Self-Care: The Future of Healthcare

NielsenIQ

Today's Presenter

Vikas Satyal
VP North America Retail, NielsenIQ
vikas.satyal@nielseniq.com

Agenda

Health in the hands of the consumer

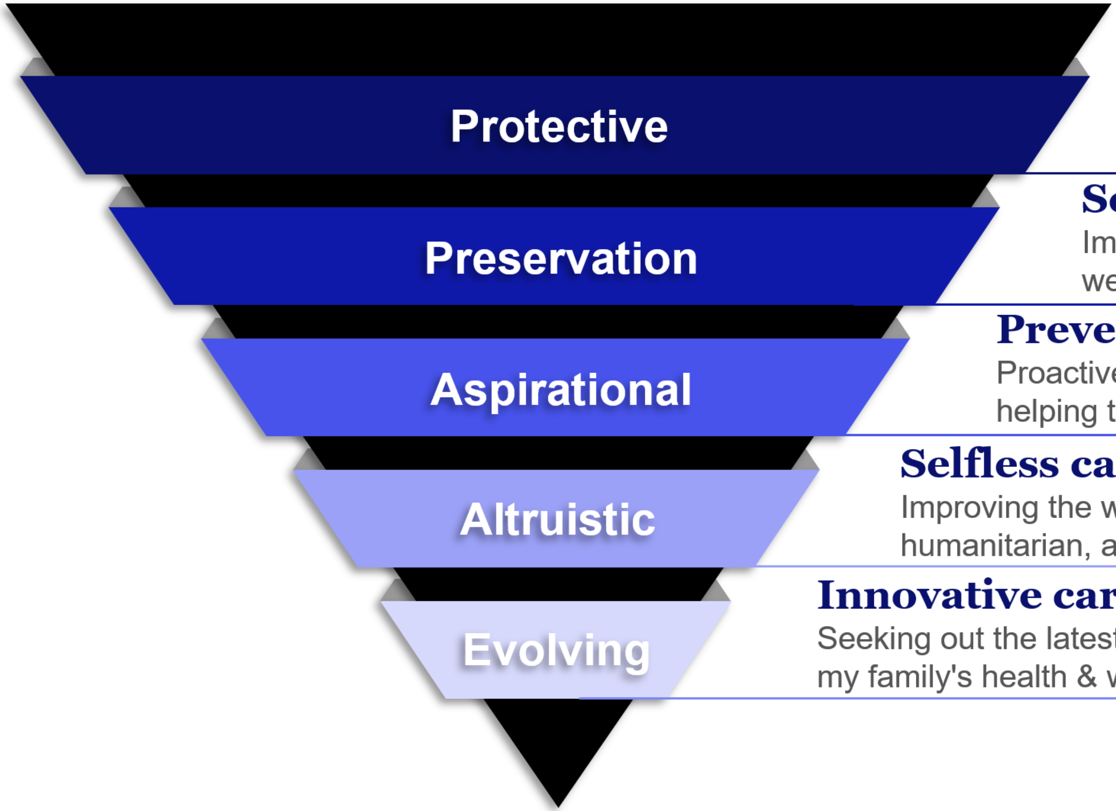
- Consumer role in health increasingly shifting
- Understanding ***how*** and ***why*** provides insight for opportunities

Exploring the shift through the lens of the GLP-1 consumer and opportunity

NIQ

Health is in the hands of the consumer

Consumer Hierarchy of Needs on Wellness



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**

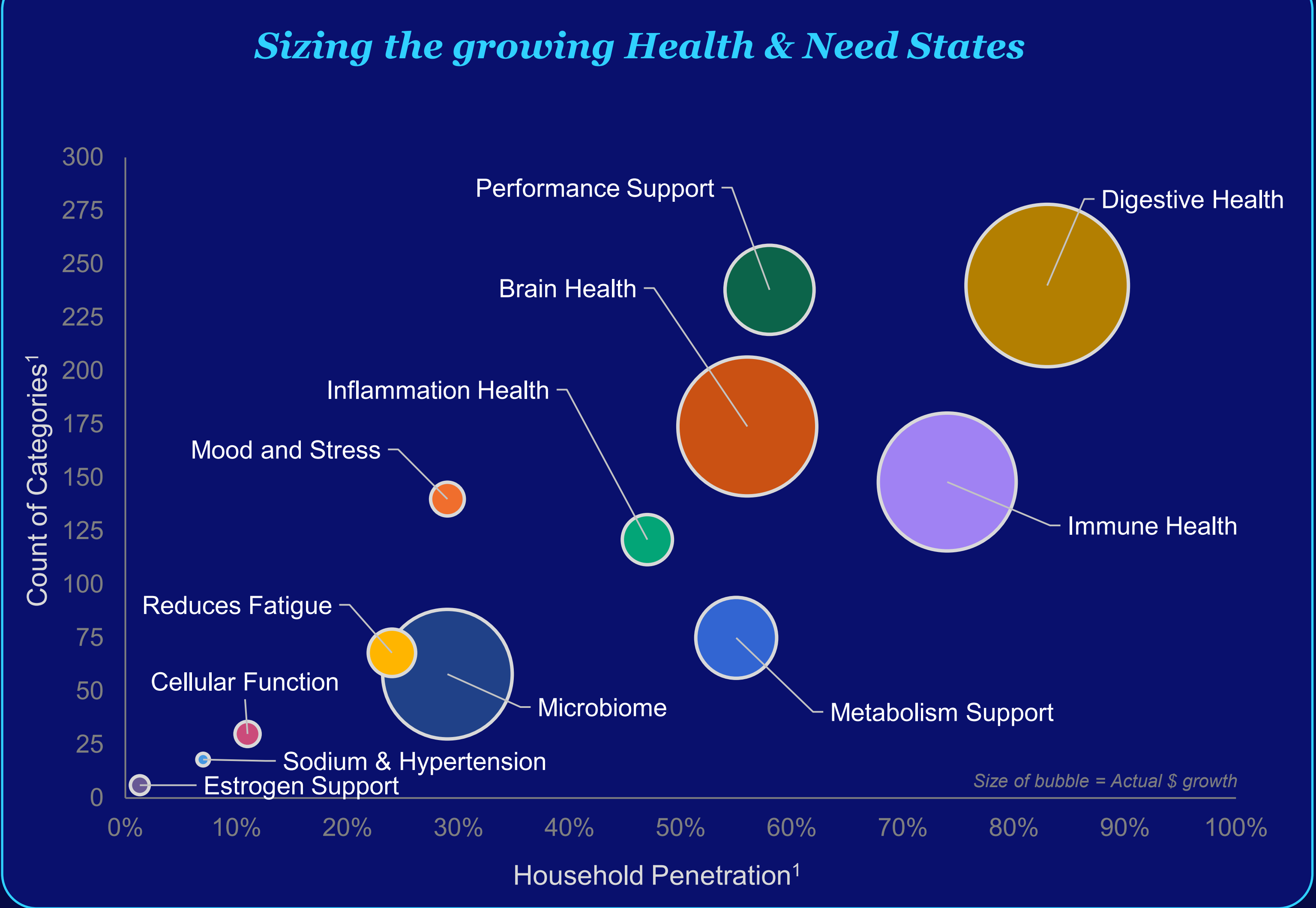
Selfless care
Improving the world around me by advocating for environmental, ethical, humanitarian, and/or philanthropic causes

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

70% of global consumers believe they are proactive in managing their health and **57%** now prioritize "aging well" more than they did five years ago.

NielsenIQ research on Consumer Hierarchy of Needs: Wellness, NielsenIQ 2025 Global Health and Wellness Survey

Consumers indicating their top health priorities across the store



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)*

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

Cost is top barrier of health

Top barriers hindering healthier life choices

Global

1. **Cost** — **54%** of consumers say the expense of healthier options is a major barrier
2. **Availability** — **31%** say difficulty finding healthy alternatives is an issue
3. **Time** — **26%** of consumers say they simply don't have time to make healthier choices
4. **Motivation** — **25%** don't feel driven to make healthier choices
5. **Trust** — **25%** don't trust that the product or service will be effective

US

- **55%** Cost
- **31%** Motivation
- **25%** Availability
- **22%** Trust
- **17%** Time

News Release

Annual Family Premiums for Employer Coverage Rise 6% in 2025, Nearing $27,000, with Workers Paying $6,850 Toward Premiums Out of Their Paychecks

More of the Largest Firms Cover GLP-1s for Weight Loss, and Use Is Higher Than Expected; Some May Be Limiting Coverage

Published: Oct 22, 2025

45% struggle to pay the costs of health care

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Bayer // United States

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Home

Community

Take Care, Now: Improving Access to Health and Nutrition in Farm and Rural Communities

64% of US:

Rising insurance costs are causing me financial stress

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39% I have decreased my medical insurance coverage because of cost

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HEALTH | HEALTHCARE

Big Changes Are Coming for 2026 Medicare Plans. What You Need to Know.

Skinnier benefits, higher premiums and fewer options mean more than a million seniors should shop for new coverage during open enrollment

40% often go without medical care because it costs too much.

