NielsenIQ

Beyond the Scale: Tracking GLP-1s, Vitamins & the New Consumer Mindset

ecrm

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About today….we'll explore

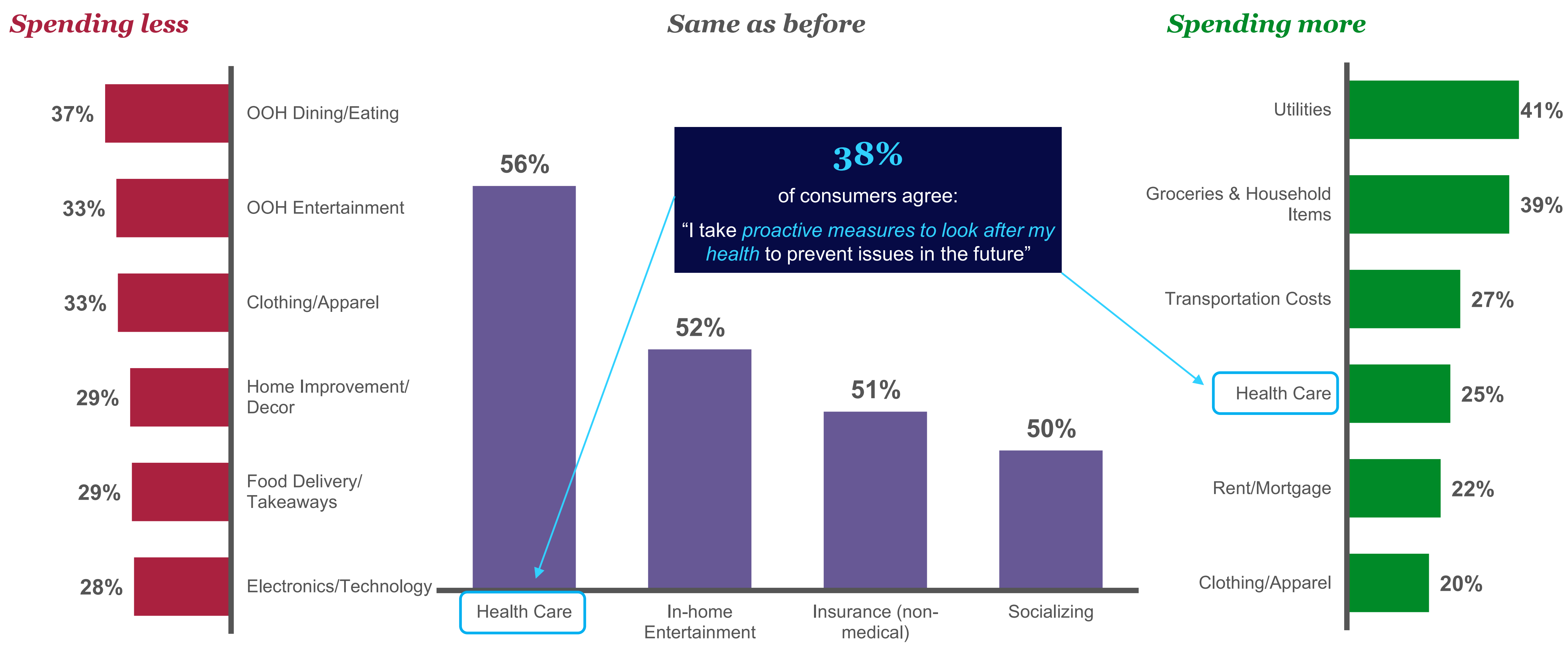
- ***What's driving consumer priorities in wellness***

- ***Exploration of omni-wellness shifts including***
  - *How social is influencing consumers in new ways*
  - *Convergence of food and supplementation*
  - *Ingredients of opportunity and ingredient scrutiny*

- ***Understanding how GLP-1s are shifting consumer behaviors***

2026 intentions indicate *cautious mindset with health as a priority*

Cautious consumers are prioritizing basic expenses rather than entertainment and luxuries.



Source: NIQ 2025 Consumer Outlook survey, US

Why Wellness Matters...

Canada & United States

40%	**Are ready to spend over $100 a month on their total wellness** (% agreeing strongly/ somewhat)
69%	**Agree that governments should regulate businesses to help them make healthier decisions** (% agreeing strongly/ somewhat)
65%	**"I am more likely to buy from companies that have a strong health and wellness focus across their entire product portfolio."** (% agreeing strongly/ somewhat)
59%	**Agree "aging well" is more important now than five years ago**
48%	**Say minimizing behaviors such as smoking, drinking, or sun exposure to protect their future health is more important to them now than five years ago**
25%	**Have a generally positive perception of anti-obesity medications (AOMs) or GLP-1s** (% saying very/ somewhat positive)
43%	**"Environmental health is more important to me now than five years ago."**
45%	**Are willing to pay up to 10% more for health and wellness products that are also ethical (e.g., fair trade, cruelty-free, or higher animal welfare) and/ or environmentally friendly**

Source: NIQ 2025 Global Health & Wellness Survey, Canada and the US

Vitamins, Minerals & Supplements

From skin to sleep to digestive health, supplements are reframed as lifestyle tools - taken not just for functional benefits but as an aspirational wellness ritual

44% of consumers plan to *take more vitamins or supplements* in the next 12 months

Value % Chg vs YA - US

Beauty Supplement
+22%

Mood Supplement
+26%

Menopause Supplement
+34%

Hydration Supplement
+54%

Source: NielsenIQ Health and Wellness Survey 2025 | Q. Thinking of your regular wellness or self-care routine, do you plan to do more or less of the following activities in the coming 12 months?

NielsenIQ

Omni-wellness: Convergence of food and supplementation

	Supplements	Food and Wellness	
Beauty			***Beauty + Wellness worth $160.8B***
Gut Health			***Digestive Health*** +9% Dollars +6.5% Units
Protein			***40g+ Protein per serving**** +30% Dollars +31% Units
Hydration			***Hydration Health (VMS)*** +21% Dollars +22% Units

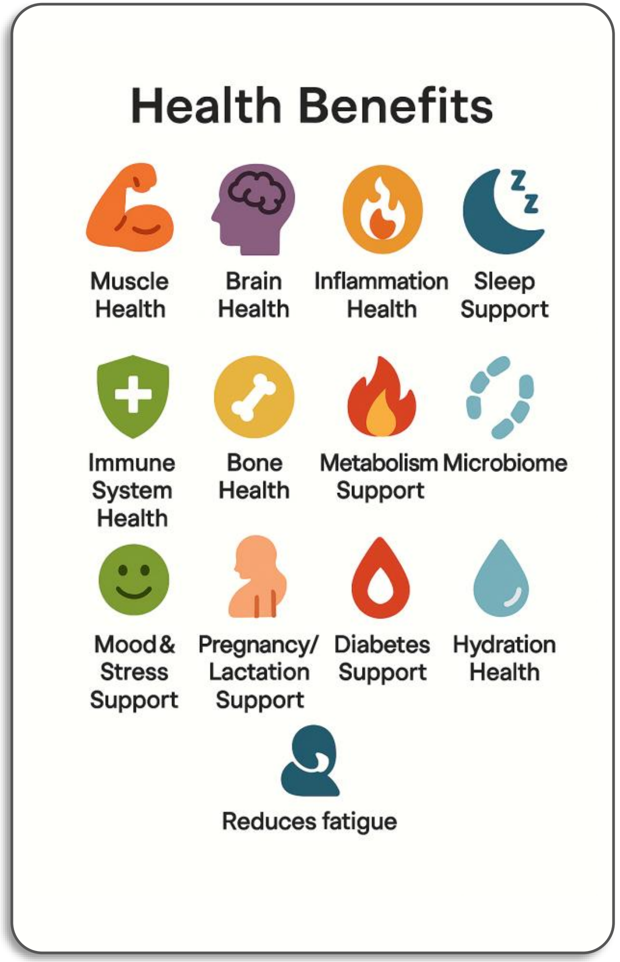
Source: NIQ Retail Measurement Services; Total US xAOC; Total Store; NielsenIQ Product Insights; Dollars & Units % Change vs year ago; 52 weeks ending September 6, 2025 | Beauty+ Wellness Omnishopper, 52 weeks ending April 19, 2025
*Food & Beverage trends

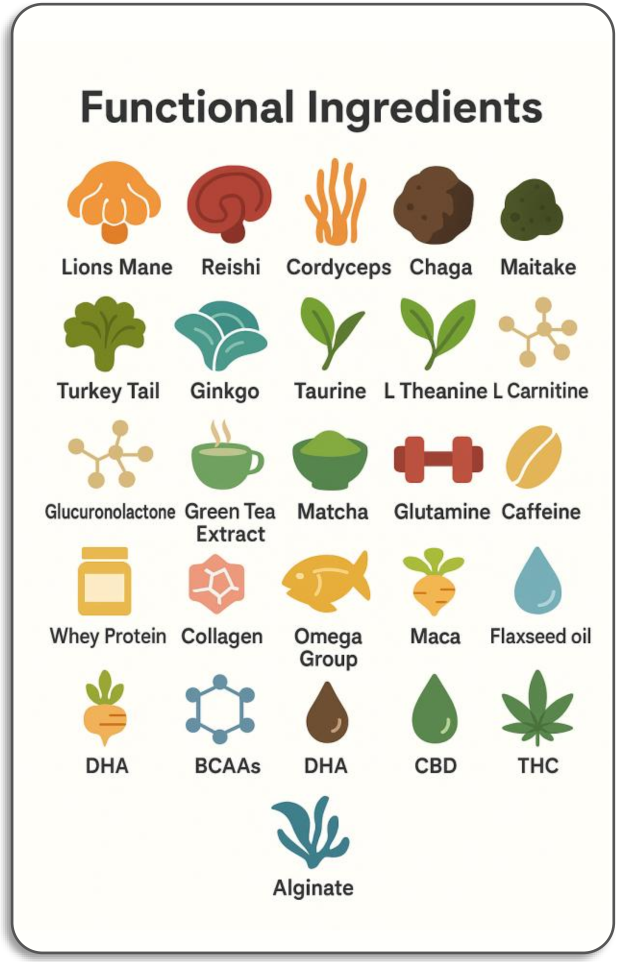
Omni-wellness: Convergence of food and supplementation

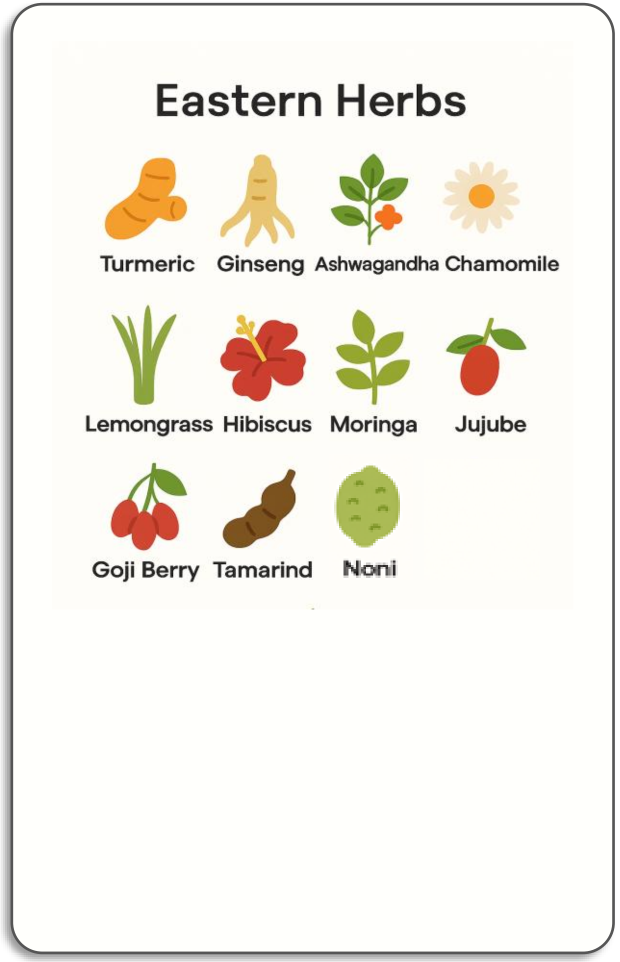
	Supplements	Food and Wellness	
Sleep/ Mood			*Mood & Stress support** +50% Dollars +75% Units
Energy			*Energy* +6% Dollars +6% Units
Women's Health			*Peri-menopause support* +30% Dollars +91% Units

