

NielsenIQ

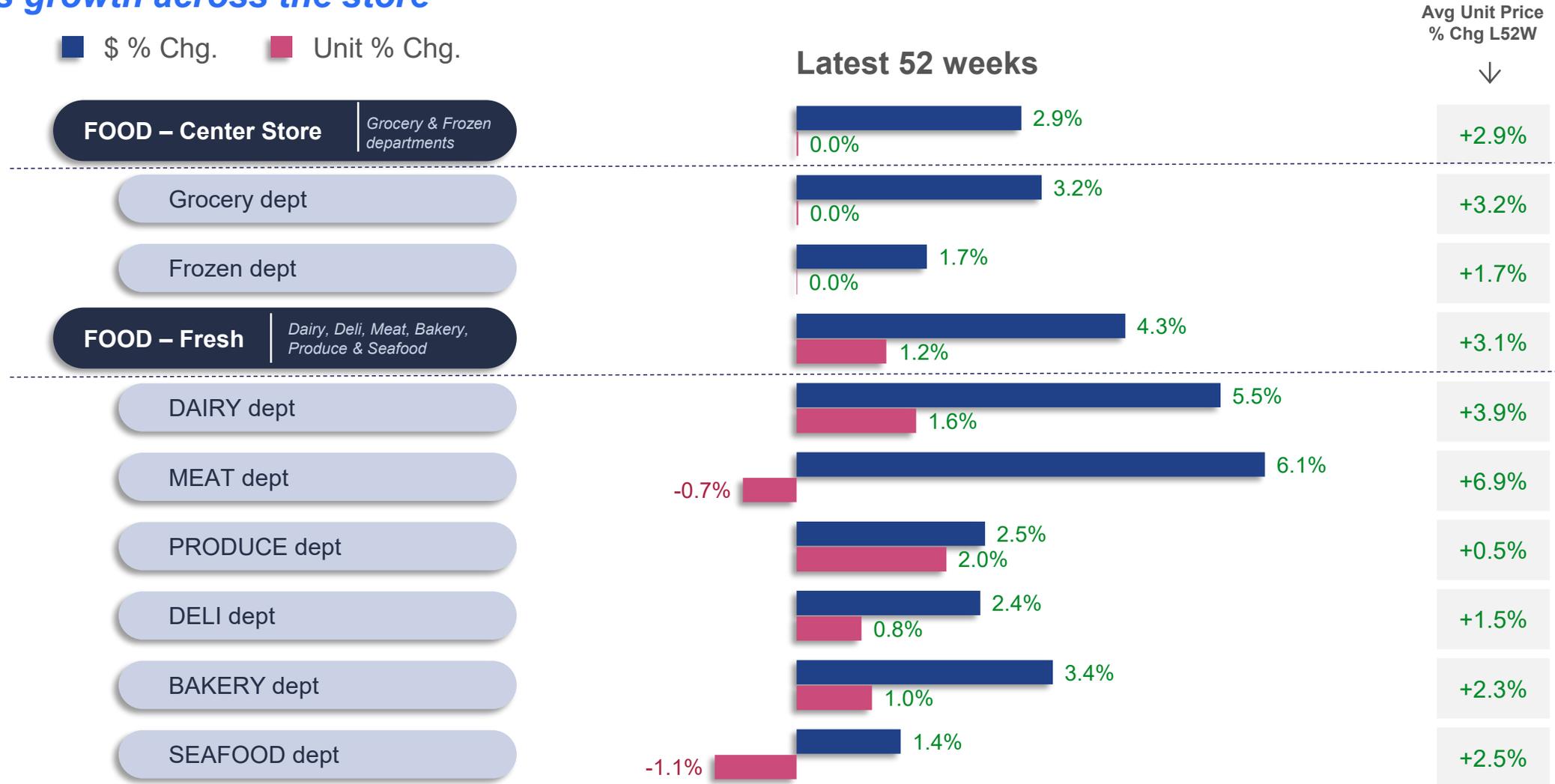
Consumer Insights

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Fresh growth is outpacing the rest of the store, with units being challenged in meat and seafood

Sales growth across the store

■ \$ % Chg. ■ Unit % Chg.



