KEYNOTE

The State of Natural & Organic

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Natural Products EXPO WEST®

Co-located with Fresh Ideas ORGANIC MARKETPLACE

Product Discovery Powered by Beacon DISCOVERY™

New Hope. NETWORK.

By Informa Markets


Natural Products EXPO WEST
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ANAHEIM CONVENTION CENTER
New Hope NETWORK
NEW HOPE NETWORK
EXPO WEST
FOR I WAS HUNGRY AND YOU GAVE ME SOMETHING TO EAT

Expo West Updates and Highlights

Show Floor Hours:

Wednesday 10:00am - 6:00pm

Thursday 10:00am - 6:00pm

Friday 10:00am - 2:00 pm

Buyer-Only Hours:

Wednesday, March 4
9:00am – 10:00am
(ACC Level 3 & North Halls)

Thursday, March 5
9:00am – 10:00am
(ACC Halls A-E & Arena)

New Pavilions

- Snack Lab (ACC Level 3)
  Taste and Rate attendee experience
- Launch Pad (ACC Arena)
  Emerging Brands

Arena Makeover

- Accelerator Meeting Space
- Hosted Buyer Lounge
- New Hope Café

Download the Show App

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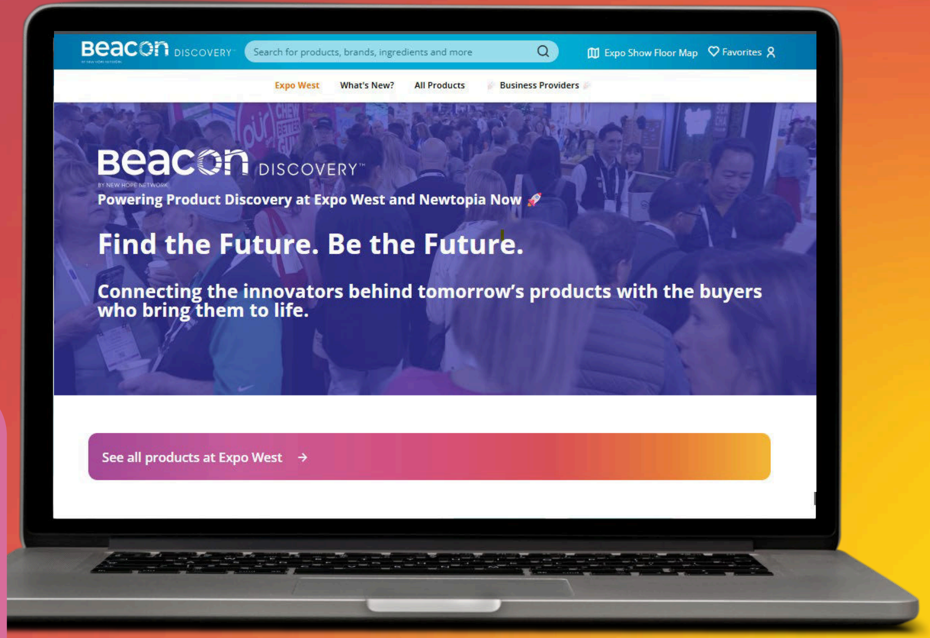
New Hope NETWORK. By Informa Markets

Beacon DISCOVERY™

BY NEW HOPE NETWORK

Beacon Discovery connects buyers and brands at Expo West and year-round through smart, targeted visibility that turns missed encounters into meaningful partnerships.



2500+	30,000+	5900+
Retailers Use Beacon	**Products** On Beacon	**Brands** On Beacon

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newtopia now

August 18-20th, 2026

Newtopia Now is *the* destination for new product innovation and can't-miss discovery opportunities. It connects CPG brands—whether launching for the first time or expanding their product line—with buyers, investors, and experts who provide insights and explore opportunities in an intimate setting. Newtopia Now is where conscious products grow.

Learn more at the Newtopia Now Meetup on Thursday, March 5, in the new Arena Accelerator Meetup Space.

Natural Products EXPO WEST

New Hope NETWORK

By Informa Markets

acosta group

From Natural Leadership to National Scale

acosta.group

Today's Presenters

Bill Giebler
Content & Insights Director
New Hope Network

Kathryn Peters
Head of Industry Relations
SPINS

Nick McCoy
Co-Founder & Managing Director
Whipstitch Capital

Kevin Liebrock
Product Director
New Hope Network

It's 45 years of Expo!

But it's an industry with deep roots

GENERAL NUTRITION CENTERS GNC

1935

1940/42

MRS. GOOCH'S

Bread & Circus

The Food, The Whole Food and Nothing But the Food.

WHOLE FOODS MARKET

1975

1977

1978

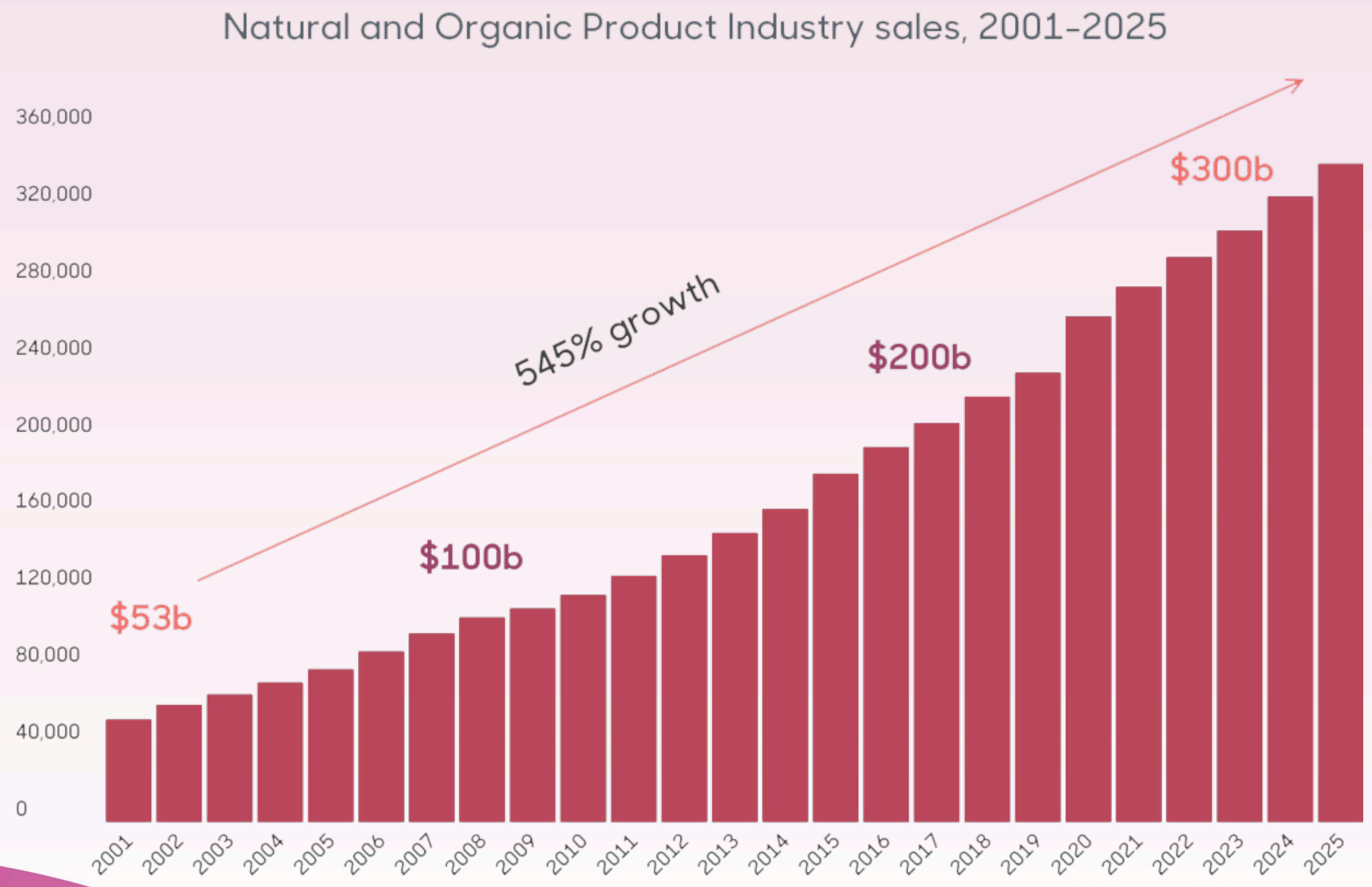
...on a straightforward value proposition

The U.S. natural products industry is a force

This industry has

grown 545% since 2001

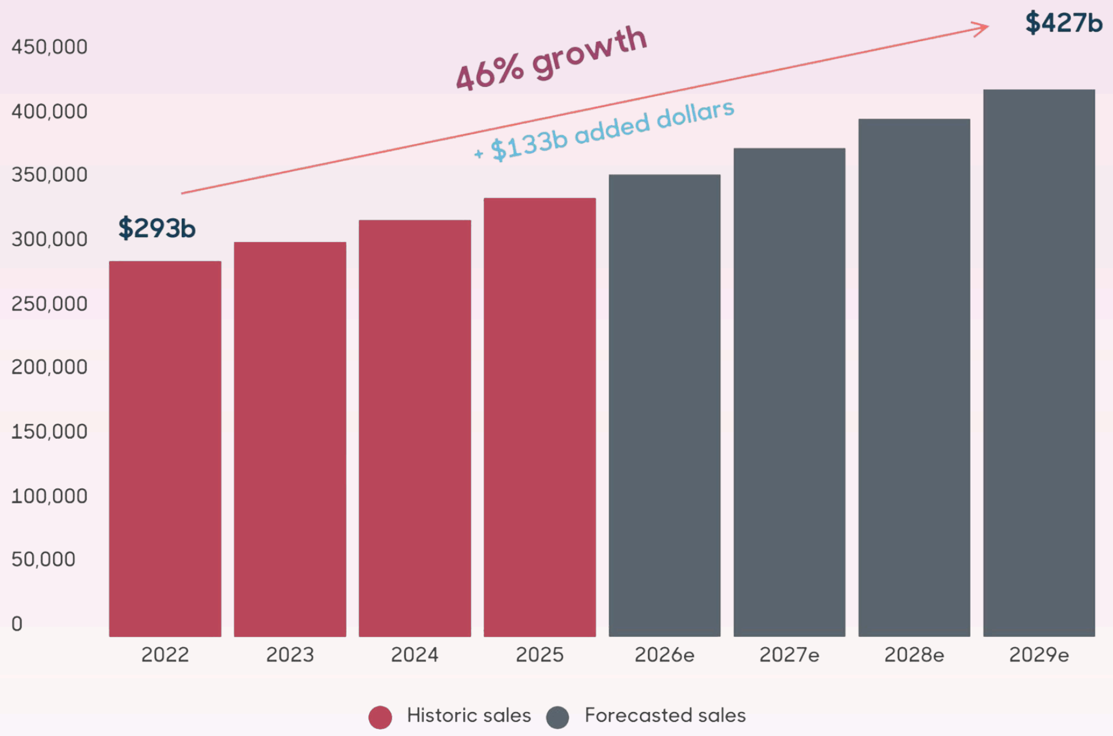
from **$53b** to over **$342B in 2025**



Source: NBJ ($mil, consumer sales), developed with input from SPINS

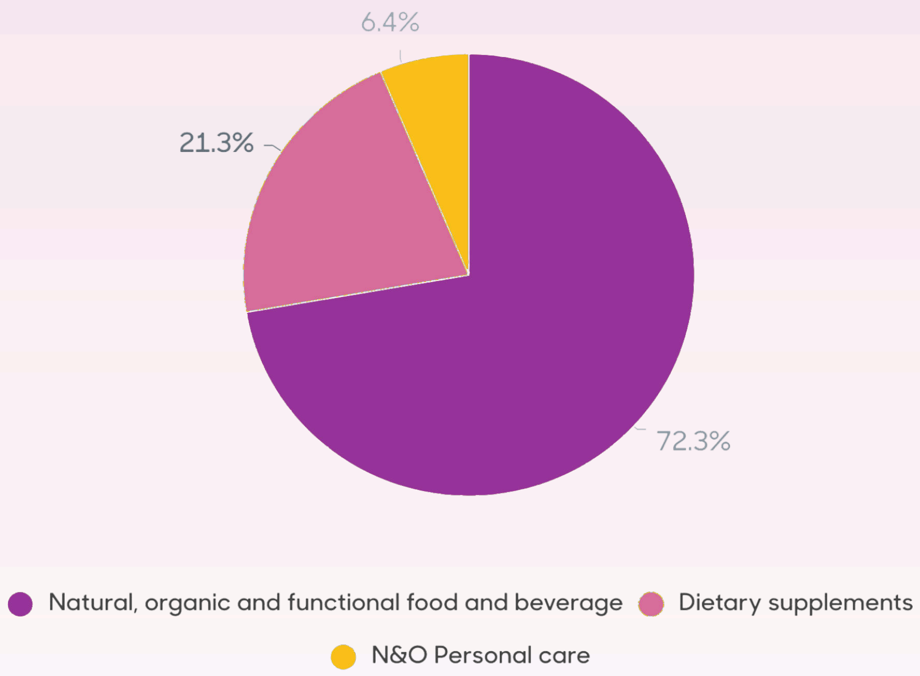
Natural and organic industry grew 5.2% over 2024, predicted 5.7% annual growth into 2029