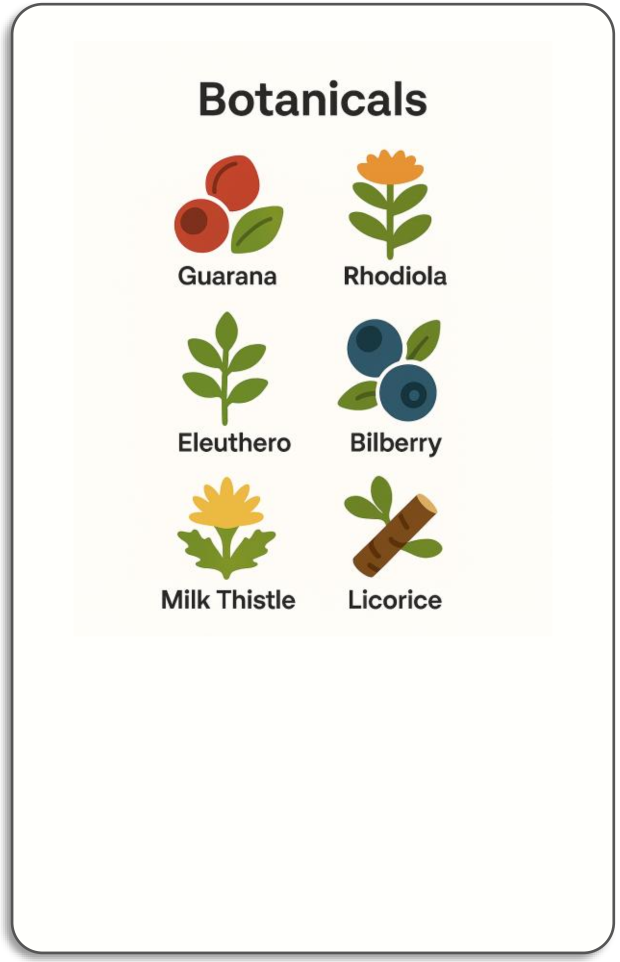
Source: NIQ Retail Measurement Services; Total US xAOC; Total Store; NielsenIQ Product Insights; Dollars & Units % Change vs year ago; 52 weeks ending September 6, 2025
*Food & Beverage trends

NPI Product Insight found function and ingredient product innovation growth across ***snacks***, ***beverages***, ***supplements/vitamins*** and ***diet/nutrition*** and ***performance nutrition***





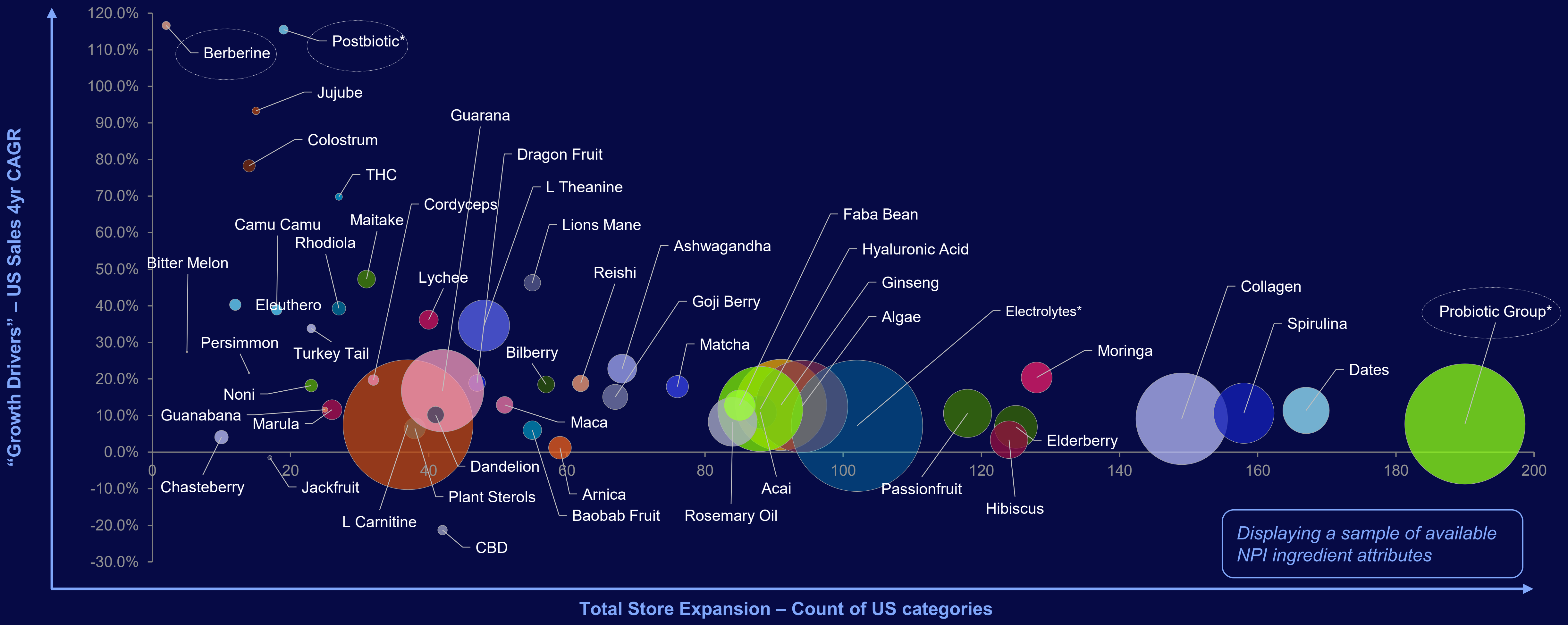




NIQ Product Insights, snacks (sweet snacks, salty snacks, cookies and crackers), beverages and beverage enhancers, vitamins and supplements, diet and nutrition and performance nutrition, growth in UPCs selling 10/4/2025

Ingredient growth illustrates functionality shifts

Ingredients across the store



Bubble size denotes total sales in L52 week All attributes represent QUALIFIED ingredients on package—those indicated by an * symbol represent STATED claims on package
Source: NIQ, Retail Measurement Services, NIQ Product Insight, powered by Label Insight, Total US xAOC; Total Store; # of Categories selling, 4-yr CAGR ($); 52 weeks ending October 4, 2025

NIQ

Rapidly changing regulatory environment is accelerating focus in key areas

NIQ Product Insights:

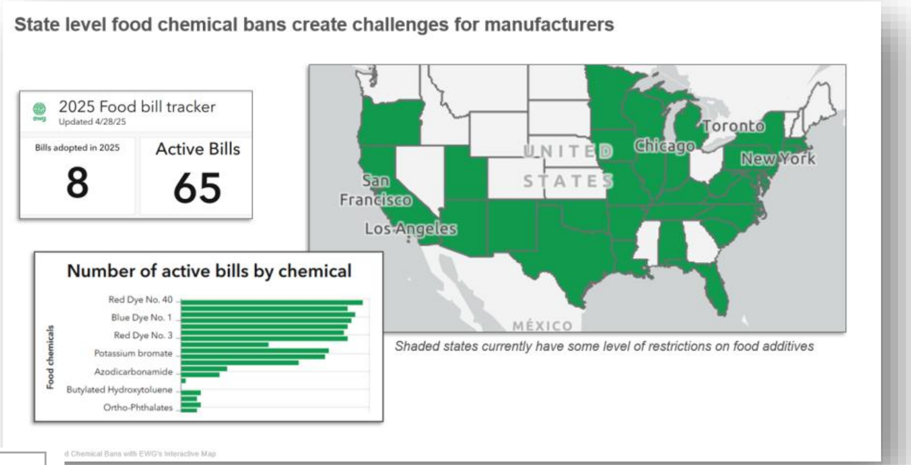
Artificial color additives[2]

\# of Food & Beverage items

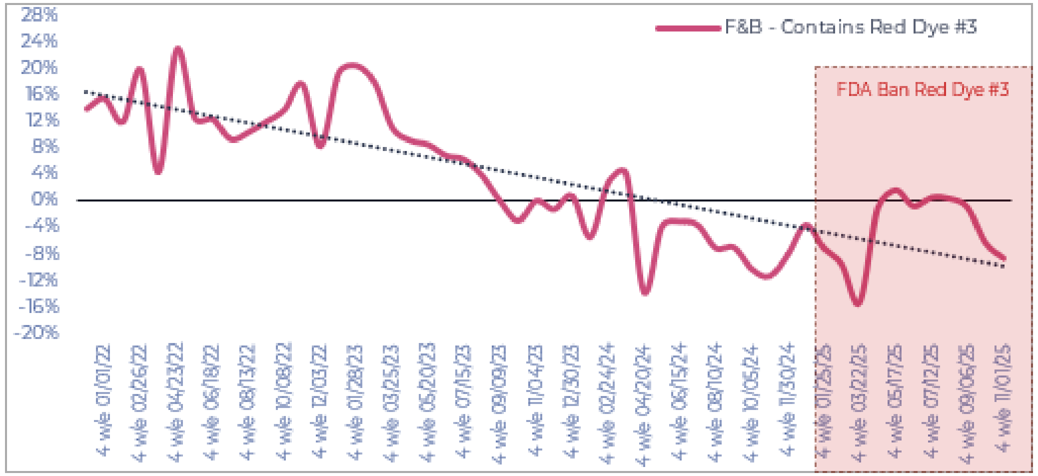
	xAOC + C-Stores	C-Stores
Red Dye 3	5.4K	1.2K
Red Dye 40	23.9K	9.5K
Blue Dye 1	18.9K	7K
Blue Dye 2	4.1K	1.4K
Yellow 5	22.5K	8.3K
Yellow 6	16.3K	6.3K
Green 3	82	

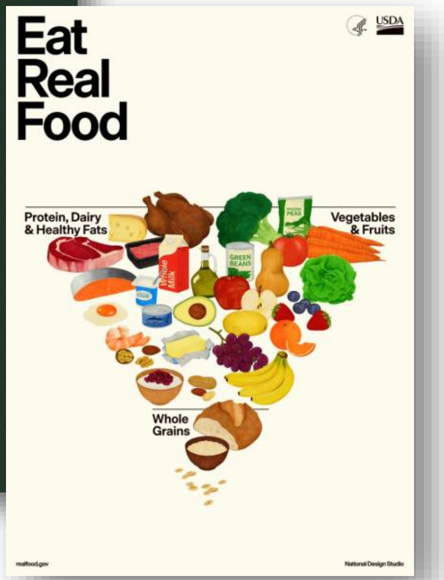
Food Additives Potential Bans Impact[2]

# of Food & Beverage items	xAOC + C-Stores	C-Stores
Brominated Vegetable Oil	~300	~140
Propyl Paraben	~260	~100
Potassium Bromate	~610	~160
Titanium Dioxide	7.5K	2.3K
High Fructose Corn Syrup	22.4K	8.6K



Sales of Red Dye #3





Sources: [2] NIQ RMS, NIQ Product Insight, powered by Label Insight; Total US xAOC + Conv & Total US Convenience; Total Food & Beverage; Number of UPCs selling impacted; 52 weeks ending March 22, 2025 | Source: NIQ, Retail Measurement Services; Total US xAOC; Dollar change vs year ago; Periods Ending November 1, 2025; Right charts: NIQ Product Insight attributes; Better For™, PI Contains Red Dye 3 Qualified

NIQ

Wellness is everywhere: Walmart to Offer Discounted GLP-1 Drugs, Following Costco, Sam's Club, and CVS

Costco to sell Ozempic and Wegovy at a large discount for people without insurance

Walmart Health: Is the Retail Giant Becoming Healthcare Gateway?

