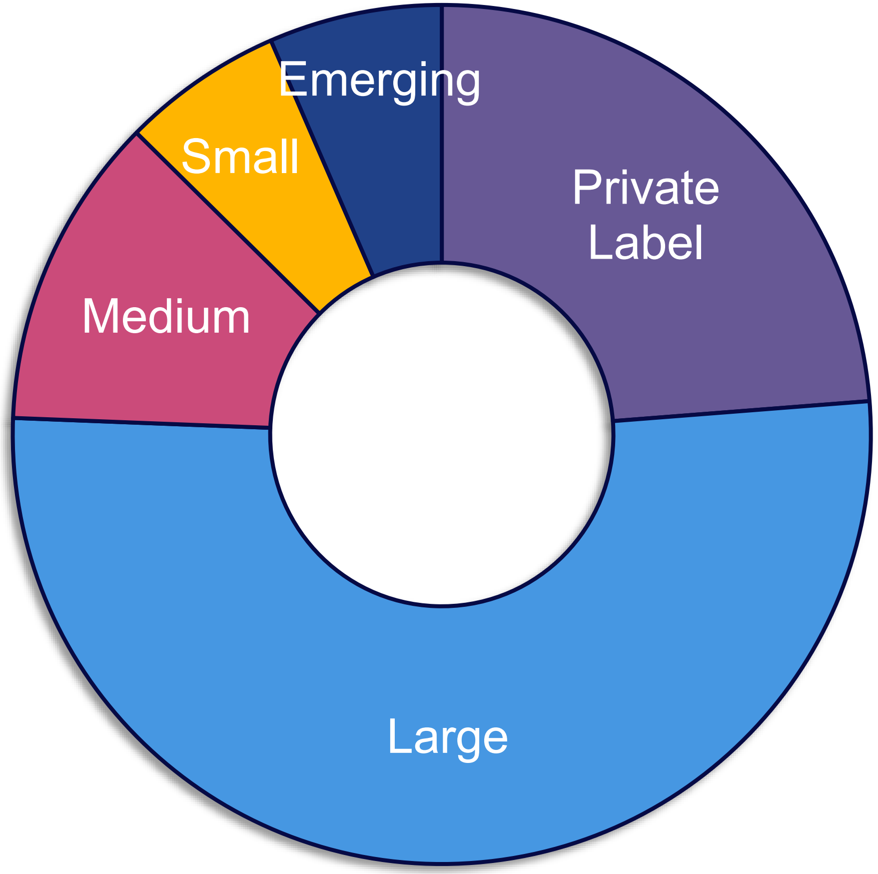
Better For™ is a resilient trend in the US and is here to stay



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

Large manufacturers make up most of Food & Beverage sales in US

Total Food & Beverage Sales | Size of Manufacturers



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

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

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

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

Consumer purchases & digital discovery is not brand centric, but rather attribute + need state centric

75%

of CPG shoppers use digital channels to become inspired, browse, research, or select a brand.

78%[1]

of grocery searches on Amazon are unbranded

84%[2]

of brands fail to claim 1 of their top 3 attributes

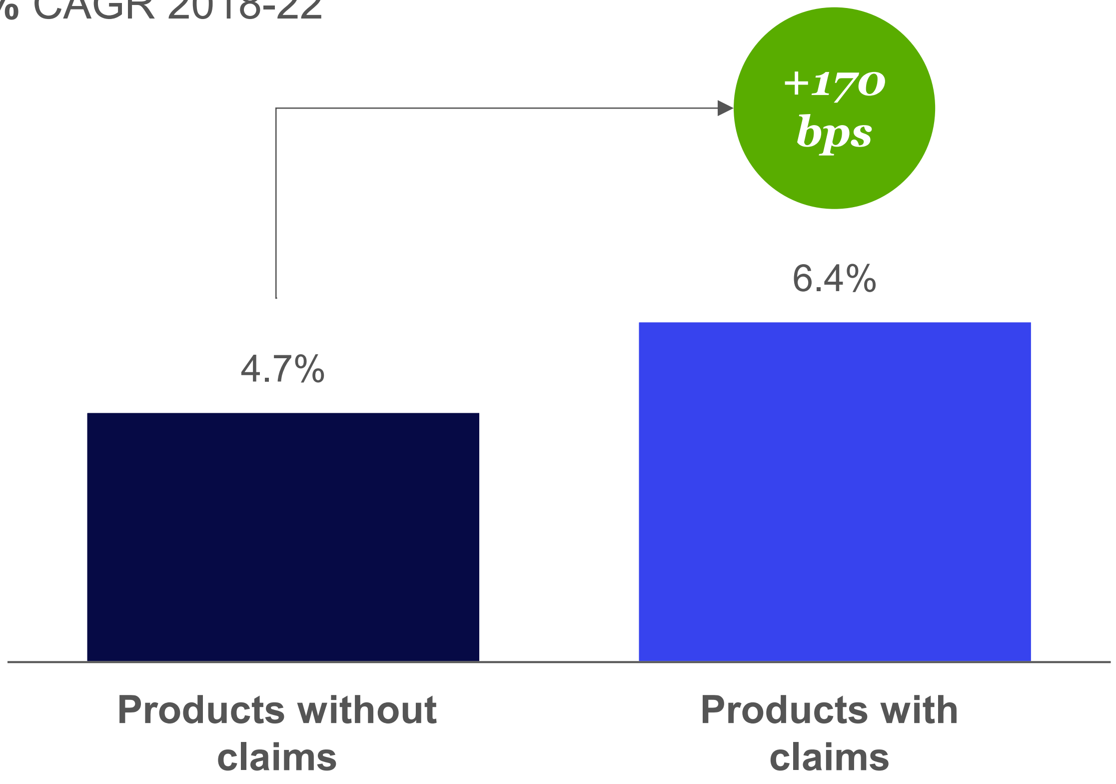
87%[3]

of products qualify for an attribute but are not returned in the retailer's search results

1. Motley Fool, 2021
2. Activating Attributes Report, Label Insight, May 2020.
3. The digital depth analysis: The e-commerce experience audit, NIQ. July 2022.
4. IBM and NRF Research Study, 2020.

So, are claims driving growth?

Retail Sales Growth Rate
% CAGR 2018-22

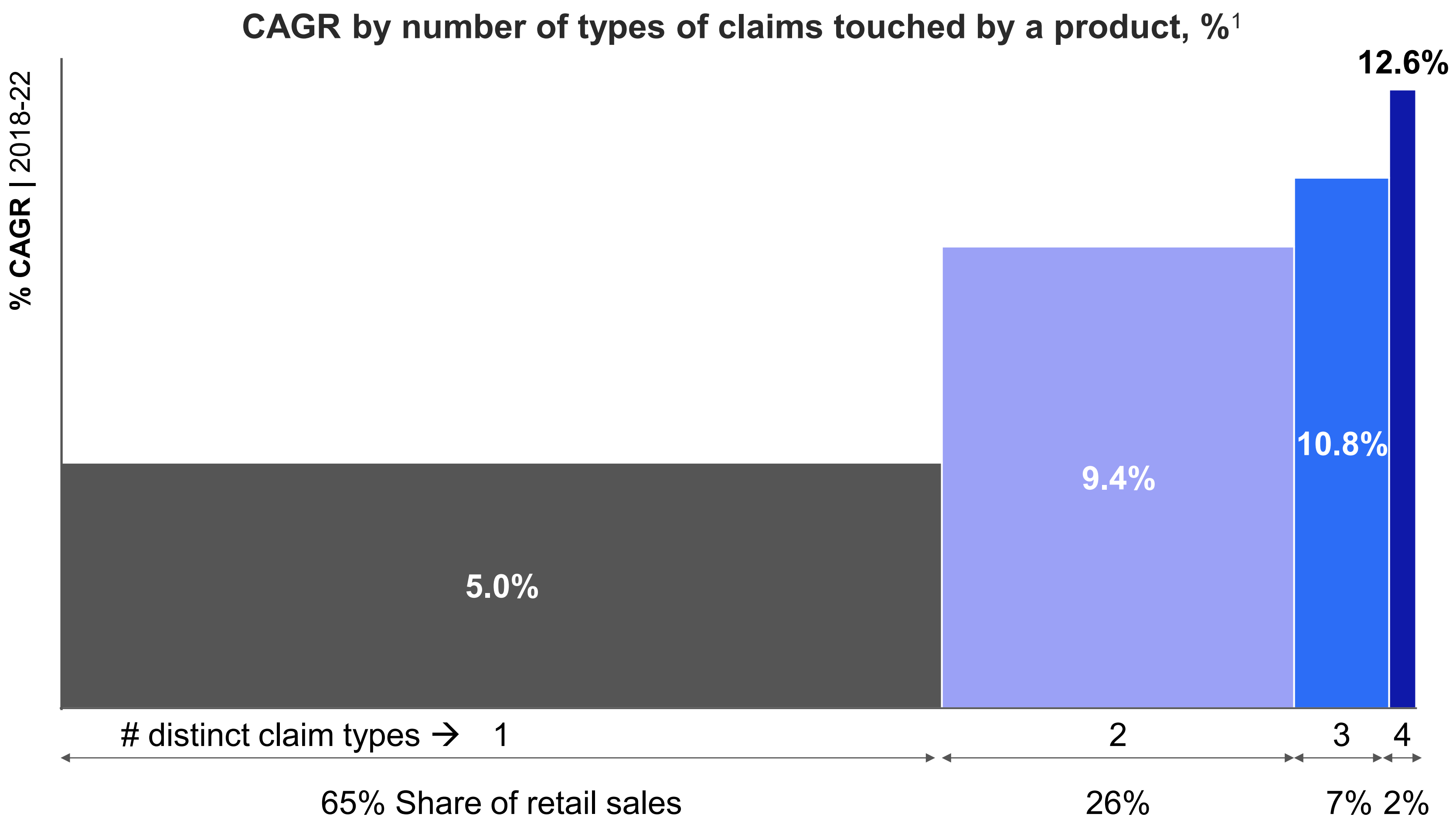


Across *32 categories analyzed*, products with claims have experienced *170 bps p.a.* (8.1% cumulative) *more growth in the past five years* than products without them

Data through June 2022

Products with more types of claims grow ~2x faster than those with only one type of claim

Few products move beyond one claim



1. 6 types of claims exist - 4, 5, and 6 type scenarios not included due to low sample size

How we measure these trends at NielsenIQ

NielsenIQ Product Insight (NPI)

Available NOW in Canada!