Natural and organic product industry sales and growth, 2022-2029e



Source: NBJ ($mil, consumer sales), developed with input from SPINS

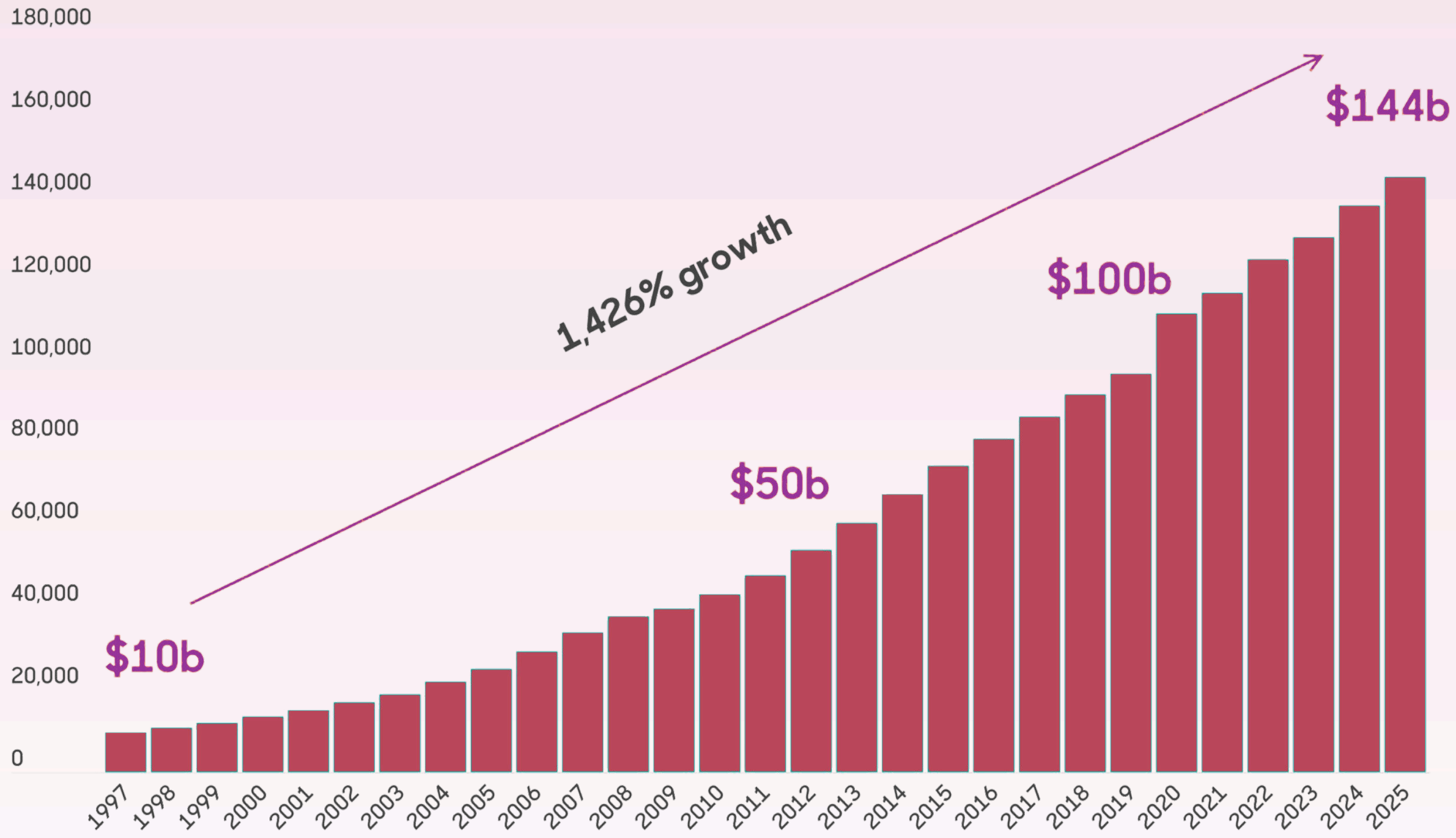
$342.10b Natural and Organic Product Industry Sales by Category, 2025



Source: NBJ, developed with input from SPINS

Natural and organic food and beverage alone is approaching $150b

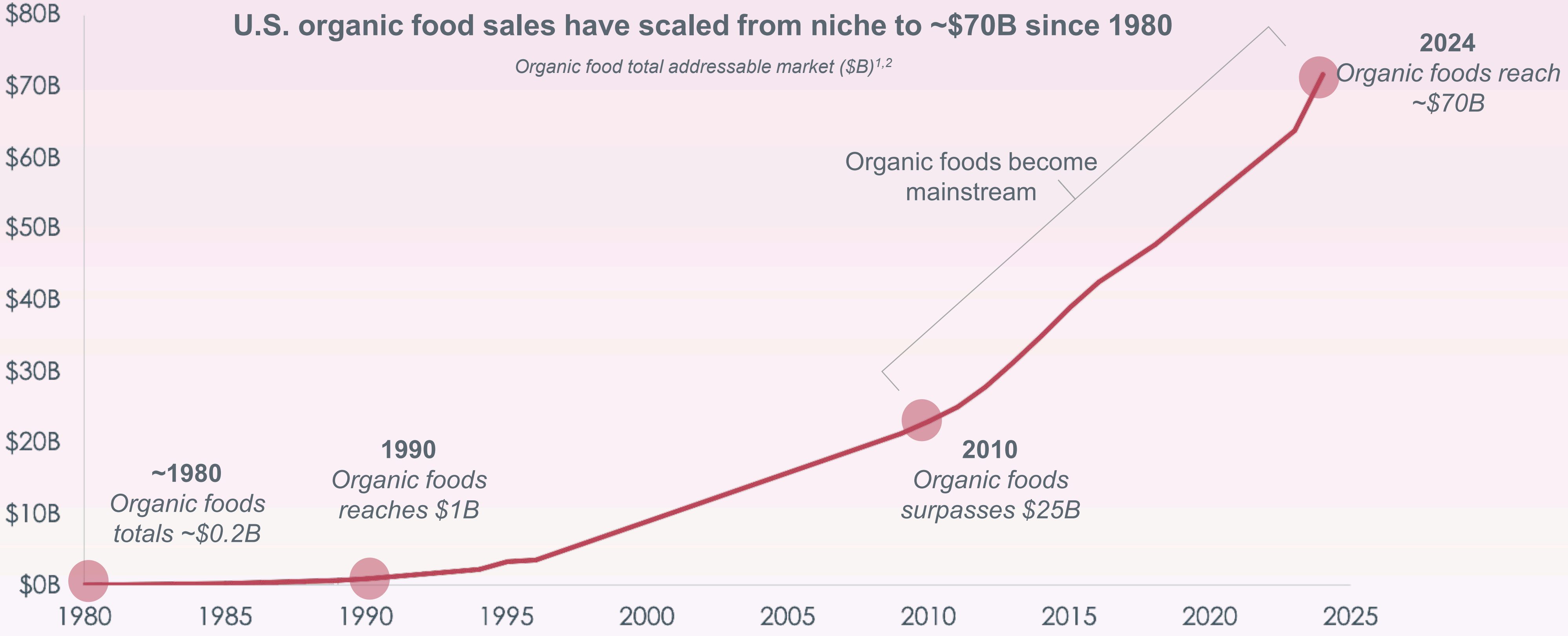
Natural and organic food and beverage sales, 1997-2025



Source: NBJ ($mil, consumer sales), developed with input from SPINS

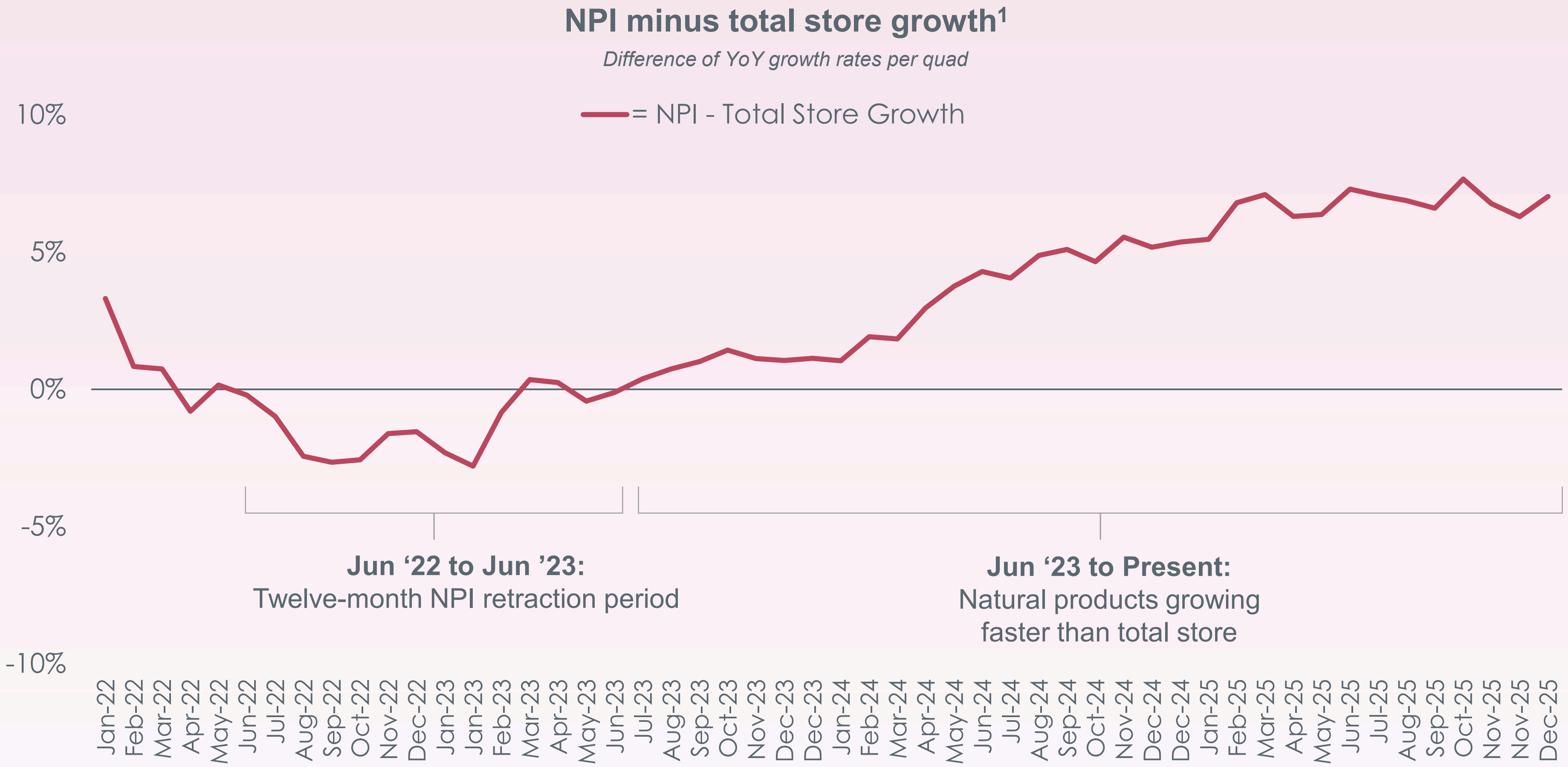
Organic since Expo Inception

The Industry Has Grown from Nascent to Mainstream Since Expo's Inception



1) Natural Foods Merchandiser, June 1996
2) Organic Trade Association, December 2025

Better for you is growing faster than historical rates

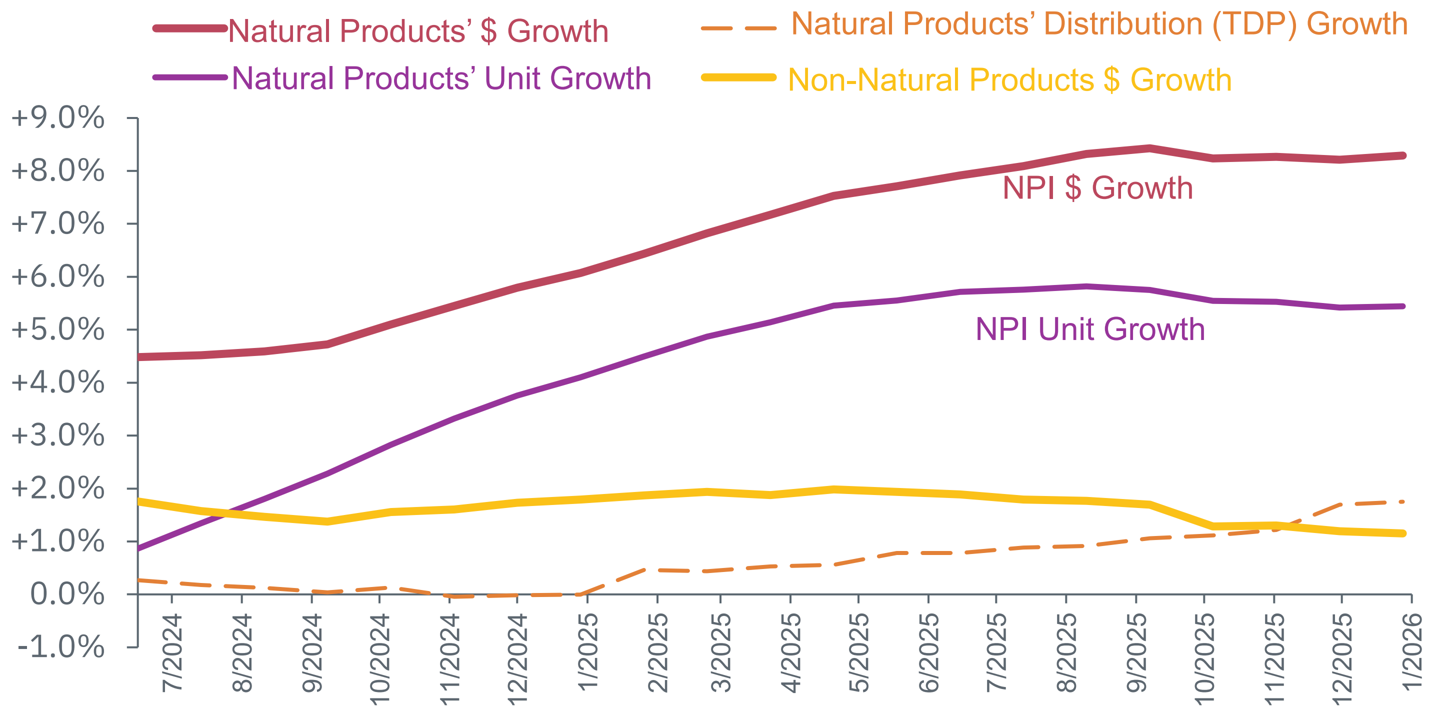


1. SPINS, MULO + Natural + Convenience, 4 WE 12/28/25; NPI = Natural Products Industry, TPL = Total Products Library

Our industry's pace of growth continues to accelerate. And attracts more buyers and trips

Year over year rolling growth for combined Natural Supermarkets and Mainstream Outlets

% chg. of each 52-week ending period vs YA



+6% INCREASE IN TRIPS PER BUYER

+3% INCREASE IN DOLLARS PER TRIP

99.6 of Households buy Natural Foods and buyer count continues to increase

Latest 52 weeks versus year ago

+10%

ALL OUTLET NATURAL PRODUCTS $ SALES GROWTH, **UNITS +7%**

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Source: SPINS Natural Channel and MultiOutlet (powered by Circana) and SPINS TriLens Consumer Panel (powered by Circana), week ending 12/28/25

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Overall, shoppers are buying more natural products

Shoppers are spending nearly 10% more than last year on natural products and where they spending those dollars is evolving.