How Walmart is building trust and innovation in wellness

Amazon Pharmacy introduces in-office kiosks to help patients get medications immediately after appointments

Target added 2K items to wellness assortment

Ulta

- Feminine Care
- Supplements
- Aromatherapy
- Personal Care

Sephora

- Supplements
- Skincare
- Devices
- Feminine Care

***LabCorp** is growing +6.8% in sales over the last six months*

***Quest Diagnostics** is growing +7.2% in sales over the last six months*

NIQ

Online is meaningfully taking share from store-based retail

eCom growing across almost all departments

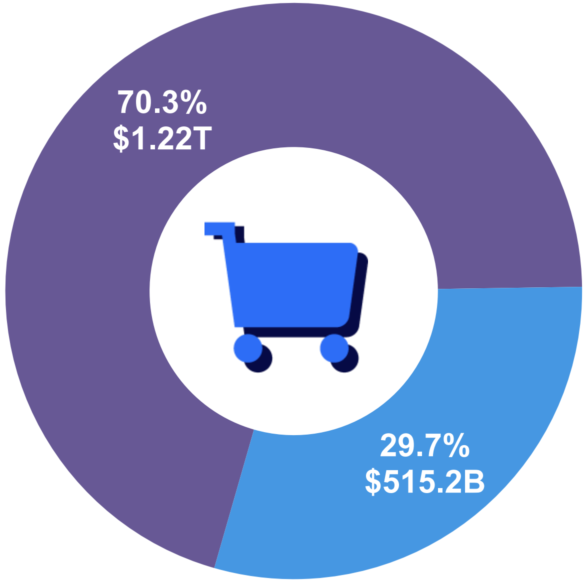
Total Online and In Store Share

$ Share and $ Change vs YA

Total Sales

$1.73T

+4.0% vs YA



In Store

(-2.2pp vs YA)

$ %Chg vs YA: +0.9%

Online

(+2.2pp vs YA)

$ %Chg vs YA: +12.2%

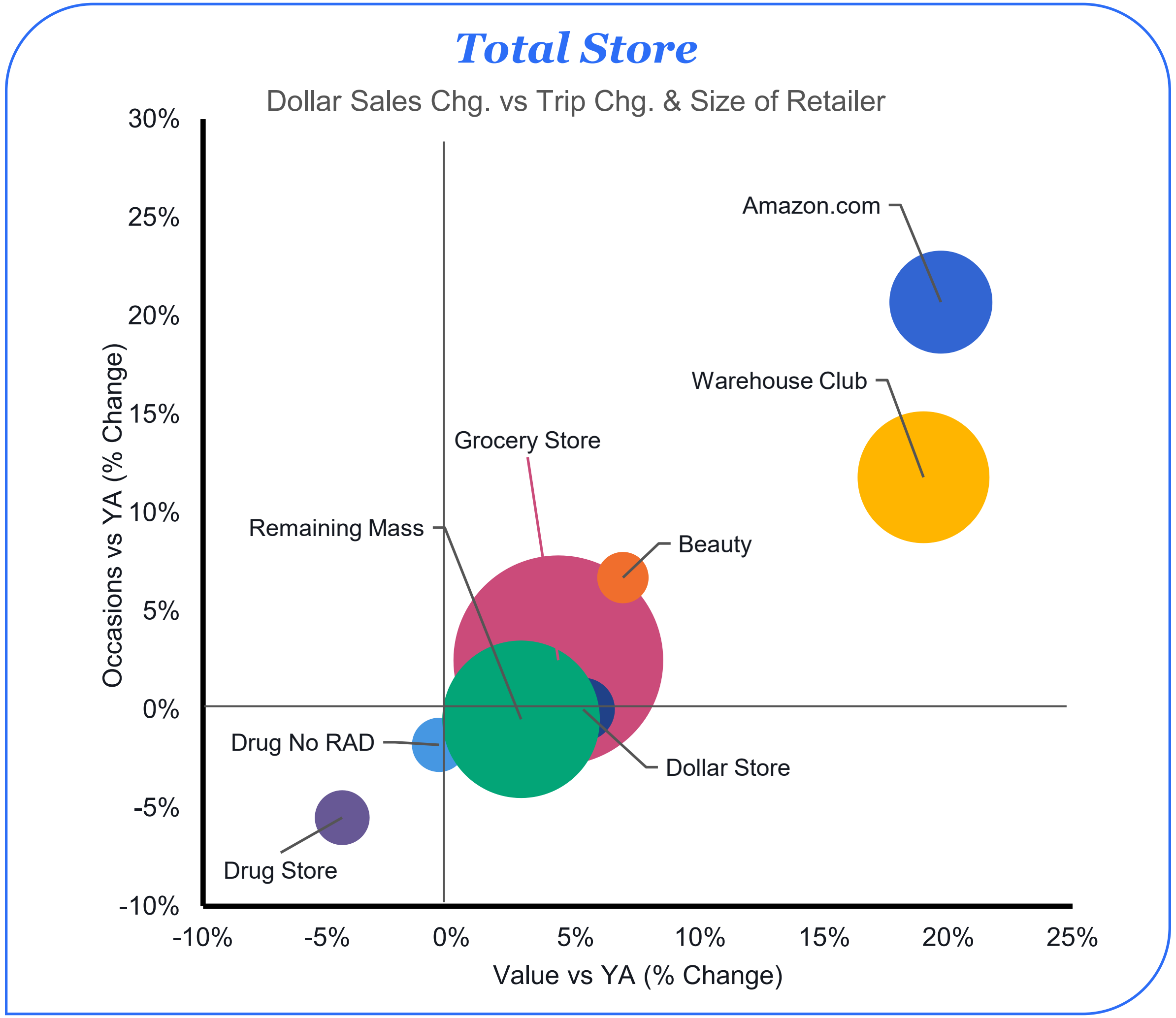
Department Online and In Store $ Performance

Online $ Share of Total Department Sales

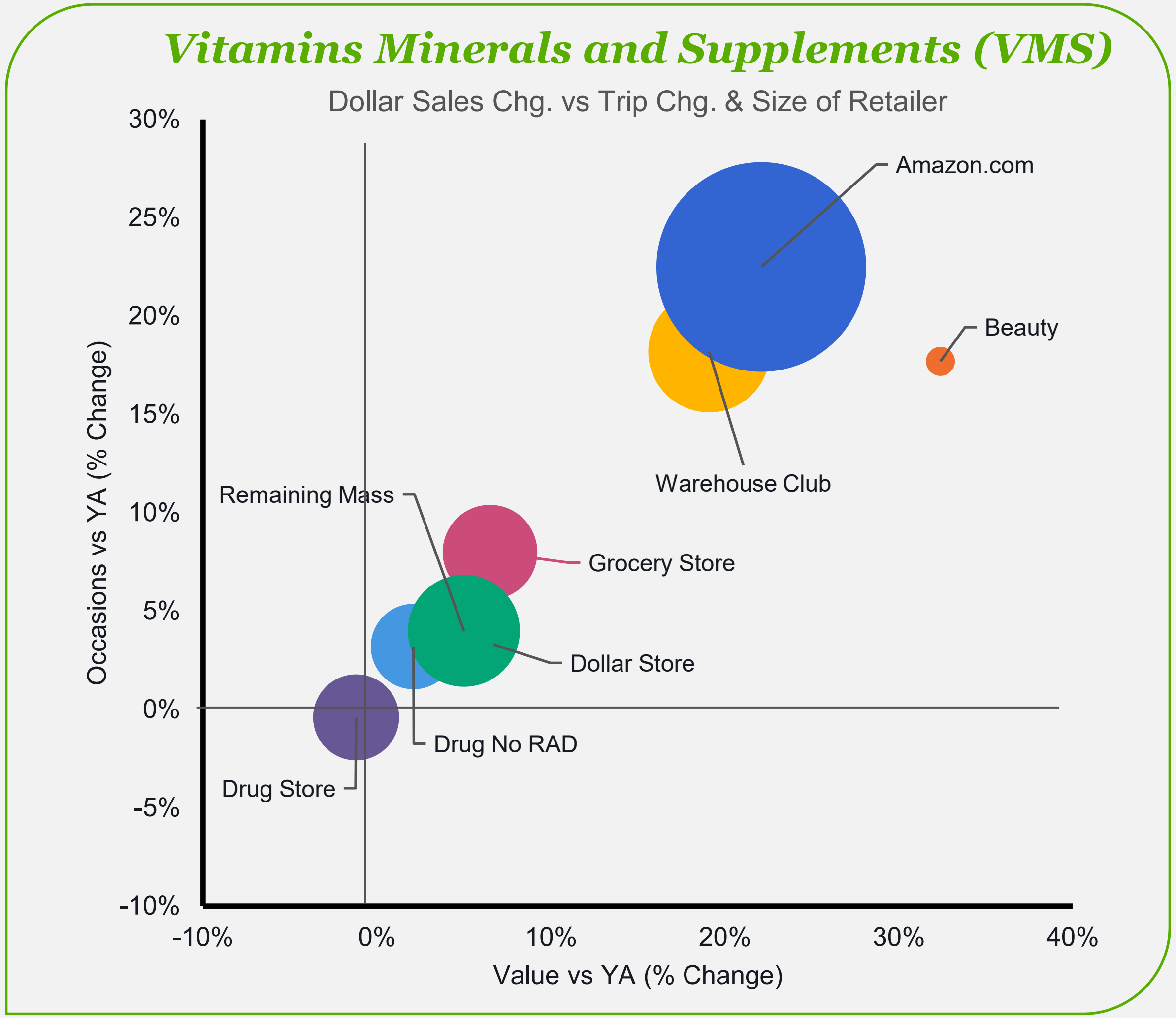
Department	Online $ Share	$ % Chg vs YA: Online	$ % Chg vs YA: In Store
Health & Beauty	49.3%	+14.7%	-0.5%
Baby Care	50.6%	+8.3%	-0.9%
Pet Care	45.4%	+11.2%	-2.3%
Household Care	27.1%	+20.5%	-0.5%
Food	12.0%	+19.2%	+2.1%
Alcohol	5.2%	+0.0%	-2.5%
VMS	63.9%	+19.1%	+2.8%
Health & Performance	42.5%	+20.6%	+13.0%
Nutrition Bars	26.5%	+24.4%	+5.7%

Source: NielsenIQ Omnisales, $, $ %Chg YA and $ Share for All Departments + VMS (Health and Beauty), Health & Performance (F&B) and Nutrition & Cereal Bars (F&B) in Total US | Latest 52 wks w/e 12/27/25

Club, Amazon and Beauty lead in overall Total Store growth



VMS mirrors Total Store's double-digit growth, with Amazon, Club, and Beauty all accelerating