Source: NIQ, Retail Measurement Services, Full View Measurement, Total Full View + Costco, Periods Ending 12/27/2025, Food & Beverage departments, Dollar, Unit, and Avg Unit Price % change vs year ago

Consumers are more health-empowered than ever

They're increasingly paying attention to ingredients and nutrition

Watching: growing conversation on seed oils

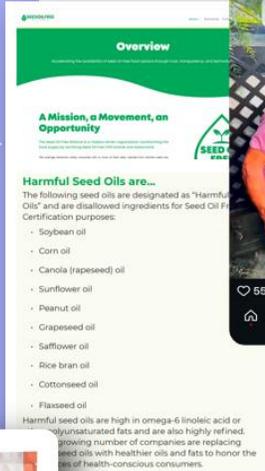
NIQ Product Insights:

Seed Oils ingredients

of Food & Beverage items

	xAOC + C-Stores	C-Stores
Soybean oil	46.4K	15K
Canola oil	33.7K	10.9K
Sunflower oil	26.6K	9.2K
Peanut oil	4.6K	1.4K
Safflower oil	4.0K	1.5K
Flaxseed oil	193	66

Lard sales **+18%**
Butter sales **+8%**



The top concern-related hashtags alongside canola by total views include **#inflammation** (3.3M total views) and **#autoimmunedisease** (122.8K total views)².

SPATE

+18%

\$ Growth vs YA from Health & Nutrition Products that are **Free From Seed Oils**

+16%

\$ Growth vs YA from Health & Nutrition Products that are **Clean Label**

Sources: NIQ Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total Us xAOC + Conv vs Total US Conv; Total Food & Beverage – Seed Oils, Number of UPCs selling; Lard and Butter sales (Total US xAOC), \$ % change vs YA; 52 weeks ending March 22, 2025. ²SPATE: US TikTok ending September 8, 2024; Health & Nutrition Product growth data Latest 52 weeks through w/e 07/12/25

Constantly shifting wellness priorities...

REMOVAL

How wellness borrowed the codes



ADDITION

How wellness blurred the codes



OPTIMIZATION

How wellness is integrating the codes



Wellness used to mean taking away, the era of “free from”, “fat free”, “low cal”, “sugar free”

Shifting toward adding value (+protein, + fiber, + adaptogens, + functional)

Prioritizing nutrient density, so that every bite, sip and moment counts toward cognitive health and quality of life

Wellness culture shifting...

The next wave of influence comes from personalized proof, not personality, demonstrated through trust and transparency

CERTIFIED AUTHORITY

How wellness borrowed the codes



Credibility demonstrated through organizations, certified advisors and government