Overall, where are natural products being purchased?	Share of a $100 NPI Wallet	Growth vs Prior Year	Index to Conventional Product Shr of Wallet
Supermarkets (including natural)	$39	-$1.00	105
Club Stores	**$20**	**+$1.60**	**151**
Walmart	$13	+$.30	53
Internet (buying online)	$10	+$.50	157

Source: SPINS TriLens Consumer Panel (powered by Circana), 52 weeks ending 12/28/25

- **Natural supermarkets are growing** driven by more household penetration and buyer count.
- **Club stores continue to make strong strides with natural shoppers** followed by buying online and Walmart. All are growing.
- Natural products shoppers continue to have a much **higher share of spend at club stores and via the internet** than conventional products shoppers.

Across retail,
the Natural Channel is leading overall growth

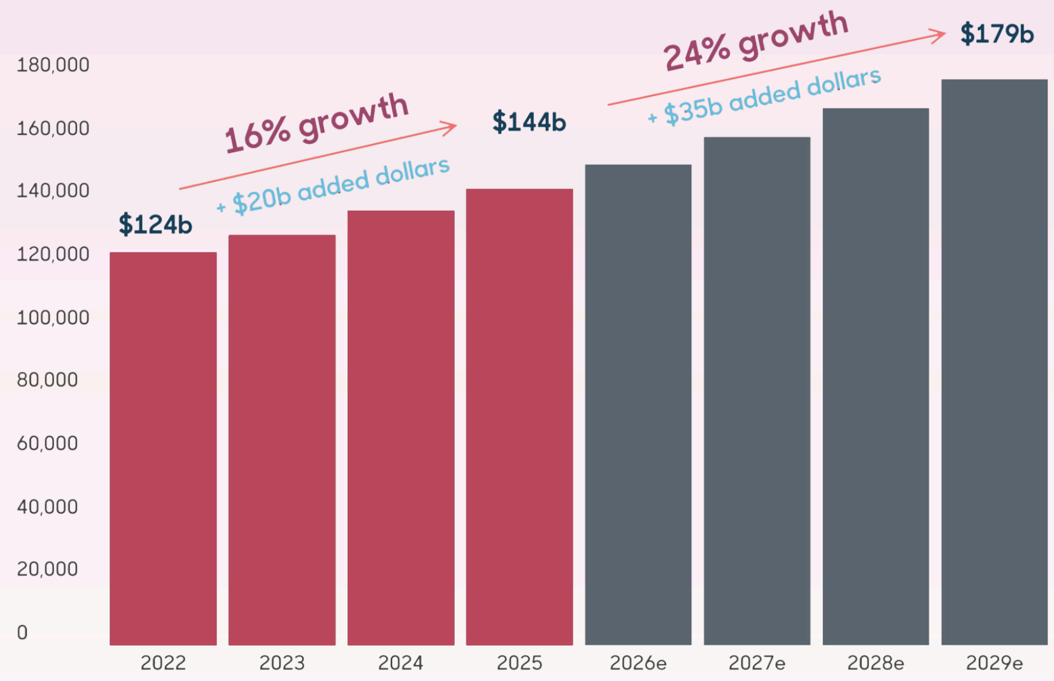
Natural products (the 'NPI') continue to outpace other products across most SPINS tracked channels. The Natural Channel continues to lead overall growth.

Natural Supermarket Channel	Regional & Independent Grocery Supermarket Channel	Conventional MultiOutlet	Convenience Channel
+4.2% Sales Growth	-0.7% Sales Growth	+1.9% Sales Growth	+1.0% Sales Growth
+7.6% **NATURAL PRODUCTS**	+5.0% NATURAL PRODUCTS	+8.3% NATURAL PRODUCTS	+4.7% NATURAL PRODUCTS
+1.9% SPECIALTY & WELLNESS PRODUCTS	+0.0% SPECIALTY & WELLNESS PRODUCTS	+3.4% SPECIALTY & WELLNESS PRODUCTS	+4.8% SPECIALTY & WELLNESS PRODUCTS
-2.0% CONVENTIONAL PRODUCTS	-1.7% CONVENTIONAL PRODUCTS	+0.7% CONVENTIONAL PRODUCTS	-2.1% CONVENTIONAL PRODUCTS

Source: SPINS Total store US Natural Enhanced Channel, Regional Grocery, Conventional Multioutlet + Convenience Channels (powered by Circana), 52 Weeks ending 12/28/25

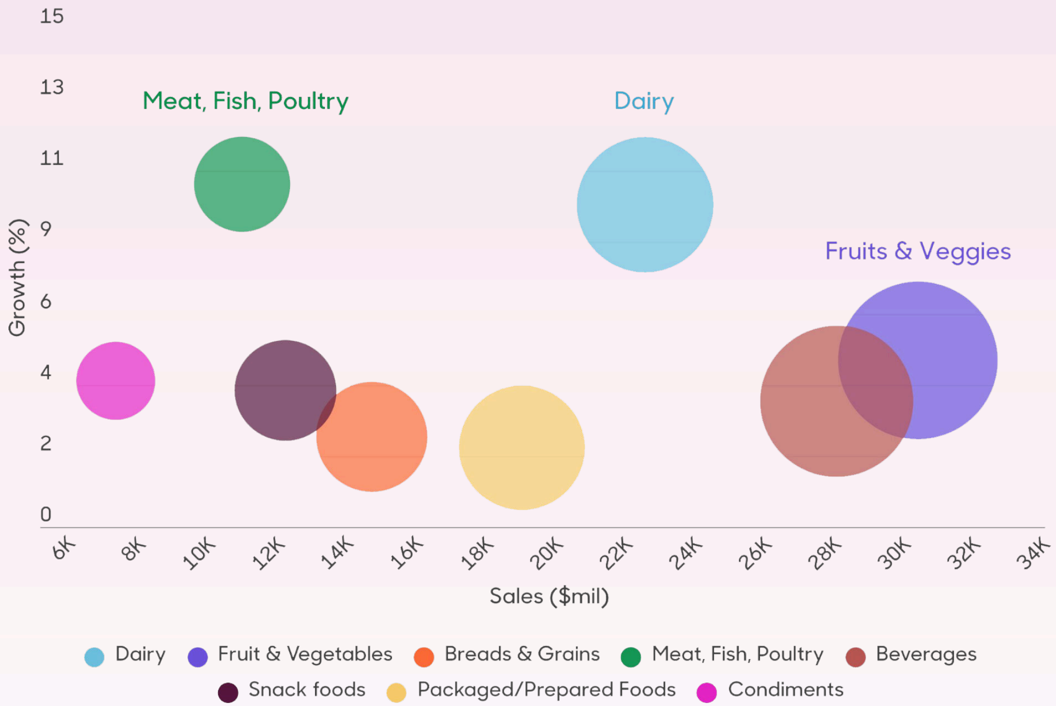
Natural and organic food and beverage market projected to reach $179b by 2029, led by Meat, Dairy and Fruits & Veggies

Natural and organic food and beverage sales and growth, 2022-2029e



Source: NBJ ($mil, consumer sales), developed with input from SPINS

$144.73 Billion N&O Food and Beverage Industry, 2025



Source: NBJ, developed with input from SPINS

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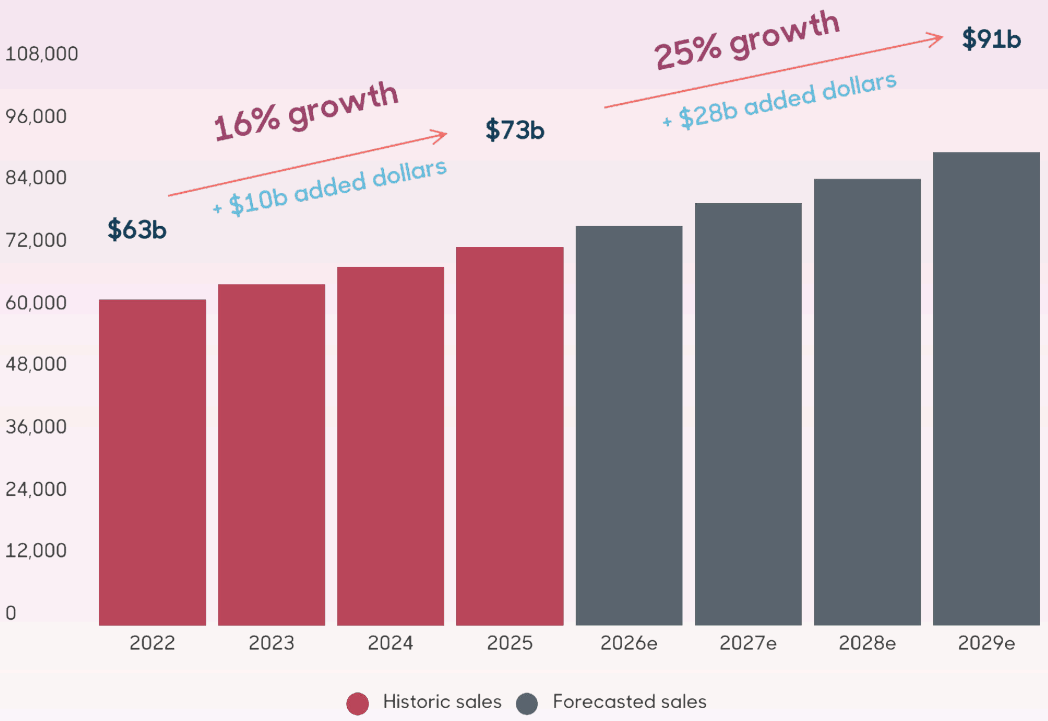
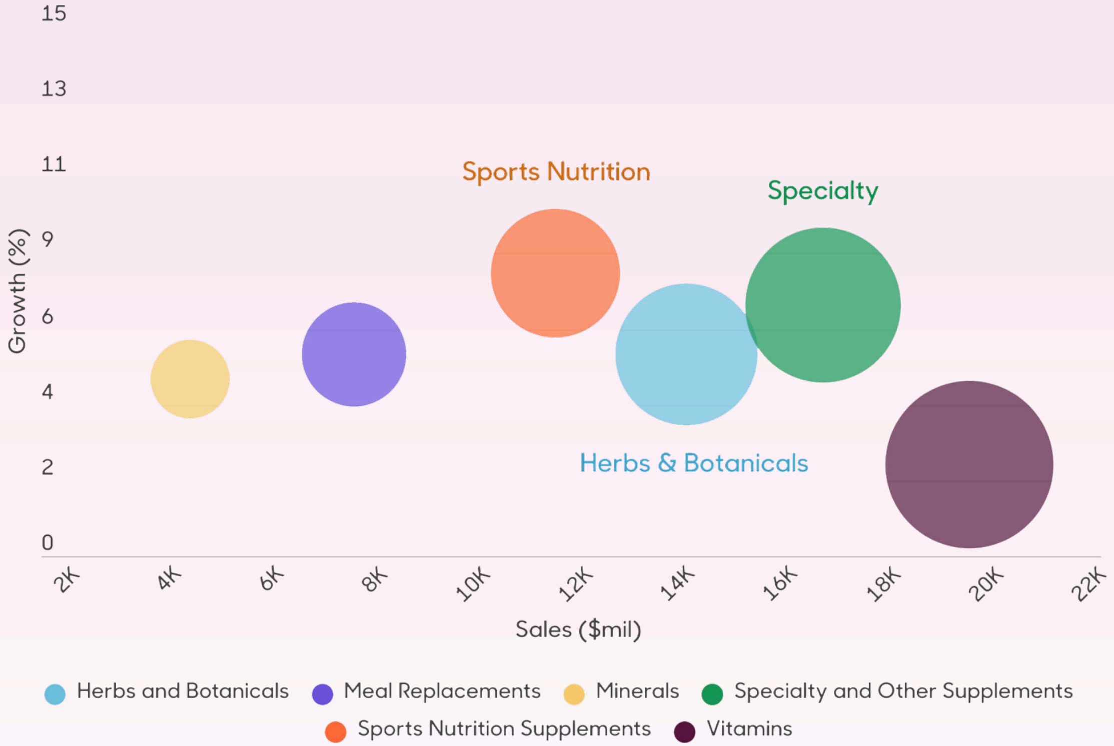
Supplement industry grew 5.5% in 2025, adding $3.78b; driven by specialty, sports nutrition and herbs