Source: NIQ Expanded Omnishopper; Total US All Outlets by Channel; Total Store vs VMS; Dollar vs Occasions/Trips % change vs year ago; 52 weeks ending Dec. 27, 2025

Amazon Prime Day: Four Days to Win Health

Prime Day July 2025: Health was the #5 department versus #6 YA

Top categories in Health sales on Amazon Prime Day

Vitamins and Supplements

Oral Hygiene

Sun Care

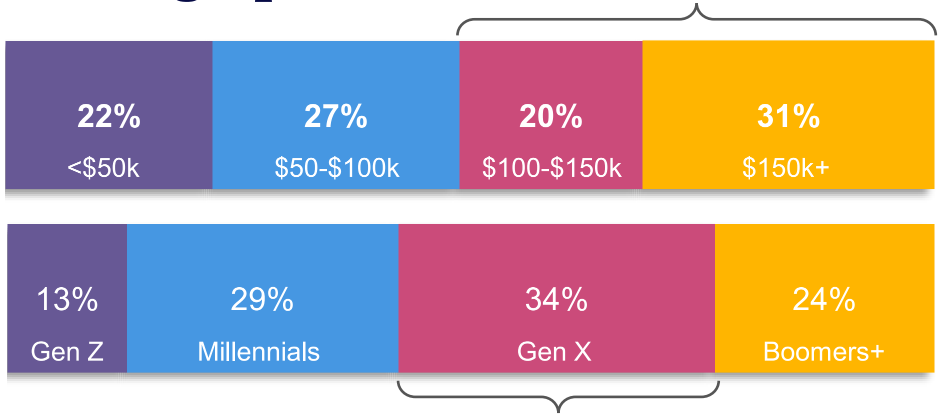
Protein Powder

$29.33
Avg. Health Order Value

1.3
Avg. # of Items per Health Order

Demographic

>50% of Health Sales came from ***Households with Income $100k+***



34% of Health Sales came from ***Gen X***

Top Selling Health Brands Across Category by Sales

Philips Sonicare, Oral-B, Crest, Supergoop!, Nutrafol, Nutricost, Sun Bum, EltaMD Skincare, Optimum Nutrition

Top Selling Health Brands Across Category by Units

Sun Bum, Crest, Nutricost, Nature's Bounty, Nature Made, Now, Supergoop!, Sports Research, Philips Sonicare

Source: NielsenIQ Digital Purchases Health = Health & Personal Care, Sun Care, Sexual Wellness, Medical Equipment & Supplies, Sports Nutrition, Vitamins & Supplements

Social selling growing

55% purchase directly via social media or live stream platforms

TikTok Shop[2]

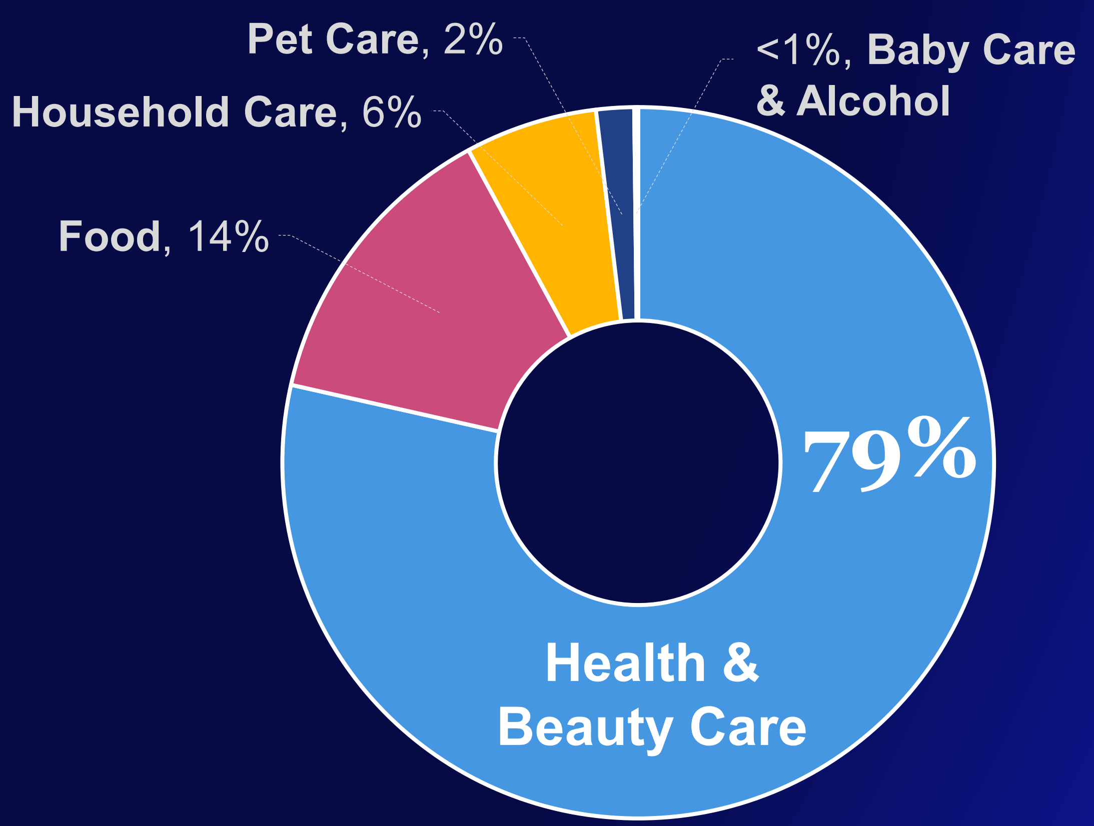
$120 *TikTok Shop H&B shoppers are spending an average of $120 per year, up +68% vs YA*

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

Top TikTok categories[3]

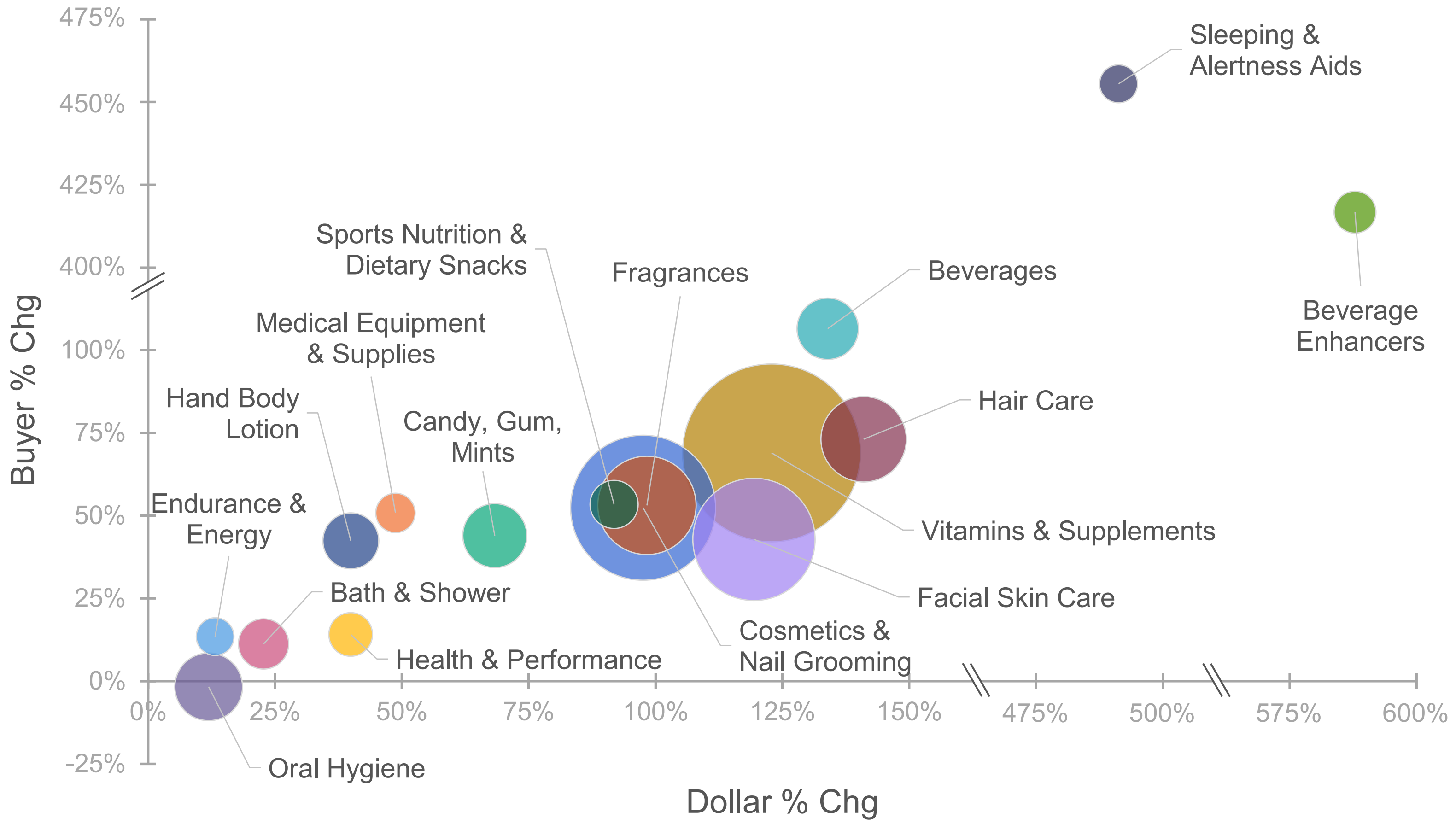
- Vitamins and supplements
- Cosmetics & Nail
- Facial Skin Care
- Fragrance
- Hair Care
- Oral Hygiene
- Candy, Gum, and Mints

TikTok Shop Category $ Share



NIQ Midyear Consumer Outlook; TikTok Shop, data ending 12 months ending November 2025

TikTok Shop's biggest selling category is Vitamins & Supplements



Bubble Size = Dollar Volume

Source: NielsenIQ e-commerce Retailer View, TikTok Health & Beauty Categories, 12 months ending 9/30/25

NIQ

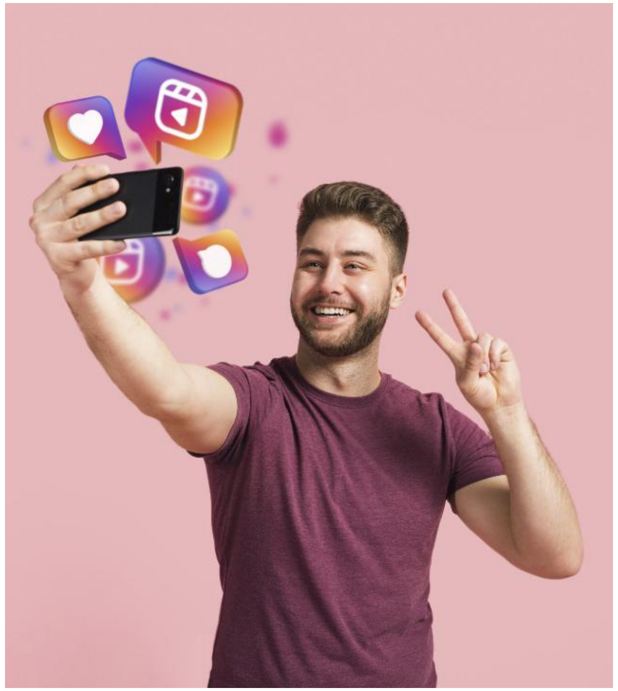
Social media is a search engine for some…

31%

Use social media as their ***primary source*** *to learn about new products and services*