NielsenIQ

Product Insights

Harness the *power* of product attribution

Shoppers are sharing what they want—are you listening?

Claims	Certifications	Ingredients	Allergens	Nutrition Facts
Country of Origin	Diets & Lifestyle	Nutrition	Functional Ingredient	Natural & Organic

What is it?

NPI combines NielsenIQ's robust market measurement with Label Insight's deep product attribute data to bring together package claims and certifications with ingredient-based attributes for a more holistic view of how CPG products position themselves and how they are formulated.

How it works

NPI attribute packages such as Natural & Organic, Clean Label, Diets and Lifestyle, ESG Sustainability, and more are delivered directly into your NIQ databases, enabling you to make more informed business decisions, revealing key opportunities for investment, and furthering your understanding of the competitive market landscape.

Key benefits

- Truly understand the shopper by analyzing the market across detailed shopper need states and preferences
- Stay ahead of trends and understand what claims and certifications are resonating most with consumers
- Track competitors by diving deep into their brand positioning and formulation to inform your strategy
- Validate proven trends and identify emerging trends and white space opportunity to command shelf space and grow your market share
- Inform R&D efforts for new product launches and identify key future brand acquisition opportunities

The industry's *deepest* and *broadest* attribute solution

550+

characteristics across the Canadian market

*Returning **158% more** products with stated and **3,000% more** products with qualified than global competitors.*

SOURCE: The digital depth analysis, NIQ Brandbank, 2022

NPI reveals everything about every product with the industry's most granular attribution data

On Package Attribution

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

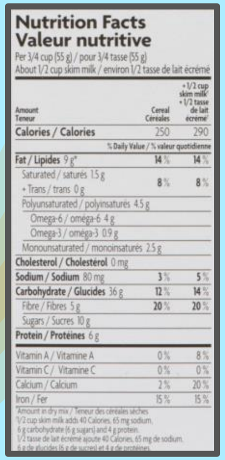
Canada Organic
Non GMO
Whole Grain
Recyclable
Kosher
QAI Organic

"Our organic promise goes back to the family farm I was raised on. In 1985, my wife Ratana and I founded Nature's Path Organic Foods based on my dad's advice to 'Always leave the soil better than you found it,' by farming without chemical pesticides, fertilizers or GMOs. For over 30 years, our family has aspired to make delicious organic foods that you can love and trust."

- Organic
- Pesticide Free
- Non GMO
- Fermented

Beyond the Label Attribution

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



Nutrition Facts
Valeur nutritive
Per 3/4 cup (55 g) / pour 3/4 tasse (55 g)
About 1/2 cup skim milk / environ 1/2 tasse de lait écrémé

Amount / Teneur	Cereal / Céréales	+1/2 cup skim milk / +1/2 tasse de lait écrémé
Calories / Calories	250	290
	% Daily Value / % valeur quotidienne	
Fat / Lipides 9 g*	14 %	14 %
Saturated / saturés 1.5 g + Trans / trans 0 g	8 %	8 %
Polyunsaturated / polyinsaturés 4.5 g		
Omega-6 / oméga-6 4 g		
Omega-3 / oméga-3 0.9 g		
Monounsaturated / monoinsaturés 2.5 g		
Cholesterol / Cholestérol 0 mg		
Sodium / Sodium 80 mg	3 %	5 %
Carbohydrate / Glucides 36 g	12 %	14 %
Fibre / Fibres 5 g	20 %	20 %
Sugars / Sucres 10 g		
Protein / Protéines 6 g		
Vitamin A / Vitamine A	0 %	8 %
Vitamin C / Vitamine C	0 %	0 %
Calcium / Calcium	2 %	20 %
Iron / Fer	15 %	15 %

*Amount in dry mix / Teneur des céréales sèches
1/2 cup skim milk adds 40 Calories, 65 mg sodium, 6 g carbohydrate (6 g sugars) and 4 g protein.
1/2 tasse de lait écrémé ajoute 40 Calories, 65 mg de sodium, 6 g de glucides (6 g de sucres) et 4 g de protéines.

- Contains Omega-3
- Contains Omega-6
- Cholesterol Free
- Trans Fat Free
- Good Source of Iron
- Good Source of Fiber
- Not Keto Diet Friendly

INGREDIENTS: Whole grain rolled oats*, cane sugar*, soy oil*, brown rice flour*, flax seeds*, almonds*, oat syrup solids* (oat syrup solids*, tocopherols), natural vanilla flavour, sea salt, molasses*. ***Organic. Contains soy, almonds and oats. May contain peanuts, wheat or other tree nuts.**

- Artificial Color Free
- Contains Natural Preservatives
- Contains Natural Sweeteners
- Plant Based
- Contains Superfood Ingredients

We are the gold standard in attribution

Trusted by the FDA and USDA for over a decade

Subset of NPI Canada Characteristics

Clean Label

All Natural
Antibiotics
Artificial Fragrance
Cruelty Free
Hand Made
Natural Preservatives
Non-GMO
Not Tested On Animals
MSG
Plant Based

Ingredients

Ancient Grains
Antioxidants
Caffeine
CBD
DHA
Hyaluronic Acid
Plant Protein
Sprouted Ingredients
Sugar Alcohols
THC

Sustainability

Biobased
Compostable
Cruelty Free
Eco Friendly
Fair Trade
Sustainable Farming
Tetrapak
Upcycled
Wild Caught
Women Owned

Place of Origin

Made in Alberta
Made in Canada
Made in Ontario
Made in Mexico
Made in Nova Scotia
Made in Ontario
Made in Quebec
Made in The Territories
Made in USA
Product of Canada

FDA

12 Yr. Partnership

Regulatory Monitoring

220 Active Users

USDA

8 Yr. Partnership

Globally Recognized as
The Academic Gold Standard

#1 API on data.gov

Active discussion with Health Canada and other agencies

Trusted by Leading CA Retailers

Credentials & Certification

Licensed, registered dietitians, chemists, food technologists, and formulation experts

Experience & Skill

Diverse competency in regulatory, public health, government, and laboratory settings

Industry Expertise

Proficiency in industry trends and topics of interest to clients and partners' businesses

Data Mastery

Stewards of building and maintaining Label Insight data taxonomies and attribution

NPI Canada Launch Attribute Packages available in Discover – Food and Beverage

Canada packages showcase top attributes and unlock future expansion opportunities

The industry's *deepest* and *broadest* attribute solution

350+
Food and Beverage characteristics across the Canada market

Allergens and Intolerances
Dairy
Egg
Fish
Gluten
Lactose
Milk
Mustard
Peanut
Sesame
Shellfish
And more...

Clean Label
All Natural Ingredients
All Natural
Antibiotics
GMO Presence
High Fructose Corn Syrup
Hormones
MSG
Natural Colours
Natural Flavours
Natural Positioning
And more...

Diets & Lifestyle
Halal
Keto
Kosher
Low Glycemic
Mediterranean
Paleo
Pescatarian
Plant Based
Raw
Source of Plant Protein
And more...

Health & Need States
Allergy Relief
Anxiety Support
Appetite Control
Arthritis Support
Bone Health
Brain Health
Cardiovascular Health
Cellular Function Support
Digestive Health
Estrogen Support
And more...

Ingredients
Algae
All Nootropic Ingredients
Allulose
Almond Protein
Aloe Extracts
Ancient Grains
Antioxidants
Apple
Avocado Oil
Berry
And more...

Natural & Organic
Artificial Colours
Artificial Flavours
Artificial Ingredients
Artificial Sweeteners
Canada Organic
GMO Presence
Natural Positioning
Naturally Derived
Organic Positioning
Organic
And more...

Nutrition
100 Calories Or Less
Added Sugar Presence
Calorie Presence
Calories Per Serving Ranges
Carbohydrate Per Serving Ranges
Fat Presence
Fibre Per Serving Ranges
Fibre Presence

Place of Origin
Made In Alberta
Made In British Columbia
Made In Canada
Made In Manitoba
Made In Mexico
Made In New Brunswick
Made In Newfoundland
Made In Nova Scotia
Made In Ontario
Made In Prince Edward Island
And more...

ESG – Animal Welfare
Animal Welfare Approved
Best Aquaculture Practices
Cage Free
Humane Raised and Handled
Crate Free
Cruelty Free
Dolphin Safe
Farm Raised
Free Range
Global Animal Partnership
And more...

ESG – Environmental Sustainability
Anti-Pollution
Bamboo
Biobased
Biodiversity
Carbon Footprint
Carbon Zero
Compostable
Deforestation
Eco Friendly
Energy Efficiency
And more...

ESG – Farming Insights
Biodynamic
EU Organic Farming
Family Farmed
Farm Raised
Farmed Seafood
Greenhouse Grown
Regenerative Agriculture
Soil Association
Sustainable Farming

ESG – Social Responsibility
B Corporation
Bipoc Owned
Black Owned
Cradle To Cradle
Ethical
Fair Trade
Fair Wages
LGBTQ+ Owned
Minority Owned
Responsibly Sourced
And more...

ESG – Sustainable Packaging
Biodegradable
BPA
Curbside Recycle
Drop Off Recycle
Eco Friendly Packaging
Less Packaging
Plastic Free
Recyclable
Refillable
Reusable Packaging
And more...