Supplement Industry sales and growth, 2022-2029e



Source: NBJ ($mil, consumer sales), developed with input from SPINS

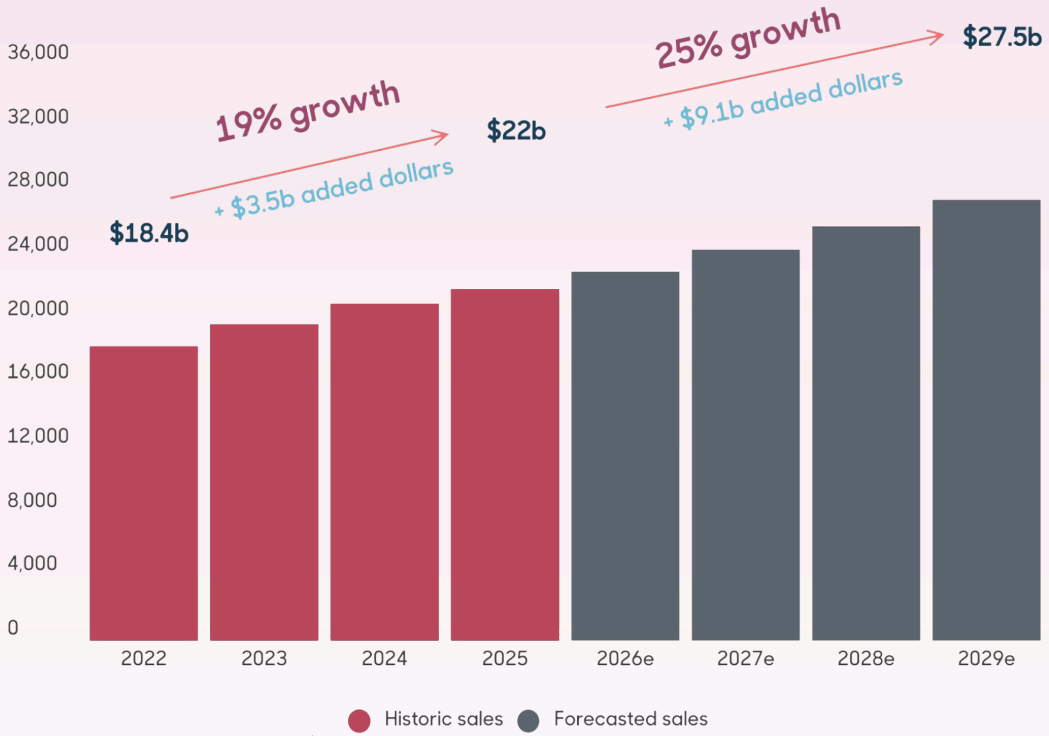
$72.98 Billion Supplement Industry, 2025



Source: NBJ, developed with input from SPINS

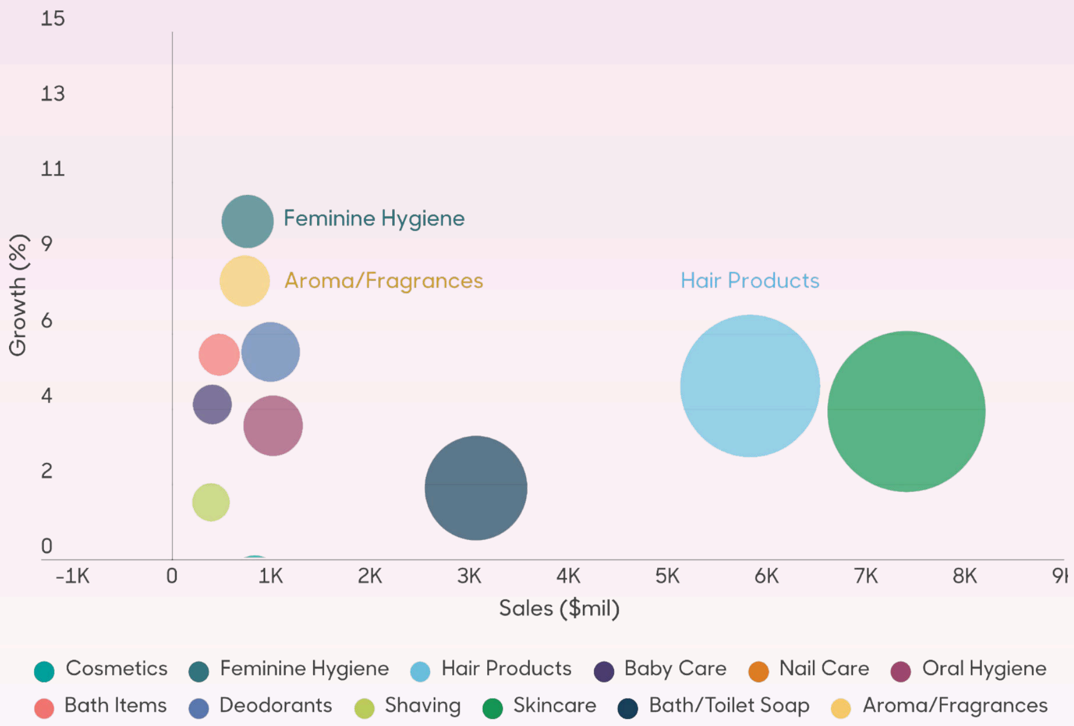
Personal care grew 4.2% to reach $22b in 2025
Watch feminine hygiene, fragrance and hair products

Natural and Organic Personal Care sales and growth, 2022-2029e



Source: NBJ ($mil, consumer sales), developed with input from SPINS

$21.96 Billion N&O Personal Care Industry, 2025



Source: NBJ, developed with input from SPINS

But, while we have tremendous tailwinds, we also have headwinds.

What one word comes to mind when you think about the current state of the economy?

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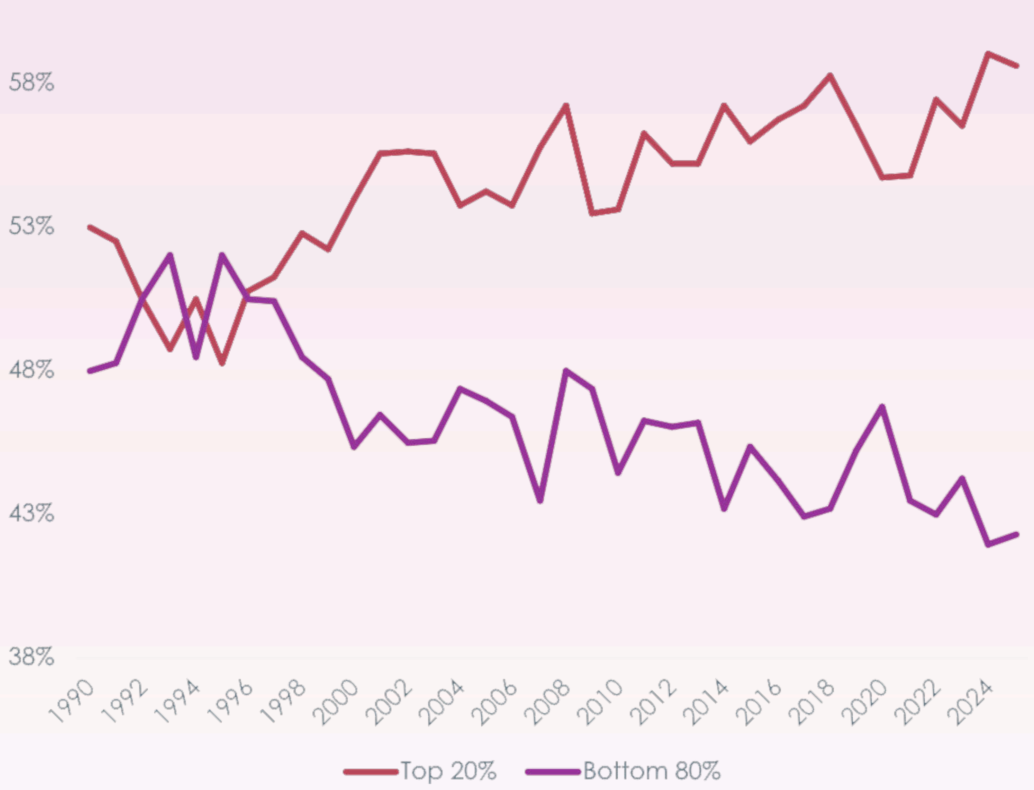
K-Shaped Economy

The U.S. Economy is Increasingly K-shaped … food is less

Household spending has continued to diverge

Share of personal outlays by income level[1]



Value-oriented consumption is growing faster, even as high-income capacity expands

Dollar share buying private label[2]

$ Share of CPG → **23.2%**

$ % Growth *(Annual vs. Yago)* → +4.6%

$ % Growth *(Annual vs. Yago)* → Non-private label: +2.6%

Food spending closely mirrors household income distribution

Food, % of dollar spend by household income[3]

Bottom 74%	**Top 26%**
76% Of Total U.S. Food Spend	24% Of Total U.S. Food Spend

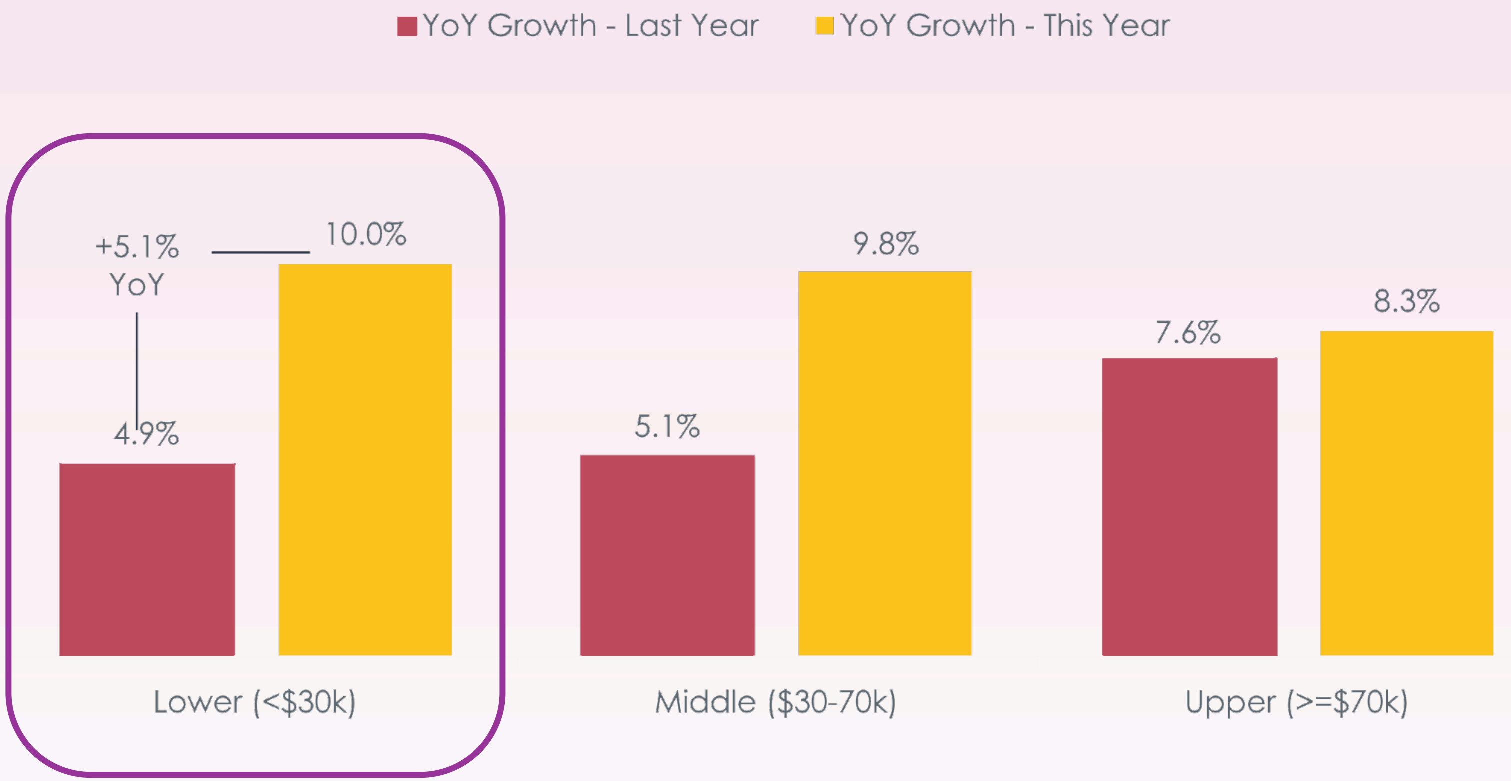
1) WSJ Today, Moody's (2025)
2) NIQ, Total US Full View, 52 Weeks ending August 23, 2025.
3) NIQ Panel On Demand Omnishopper | US Exp Osh – NDH Synd Full View – 444 5 yr | Entire Dataset and dqydj.com

K-Shaped Economy

Low Income Growth Is Accelerating in “K Economy”

Lower income consumers are driving the fastest acceleration in natural product spend

Growth in $/Buyer – Natural Products[1,2]