28%

Search social media for product information ***before*** *using a traditional search engine*



We know social media is influential in CPG

35%

Sought out a new product in-store or online because of something ***seen on social media***

22%

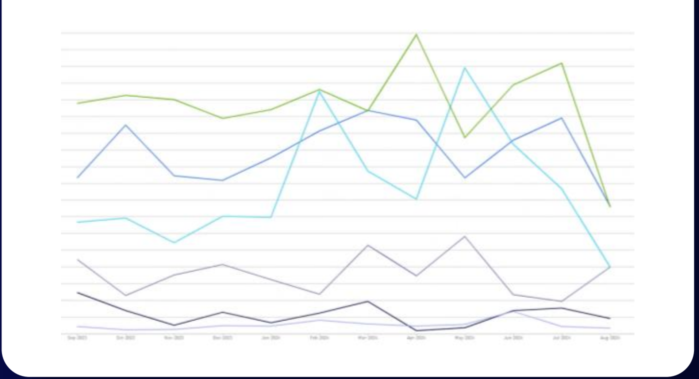
Changed brands *based on the recommendation of a social influencer*

Source: NIQ 2024 Consumer Outlook, U.S

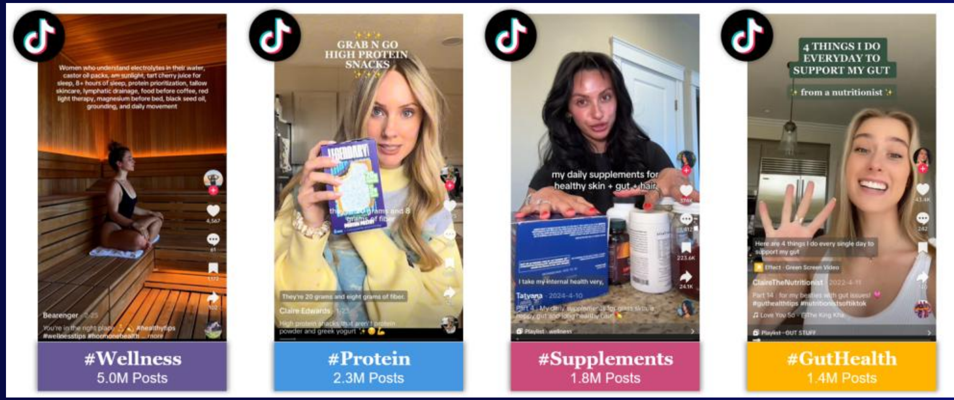
Creating new channels to influence consumers but often threatening brand loyalty

68% of purchases on social selling platforms are made on impulse

Sales fluctuation of top sports nutrition brands on TikTok



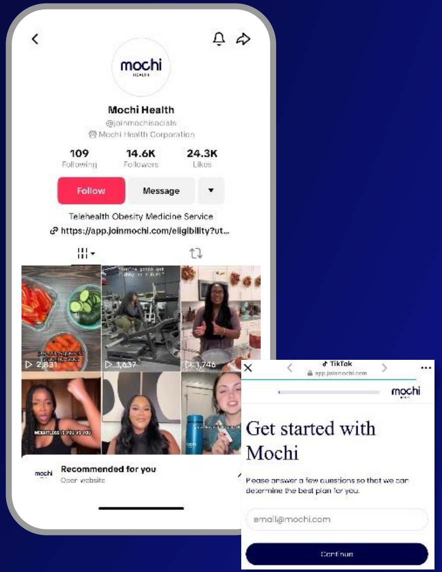
One in five global consumers say influencers/ads on social media have a "significant influence" on which H&W products they buy.



Livestream Shopping

1. Click shop button
2. Click Buy Now
3. Fill in info
4. Place order

TikTok | instacart ads



NielsenIQ Global Health and Wellness report, NIQ Digital purchases TikTok, TikTok Posts June 2025

When it comes to *weight management*, consumer behavior 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	2025	
Diet	64	62	61	56	55	55	**53**	▼ 11 pts (since 2016)
Exercise	58	56	53	52	51	51	**51**	▼ 7 pts
Did not treat/manage	23	22	23	25	26	24	**23**	No change
Vitamins	15	14	14	15	14	14	**12**	▼ 3 pts
Prescription and or OTC net	8	8	8	8	12	15	**20**	▲ 12 pts
Prescription medication(s)/products	4	5	5	5	9	13	**18**	▲ 14 pts
Supplements (e.g. herbal, fish oil etc.)	11	11	11	11	12	11	**10**	▼ 1 pts
Non-prescription/over-the-counter product(s)	4	4	4	4	3	3	**3**	▼ 1 pts

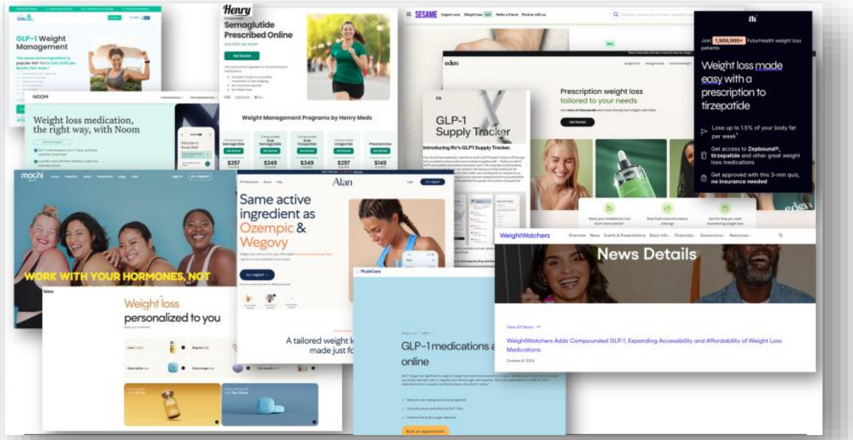
Source: NIQ Health Shopper Survey, 2016 to 2025; Q. What influenced the decision for you/your household member to treat or manage the [ailment] in the ways mentioned? Select all that apply.

The GLP-1 drugs have rapidly shifted the dynamic around weight management

Current players

Name	Dosage and form	Approved use	Other benefits
Ozempic Semaglutide	Injection 1 weekly	Type 2 diabetes	Heart, kidneys, weight loss; Indicated for reduction of CV in T2D
Wegovy Semaglutide	Injection 1 weekly	Weight loss	
Rybelsus Semaglutide	Oral tablet 1 daily	Type 2 diabetes	Weight loss
Victoza Liraglutide	Injection 1 daily	Type 2 diabetes	Heart, kidneys, weight loss; Indicated for reduction of CV in T2D
Saxenda Liraglutide	Injection 1 daily	Weight loss	
Mounjaro Tirzepatide	Injection 1 weekly	Type 2 diabetes	Weight loss
Zepbound Tirzepatide	Injection 1 weekly	Weight loss	Indicated to treat moderate-severe sleep apnea
Trulicity Dulaglutide	Injection 1 weekly	Type 2 diabetes	Heart, kidneys, weight loss
Byetta Exenatide	Injection 1 weekly	Type 2 diabetes	Weight loss
Bydureon Exenatide ext. release	Injection 1 weekly	Type 2 diabetes	Weight loss

+ Compounding pharmacies



Until late last year, most GLP-1 versions were on **the FDA shortage list,** driving a market for **compounded formulations**

NIQ Fall 2024 research

- *Ozempic*
- *Mounjaro*
- *Trulicity*
- *Wegovy*
- ***Generic/Compound***
- ***Zepbound***

NIQ Summer 2025 research

- *Ozempic*
- *Mounjaro*
- ***Generic/Compound*** ▲
- ***Zepbound*** ▲
- *Trulicity and Wegovy* ▼

Ranked by share of GLP-1 users

What's happening

- ***New delivery mechanisms*** *(e.g., oral, 1 per month)*
- ***Approved conditions beyond weight loss*** (CV, CNS)
- ***Reduced side effects***
- ***Reduced costs***
- ***Longevity/ microdosing***
- ***Cycling***

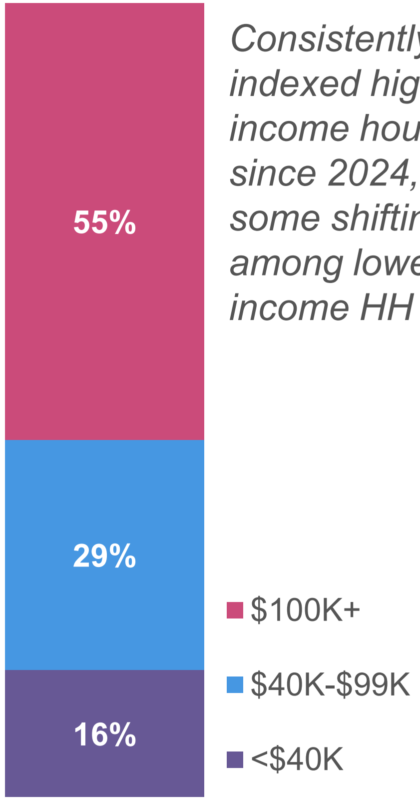
Source: NielsenIQ, Homescan GLP-1 Panel Survey (February 2025)

NIQ

The GLP-1 weight-loss shopper has changed over time

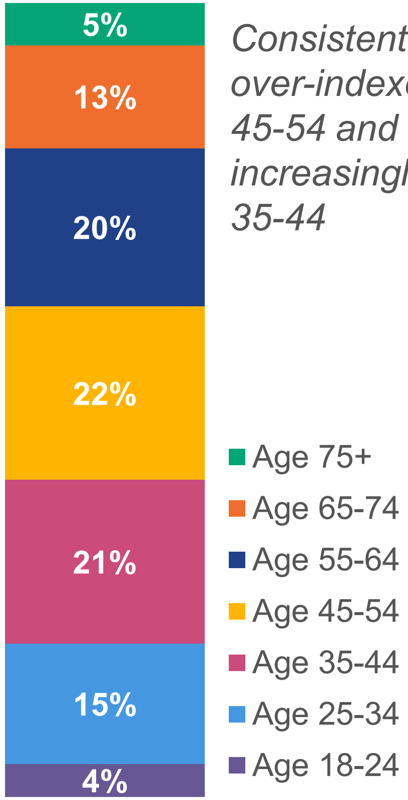
Current GLP-1 Weight Loss Consumer

Household Income



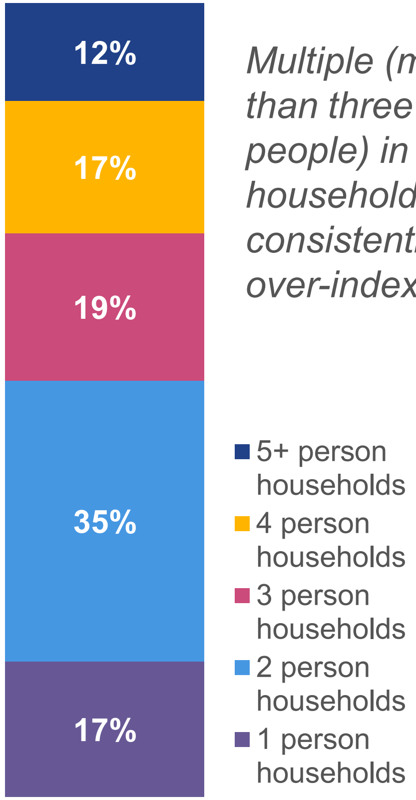
Consistently over-indexed higher income households since 2024, with some shifting among lower income HH