SOCIAL PROOF

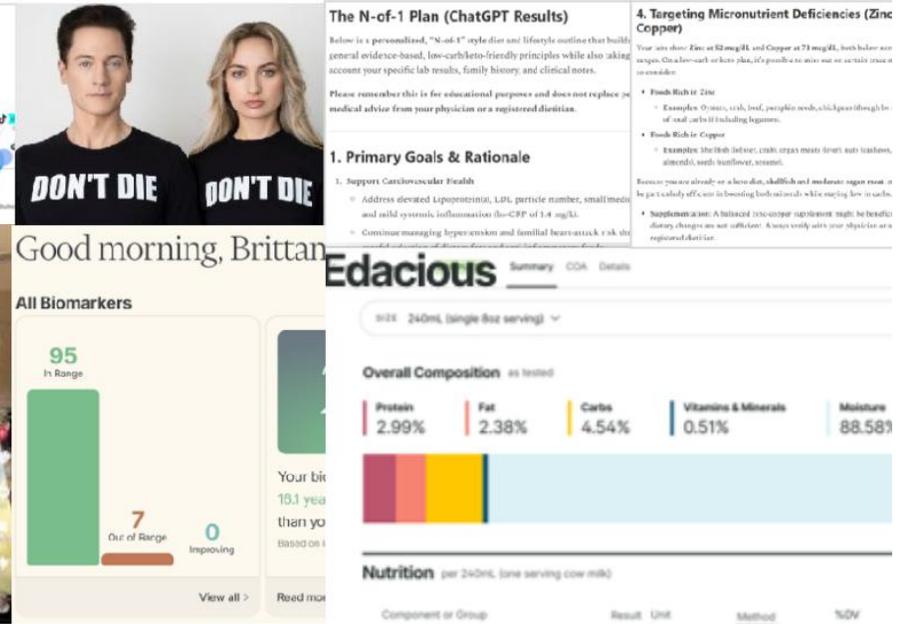
How wellness blurred the codes



Social media wellness becomes performance driven and identity-based

CURATED VALIDATION

How wellness is integrating the codes



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

Shoppers are paying attention and...