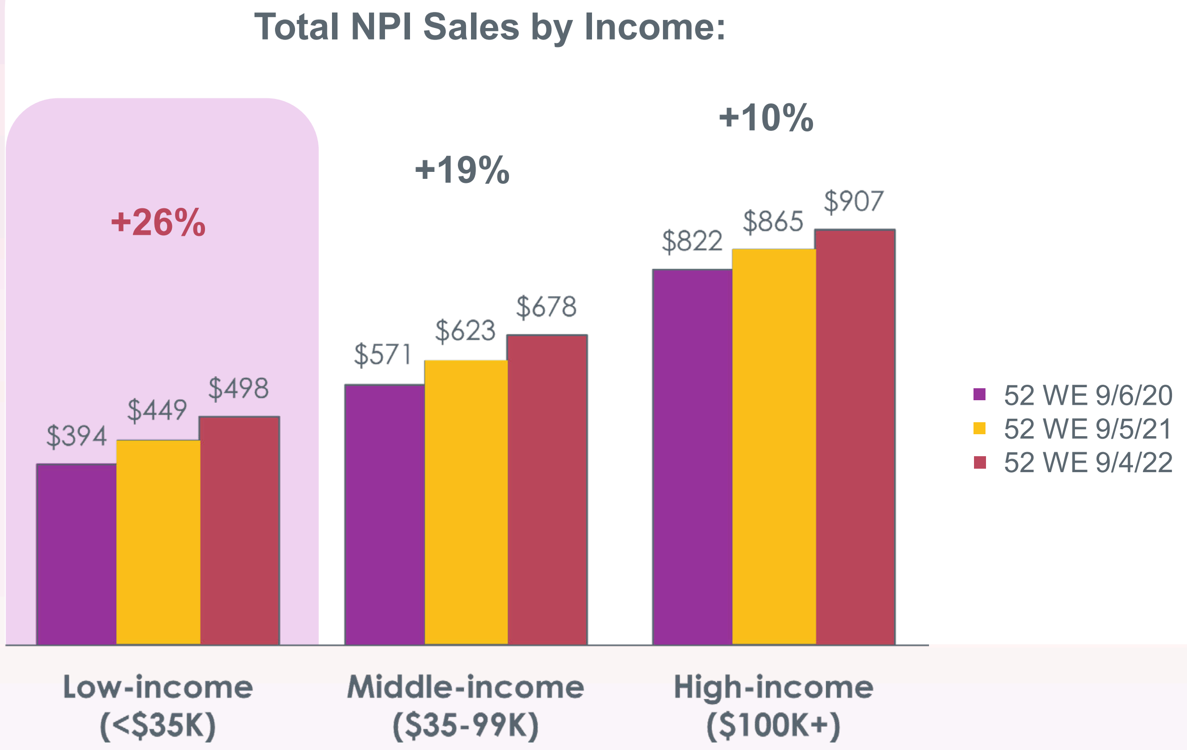


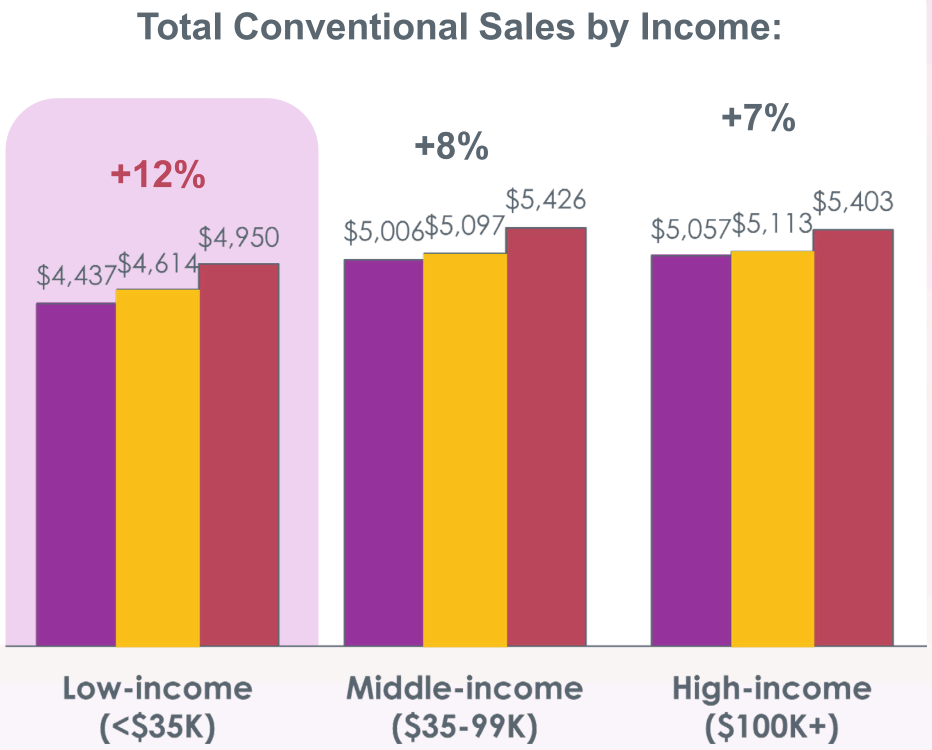
1) SPINS, Trilens, Natural Positioning, 52 Weeks ending 12/31/25

K-Shaped Economy

FLASHBACK - Enhanced SNAP and COVID Wage Gains Boosted Better For Spending from 2019 - 2022

Opportunity to Advance the Democratization of Wellness by Capturing White Space





1. SPINS Consumer Panel (powered by Circana)

In this increasingly ‘K economy’, we see Values give shoppers motivation while Financial Sentiment dictates the execution

Improved Financial Standing

These consumers are shopping with intentionality and redefining “premium” as an attribute profile, not just a price barrier.

30% **Increased Their Trips**
With nearly 85% shopping multiple times per week

29% **Expanded Attribute Loyalty**
% who increased purchasing of health-focused, sustainable products

Diversified Channels
Leaned heavier into **Natural and Specialty channels** for curated shopping vs one-stop stock-ups

Financial sentiment dictates *how* consumers are shopping with their values in mind

Facing Financial Headwinds

These consumers are executing a strategy of control when purchasing – shifting from exploration to efficiency

43% **Decreased Their Trips**
Fewer trips to consolidate and reduce impulse exposure

60% **Focused on Price Comparing**
More crucial to decision hierarchy than scrutiny of ingredient labels

49% **Relied on Private Label**
Their value toolkit also included buying in bulk (29%) and seeking out promotions (57%)

*Source: **SPINS Survey Conscious Consumption: How Values Shape the Basket,*** ,January 2026, N = 1,042

Consumers more likely to cut experiences and non-essentials than core nutrition purchases

Dining out
71%

29%
Fresh fruits/veg's

23%
Pantry items

25%
Dairy/eggs

23%
Supplements

Alcoholic beverages
53%

Fitness and wellness services
46%

Organic/ Premium
39%

Personal Care/ Beauty
32%

Meat, Poultry, Seafood
25%

The Shopper of the Next 5 Years

Values-driven shopper preferences for **health**, **sustainability**, and **transparency** combined with the growing influence of agentic commerce will transform how brands and retailers grow

PREFERENCE-BASED CONSUMPTION

NON-HUMAN PARTICIPATION

ANYWHERE COMMERCE

>90% U.S. shoppers seek to buy values-oriented products: Good for people, planet and animals[1]

90% of Gen Z & Millennials are actively looking to avoid using or consuming certain ingredients[2]

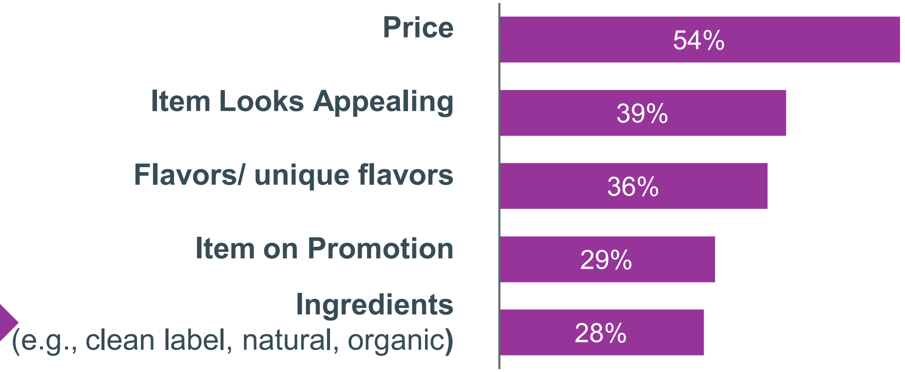
63% of 2025 CPG unit growth across channels driven by Naturally Positioned products alone[3]

Sources 1-SPINS Survey Conscious Consumption: How Values Shape the Basket, ,January 2026, N = 1,042, 2 - SPINS - The Next Generation of Consumers, 3-SPINS MultiOutlet (powered by Circana) and Natural Enhanced Channels, 52 weeks ending December 28, 2025

Ingredients are an important factor after price and taste when choosing a new or premium brand

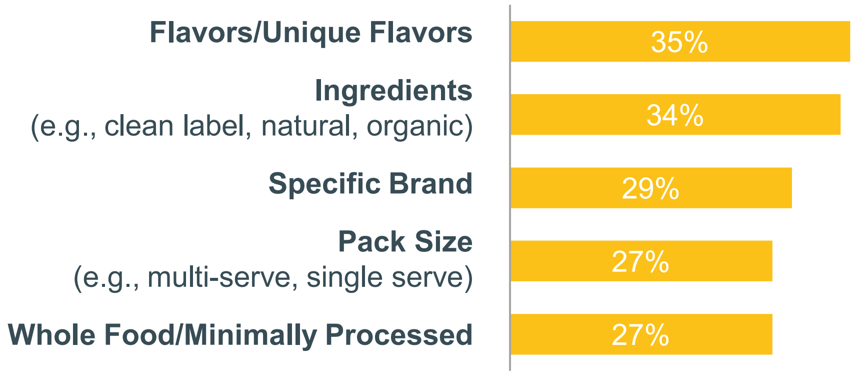
56% Of consumers **always** or **usually** pay attention to ingredients and nutrition on labels.

Top 5 Purchase Drivers When Buying A New Brand



47% Prioritize certain product attributes because 'they help me live a healthier lifestyle'

Top 5 Characteristics Willing To Pay Premium For



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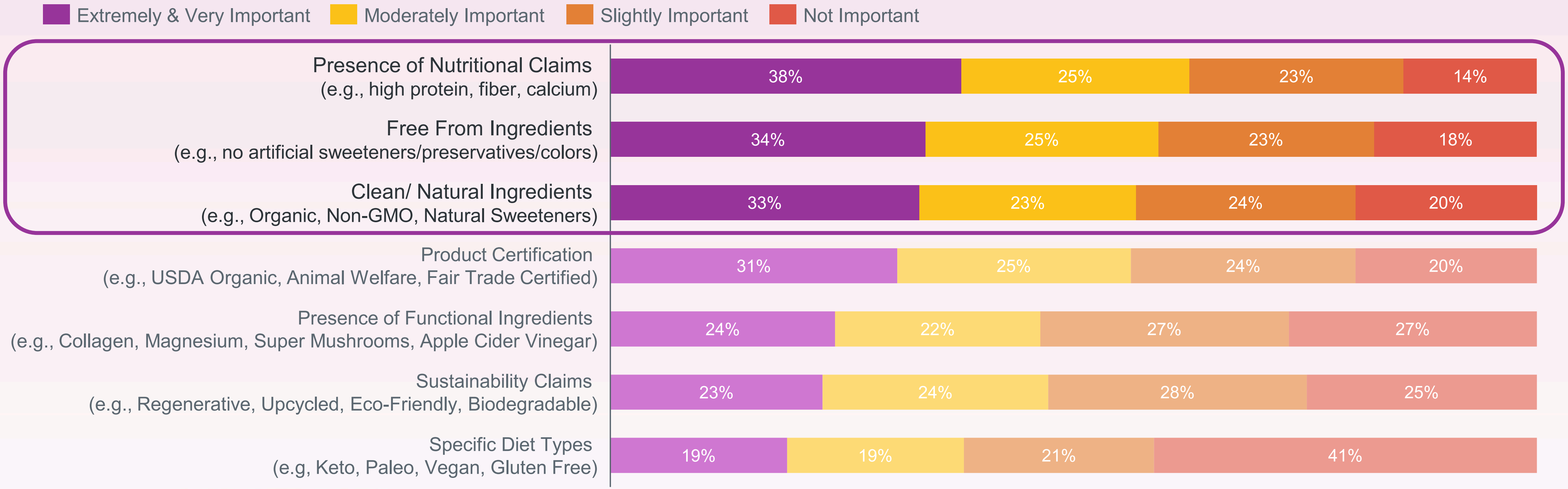
Source: ***Conscious Consumption: How Values Shape the Basket***, January 2026, N = 1,042, "Thinking about the last time you purchased a new brand (one you purchased for the first time) at the grocery store or a retailer where you purchase food and beverages, what was the primary reason for purchasing this new brand?" "Which of the following would you be willing to pay a premium for?"

Nutritional Claims and Free From/Clean Ingredients are top of mind for the Conscious Consumer

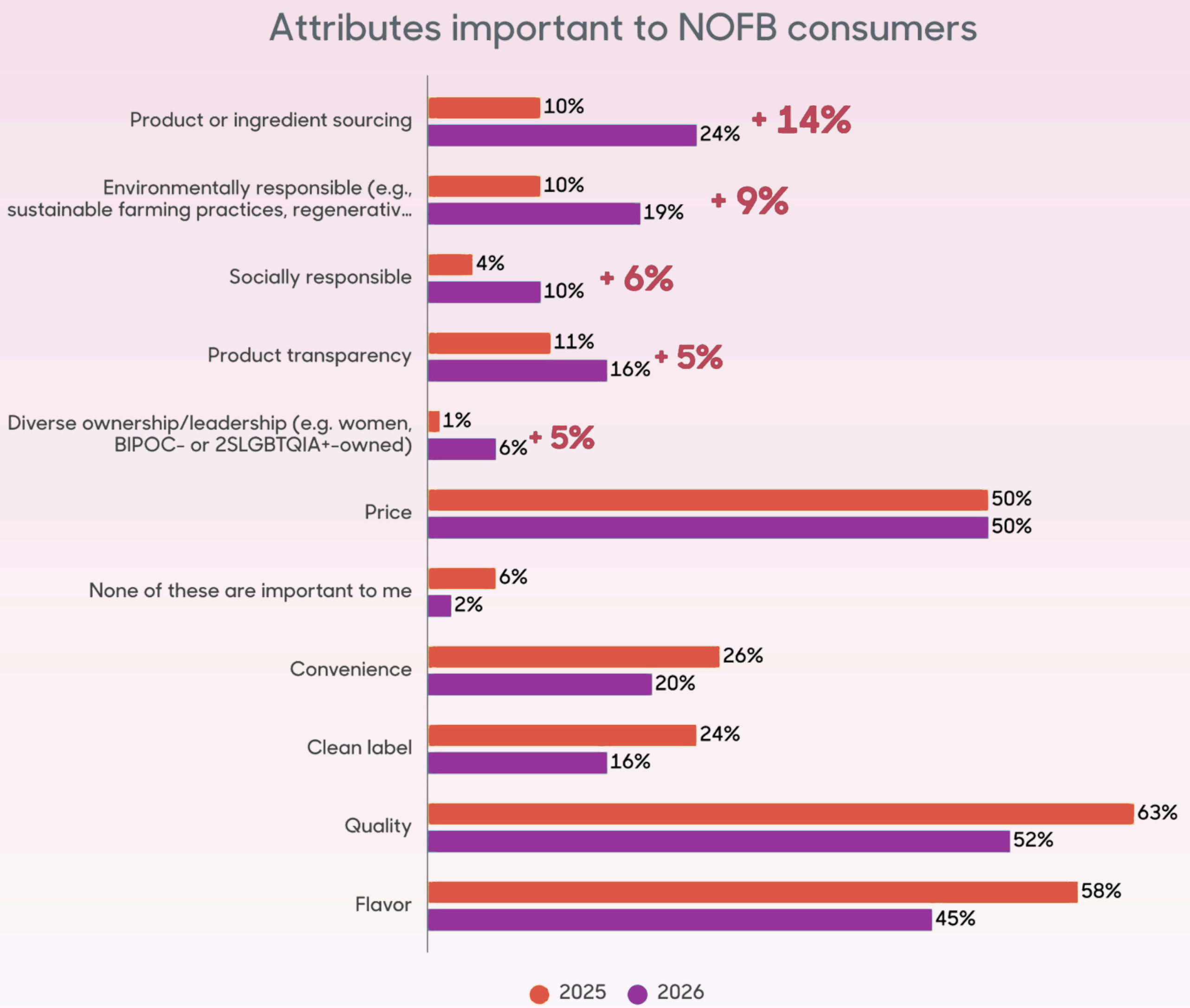
Level of importance when shopping for groceries as identified through product and packaging.