Age of Head of Household



Consistently over-indexed 45-54 and increasingly 35-44

Number of Persons



Multiple (more than three people) in household have consistently over-indexed

Homescan GLP-1 Survey: GLP-1 for Diabetes/WL: June/July 2025: Spectra Oct 2025 (compared against March 2024, August 2024, January 2025 and June 2025)

GLP-1s are changing lives and creating the next frontier

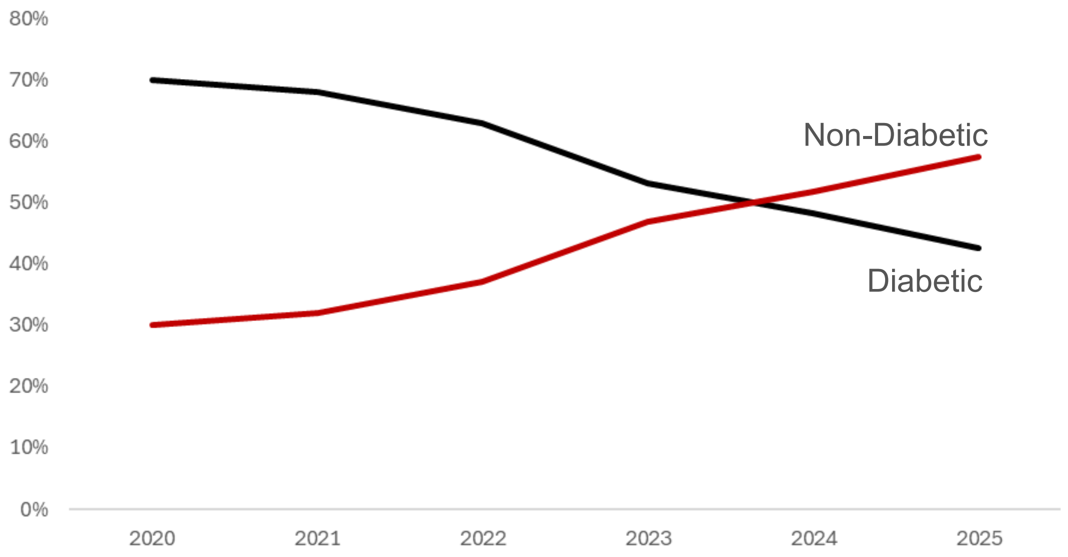
~130M clinically indicated across the United States^

~100M
Obese

~45M
Over-Weight*

~35M
Type 2 Diabetic

Medical records show weight loss is now the #1 reason for taking GLP-1s



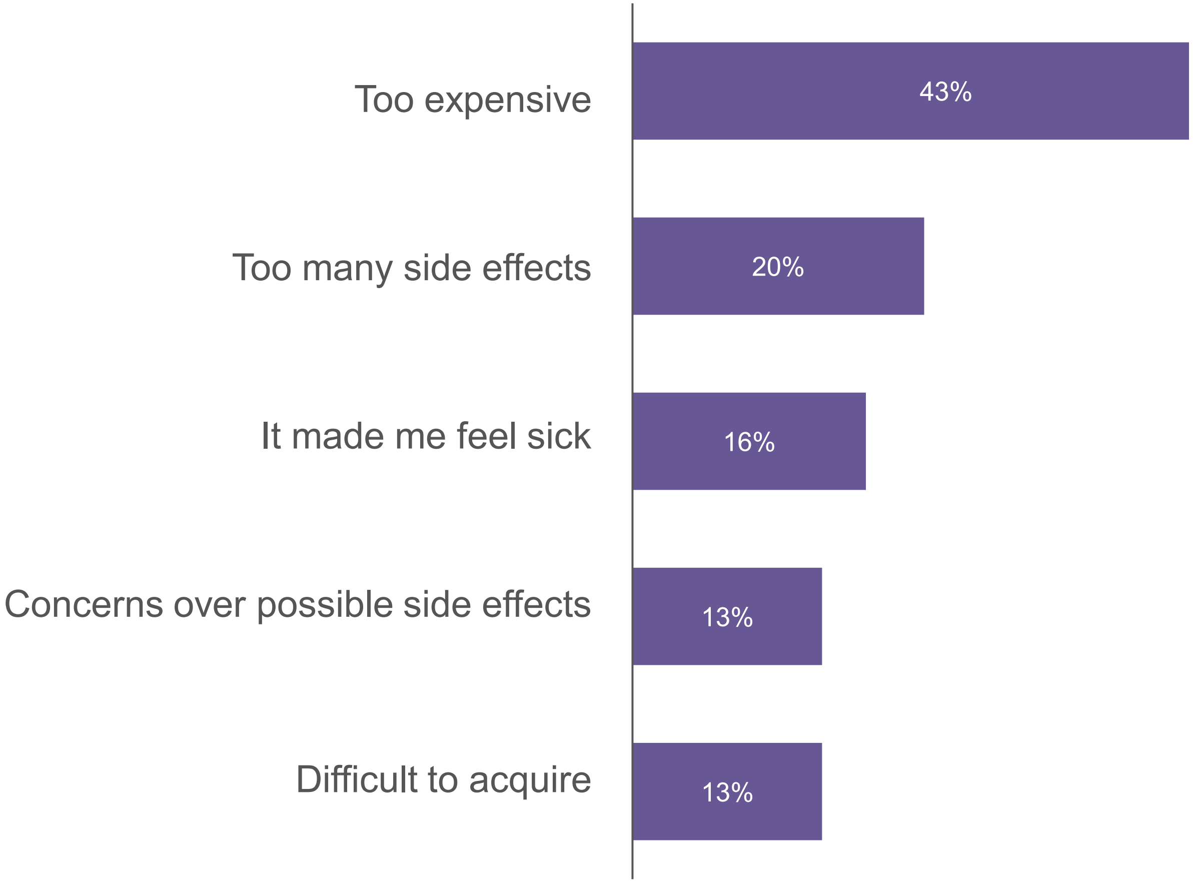
New weight loss GLP-1 users are driving adoption

Left Source: Centers for Disease Control; Middle & Right Source: Management Science Associates, Inc.
Notes: *Over-weight with one or more comorbidities; ^Defined as over-weight/obese/diabetic
Right Chart: Sums may not equal totals in middle chart due to rounding

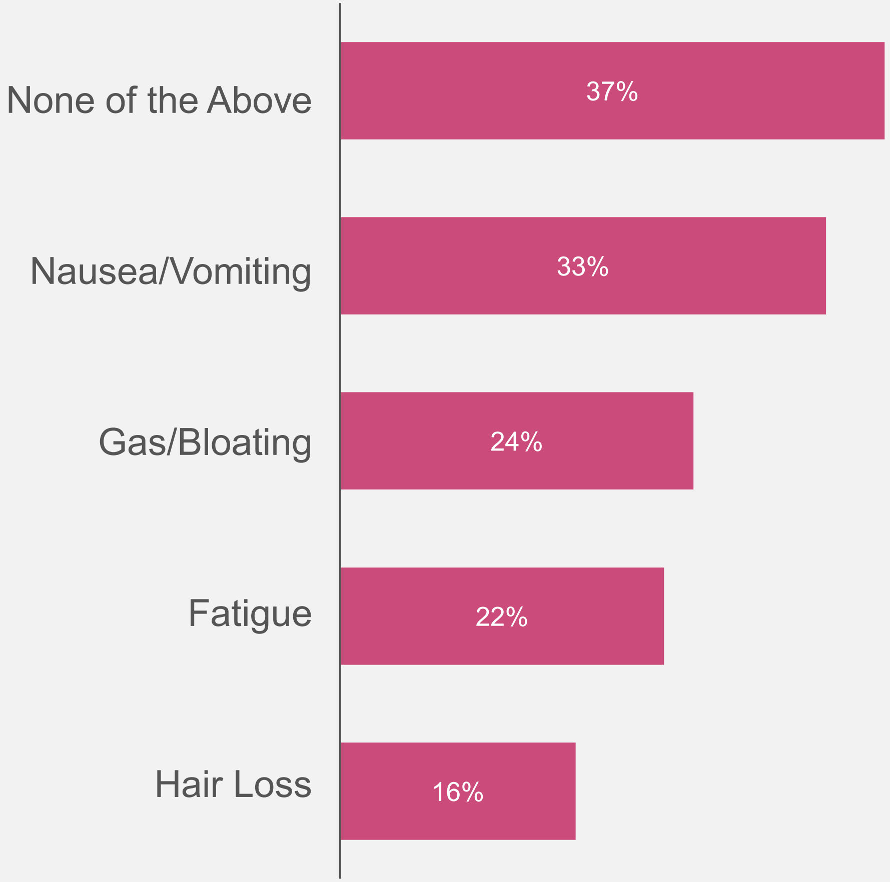
Cost concerns dominate as the main barrier for continuous GLP-1 usage

Other side effects predominately affect the gastrointestinal system, impacting how a user feels after eating

Reasons for Discontinuation



Side Effects

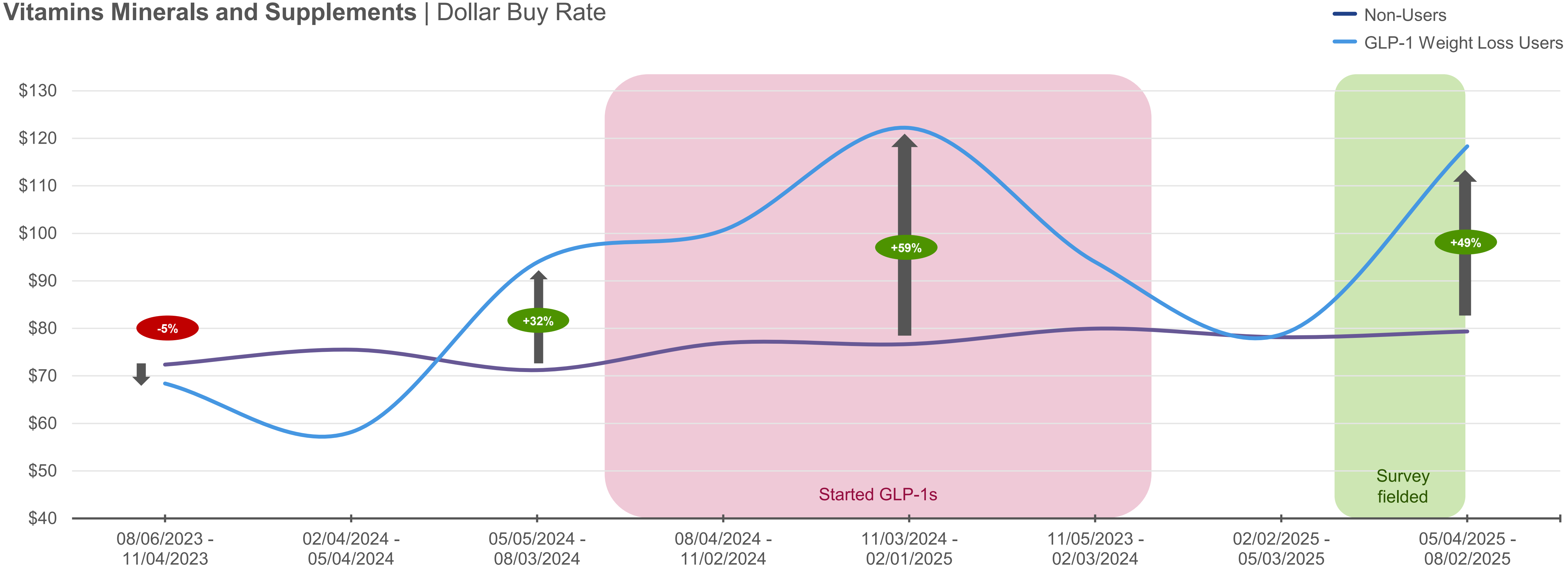


Source: NIQ Expanded Omnishopper GLP-1 Survey, September 2025, Total Outlets, Syndicated