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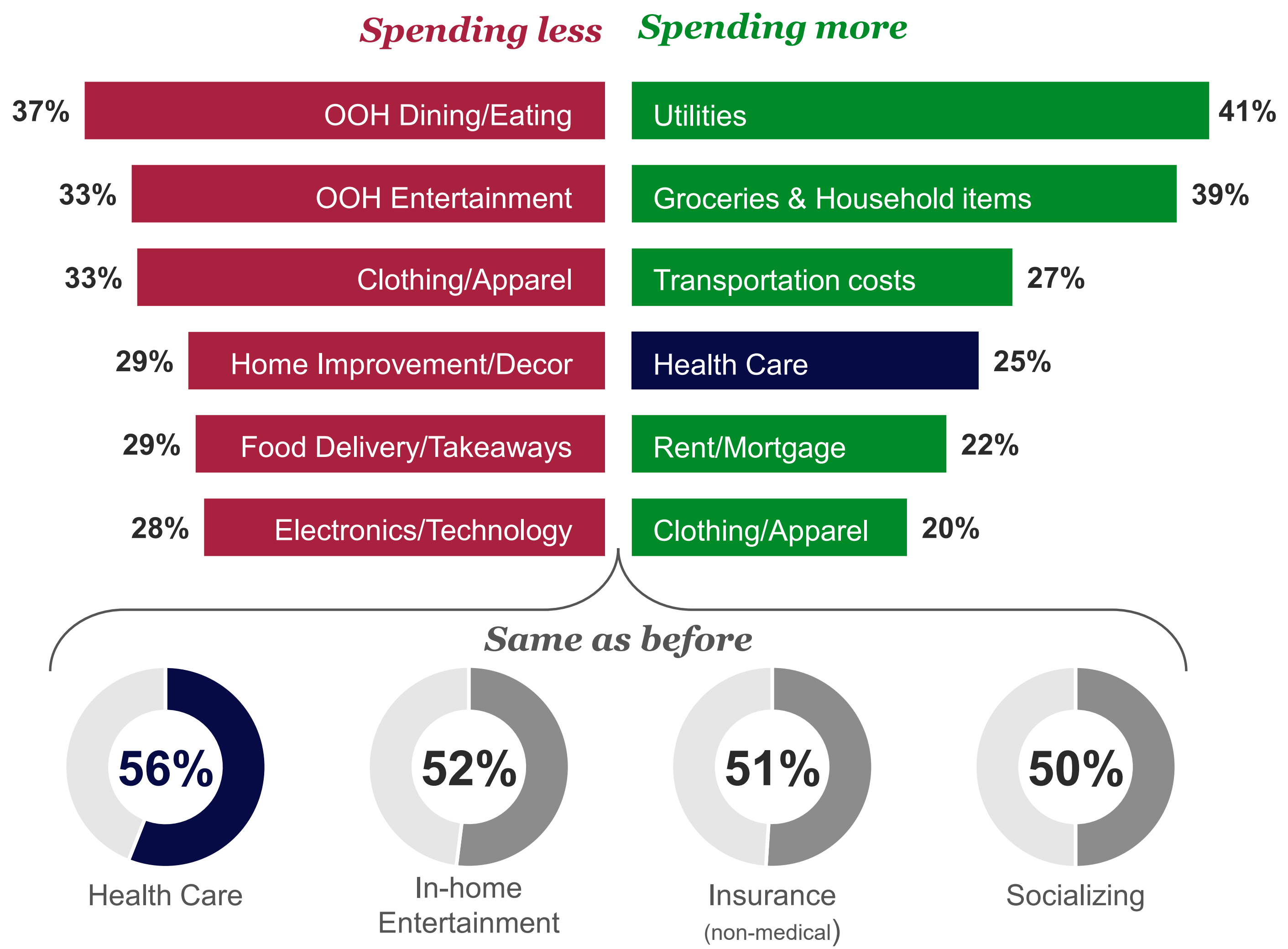
2026 wallet intentions reinforce the idea of a cautious mindset

Health care costs are anticipated to be same or more of overall budget



38%

of consumers agree:

"I take *proactive measures to look after my health* to prevent issues in the future"

Source: NIQ Consumer Outlook 2026 (US View)

Redefining the healthcare experience

28.9%
have visited urgent care* in the L12M
+1.2pts

33.9%
when sick, would rather go to urgent care than visit the doctor's office
+1.7pts

59.2%
the quality of care you receive at an urgent care is equal to what you would get at a doctor's office
+3.1pts

47.2%
Urgent care centers are less expensive than a doctor's office
+2.5pts

29.1% accessed care virtually or via telehealth in L12M — +2.1pts

65% very satisfied with most recent telehealth experience — +1.7pts

68.9% think telehealth is more convenient than in-person visit — +0.9pts

**does not include Retail Health Clinics: 30.1% of the US has visited in L12M*

MRI Simmons 2025 Health & Wellness Survey: ~260M US Consumers – Any agree

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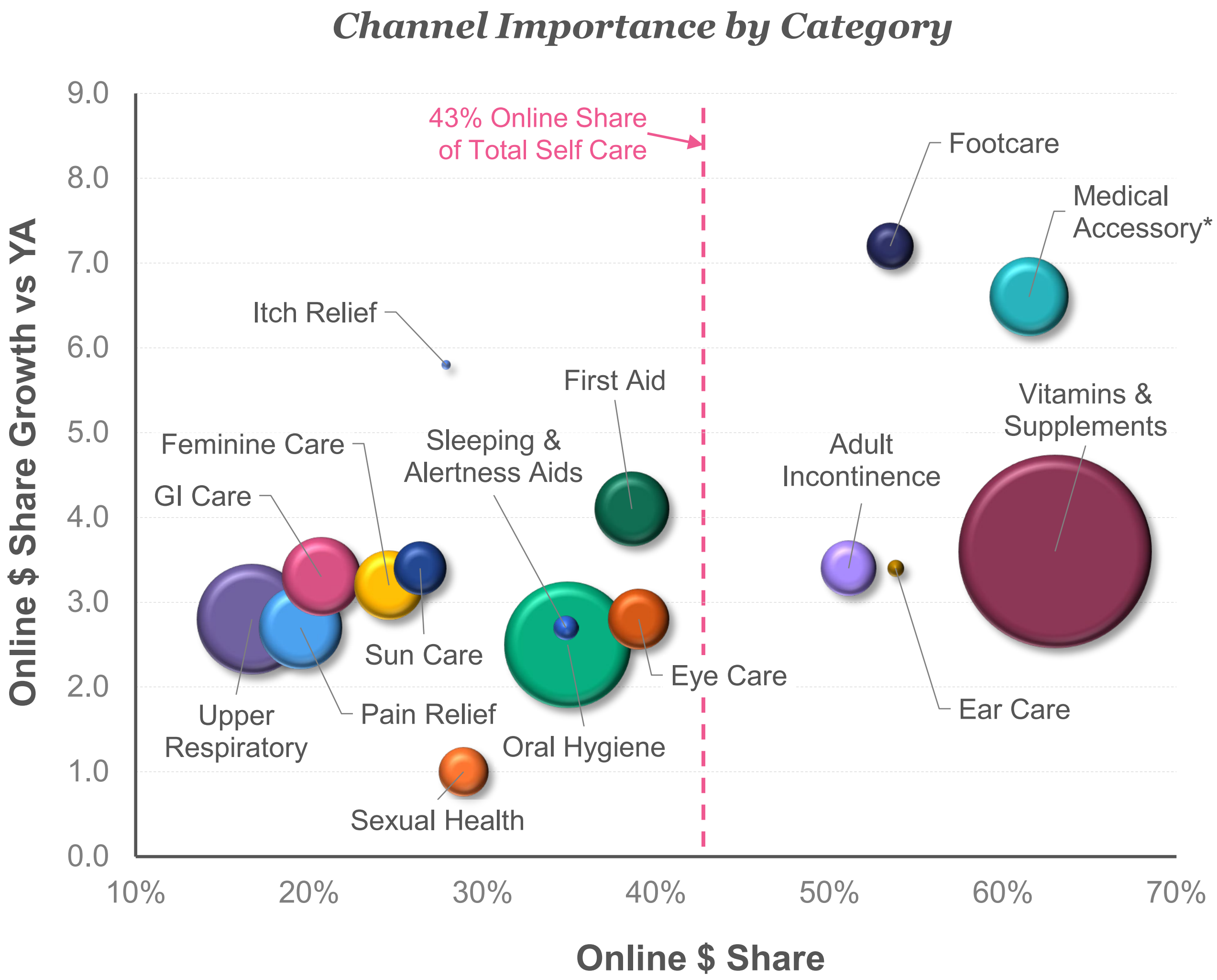
Most self care categories still sold primarily in store but shifts online occurring



* Medical Accessory excluding *Test Kit** Self Care = Adult Incontinence, Ear Care, Eye Care, Feminine Care, First Aid, Foot Care, GI Care, Itch Relief, Medical Accessory, Oral Hygiene, Pain Relief, Sexual Health, Sleeping & Alertness Aids, Sun Care, Upper Respiratory, Vitamins & Supplements; Source: NIQ, Omnisales+; Total US; Total Health & Beauty Care Department; $ % share of volume; 52 weeks ending September 27, 2025

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

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

Walmart Health: Is the Retail Giant Becoming Healthcare Gateway?