How Shoppers Check For *Artificial Ingredients*

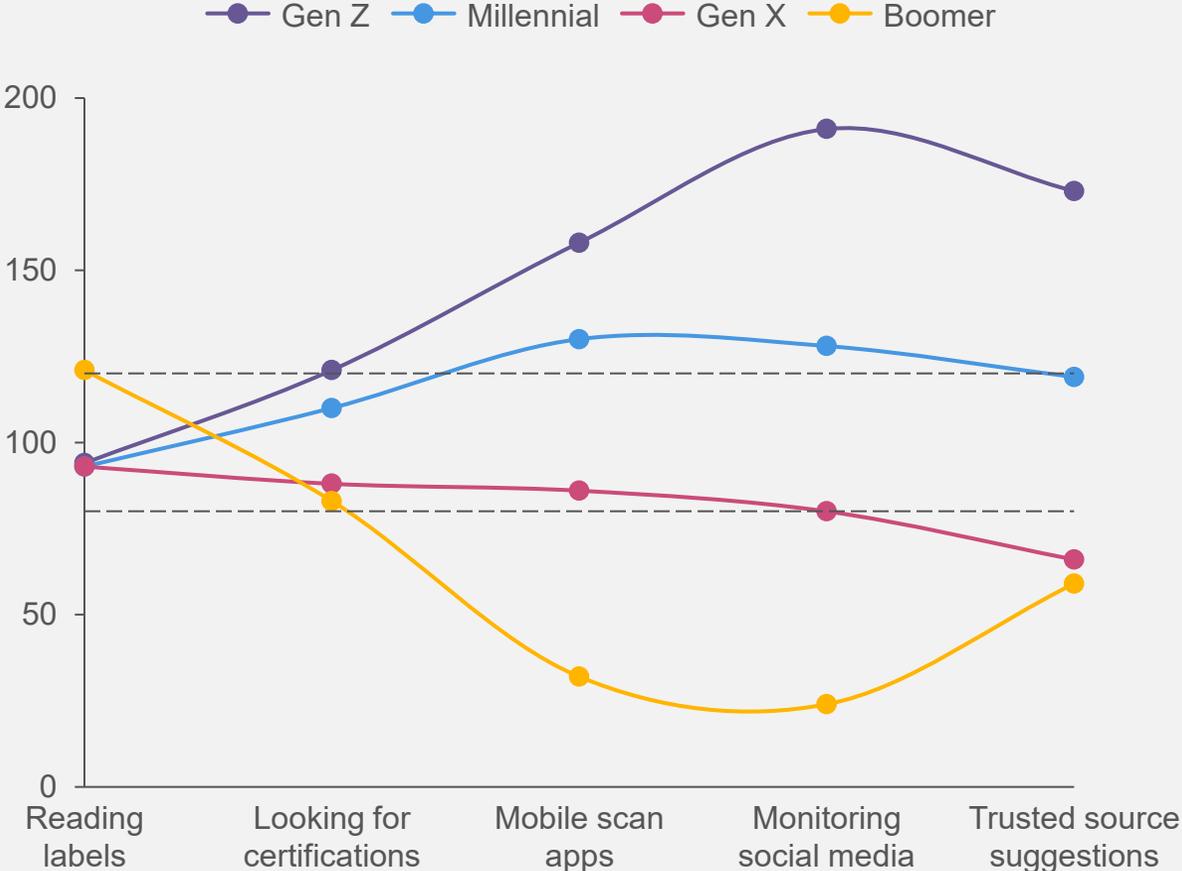


Source: NIQ, BASES Quick Question Omnibus Survey, May 2025, n=1,000
 Note: Index value ≥120 indicates above average significance, <80 indicates below average significance

...enlisting technology to help

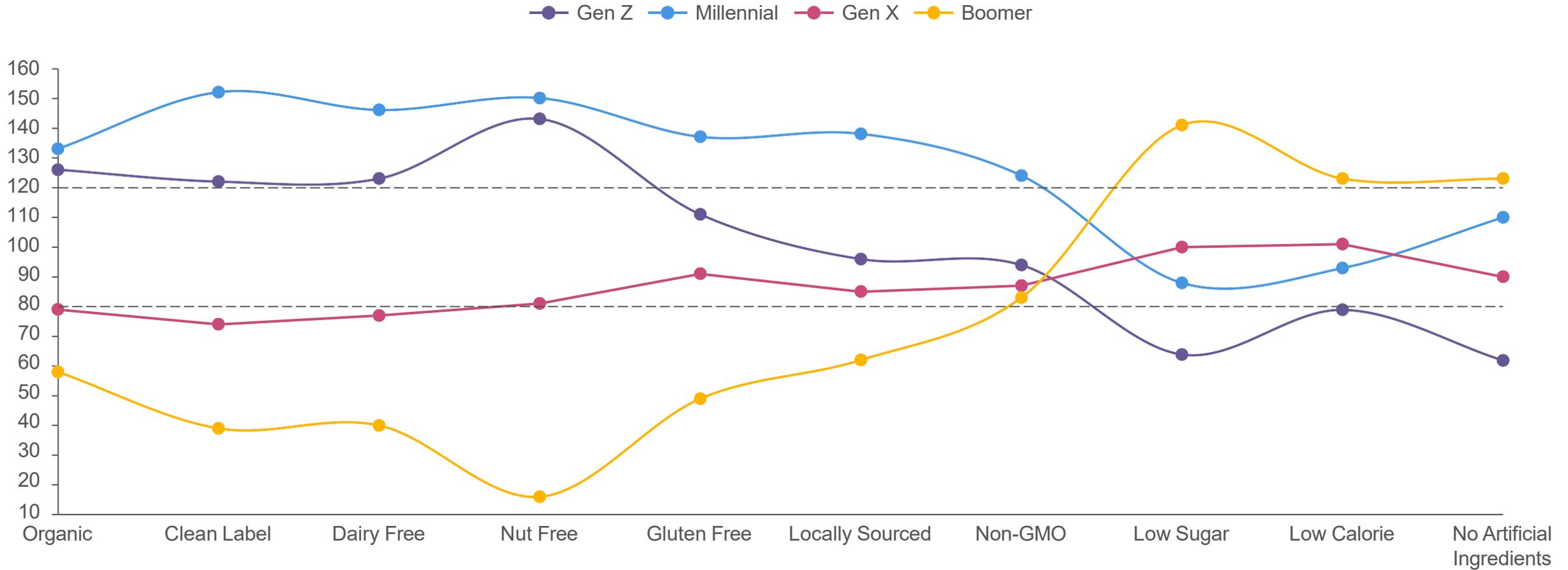
How Shoppers Check For *Artificial Ingredients* By Generation