A view into the GLP-1 user journey unlocks key consumption moment opportunities

GLP-1 Buyers (Started 7-11 Months Ago) Compared To Non-Users

Vitamins Minerals and Supplements | Dollar Buy Rate

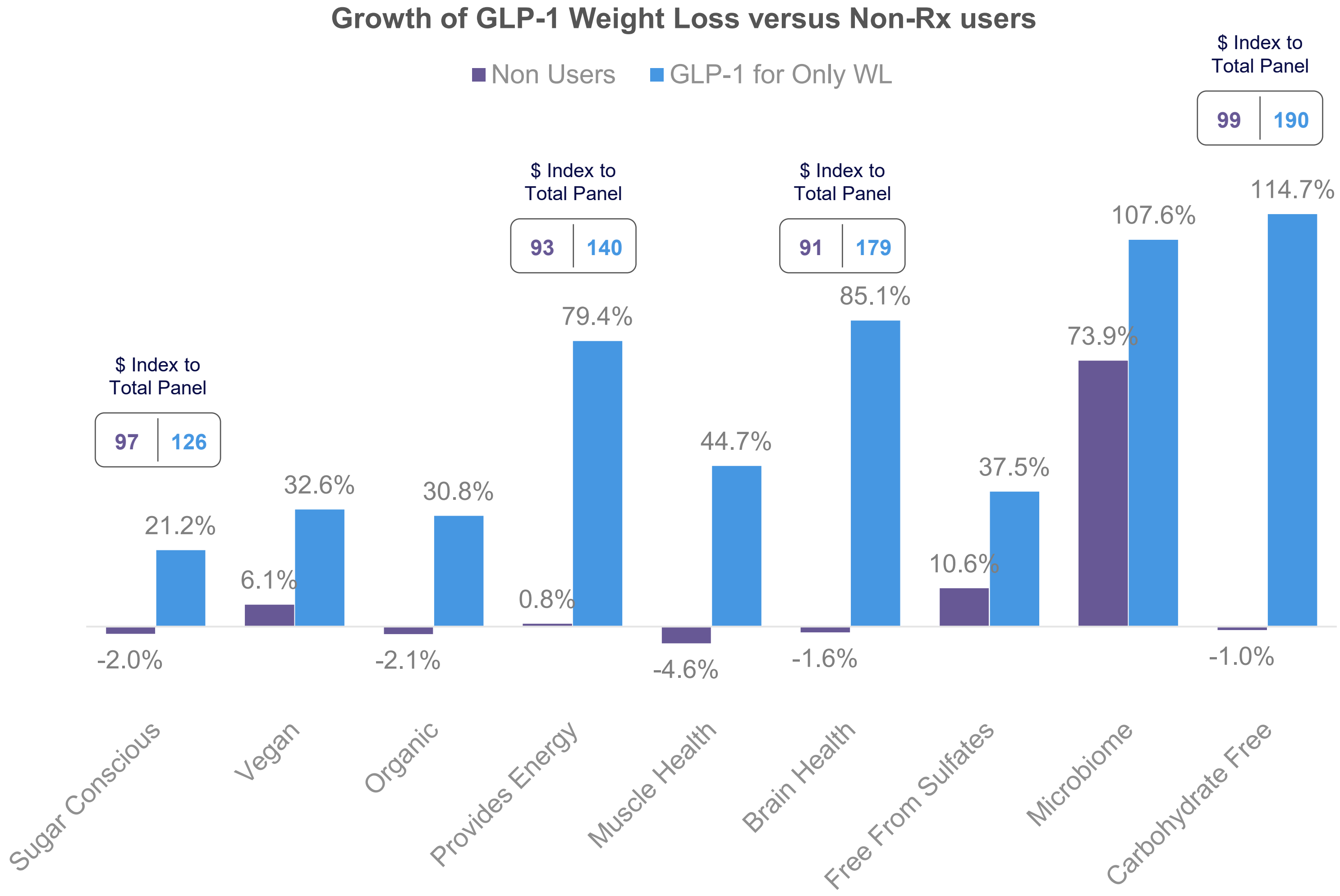


Source: NIQ, Homescan GLP-1 Panel Survey (Jun/Jul 2025); Total US; Total Outlets; Health & Beauty Care; $ per buyer; Quarterly periods through 13 weeks ending August 2, 2025

NIQ

GLP-1 weight loss shoppers seem to be increasingly intentional

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



Some attributes GLP-1 weight loss users showing stronger growth

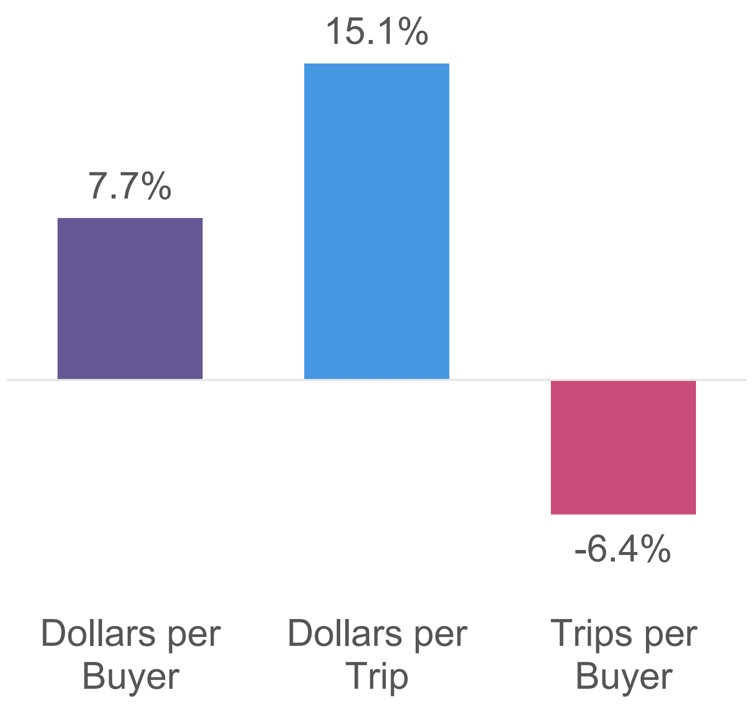
- *Immune health*
- *Joint health*
- *Muscle health*
- *Osteoporosis*
- *Bone Health*
- *Digestive Health*
- *Hair, Skin Nail support*
- *Clinically tested*
- *Free from aluminum*
- *Free from antibiotics, hormones*
- *Free from high fructose corn syrup*
- *Free from artificial colors, flavors, fragrances,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

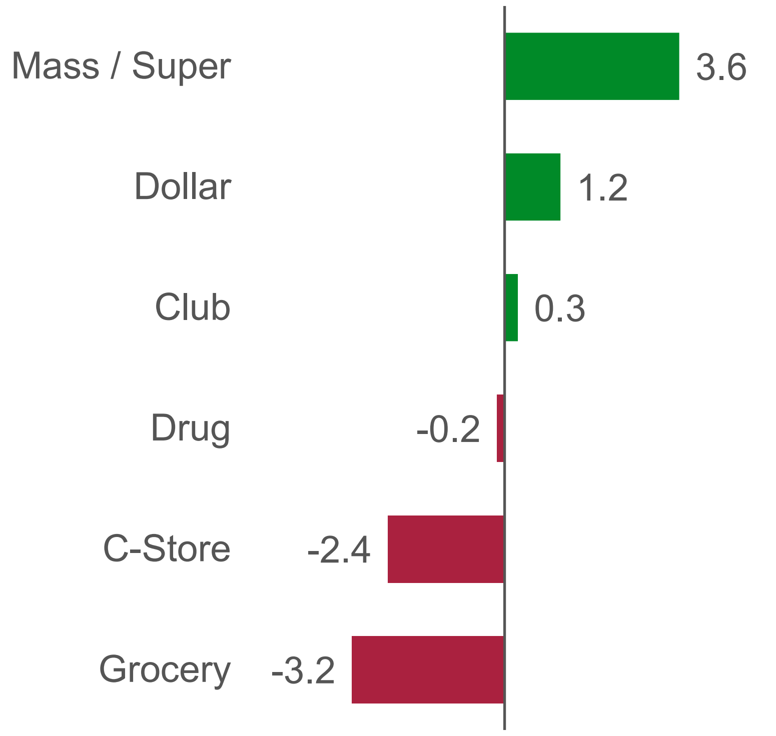
As channel dynamics shift, unexpected channels have opportunity with GLP-1 shoppers

***Channel Focus:** GLP-1 Weight Loss Users^*

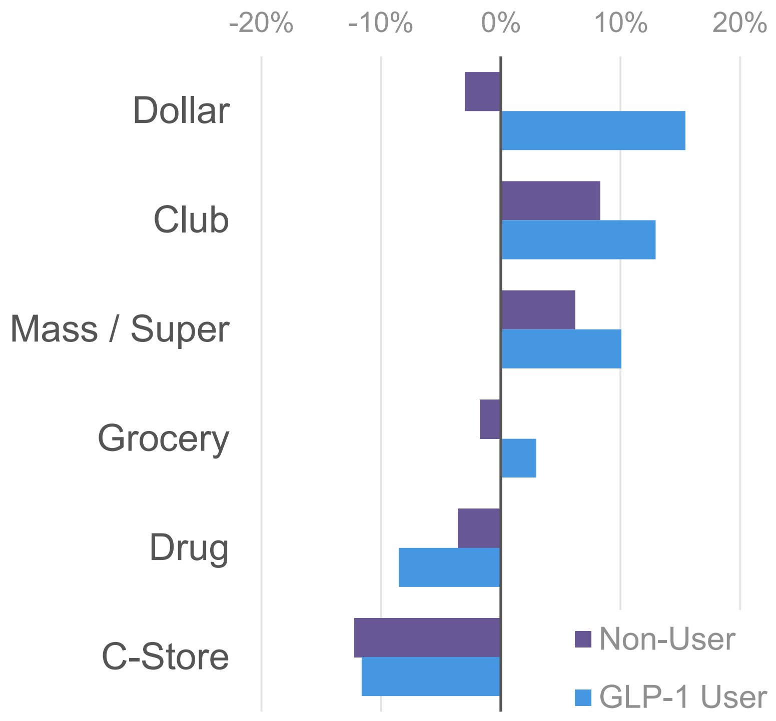
GLP-1 users are valuable shoppers with increased basket sizes