Source: Conscious Consumption: How Values Shape the Basket, January 2026, N = 1,042 for "Do you look at the nutrition label, supplement facts, or ingredient panel when you purchase any of the types of groceries below?"

Purchase drivers expand beyond taste and price to include values-led attributes

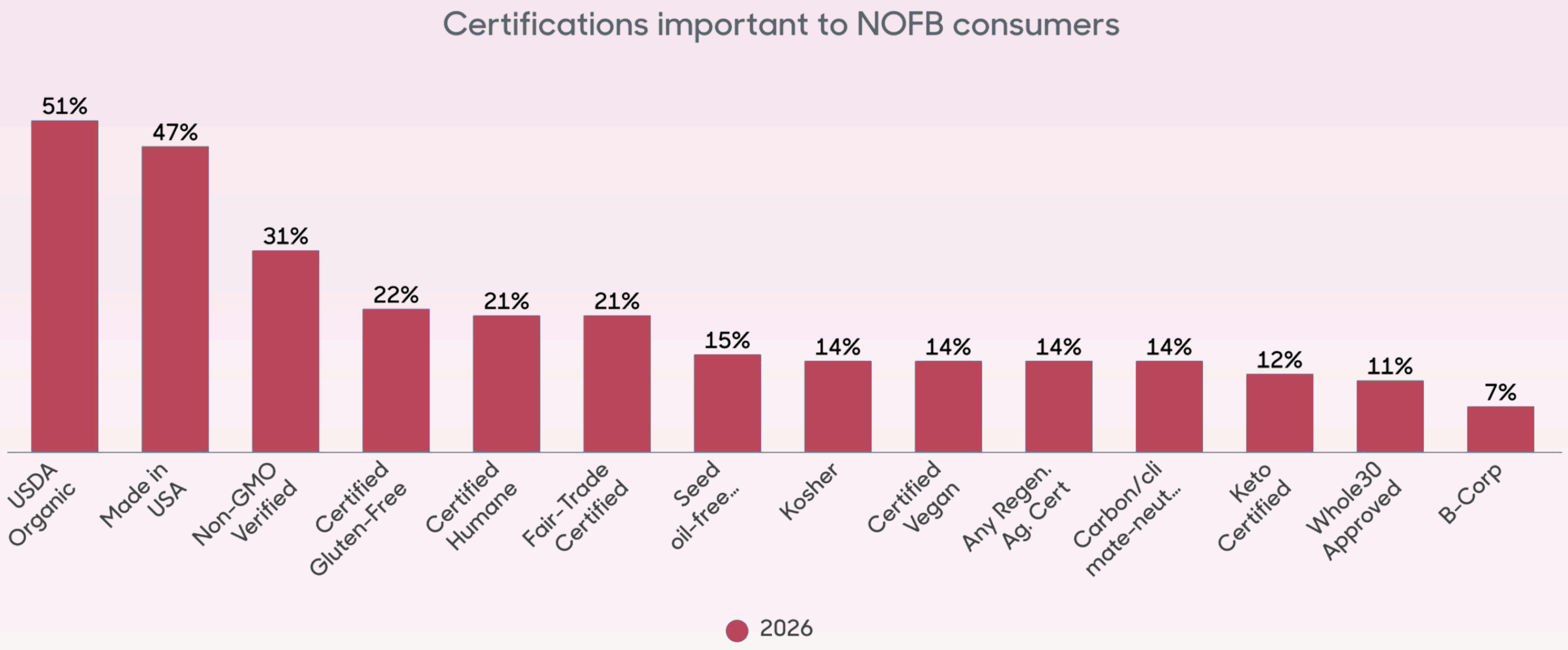
- Product or ingredient sourcing shows the largest increase (+14 pts)
- Environmentally responsible attributes (+9 pts) and socially responsible claims (+6 pts) both gain relevance year over year
- Product transparency (+5 pts) continues to trend upward, reinforcing trust-driven demand



Source: *Nutrition Business Journal* surveys targeting consumers that purchase natural or organic food or beverage products, aged 20-75. Completed Feb 2025 with N=1,026; and Jan 2026 with N=1,012powered by the Suzy online platform.
Question: "What attributes are most important to you when purchasing natural or organic food and beverage products? Please select your top three options."

Certifications are increasingly important, and it's not just personal

- Importance rises across nearly all certifications, indicating growing demand for third-party validation
- Demand expected to increase due to younger consumers

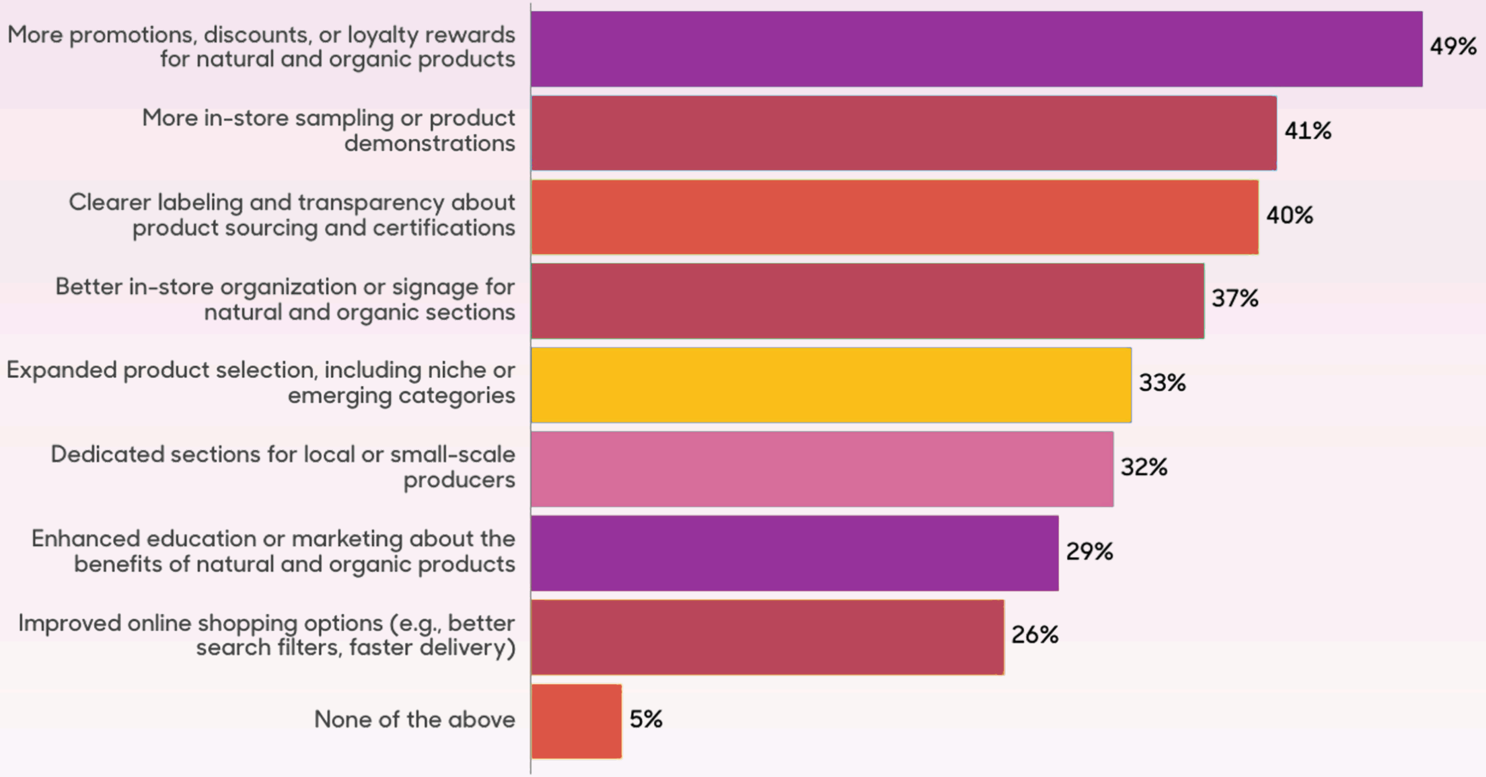


Source: *Nutrition Business Journal* surveys targeting consumers that purchase natural or organic food or beverage products, aged 20-75. Completed Feb 2024 with N=1,083; Feb 2025 with N=1,026; and Jan 2026 with N=1,012; powered by the Suzy online platform.
Question: "Which product certifications are most important to you when purchasing natural or organic food and beverage products? Please select all that apply."

Retailers can win NOFB shoppers through value, experience, and clearer product transparency

- In-store sampling (41%) and clearer labeling/ transparency (40%) indicate strong demand for education and product discovery
- Better signage and organization in natural/organic sections (37%) suggests navigation friction incurrent retail layouts

How retailers can improve shopping experience for NOFB consumers



Source: *Nutrition Business Journal* surveys targeting average consumers, aged 20-75. Completed January 2026; N=1,000; powered by the Suzy online platform.
Question: "Which of the below do you feel retailers could do to improve the shopping experience for natural and organic products?"

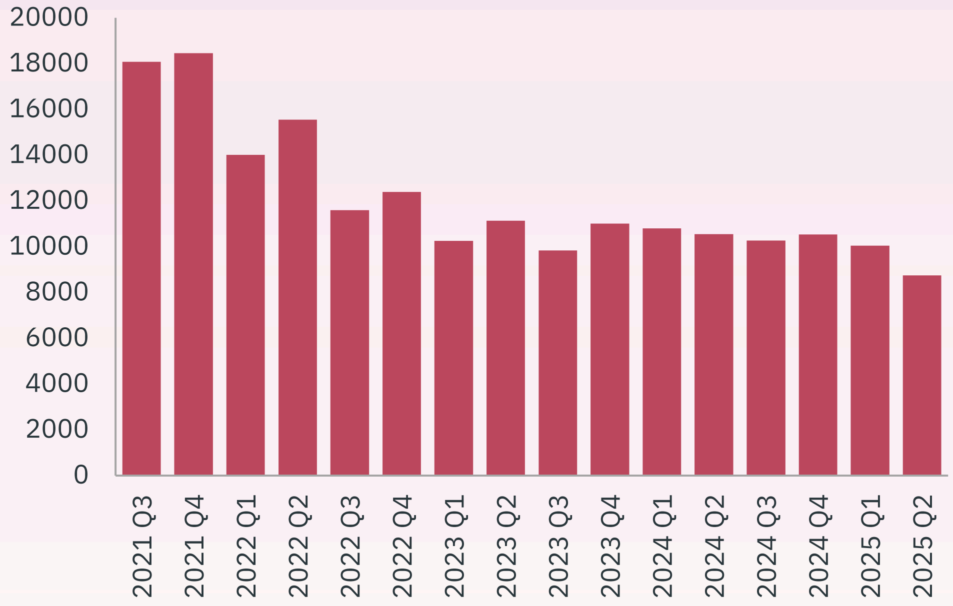
The Innovation Gap

The gap between conscious consumer-driven demand and new product innovation creates **opportunity** in the market for disruptive innovation.

Premium products lead CPG growth across store

Avg. Retail Price	Unit Growth Vs. YAGO	Dollar Growth Vs. YAGO	Positioning Group
$4.41	-0.2%	+1.8%	Total Store
$5.29	+5.2%	+8.1%	NATURAL PRODUCTS
$5.08	+2.7%	+3.7%	SPECIALTY & WELLNESS PRODUCTS
$4.16	-1.4%	+0.5%	CONVENTIONAL PRODUCTS

New product launches have slowed



NUMBER OF ITEMS LAUNCHED BY QUARTER

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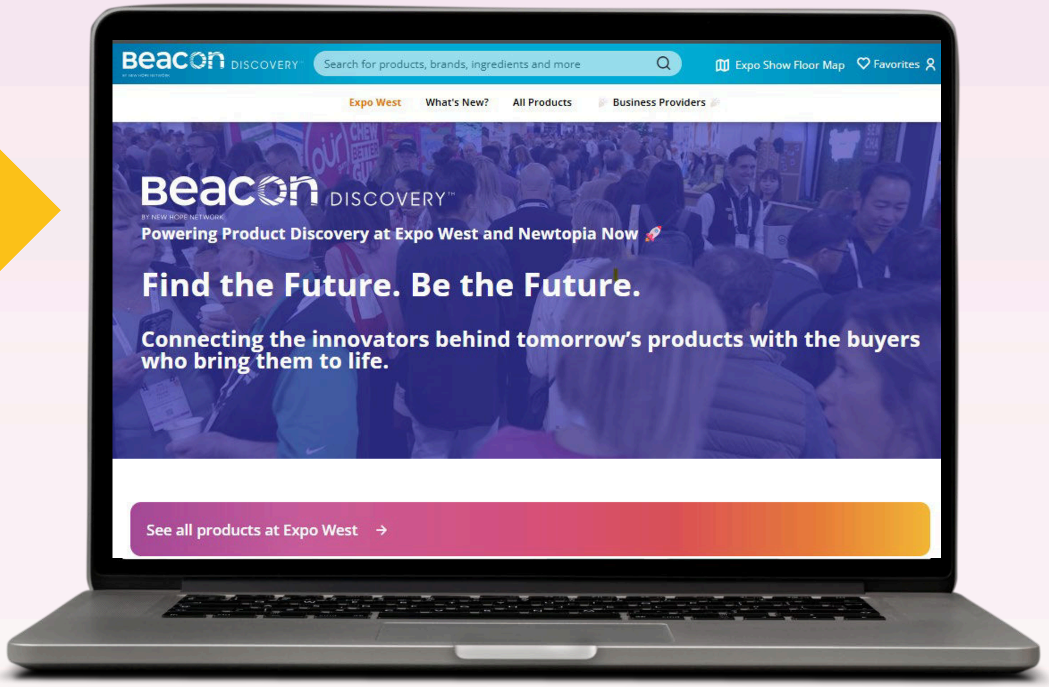
Source: Total Store, All Departments; Natural Expanded, Mulo + Convenience Channels; 52 Weeks Ending 12/28/25

Beacon DISCOVERY™ BY NEW HOPE NETWORK

Signals from the Edge

Beacon's view of what brands are building, before it hits retail.