How Walmart is building trust and innovation in wellness

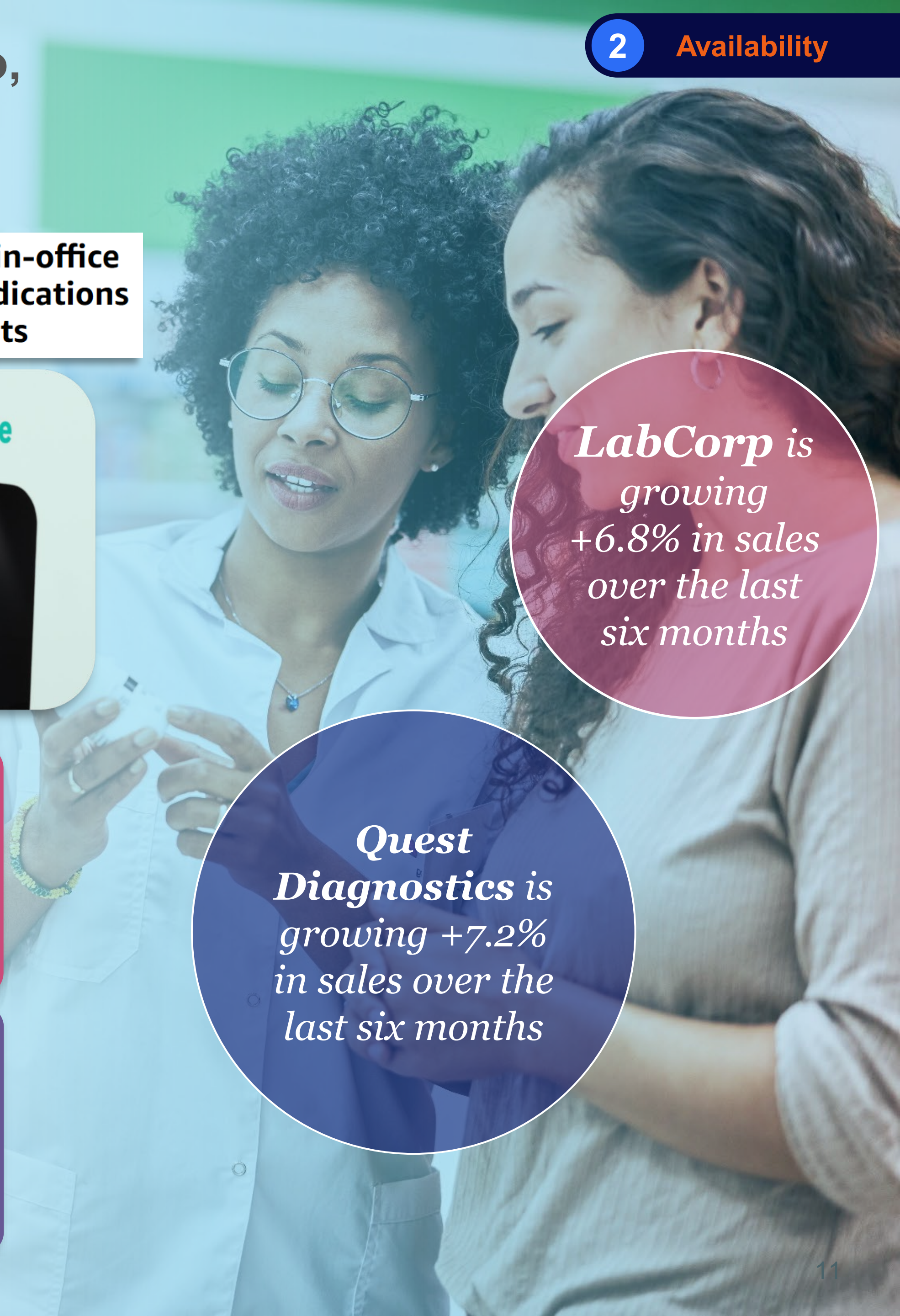
Target added 2K items to wellness assortment

Ulta

Feminine Care
Supplements
Aromatherapy
Personal Care

Sephora

Supplements
Skincare
Devices
Feminine Care

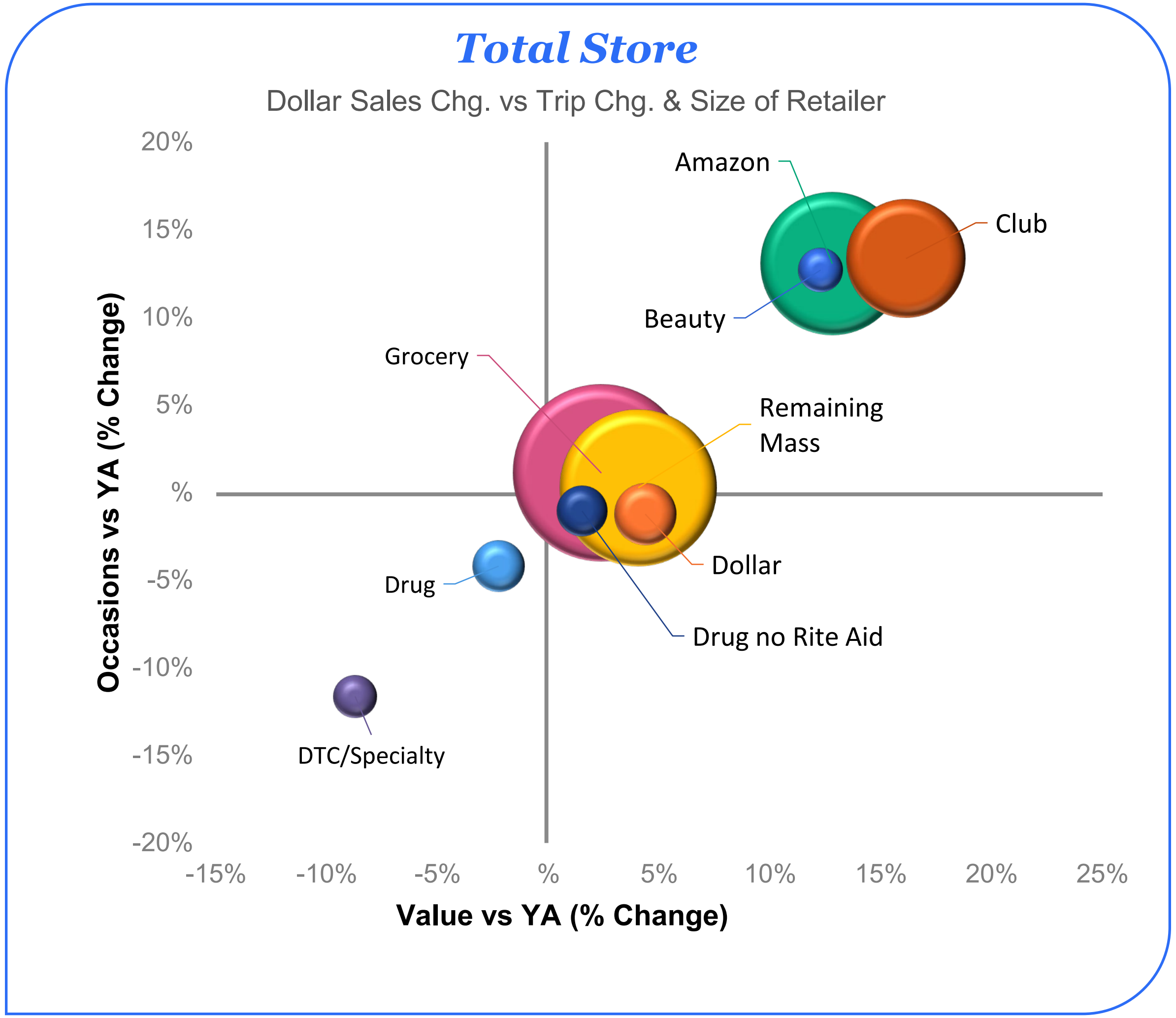


LabCorp is growing +6.8% in sales over the last six months

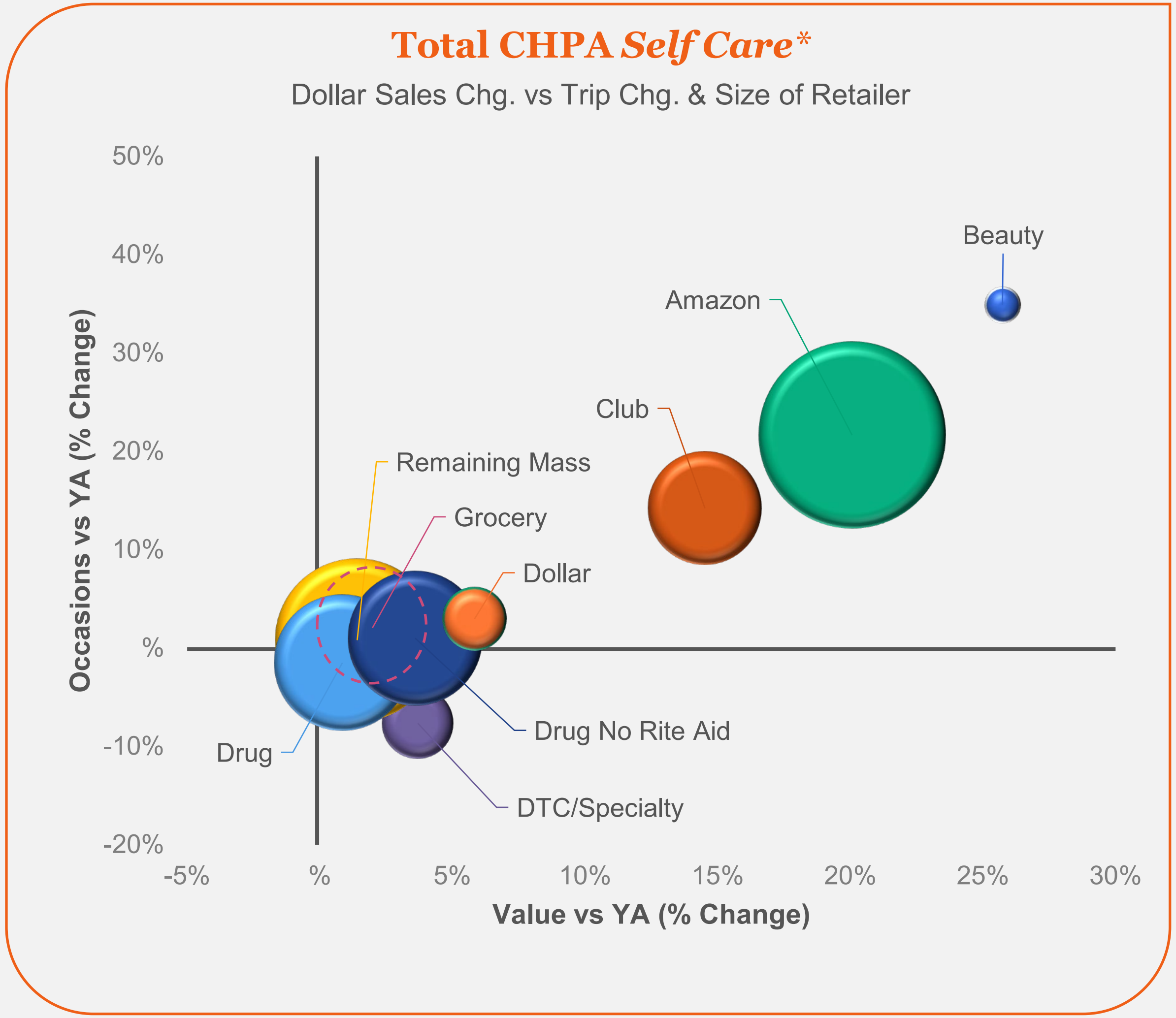
Quest Diagnostics is growing +7.2% in sales over the last six months