(Index To Total Respondents)



...but what they are on the lookout for varies

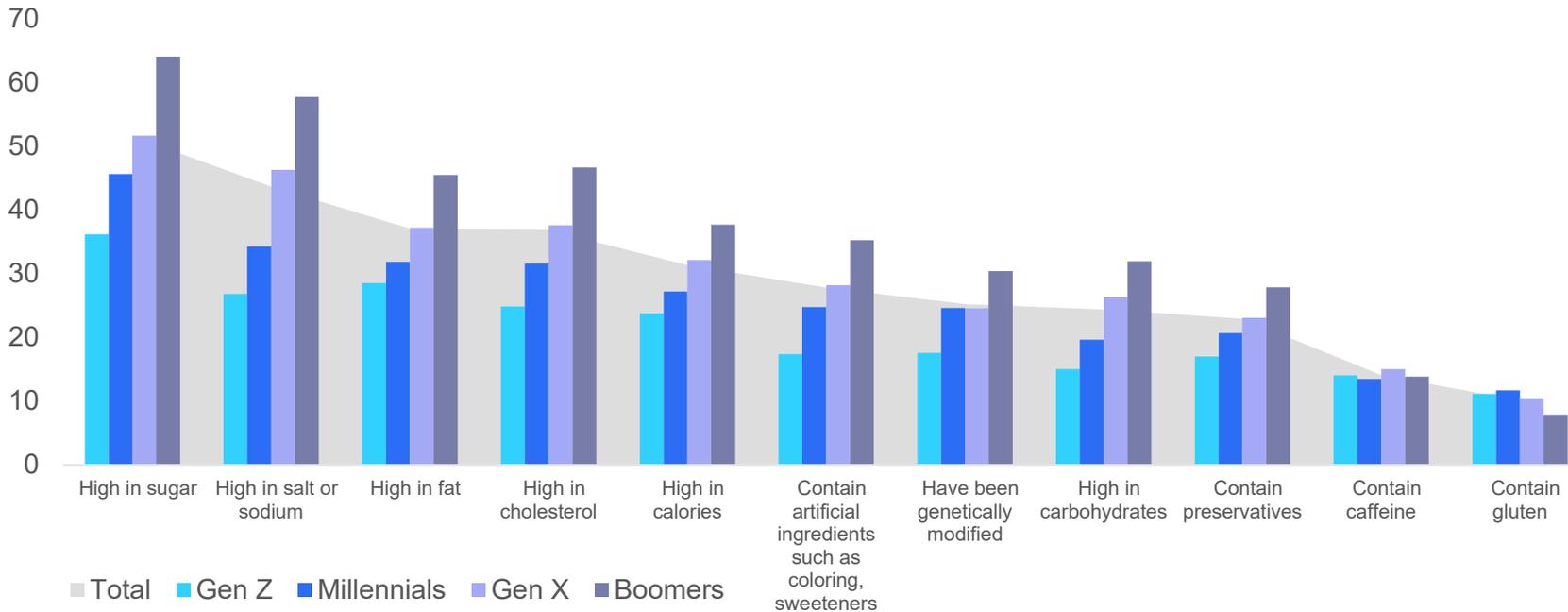
Important Characteristics When Choosing A Snack By Generation



Source: NIQ, BASES Quick Question Omnibus Survey, February 2025, n=1,003
 Note: Index value ≥120 indicates above average significance, <80 indicates below average significance

Sugar and salt are the top ingredients that Americans watch

American consumers try to minimize or avoid any of the following types of food



29% 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 **+5% vs YA**
Sugar Conscious **+4% vs YA**

23% 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 **+5% vs YA**
Sodium Conscious **+4%**