NPI Canada Launch Attribute Packages available in Discover – Beauty & Personal Care

Canada packages showcase top attributes and unlock future expansion opportunities

The industry's *deepest* and *broadest* attribute solution

350+
Beauty and Personal Care characteristics across the Canada market

Allergens and Intolerances
Dairy
Egg
Fish
Gluten
Lactose
Milk
Mustard
Peanut
Sesame
Shellfish
And more…

Beauty Benefits
Advanced Formula
Antibacterial Agents
Breathable
Clinically Tested
Concentrated Formula
Daily Use
Dark Spots
Dermatologist Tested
Detoxifying
Evening
And more…

Beauty Ingredients
Adaptogens
Aloe Extracts
Alpha Hydroxy Acid AHA
Aluminum
Amino Acids
Antioxidants
Apple
Arnica
Avocado Oil
Ayurvedic
And more…

Clean Beauty
Alcohol Content
Ammonia
Artificial Fragrance
BHA
BHT
Cruelty Free
Diethanolamine
Formaldehyde
Gluten
Hand Made
And more…

Clean Label
All Natural Ingredients
All Natural
Antibiotics
GMO Presence
High Fructose Corn Syrup
Hormones
MSG
Natural Colours
Natural Flavours
Natural Positioning
And more…

Health & Need States
Allergy Relief
Anxiety Support
Appetite Control
Arthritis Support
Bone Health
Brain Health
Cardiovascular Health
Cellular Function Support
Digestive Health
Estrogen Support
And more…

Natural & Organic
Artificial Colours
Artificial Flavours
Artificial Ingredients
Artificial Sweeteners
Canada Organic
GMO Presence
Natural Positioning
Naturally Derived
Organic Positioning
Organic
And more…

Place of Origin
Made In Alberta
Made In British Columbia
Made In Canada
Made In Manitoba
Made In Mexico
Made In New Brunswick
Made In Newfoundland
Made In Nova Scotia
Made In Ontario
Made In Prince Edward Island
And more…

ESG – Animal Welfare
Animal Welfare Approved
Best Aquaculture Practices
Cage Free
Humane Raised and Handled
Crate Free
Cruelty Free
Dolphin Safe
Farm Raised
Free Range
Global Animal Partnership
And more…

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Anti-Pollution
Bamboo
Biobased
Biodiversity
Carbon Footprint
Carbon Zero
Compostable
Deforestation
Eco Friendly
Energy Efficiency
And more…

ESG – Farming Insights
Biodynamic
EU Organic Farming
Family Farmed
Farm Raised
Farmed Seafood
Greenhouse Grown
Regenerative Agriculture
Soil Association
Sustainable Farming

ESG – Social Responsibility
B Corporation
Bipoc Owned
Black Owned
Cradle To Cradle
Ethical
Fair Trade
Fair Wages
LGBTQ+ Owned
Minority Owned
Responsibly Sourced
And more…

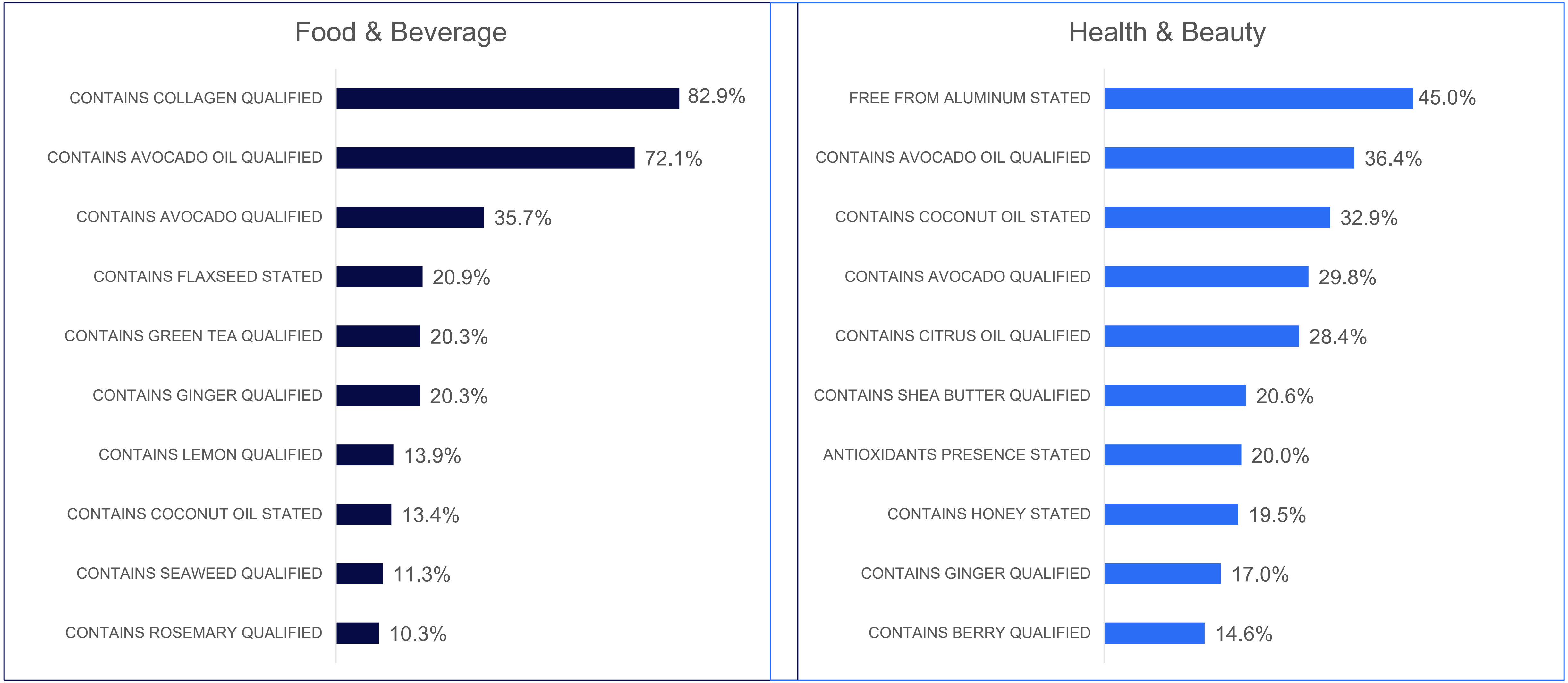
ESG – Sustainable Packaging
Biodegradable
BPA
Curbside Recycle
Drop Off Recycle
Eco Friendly Packaging
Less Packaging
Plastic Free
Recyclable
Refillable
Reusable Packaging
And more…

Top Health & Wellness Trends in Canada

Examples of what is emerging

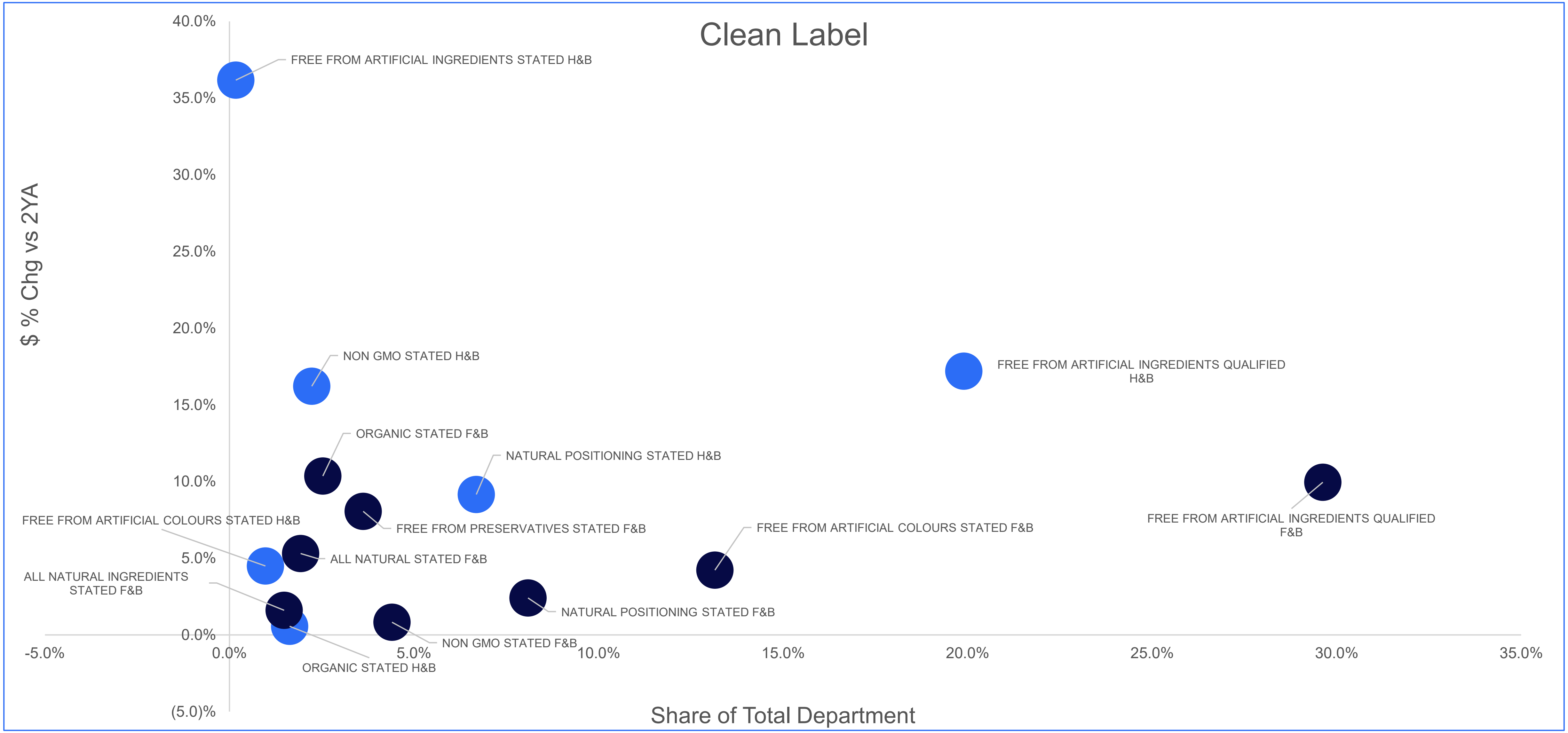
NIQ can help identify growth through ingredient trends across the store, like Avocado Oil

Growing Ingredients - % Chg vs 2YA



Source: NielsenIQ Product Insight, National incl. NFLD GB+DR+MM, L52W PE June 7th 2025

Many Clean Label “Free From” Products outpacing the broader market growth



Source: NielsenIQ Product Insight, National incl. NFLD GB+DR+MM, L52W PE June 7th 2025

Case Studies: Top wellness attributes are overperforming

What is driving this change?