NIQ

Club, Amazon and Beauty lead in overall Total Store growth



Amazon is now the largest Health & Beauty retailer, including in self care



Source: NIQ Expanded Omnishopper; Total US All Outlets by Channel; Total Store vs Self Care; Dollar vs Occasions/Trips % change vs year ago; 52 weeks ending September 7, 2025 | **Self Care = Adult Incontinence, Ear Care, Eye Care, Feminine Care, First Aid, Foot Care, GI Care, Itch Relief, Medical Accessory, Oral Hygiene, Pain Relief, Sexual Health, Sleeping & Alertness Aids, Sun Care, Upper Respiratory, Vitamins & Supplements*

Amazon is having varied impact across channels, categories and consumer behavior

Share of Amazon's net shifting gains[2]

Self Care[1]

Mass Merch	23%
Drug Store	22%
Grocery Store	16%
Warehouse Club	7%
Remaining Outlets	6%
Dollar Store	4%

Amazon's growth in Self Care[2]

$ % Chg. vs YA on Amazon.com

Vitamins, Minerals & Supplements	+21%
Medical Accessory	+19%
Oral Hygiene	+21%
First Aid	+16%

Categories ranked by share of Amazon.com's $ growth

The Amazon experience[3]

90%

*of CPG searches on Amazon are **unbranded***

68%

***of Personal Care is sold via Amazon 3P** led by Ear care, First aid, Medical accessories, and Vitamins & Supplements*[3]

1/3

*of Amazon Personal Care sales are **subscribe and save**, led by VMS*

Self-Care = Adult Incontinence, Ear Care, Eye Care, Feminine Care, First Aid, Foot Care, GI Care, Itch Relief, Medical Accessory, Oral Hygiene, Pain Relief, Sexual Health, Sleeping & Alertness Aids, Sun Care, Upper Respiratory, Vitamins & Supplements

[2]Source: NielsenIQ Expanded Omnishopper (Full View Measurement)– Shifting analysis; Total US, Total Outlets; Net shifting gains for Amazon.com; Latest 52 weeks ending September 6, 2025

[3]Source: Amazon Sales & Share; Total Amazon 3P sales, Total US; Personal Care* $ sales; 52 weeks ending 1/2025

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

Demographic

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

22%	27%	20%	31%
<$50k	$50-$100k	$100-$150k	$150k+

13%	29%	34%	24%
Gen Z	Millennials	Gen X	Boomers+

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

$29.33
Avg. Health Order Value

1.3
Avg. # of Items per Health Order

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*

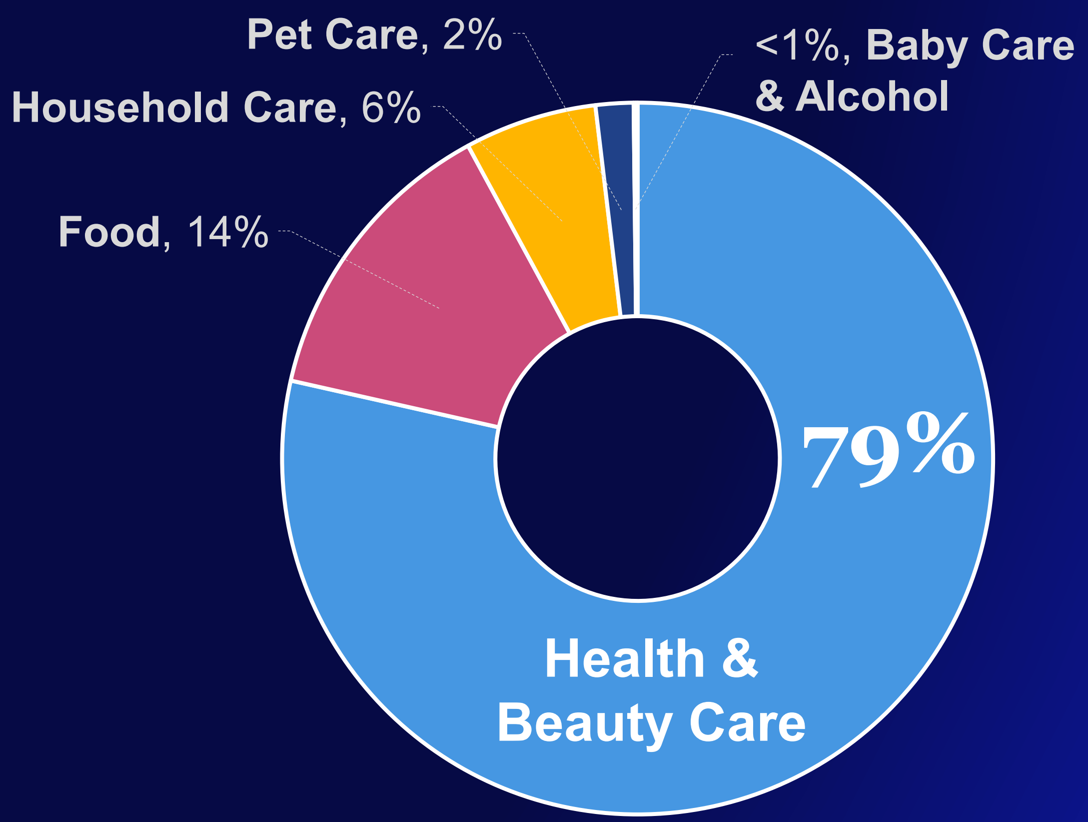
#6 *TikTok Shop is the Health and Beauty ecommerce retailer*

***Top TikTok categories**[3]*

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

*There are just as many **65+ purchasers** on TikTok as there are 18–24-year-olds*

TikTok Shop Category $ Share

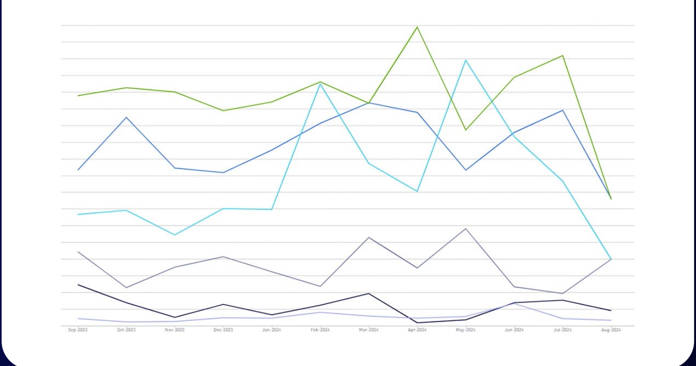


NIQ Midyear Consumer Outlook; TikTok Shop, data ending 12 months ending November 2025

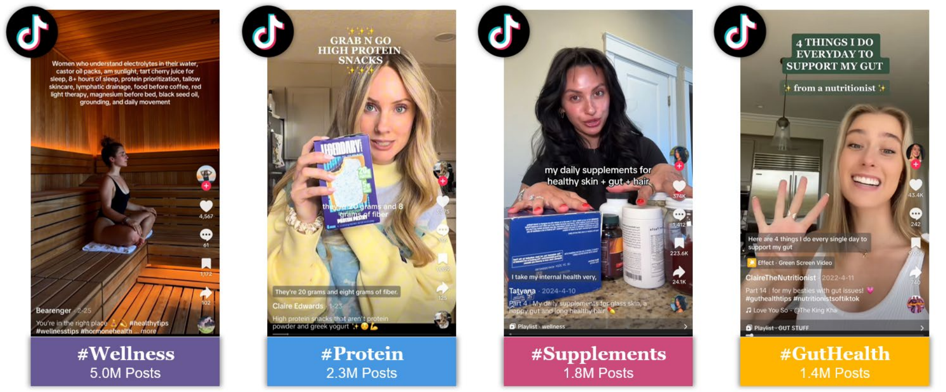
Creating new channels to influence consumers but often threatening brand loyalty

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

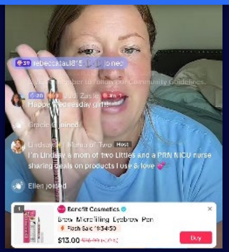
Sales fluctuation of top sports nutrition brands on TikTok



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

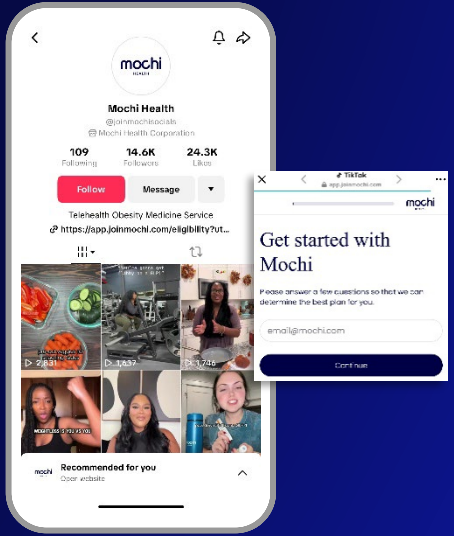


Livestream Shopping



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

TikTok | instacart ads



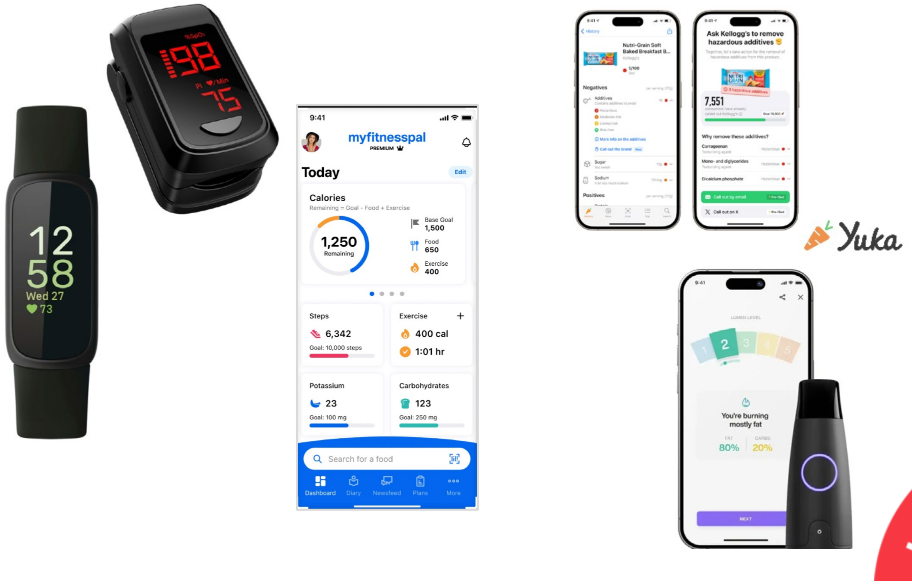
NielsenIQ Global Health and Wellness report