NIQ Consumer Life US 2024 F29

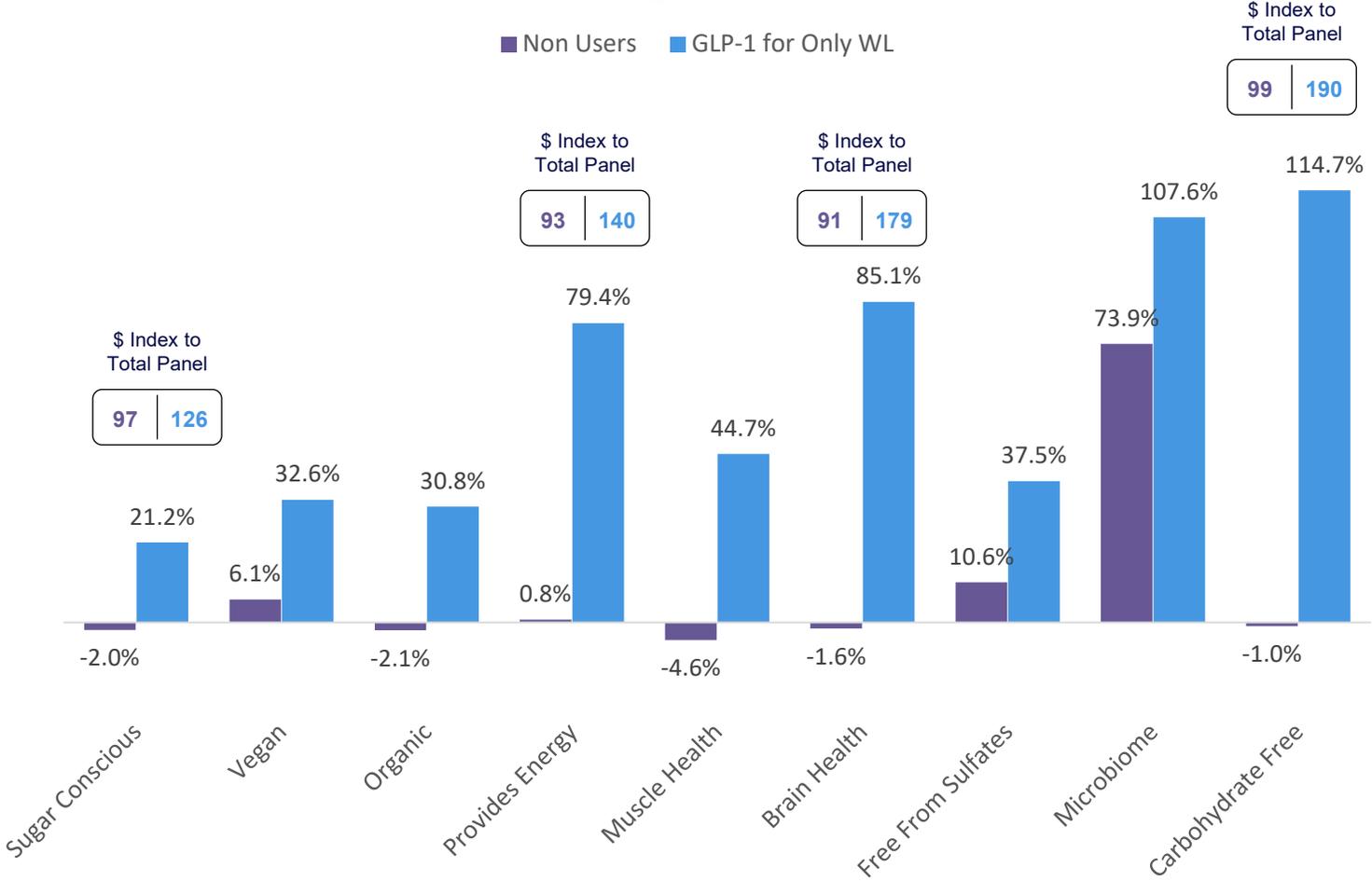
Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage; \$ Share of Food & Beverage, \$ % change vs year ago; 52 weeks ending November 30, 2024

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

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