Innovation → Beacon Submissions → What we're seeing first → Retail Results



What we see from Beacon Submissions, before they hit the show and retail shelves...

Source: New products submitted to Beacon (2024–2026 YTD)

Beacon DISCOVERY™ BY NEW HOPE NETWORK

31 NEW and innovative refrigerated protein SKUs identified in Beacon submissions

Premium Protein: Innovation in Ready to Eat and Refrigerated Products

Refrigerated animal proteins emerging as high velocity new product submissions in Beacon ahead of distribution expansion

Grass-fed beef products (smoked, cured formats)	Ancestral protein blends (bison, heritage meats)	Organic cured meat products (sausages, bratwurst)	Portable protein formats (sticks, jerky)	Pasture-raised eggs

Across refrigerated and shelf-stable formats, animal proteins—grass-fed beef, bison, and pasture-raised eggs—are emerging as high-velocity signals in Beacon's newest product submissions.

Beacon DISCOVERY™ BY NEW HOPE NETWORK

What Users Are Discovering on Beacon: Five Behavioral Clusters

User Favorites 2025-2026

Sea moss breakout

- Gel-based formats
- Immune-focused positioning
- Fruit & botanical blends

Refrigerated cultured Dairy alternatives

- Probiotic yogurt (plant-based)
- Sheep milk dairy
- High-protein cottage cheese
- Raw aged cheese

Functional beverages

- Plant-based milk lattes
- Herbal tea blends
- Electrolyte powders
- Sparkling botanical teas

Premium pantry & ingredient-forward

- Cold-pressed oils
- Organic sweeteners
- Roasted seeds & nuts
- Sprouted nut butters

Functional supplements

- Omega-3 concentrates
- Mushroom extracts
- Amino acid supplements
- Plant-based berberine

Beacon DISCOVERY™ BY NEW HOPE NETWORK

Sustainability Scores vs Sales

Analysis of 8,362 products across 1,130 brands: HowGood scores vs. velocity efficiency

HowGood

1 Strongest sustainability correlation

- **Refrigerated Yogurt / Kefir / Cultured Dairy**
  - 2× higher dollar sales vs. Peers with lower HowGood estimates
- **Eggs (Premium & Pasture-Raised)**

2 Moderate sustainability correlation

- **Shelf-Stable Oils & Pantry Staples**
  - 1.33× higher dollar sales for SKUs with higher HowGood estimates
- **Functional & Non-Alcoholic Beverages**
  - Sustainability more strongly tied to growth signals

3 Catalog sustainability correlation

- **Functional Supplements & Superfoods**
  - Brands with higher HowGood estimates were more likely to have multiple strong SKUs

4 Minimal sustainability correlation

- Candy & Indulgent Snacks
- Commodity Beverages
- Frozen Novelties
- Velocity driven primarily by taste, price, or impulse

Soil Health

Animal Welfare

Biodiversity

Blue Water Usage

Labor Risk

Greenhouse Emissions

Land Use

Beacon DISCOVERY™ BY NEW HOPE NETWORK

Gut Health: The Signal Emerging in Product Development

What brands are building into everyday formats before mainstream retail distribution

21× Growth

in microbiome SKUs entering the Beacon pipeline, with new formats emerging as well

235 Probiotic SKUs

59 Prebiotic SKUs

68 Fiber SKUs

22 Sea moss SKUs

Data Source: Beacon New Product Submissions Pipeline (2024 vs 2025 vs 2026 YTD)

Beacon DISCOVERY™ BY NEW HOPE NETWORK

Brain Function: The Signal Emerging in Product Development

What brands are building into everyday formats before mainstream retail distribution

Mental wellness ingredients are moving out of nootropic supplements and into mainstream beverages, coffee, and snacks.

32× Growth

in brain-function SKUs entering the pipeline (2024 to 2025)

218	49	22
Mushroom SKUs	Creatine SKUs	Adaptogen SKUs

Data Source: Beacon New Product Submissions Pipeline (2024 vs 2025 vs 2026 YTD)

Hydration: The Signal Emerging in Product Development

What brands are building into everyday formats before mainstream retail distribution

Sparkling formats are driving experimentation, while collagen and antioxidant add-ons are gaining traction in product development.

10.9× Growth

in hydration SKUs entering the pipeline

Hydration base

195 Hydration SKUs	**65** Electrolyte SKUs
291 Sparkling SKUs	**112** Functional soda SKUs

Benefit layering

200 Collagen SKUs	**90** Antioxidant berry SKUs
35 Aloe SKUs	**22** Sea moss SKUs

Data Source: Beacon New Product Submissions Pipeline (2024 vs 2025 vs 2026 YTD)

Nutrition and information are core drivers of wellness and healthspan

Integrated Health
“How You Show Up Today"

Goals
- Physical health
- Mental performance and presence
- Skin vitality and appearance

Long-Term Resilience
“Healthspan”

Goals
- Extend healthspan
- Avoid chronic diseases
- Metabolic optimization

Functional Inputs
“Nutrition, Supplementation, personal care and Medication”

Goals
- Fuel to achieve your potential - Nutrition touches everything
- Body system optimization
- Reduction of risk of chronic disease

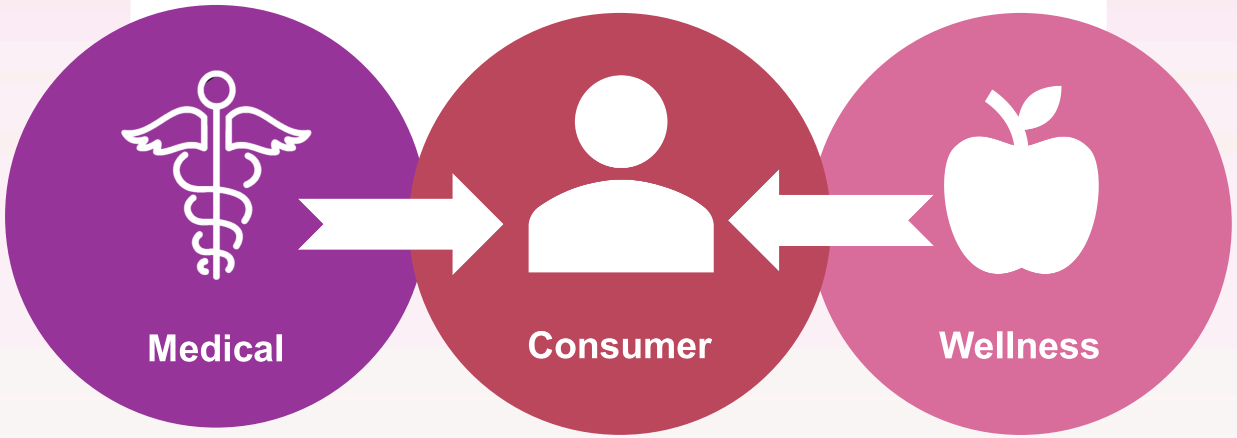
Continuous Measurement
“Optimization”

Goals
- Real-time visibility of markers
- Early discovery of healthspan threats
- Comprehensive information

Future of Health & Wellness

Healthcare is shifting upstream as consumers take control of prevention

Healthcare is no longer provider-centric, consumers now have agency



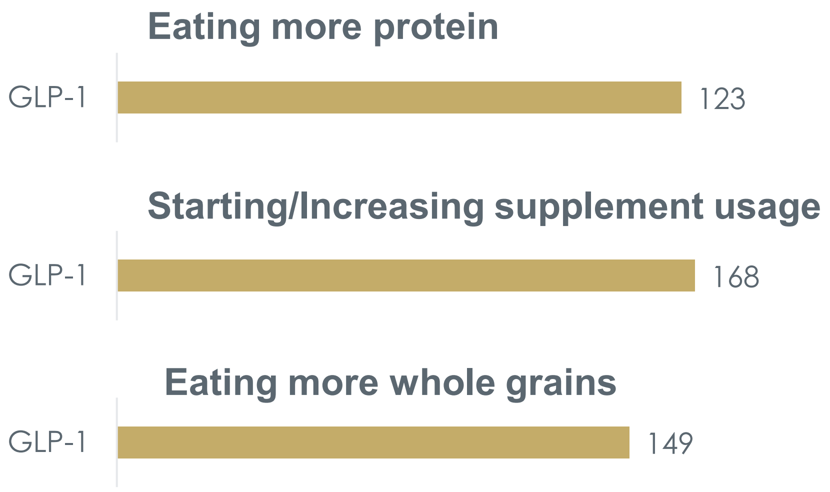
Consumers are actively engaging in preventive health tools

Indexed to U.S. general population (100)[2]

36% of U.S. adults use a health wearable

62% of wearable users have worn their device for >1 year

1.6x higher wearable adoption among GLP-1 households vs. general population

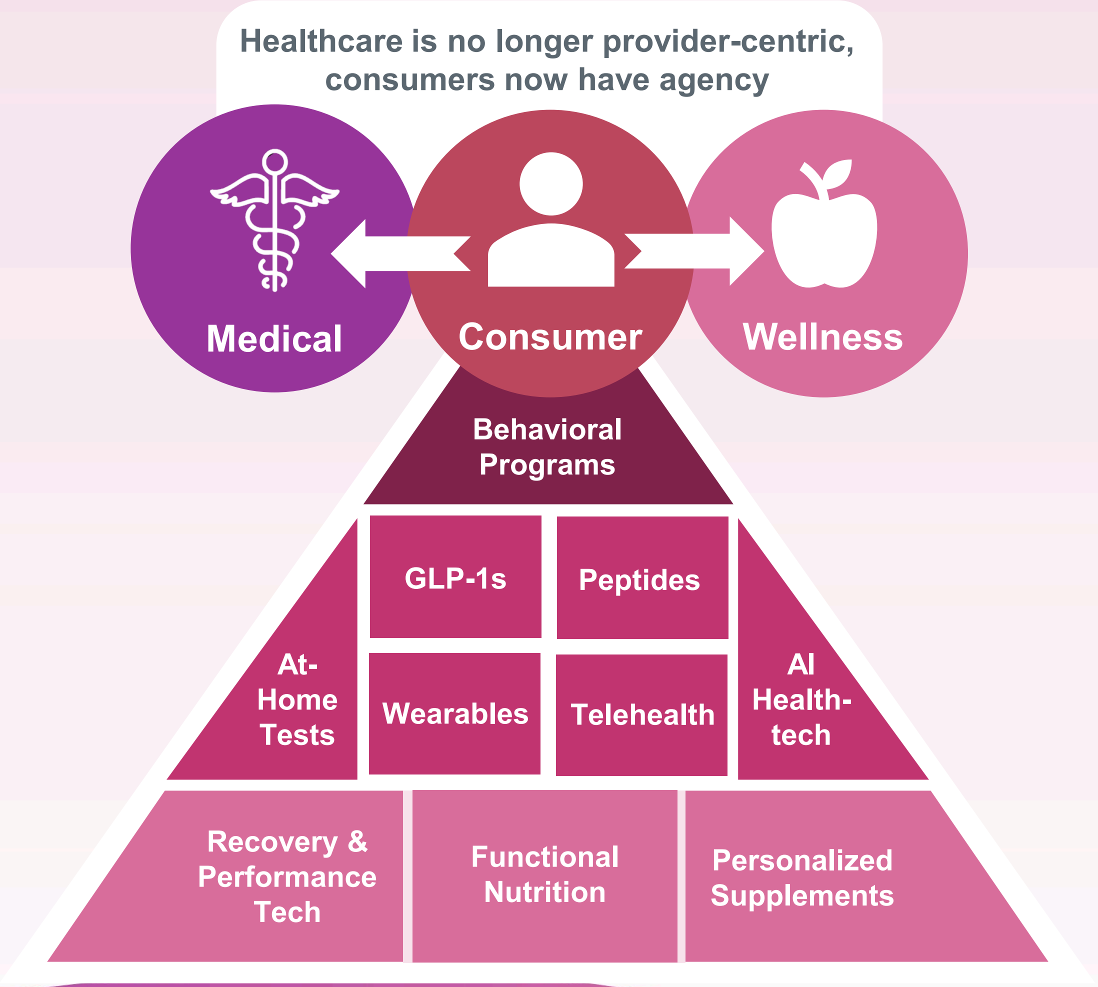


Natural Products EXPO WEST

1) Centers for Medicare & Medicaid Services, Office of the Actuary, National Health Statistics Group, U.S. Department of Commerce
2) NielsenIQ, December 2025