Mass and Dollar are winning a greater share of GLP-1 user spending



GLP-1 users spend 15% more per trip than non-users

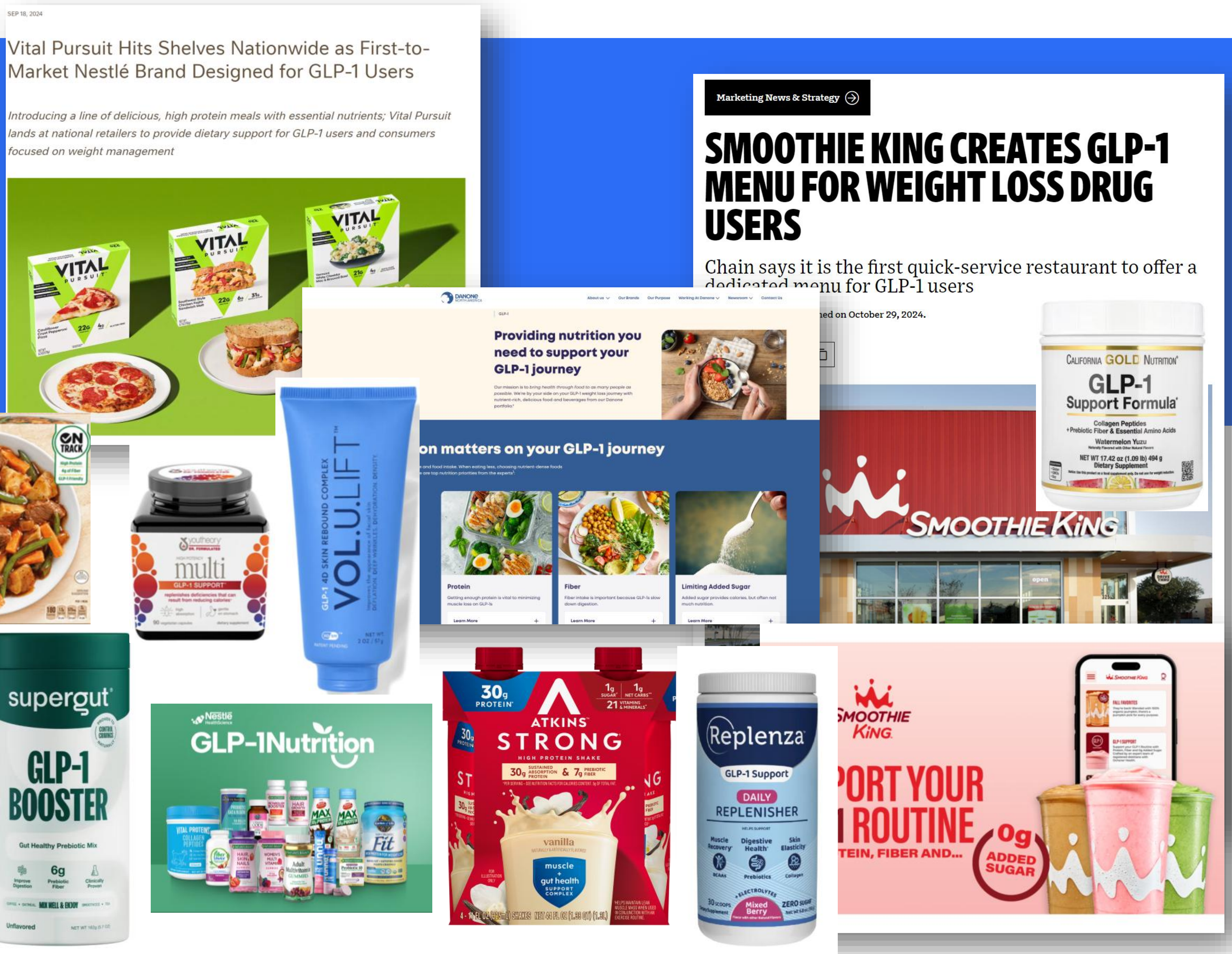


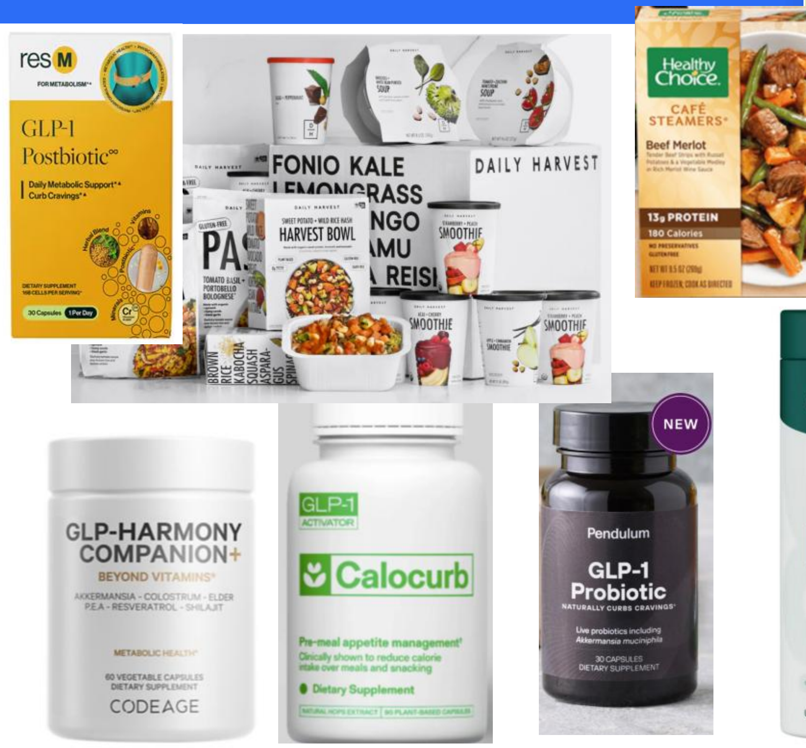
Left Source: NIQ, Homescan GLP-1 Panel Survey (Jun/Jul 2025), Total US, Total Outlets, Total Store, 52 Weeks Ending August 2, 2025 vs previous 52 weeks

^Note: GLP-1 users are defined as only those using GLP-1 medications for weight loss, excludes those taking GLP-1s for Type 2 Diabetes only.

Pathways

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





GLP-1s in Conversation: Diet, Side Effects, Alternatives, and the Lifestyle Reset Behind the Buzziest Weight Loss Topic

Diet & Supplements

- Food noise reduction
- High-protein intake
- Portion adjustment
- Meal pacing
- Hydration
- Vitamins & supplements
- Probiotics
- "What I eat in a day"
- Dietary content

White House / Pricing Reform

- Policy changes
- White House price measures
- Cost reduction

Side Effects

- Fatigue
- Sleep disruption
- Hair loss
- "Ozempic face"
- Muscle loss

Compounded Pharmacy

- Compounded Semaglutide
- Budget GLP-1s
- DIY Ozempic
- Zepbound

Lifestyle, Body & Mental Health

- Exercise
- Therapy
- Emotional regulation
- Weight-loss stigma

Benefits & Improvements

- Appetite suppression
- Diabetes management
- Anti-inflammatory effects
- Liver & kidney health
- Alzheimer's & depression risk reduction
- Addiction reduction

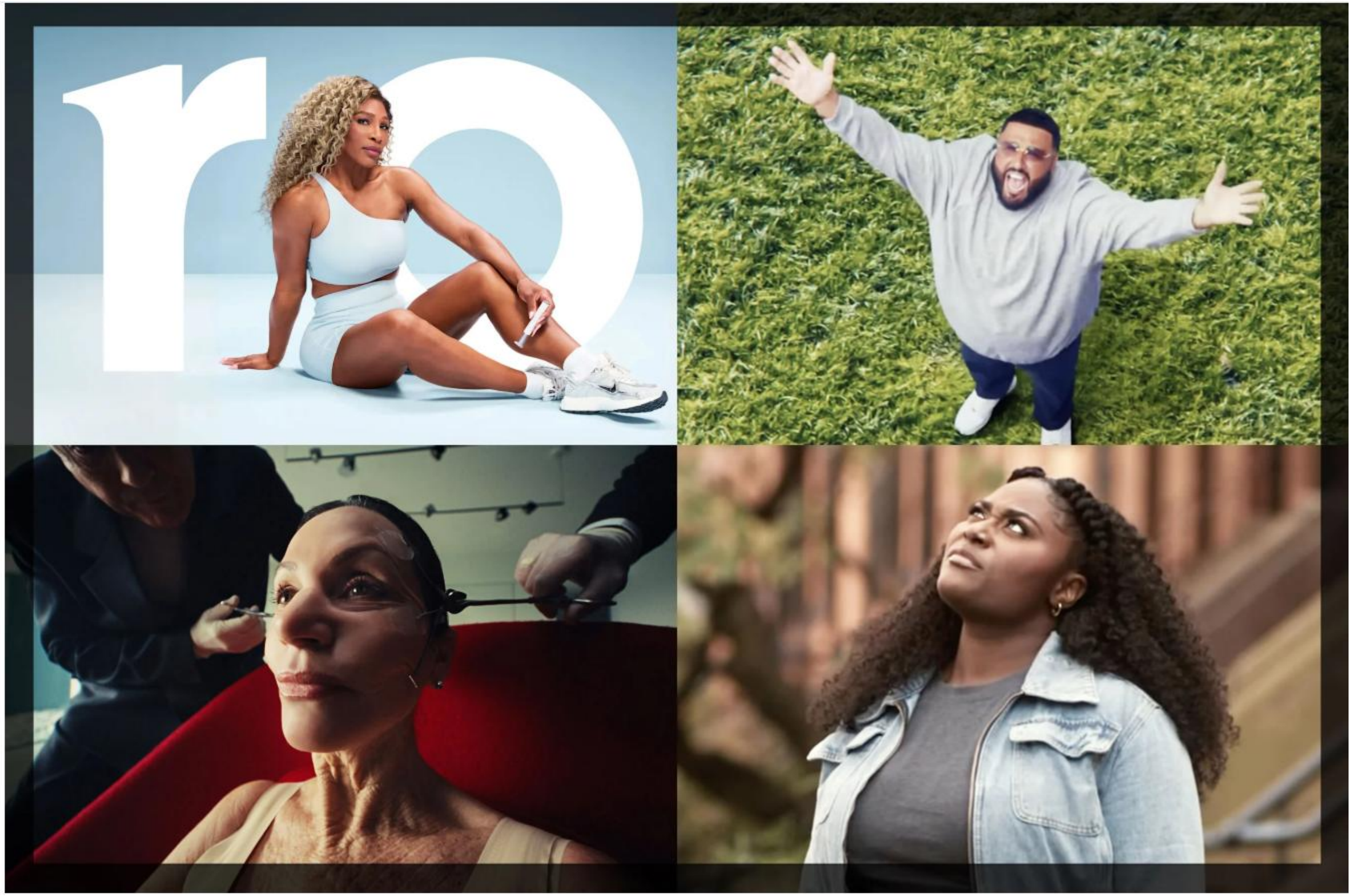
Natural Alternatives

- Nature's Ozempic
- Oatzempic & GLP-Activate
- Natural non-prescription solutions

Consumption

- Dosing strategies
- Treatment breaks & fatigue
- Regimen adjustment

Hims & Hers, Ro, Novo Nordisk and Eli Lilly all ran Super Bowl ads for weight loss medications



GLP-1 Takeaways…

The science behind GLP-1s are increasingly well-understood

- GLP-1s have been on the market for 20 years—meaning their mechanism of action is well understood
- Research is still emerging, revealing new benefits on a surprising breadth of body systems (e.g., CV, CNS) and real-world evidence continues to grow as GLP-1 is used in a larger population
- Yet, the longer-term impact to health (e.g., nutrient deficiency) is only beginning to be understood

The future regulatory environment is unknown:

- Growing number of options (monthlies, orals) and generics with assumptions that access and reimbursement restrictions may ease
- May change the types of consumers that use GLP-1s and the way they are used (e.g., intermittent, short-term)

Now is the time to prepare for a potential shift:

- Broader usage, increased demand around products and services and consumer segmentation

The opportunity to meet consumer needs

Convenient: Protein – Hydration – Fiber/Gut health – Macro/Micronutrients

GLP-1s are not a weight-loss fad:

their growth will change the way consumers eat, prioritize health and self care

UBS Evidence Lab GLP-1 Survey

NIQ

In closing…

- GLP-1s expand the VMS and nutrition market—they don’t shrink it
- Protein, micronutrients, gut health, hydration, and beauty lead
- Channel strategy matters as much as formulation

NIQ