Health-related technology shaping the future

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

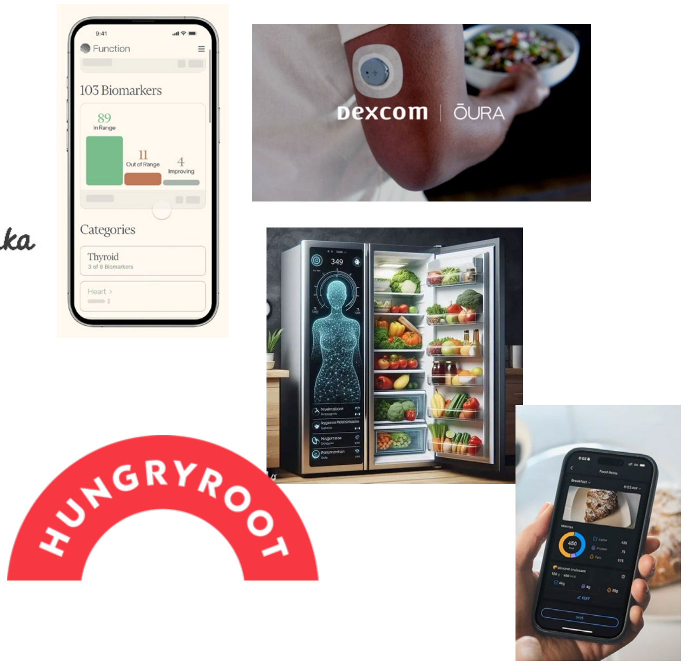
SIMPLISTIC SPECIFIC

Technology was rooted in foundational fundamentals and health tracking, where each product worked in isolation



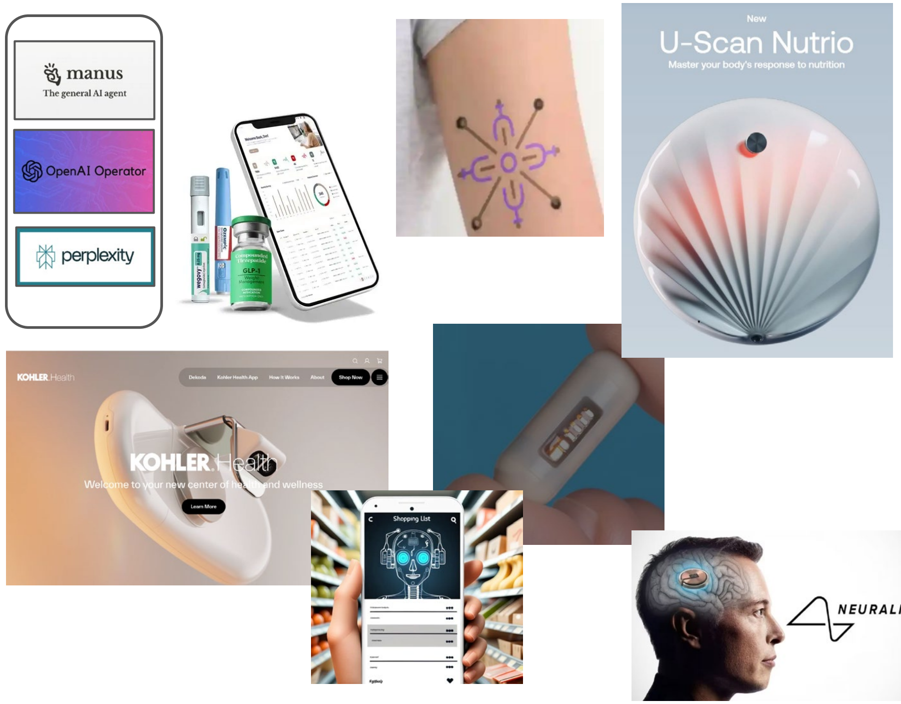
COMPANIONS

Technology is interacting with each other across categories, products and demonstrating behavioral changes



ECO-SYSTEMS

Technology will empower holistic health curation and outcomes



Tech shifting from tracking behavior to *directing behavior*

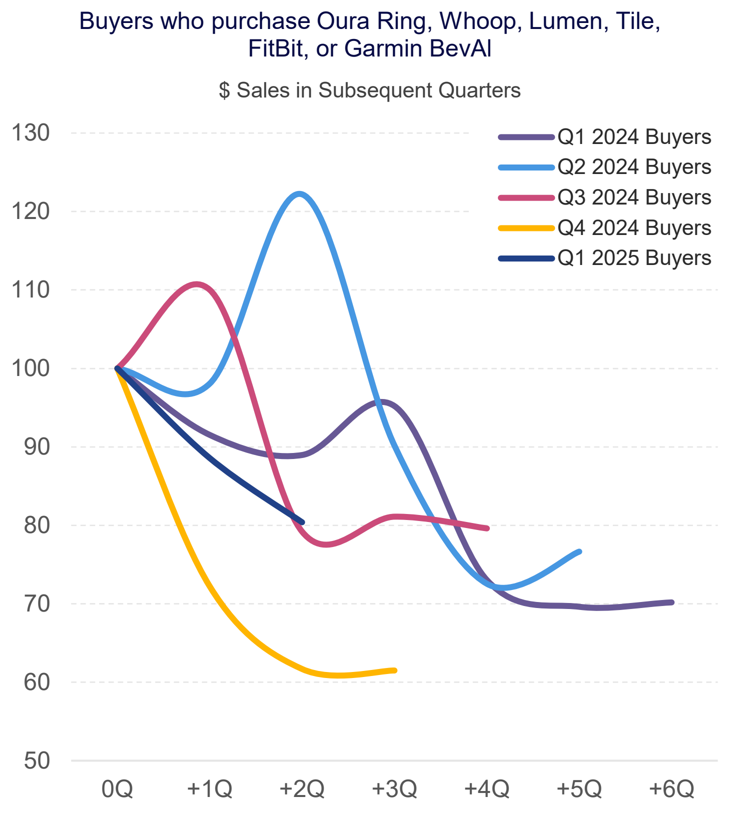
Proactive and Empowered consumer, it's in our hands

74% of consumers would prefer a tech product with extra health and wellness features over one without.

63% say "health-focused technology products are effective in helping my health and wellness"

57% would share select personal health information in return for smarter, more personalized recommendations to help achieve health goals.

New wearable buyers cut alcohol, result of personalized feedback on sleep and recovery?



Top Selling Tech Wearables Brands on Amazon Prime Day 2025

Top motivations for buying health tech **healthier cooking**, **overall well-being**, tracking **physical activity**, and improving **sleep quality**.

Source: NielsenIQ Global Wellness Study; Apple App Store, NielsenIQ Digital Purchases, October 2025 top Health and Fitness and Medical apps

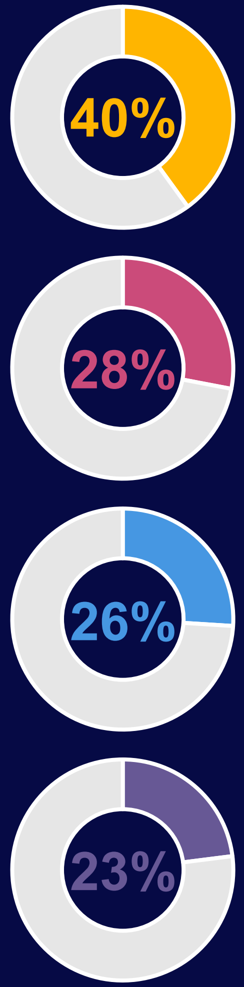
Trust: What matters most to consumers overall?

Self-Research	64%	*research treatment options independently before consulting their doctor*
Challenging Doctors	61%	*are willing to challenge their doctor's recommendations regarding their health*
Doctor Recommendations	57%	*worry that doctors recommend treatments based on financial incentives, and this concern is also growing*
Alternative medical care	56%	*are incorporating more alternative medical care into their lives over traditional care*
Homeopathic medicine	45%	*trust homeopathic medicine*
Alternative medicine	44%	*prefer alternative medicines over traditional ones, and 60% believe herbal supplements are effective*

MRI Simmons study

I am more skeptical *about which sources of information I can trust*

Boomers



Gen X

Gen Y

Gen Z

One in four **consumers *don't believe* the health products and services they purchase will be effective—** *and say this is a major barrier to them making healthier choices.*

Gen Z

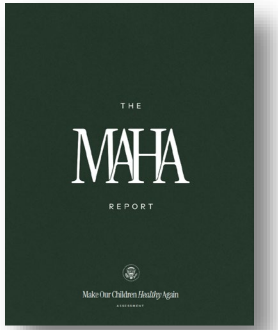
207 *Social Media is Media Trusted the Most*

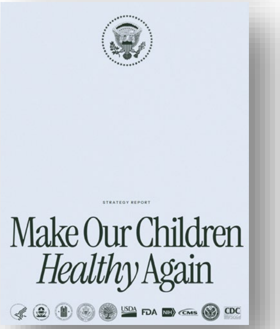
126 *Use Social Media to Obtain Healthcare Info*