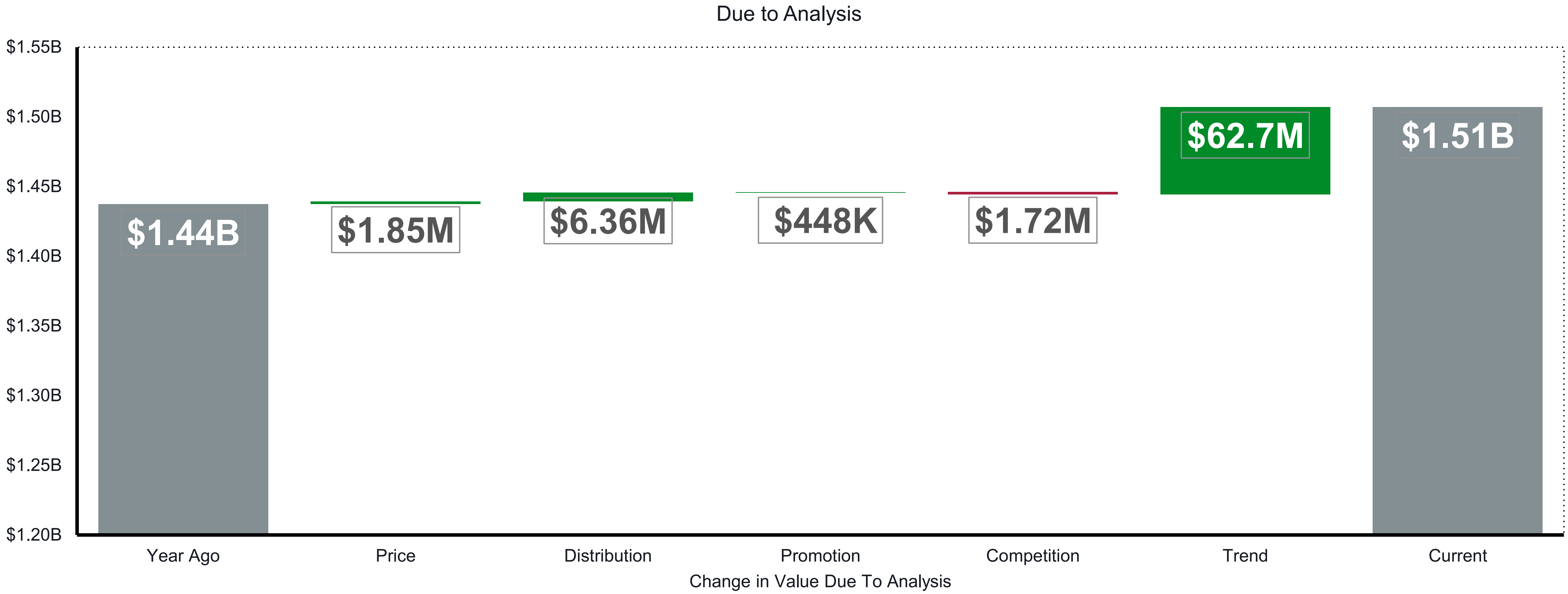
Total GB+DR+MM			
	$ (M)	$ % Chg YA	$ % Chg 2YA
TOTAL TRACKED SALES	123,867	3.0%	6.4%
TOTAL GROCERY	56,222	3.5%	8.2%
ORGANIC POSITIONING STATED (GROCERY)*	1,517	4.9%	9.4%
HEALTH AND BEAUTY AIDS	16,868	3.0%	5.8%
FREE FROM PARABENS STATED (HABA)*	1,535	3.8%	23.2%
CONTAINS PARABENS QUALIFIED (HABA)*	434	(4.8)%	(8.1)%

Source: NielsenIQ Retail Measurement Services (leveraging NIQ Product Insights), National GB+DR+MM, L52W ending 06/07/25
*Based on product claims over a closed group of categories (food/beverage, or personal care)

NIQ

Organic-Positioned Products winning on the strength of consumer resonance

NIQ Business Drivers outlines the multiple drivers of growth, particularly “Trend” indicating strong consumer resonance of these items



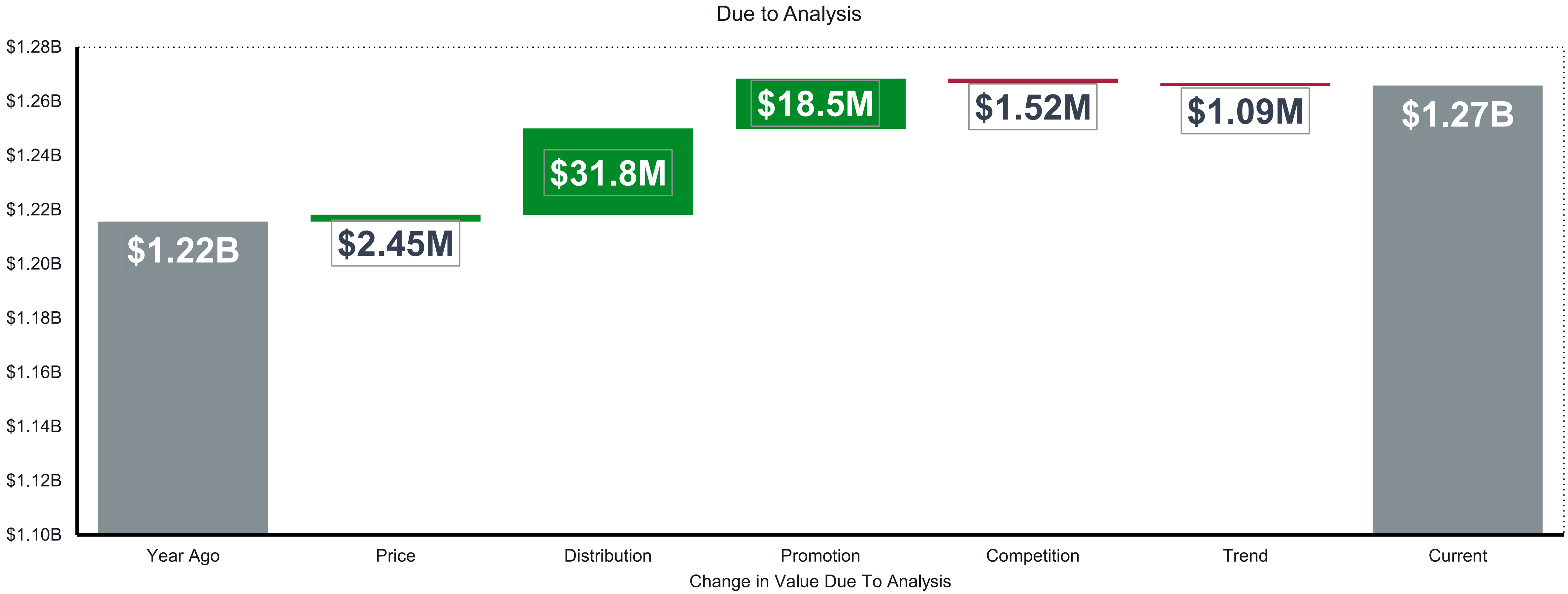
Source: NielsenIQ Retail Measurement Services in Business Drivers (leveraging NIQ Product Insights), National GB+DR+MM, L52W ending 06/07/25

*Based on product claims over a closed group of categories (food/beverage, or personal care)

NIQ

Paraben-Free Products growing on the strength of distribution and promotions

Other factors are effectively flat suggesting that this may have become a “minimum entry point” in personal care

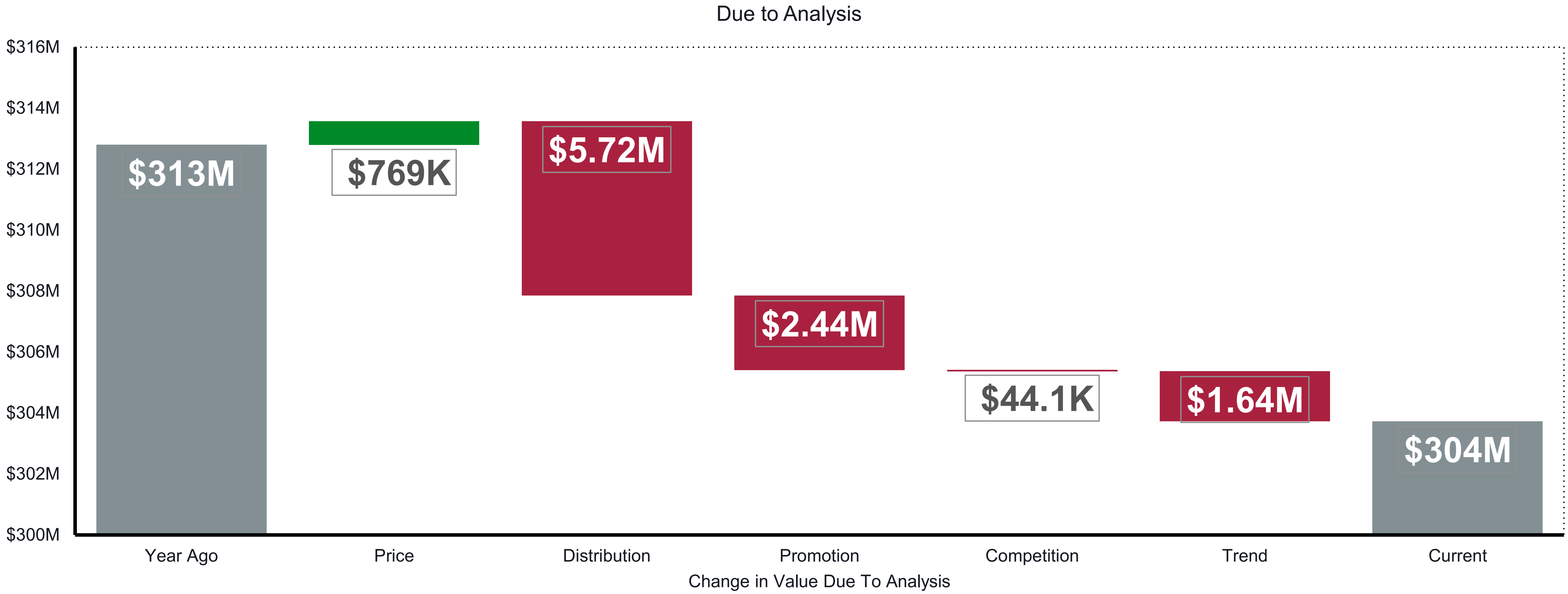


Source: NielsenIQ Retail Measurement Services in Business Drivers (leveraging NIQ Product Insights), National GB+DR+MM, L52W ending 06/07/25

*Based on product claims over a closed group of categories (food/beverage, or personal care)

Paraben-Containing Products in Personal Care losing space, promotions, and consumer resonance

There is clearly a shift away from paraben-containing products, and lower consumer resonance suggests it may shift further



Source: NielsenIQ Retail Measurement Services in Business Drivers (leveraging NIQ Product Insights), National GB+DR+MM, L52W ending 06/07/25

*Based on product claims over a closed group of categories (food/beverage, or personal care)

Challenges and Opportunities in Sustainability

Case Studies: Sustainability attributes show mixed results

What is driving this change?