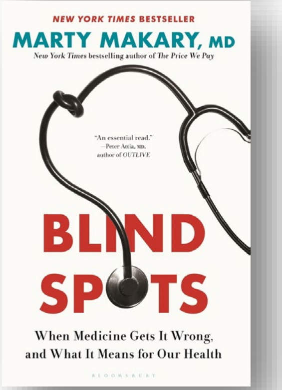
Source: MRI Simmons, Spectra,, NIQ Consumer Outlook 2024. Source: NIQ's 2025 Global Health & Wellness Report

NIQ

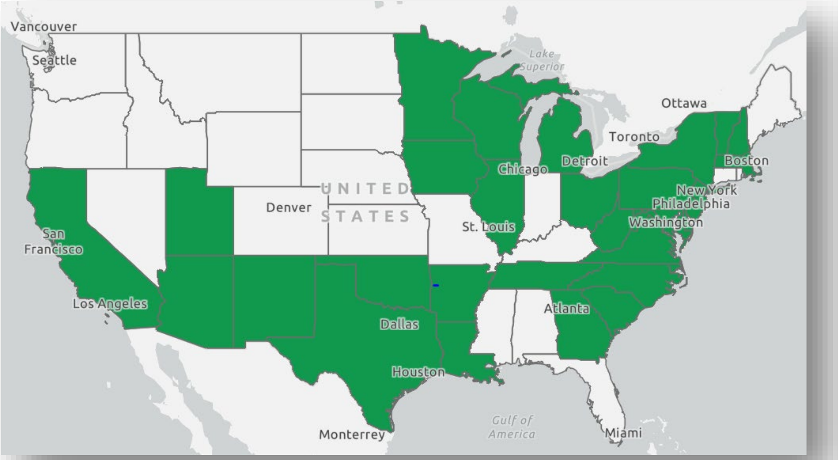
Shifting regulatory and cultural environment can challenge trust

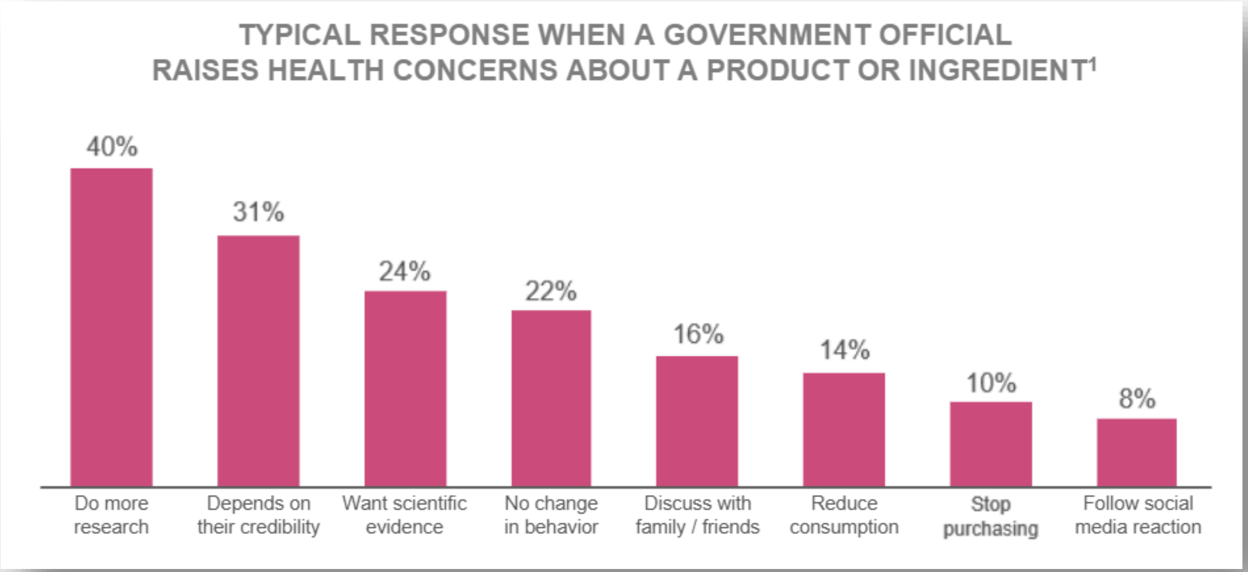




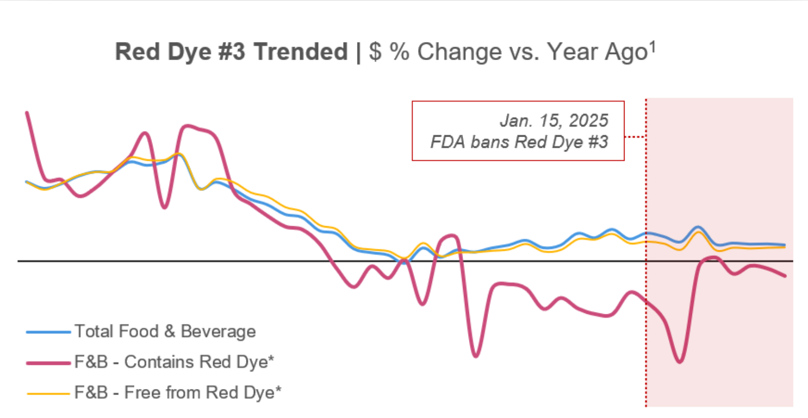


Active state-level ingredient bills[1]





*Globally, **82%** say labels on health and wellness products need to be more transparent and easier to understand*



Free From Artificial Colors down in most categories but growing 5% in sexual health and 9% in pain relief versus year ago
Contains Artificial Colors up 5% overall but declining in upper respiratory, GI care and oral hygiene

[1]Source MRI Simmons, NIQ, Retail Measurement Services – NIQ Product Insight; Total US xAOC+Conv; Total Food & Beverage vs PI Contains vs Free from Red Dye 3 Qualified; $ % Change vs year ago; 4-week trended through week ending September 6, 2025 [2]Source: NIQ Retail Measurement Services, NIQ Product Insight, powered by Label Insight; Total US xAOC+Conv vs Total US Convenience; Total Food & Beverage; Number of UPCs selling impacted; 52 weeks ending March 22, 2025 1NIQ, BASES Quick Question Artificial Ingredient Survey, October 2025, n=1,025, NielsenIQ Product Insights, data ending 9/6/2025, NielsenIQ Global Wellness Report, 2025

Wellness is everywhere

Rising healthcare costs

Rx to OTC switches

Shift to healthspan

Technology-enabled healthcare

Destigmatization of formerly taboo health topics

Growth of telehealth

Increase of care givers

Aging population

Ease of ordering own lab tests

Wait times for appointments

Convergence of food and supplementation

Self-diagnosis

"Dr. TikTok"

Consumer acceptance of at home testing

Increasing prevalence of chronic diseases


NEWSLETTERS | THE FUTURE OF EVERYTHING

The Rise of DIY Healthcare

Plus, China's cyberpunk megacity, windowless jets and OpenAI's TikTok rival, in this edition of The Future of Everything newsletter

By Conor Grant Follow

Oct. 3, 2025 9:41 am ET

Gift unlocked article Listen (5 min)

"The evidence shows that the more a patient gets involved in their own care, the better the outcomes.
In the future, primary-care doctors could act more as expert consultants rather than paternalistic bosses to patients." Dr. Tom Delbanco

Alternative group more likely to consult friends, seek alternative care

TRADITIONAL

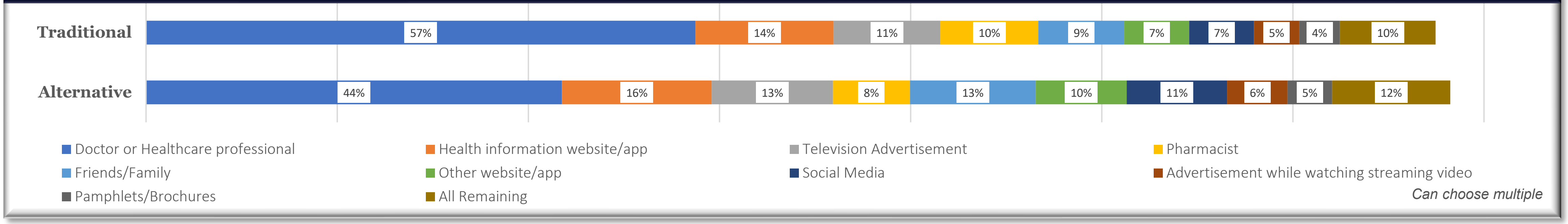
ALTERNATIVE

TRADITIONAL		ALTERNATIVE
MORE LIKELY	*"I go to the doctor regularly for check-ups."*	LESS LIKELY
LESS LIKELY	*"I only go to the doctor when I am sick."*	MORE LIKELY
LESS LIKELY	*"I consult with my pharmacist for health advice."*	MORE LIKELY
LESS LIKELY	*"I take advice on health issues from my friends."*	MORE LIKELY
LESS LIKELY	*"I research treatment options on my own before asking my doctor about them."*	MORE LIKELY
LESS LIKELY	*"I prefer alternative medicine to traditional medical practices."*	MORE LIKELY

MRI Simmons 2025 Health & Wellness Survey: ~260M US Consumers – Any agree

While Traditional and Alternative consumers differ on media preferences, both groups are motivated by testimonials, experiential, and value

How did you obtain information about an ailment or prescription drug? – L12M



Typically read online reviews submitted by others	79%	83%
Social media influencers impact the brands I buy	16%	30%
Prefer shopping at specialty stores because the employees are knowledgeable about products	46%	50%
I usually read the information on product labels	68%	76%
I smell personal care and household products in the store before I buy them.	59%	68%

Path to Purchase

Value Driven

- Over 75% of both groups agree "*price is more important than brand name.*"
- Over 65% of both groups prefer to shop at stores that offer loyalty rewards."
- Over 60% of both groups hold off buying things until they go on sale.

MRI | SIMMONS

MRI Simmons Total US 2025 Health & Wellness Study (SP25 USA)

Exploring the changing health care path through the lens of **GLP-1** and menopause

Increasingly important to understand how health conditions impact household purchasing

Percent of household in NIQ Consumer Panel reporting conditions in 2025

- 39% Allergies (non-food)
- 33% Depression/Anxiety (NET)
- 32% High Blood Pressure / Hypertension
- 32% Imperfect vision
- 29% Anxiety
- 27% Obesity/Overweight
- 25% Acid reflux/GERD/Heartburn
- 24% Joint/Neck/ Back Pain
- 23% Depression
- 22% Arthritis
- 22% Cholesterol problems
- 18% Insomnia/Sleeplessness
- 18% Headache - migraine
- 16% Muscle, Musculoskeletal pain/Spasms
- 14% Diabetes – Type 2
- 14% Headache – chronic/tension
- 12% Dry eye
- 12% Menopause/Perimenopause
- 12% Hair loss
- 11% Asthma
- 11% Acne
- 11% Eczema
- 10% Other skin condition (skin rash, irritation, dermatitis)
- 10% Attention Deficit Disorder / Hyperactivity
- 9% Upper respiratory (RSV, Coronavirus/COVID-19, Flu)
- 9% Lactose intolerance
- 8% Urinary incontinence / Overactive bladder
- 8% Pre-Diabetes
- 8% Restless leg syndrome (RLS)
- 7% Irritable bowel syndrome (IBS)
- 7% Gum disease (Gingivitis, Inflammation, Periodontis, etc.)
- 7% Eye disease (glaucoma, cataracts, macular degeneration)

Source: NIQ Annual Shopper Health Study, 2025, 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

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

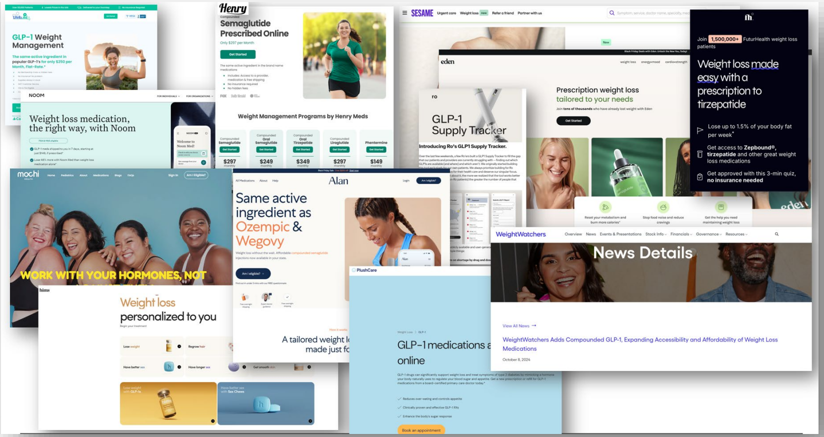
Source: NIQ Health Shopper Survey, 2016 to 2025; Q. What influenced the decision for you/your household member to treat or manage the [ailment] in the ways mentioned? Select all that apply.

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 coming

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

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

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

Consumer Focus: *GLP-1 Users*

~130M clinically indicated across the United States^

~100M

Obese

~45M

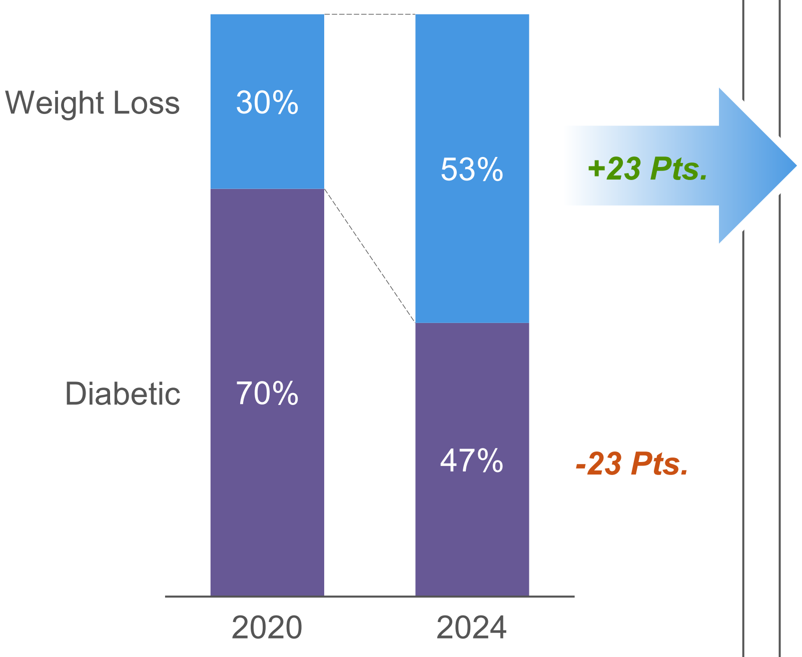
Over-Weight*

~35M

Type 2 Diabetic

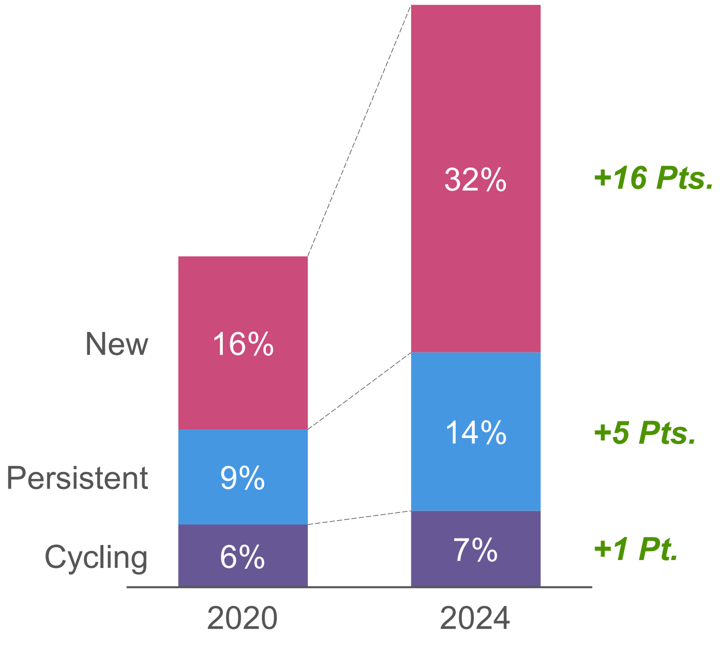
Medical records show weight loss is now the #1 reason for taking GLP-1s

% Patients Taking GLP-1 based on anonymized medical record data



New weight loss GLP-1 users are driving adoption

% Weight Loss patients taking GLP-1

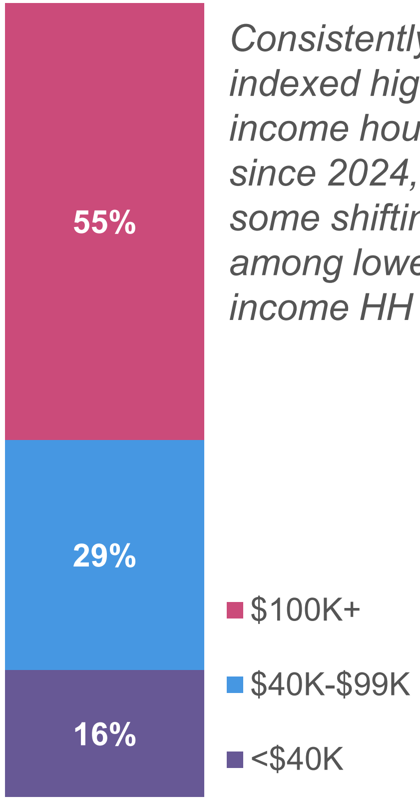


Left Source: Centers for Disease Control; Middle & Right Source: Management Science Associates, Inc.
Notes: *Over-weight with one or more comorbidities; ^Defined as over-weight/obese/diabetic
Right Chart: Sums may not equal totals in middle chart due to rounding

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

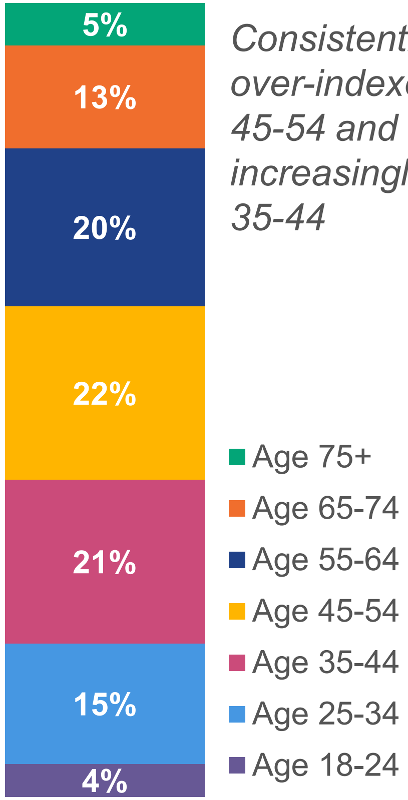
Current GLP-1 Weight Loss Consumer

Household Income



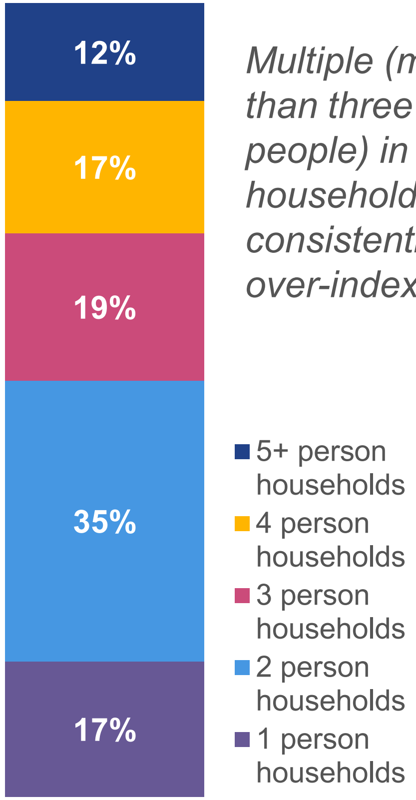
Consistently over-indexed higher income households since 2024, with some shifting among lower income HH