	Total GB+DR+MM		
	$ (M)	$ % Chg YA	$ % Chg 2YA
TOTAL TRACKED SALES	123,867	3.1%	6.2%
TOTAL GROCERY	56,391	3.6%	7.9%
NON GMO STATED	2,441	(0.8)%	(0.2)%
SUSTAINABILITY CERTIFIED STATED	2,299	(5.1)%	(6.3)%
FAIR TRADE STATED	364	3.1%	15.1%
SUSTAINABLE FARMING STATED	109	(2.7)%	(2.5)%

Source: NielsenIQ Retail Measurement Services (leveraging NIQ Product Insights), National GB+DR+MM, L52W ending 07/05/25
*Based on product claims over a closed group of grocery/centre of store categories (food/beverage)

NIQ

According to **NIQ Business Drivers Analytics…**

Up to 100%

Of recent losses driven by **distribution declines** of these more sustainable products*

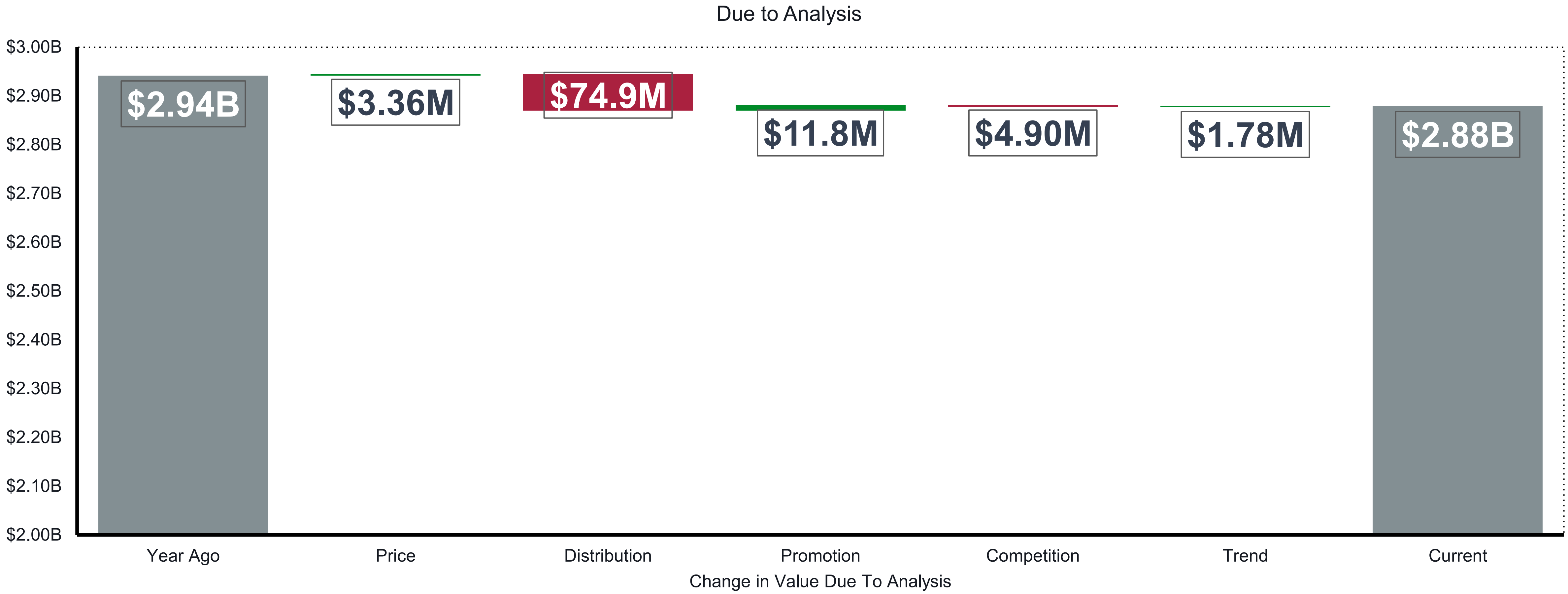
Up to 100%

Of recent losses driven by **promotion declines** of these more sustainable products*

Source: NielsenIQ Canada, NIQ Product Insights Attributes (BCorp, Non-GMO, Fair Trade, Sustainability Cert Stated, Organic Positioning) across Closed Group of Food/Bev/Personal Care Categories; L52wks PE May 24th, 2025 vs YA

Non-GMO Products struggling with distribution losses, but still has modest consumer resonance

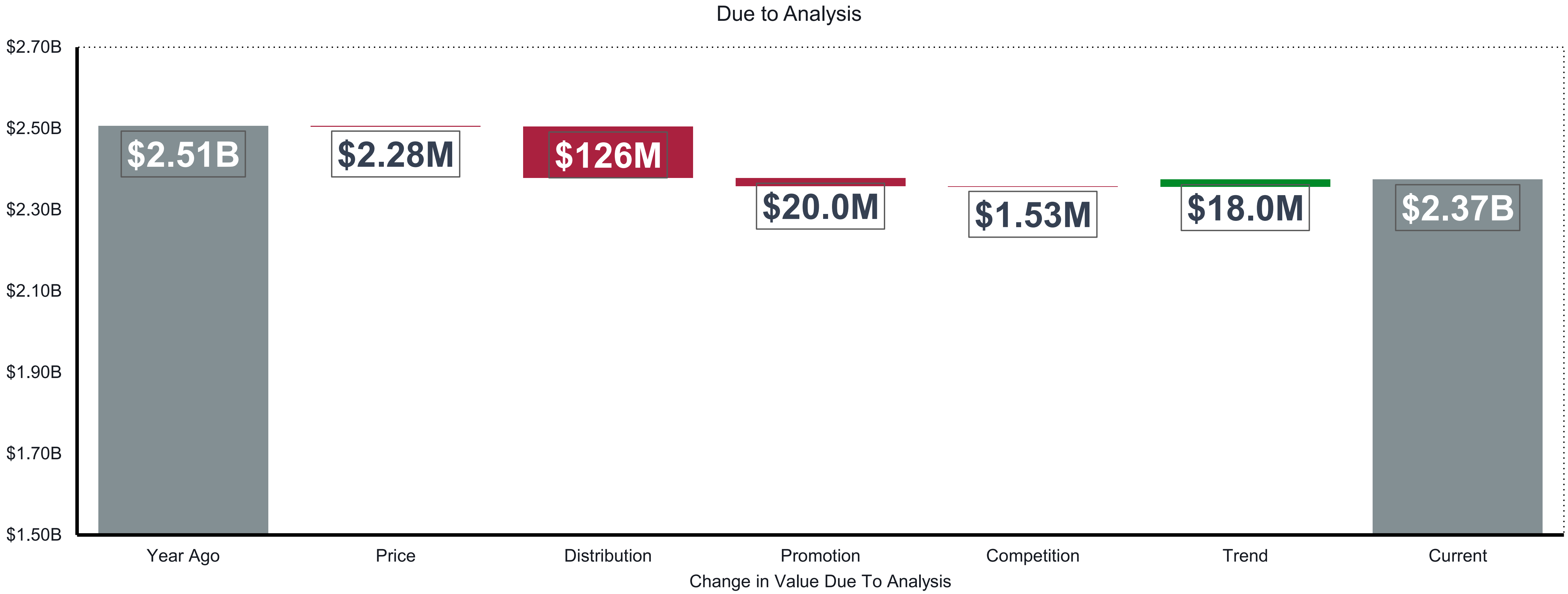
NIQ Business Drivers outlines the multiple drivers of growth, particularly “Trend” indicating some consumer resonance of these items



Dataset: NielsenIQ Retail Measurement | CA - NDH MULTIPURPOSE - CROSS CATEGORY - Business Drivers | NDH MULTIPURPOSE BD, L52wks PE July 5th, 2025

Certified Sustainable Products struggling with distribution but still resonating with consumers

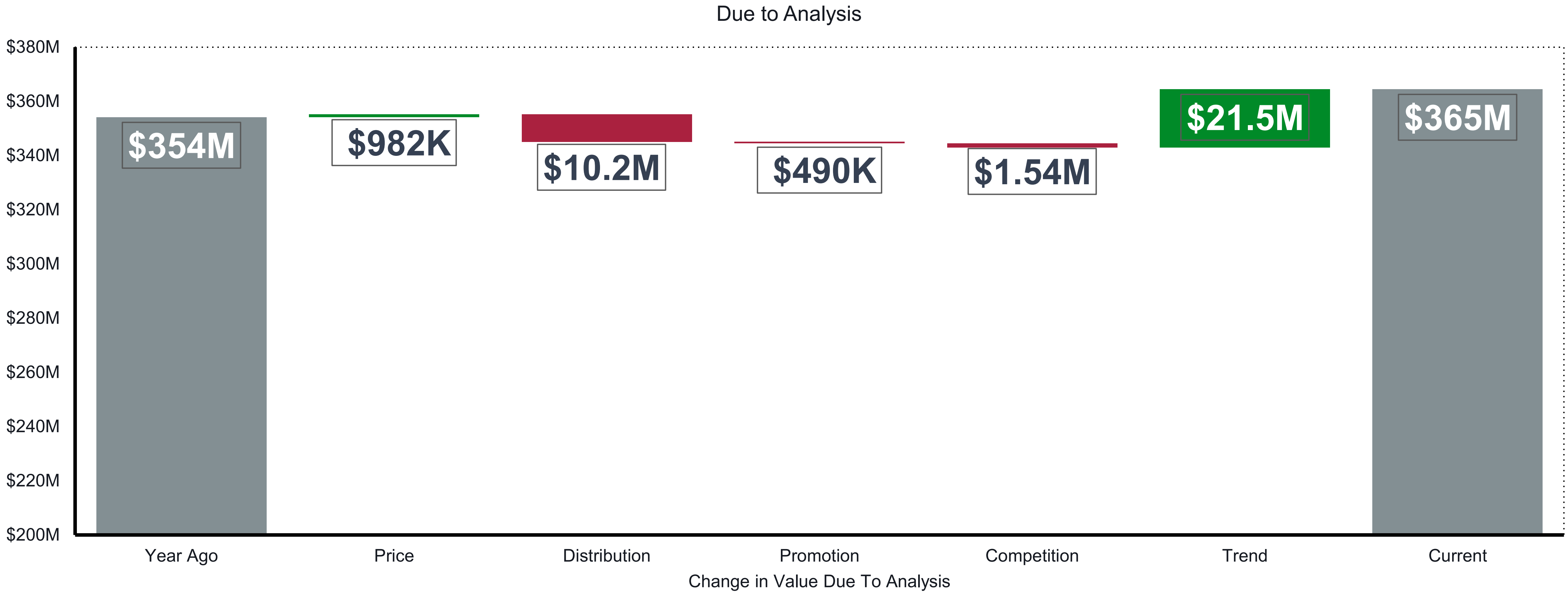
NIQ Business Drivers outlines the multiple drivers of growth, particularly “Trend” indicating strong consumer resonance of these items