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

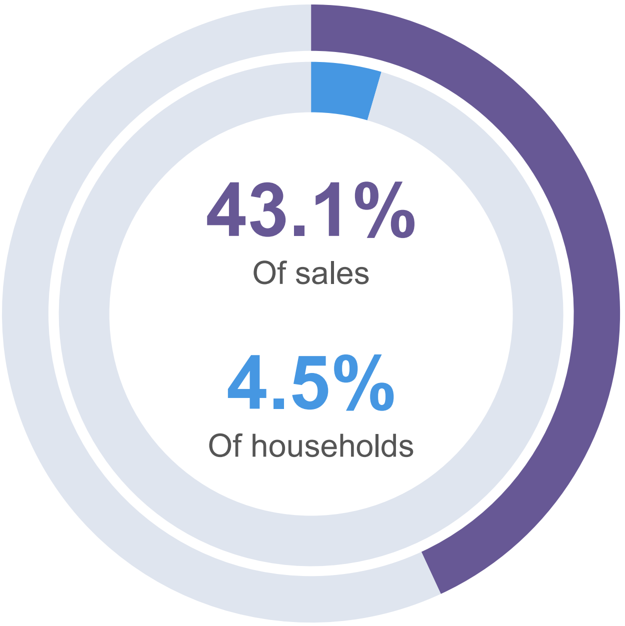
Homescan GLP-1 Survey: GLP-1 for Diabetes/WL: June/July 2025: Spectra Oct 2025 (compared against March 2024, August 2024, January 2025 and June 2025)

GLP-1 users are redefining demand, driving outsized growth in the claims that matter most

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

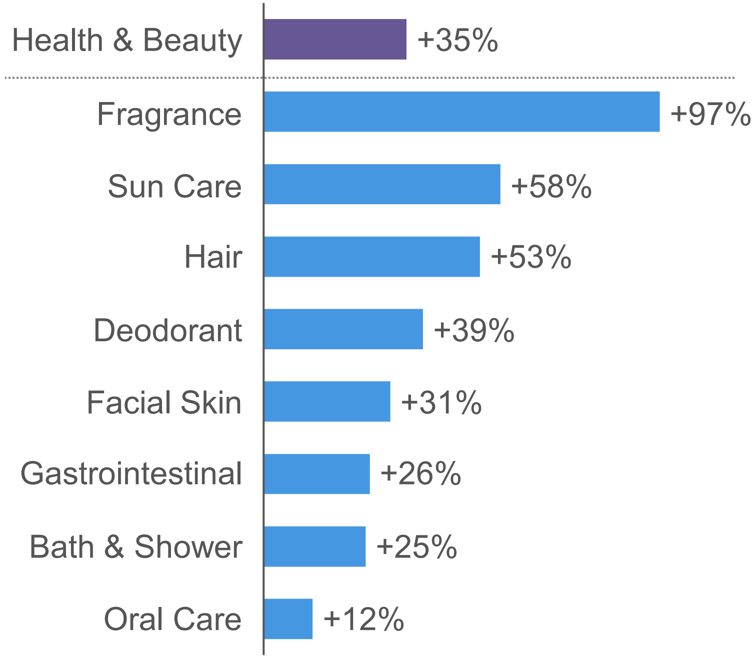
Characteristic Focus: GLP-1 Weight Loss Users^

GLP-1 User Contribution to Muscle Health claim sales growth



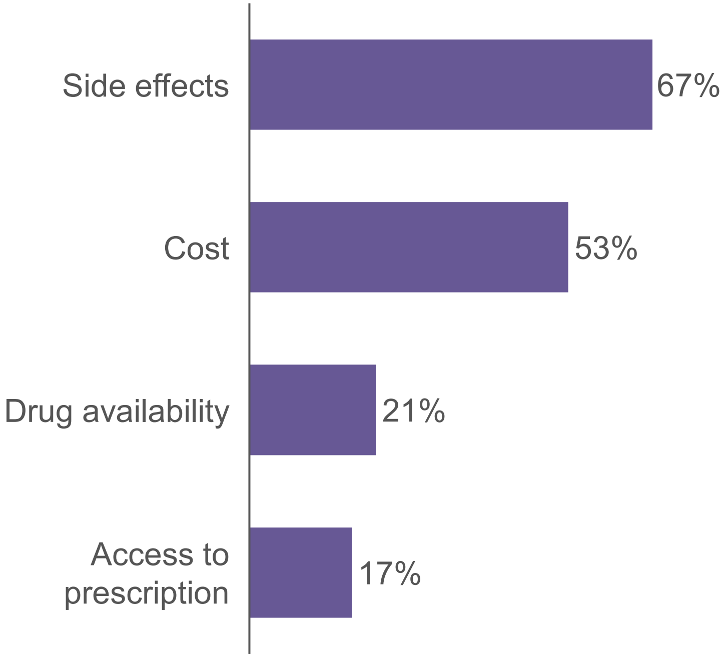
GLP-1 users spend over $1,150 on Health & Beauty; 1.3X more than non-users

GLP-1 Users spend more on Health & Beauty



Malnutrition risk fuels potential side effects for GLP-1 users

Leading Barriers to using Anti-Obesity medication

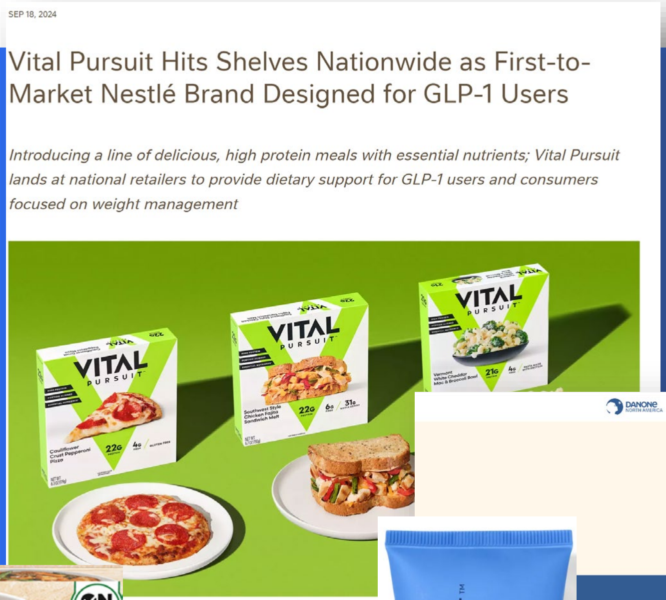


Left Source: NIQ, Homescan Panel On Demand, Powered By Label Insights, Total Panel, Total Outlet, P1 = 3/5/2023-3/2/2024, P2 = 3/3/2024-3/1/2025; Middle Source: Management Science Associates, Inc. & NIQ, Homescan Panel On Demand, Powered By Label Insights; Right Source: NIQ, Global Health & Wellness Survey, May 2025 Release, n=1,000

^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.

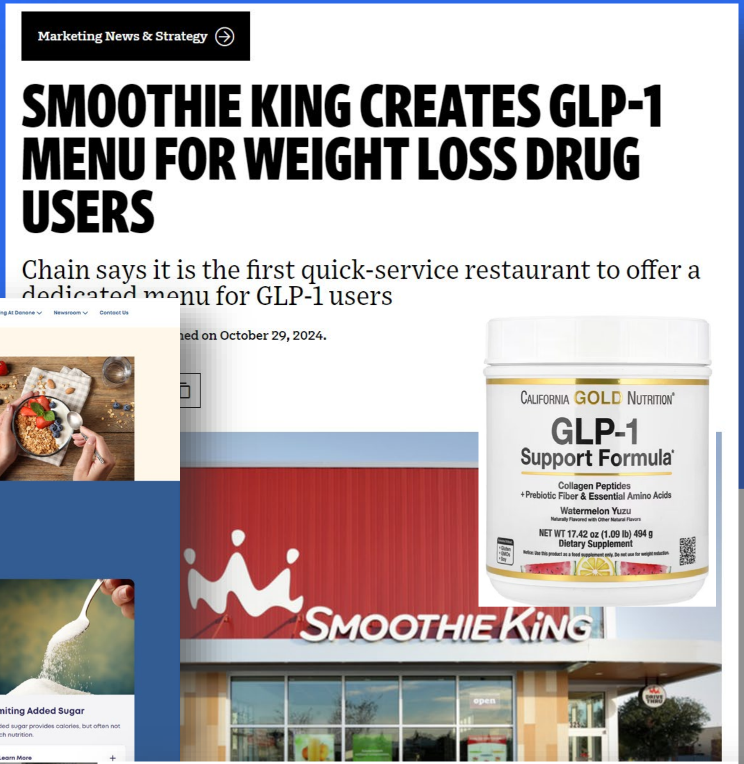
Pathways

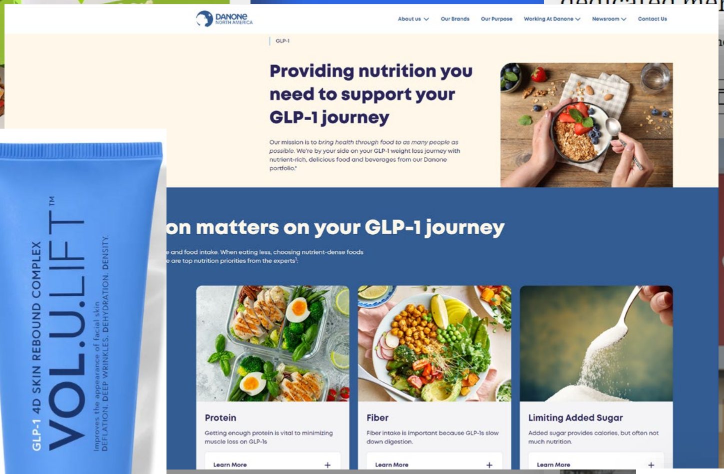
1. As prevention: without or before GLP-1s
2. Onboarding/companion products
3. Off-boarding/step-down/after GLP-1


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





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

Self-Care: The Future of Healthcare Takeaway

The opportunities for self-care categories to meet consumer health care needs has never been better.

NIQ