Dataset: NielsenIQ Retail Measurement | CA - NDH MULTIPURPOSE - CROSS CATEGORY - Business Drivers | NDH MULTIPURPOSE BD, L52wks PE June 7th, 2025

Fair Trade Products winning on the strength of consumer resonance, despite distribution losses

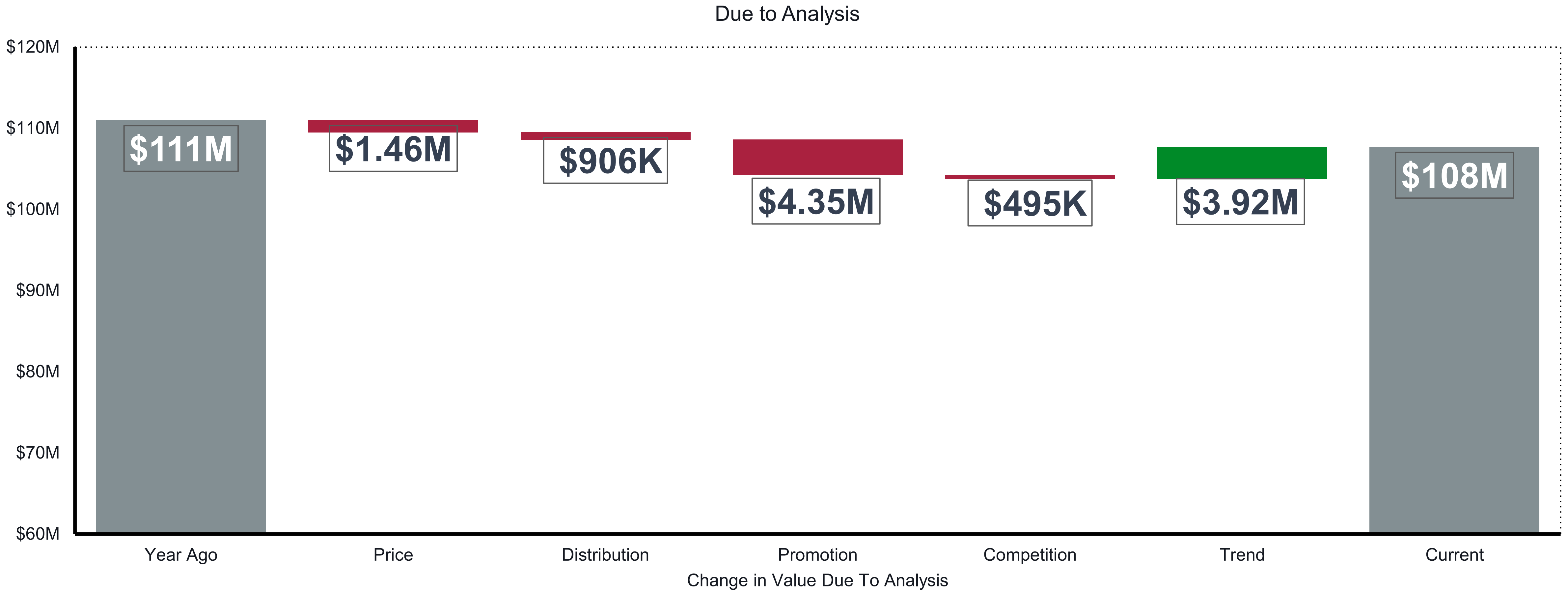
NIQ Business Drivers outlines the multiple drivers of growth, particularly “Trend” indicating strong consumer resonance of these items



Dataset: NielsenIQ Retail Measurement | CA - NDH MULTIPURPOSE - CROSS CATEGORY - Business Drivers | NDH MULTIPURPOSE BD, L52wks PE July 5th, 2025

Sustainable Farming Products struggling with promotion losses, but still has strong consumer resonance

NIQ Business Drivers outlines the multiple drivers of growth, particularly “Trend” indicating strong consumer resonance of these items



Dataset: NielsenIQ Retail Measurement | CA - NDH MULTIPURPOSE - CROSS CATEGORY - Business Drivers | NDH MULTIPURPOSE BD, L52wks PE July 5th, 2025

The Risk of No-Change

US Case Study on Indulgence Categories

Snacking brings joy to consumers

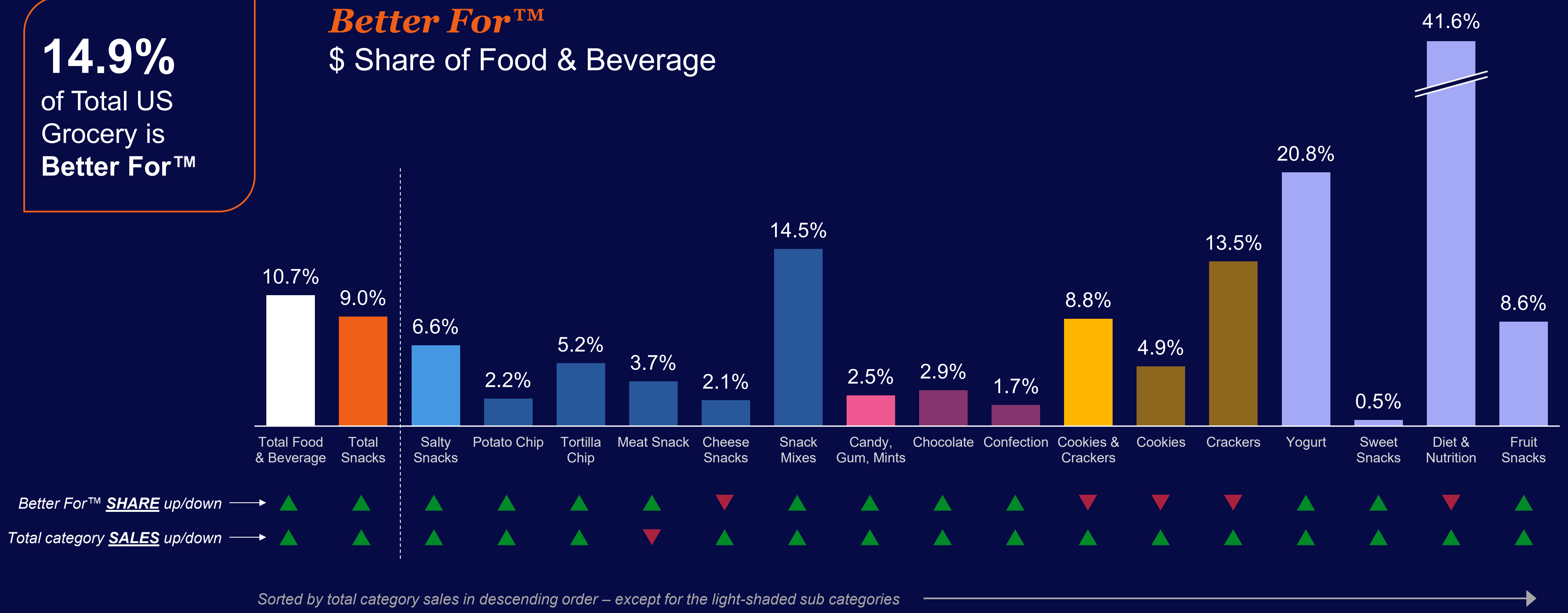
The Four Main Emotional Benefits Consumers Derive From Snacks

Pleasure and joy	Indulge in something I love	Comfort in a stress-filled world	To reward myself
52%	40%	40%	38%
▲ 5 pts vs YA	▲ 3 pts vs YA	▲ 2 pts vs YA	▲ 3 pts vs YA

Source: NielsenIQ Snackonomics Survey 2023, 2024

While US snacking is generally growing, most snacking categories are *under-indexing in Better For™*, even if it's generally growing share

14.9%
of Total US Grocery is
Better For™



Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC+Conv; Total Food & Beverage vs Better For segment™; Better For™ $ share of Food & Beverage; Latest 52 weeks ending June 15, 2024

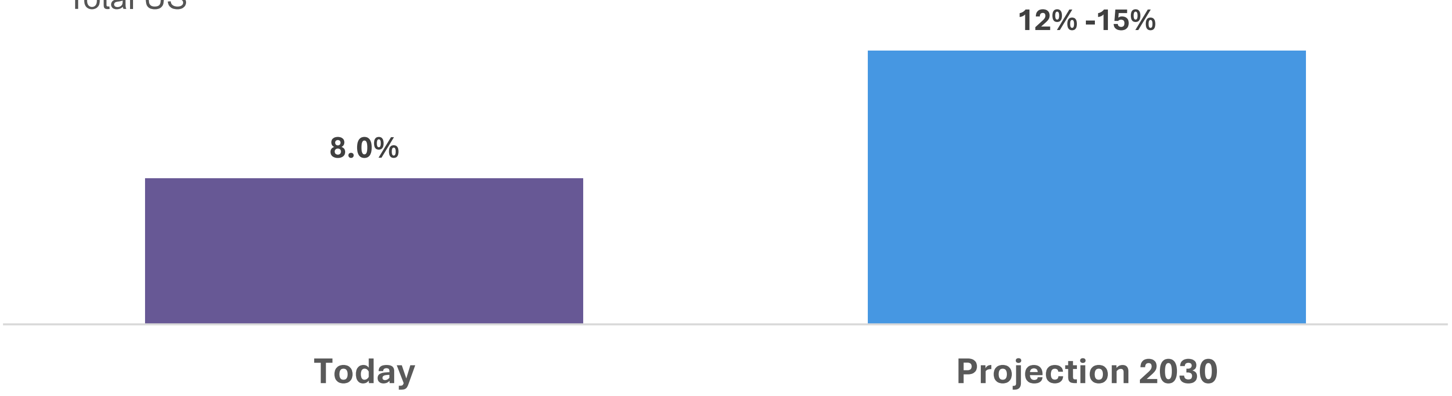
US GLP-1 usage has the potential to continue acceleration

12% of US HHs currently on GLP-1 (14.6M households)

By 2030, the percent of HHs could **double**

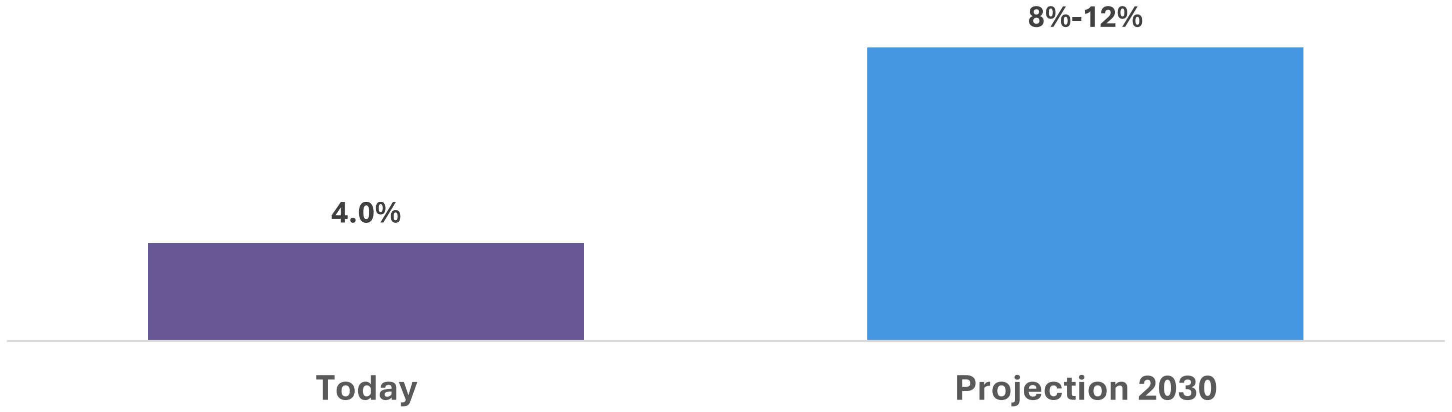
Projected Penetration Growth of Consumers using GLP-1s for **Diabetes**

Total US



Projected Penetration Growth of Consumers using GLP-1s for **Weight Loss**

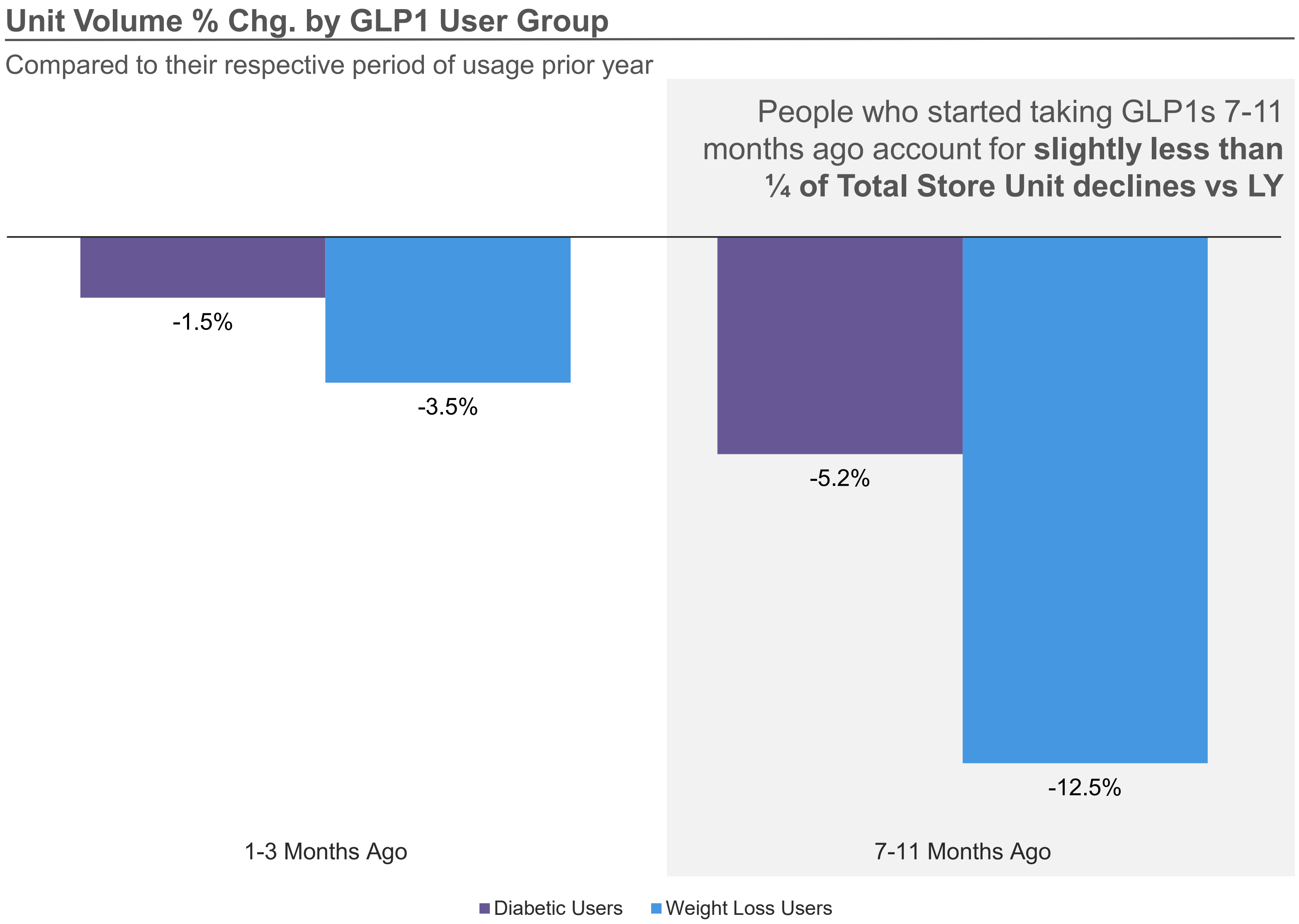
Total US



Source: NielsenIQ, Homescan GLP-1 Panel Survey; Total US; Total Outlets; All Departments, % of Buying Households, Latest 52 weeks ending January 2024

After 7-11 months, users have fully integrated the appetite-suppressing effects and experience a sustained decrease in food consumption and related expenses.

US Sales Trends among GLP-1 Users

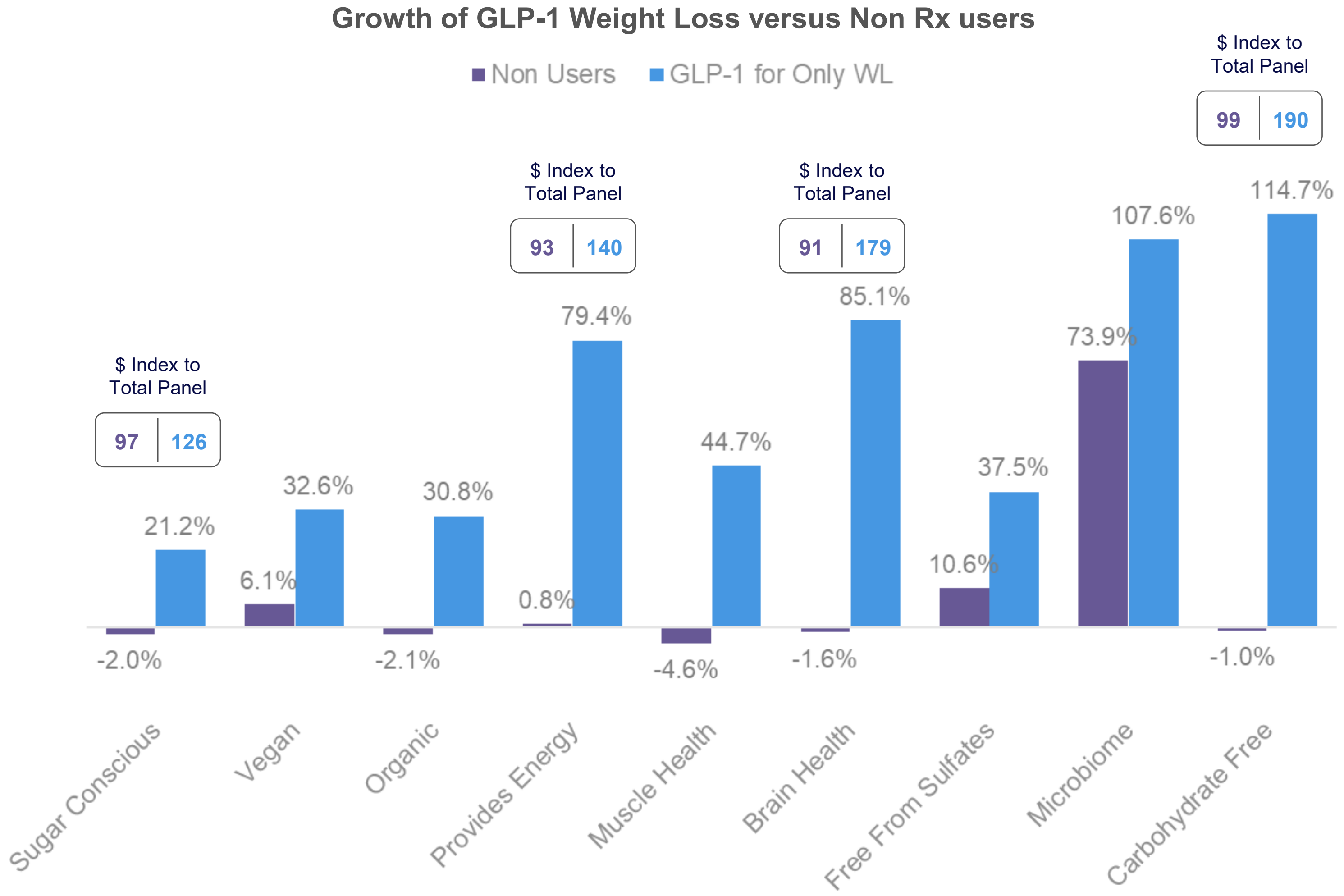


Source: NielsenIQ, Homescan GLP-1 Panel Survey; Total US; Total Outlets; All Departments, Unit % Change, Latest 52 weeks ending January 2024

Disclaimer: The slide's data is panel data and should be used directionally.

US Consumer Insights: GLP-1 weight loss shoppers are increasingly intentional

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

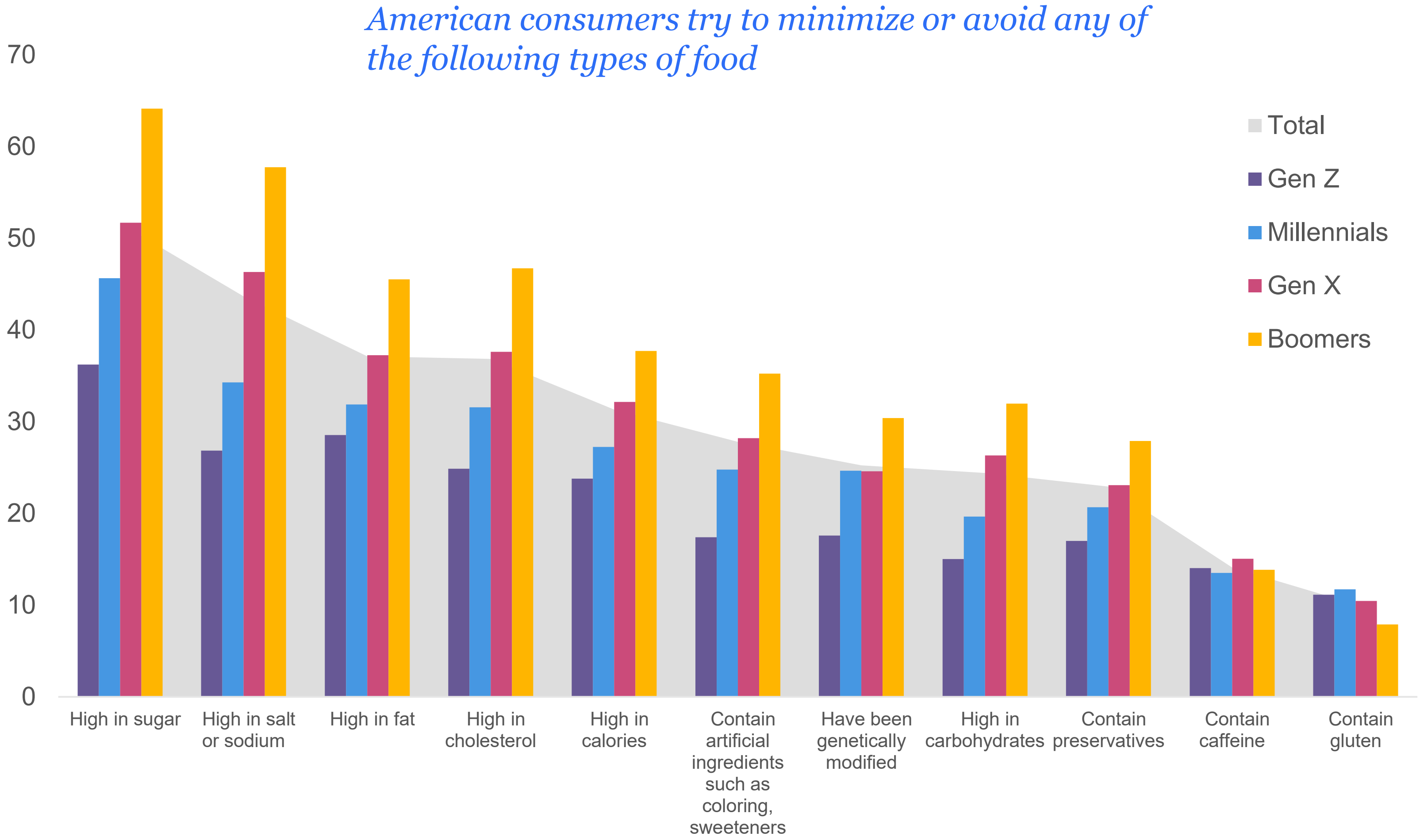


Some attributes GLP-1 weight loss users showing stronger growth

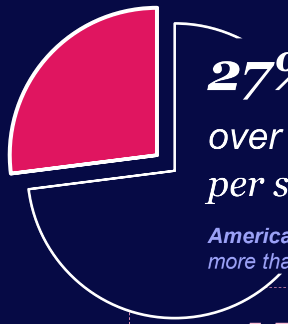
- *Immune health*
- *Joint health*
- *Muscle health*
- *Osteoporosis*
- *Bone Health*
- *Digestive Health*
- *Hair, Skin Nail support*
- *Clinically tested*
- *Free from aluminum*
- *Free from antibiotics, hormones*
- *Free from high fructose corn syrup*
- *Free from artificial colors, flavors, fragrances,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

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

Sugar and salt are the top ingredients that Americans watch



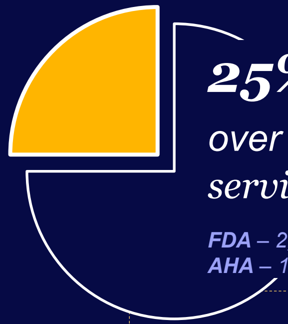
NIQ Consumer Life US 2024 F29
Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage; $ Share of Food & Beverage, $ % change vs year ago; 52 weeks ending November 30, 2024



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*

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

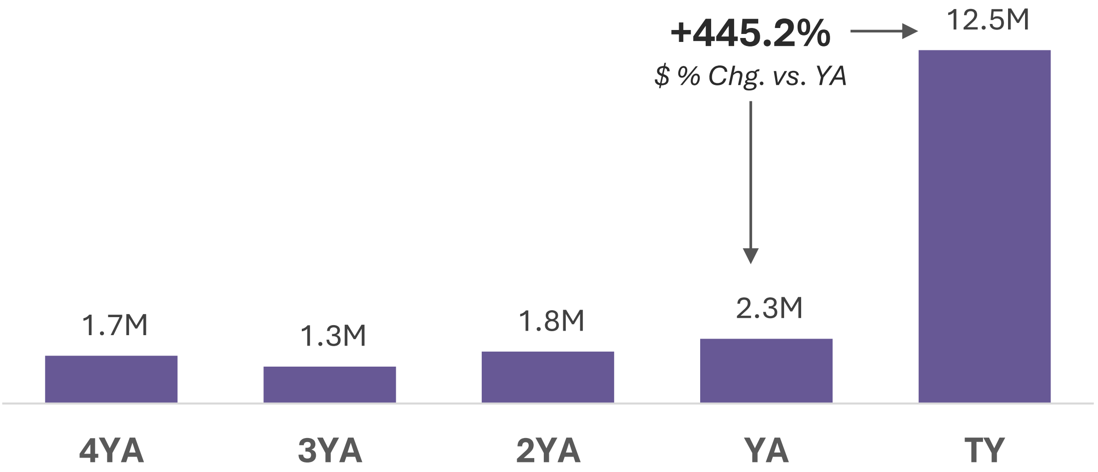
**Based on Food & Beverage products that include a Nutrition Facts Panel (NFP) label on package*

…and GLP-1's have alternatives

Supplement Berberine has been called 'Nature's Ozempic"

Berberine 5YR Dollar Sales

Total Store, xAOC



New Brands in Berberine ($ > $1,000 L52)

-	+1	+1	+2	+6

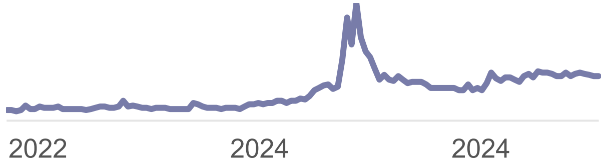
Berberine going viral on numerous platforms

#berberine
5.8K total posts

#berberine
23.3K total posts

berberine
450.0K monthly searches

Google Search Trends



Source: NielsenIQ Retail Measurement Services; Total US xAOC; Dollar Volume; Latest 52 weeks ending June 2024

Source: Search Data as of June 2024

Summary & Next Steps

Wellness is resilient – how will you capitalize?

What is happening & where do we focus next

1. Attitudes remain resilient amid other industry & consumer pressures

Pressure on consumers and industry is real, but our insights demonstrate that these wellness trends remain generally resilient amid these challenges

2. Topline performance doesn't tell the whole story

Understanding topline performance of particular health & wellness trends is critical, but going further to understand the "why" of the growth/declines is critical to understand what action to take. Precise data helps tease out the noise.

3. Find the trends that matter & focus on consumers who care

The comprehensive nature of our attribute insights allows retailers & brands the ability to look at critical trends within and across categories. Further, the ability to segment consumers by how much they care about these issues, then look at their actual purchases, is the next unlock for companies looking to drive growth into the future.

NIQ Product Insights (NPI) will expand in Canada & Beyond

- What is coming in the future?
  - **More consumer insights**
    - Added to our Homescan panel (and soon Omnishopper)
  - **More characteristics**
    - We already have 555+ characteristics in Food & Bev/Personal Care, but we will continue to have more added
      - Any recommendations you have are encouraged!
  - **More categories**
    - Beyond Food/Bev/Personal Care, we will soon be adding pet, supplements/OTC, and more
  - **More countries**
    - In addition to Canada and the US, UK/Western Europe has launched! More countries across the world will come in 2026 & 2027
      - We can access NPI insights from these other places through our Global Snapshots team

NIQ

Questions?

Get a copy of this deck for yourself!

Connect on LinkedIn:

Nick Gibson
Canada Lead,
NielsenIQ Product Insights

Coming *into view*