New Hope NETWORK By Informa Markets

Healthcare is shifting upstream as consumers take control of prevention



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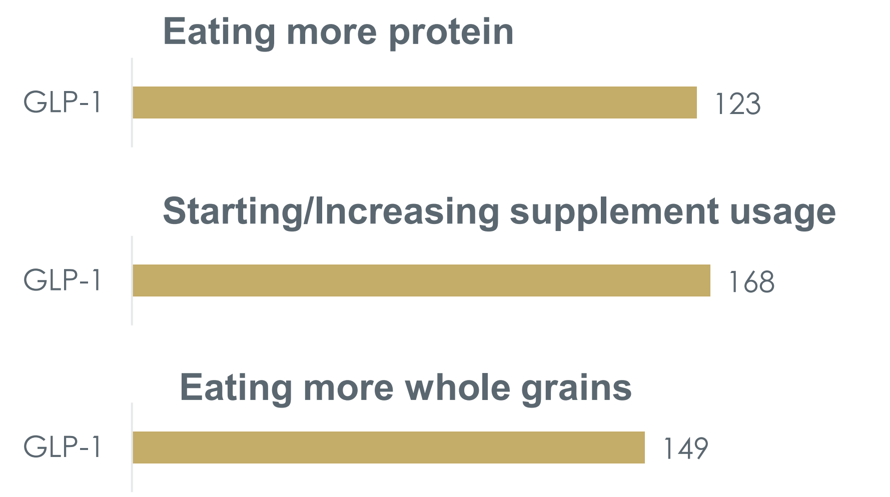


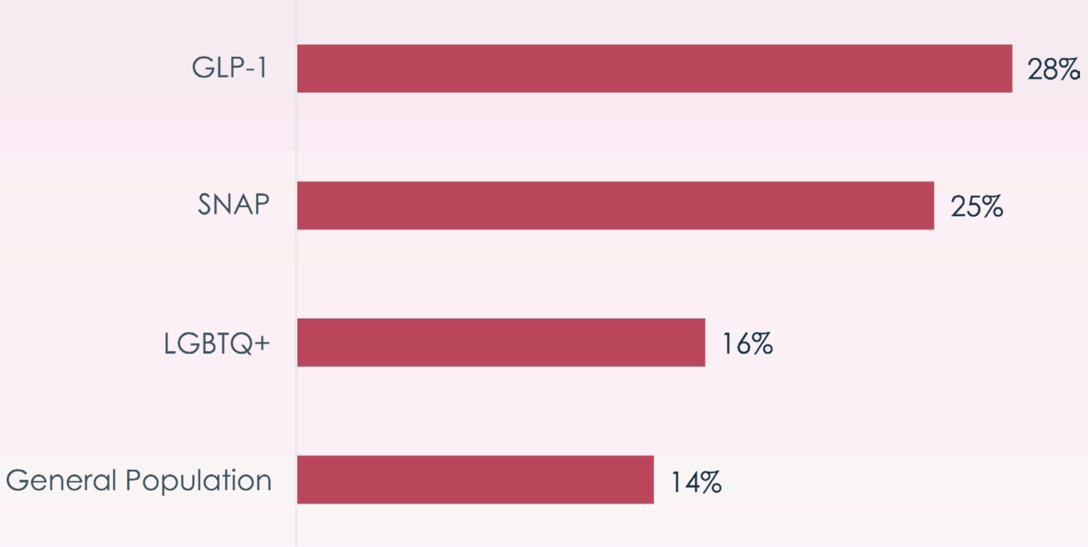
1) Centers for Medicare & Medicaid Services, Office of the Actuary, National Health Statistics Group, U.S. Department of Commerce
2) NielsenIQ, December 2025

Future of Health & Wellness

Consumers are increasingly open to AI-guided nutrition – Higher Income More than Lower

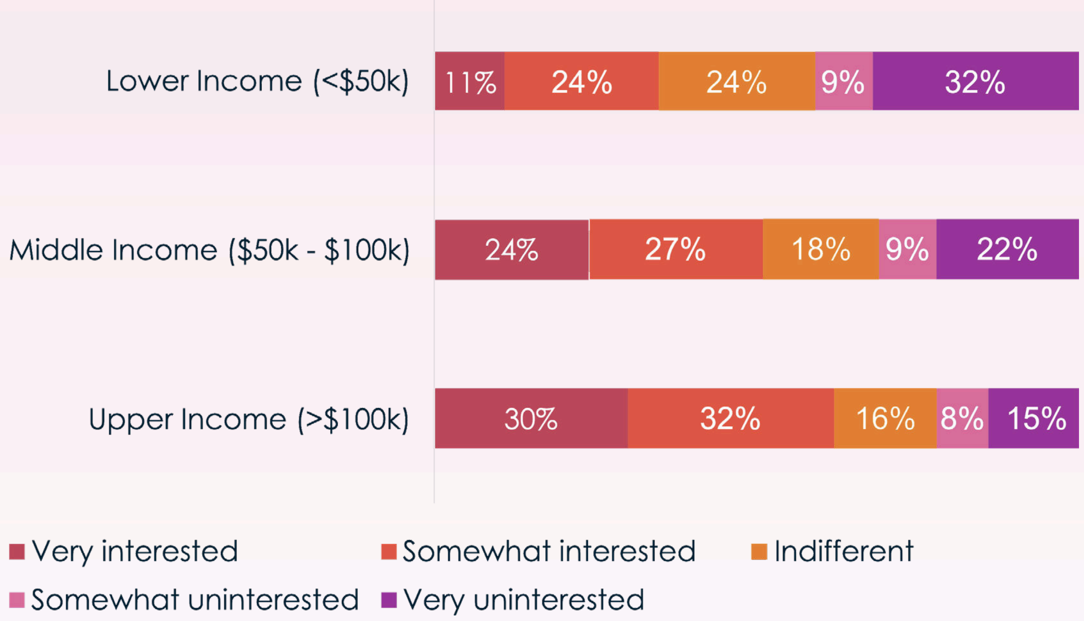
Early adopter groups, including SNAP, GLP-1, and LGBTQ+ households, show higher trust in AI-generated nutrition

Percent of consumers who trust AI-generated nutrition guidance



Higher income households more open to utilizing AI tools for shopping

Interest in having a Generative AI agent help with researching and purchasing a product[2]



1) NielsenIQ, December 2025
2) NielsenIQ, November 2025

Future of Health & Wellness

SNAP households illustrate how wearables extend preventive care upstream

Recent adoption and chronic condition monitoring highlight wearables as a high-frequency, low-cost preventive care layer

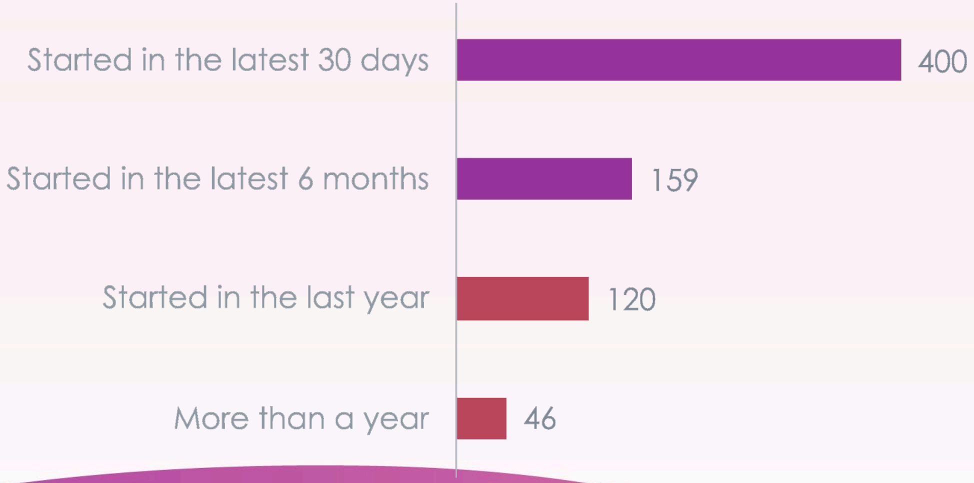
37% of SNAP households use a health wearable

29% of SNAP wearable users started using their device in the last 30 days

41% Have said using a wearable has led to increased protein use

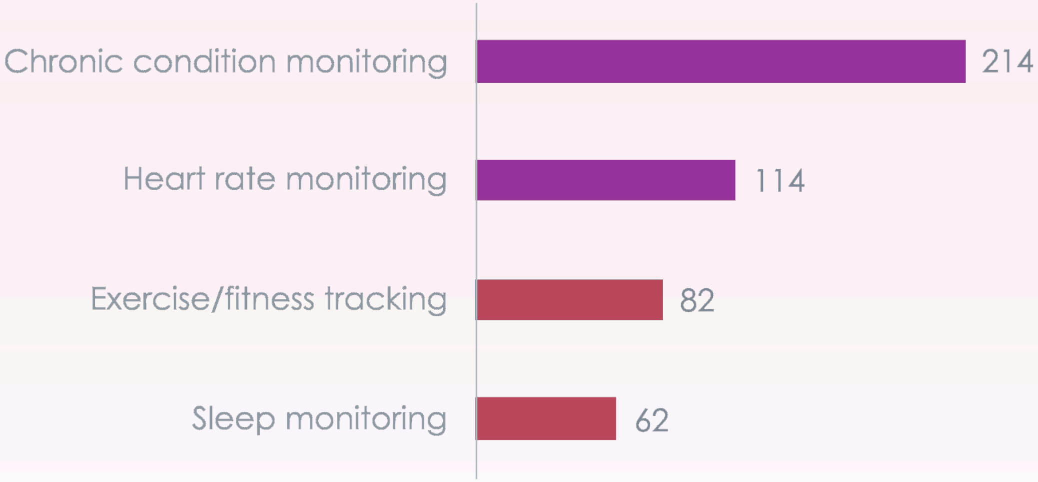
Wearable adoption among SNAP users is recent and accelerating

Indexed to U.S. general population (100)[1]



SNAP users prioritize monitoring-oriented use cases opposed to fitness and sleep optimization

Indexed to U.S. general population (100)[1]



Natural Products EXPO WEST®

1) NielsenIQ, December 2025

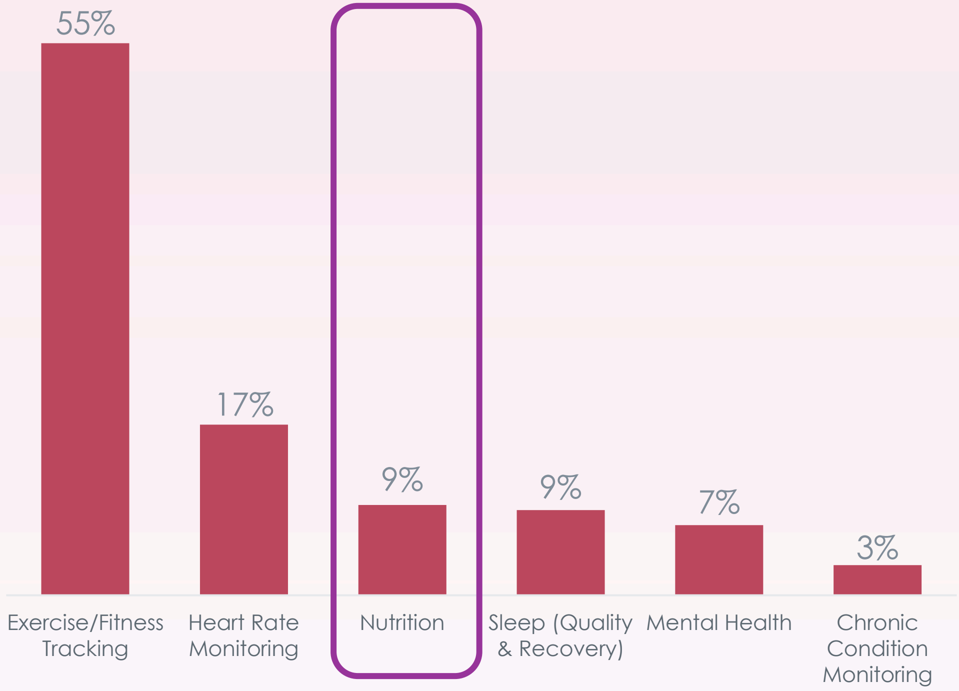
New Hope Network. By Informa Markets

Future of Health & Wellness

Wearables Impact Nutrition Choices Almost 2x More than Wearers Intend

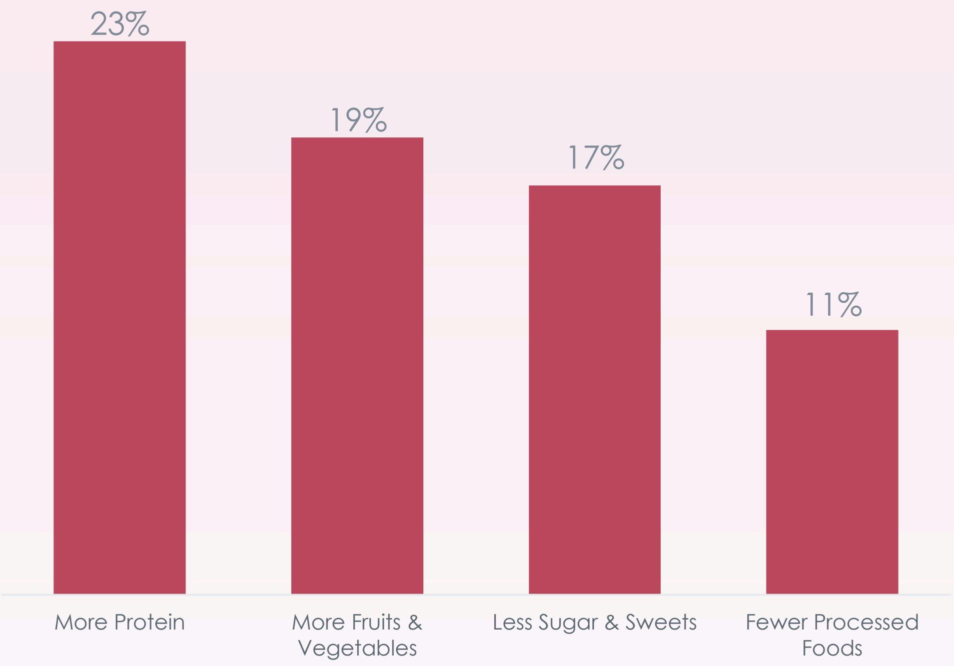
Nutrition is a low stated motivation for wearable use…

Top motivations for wearing a wearable[1]



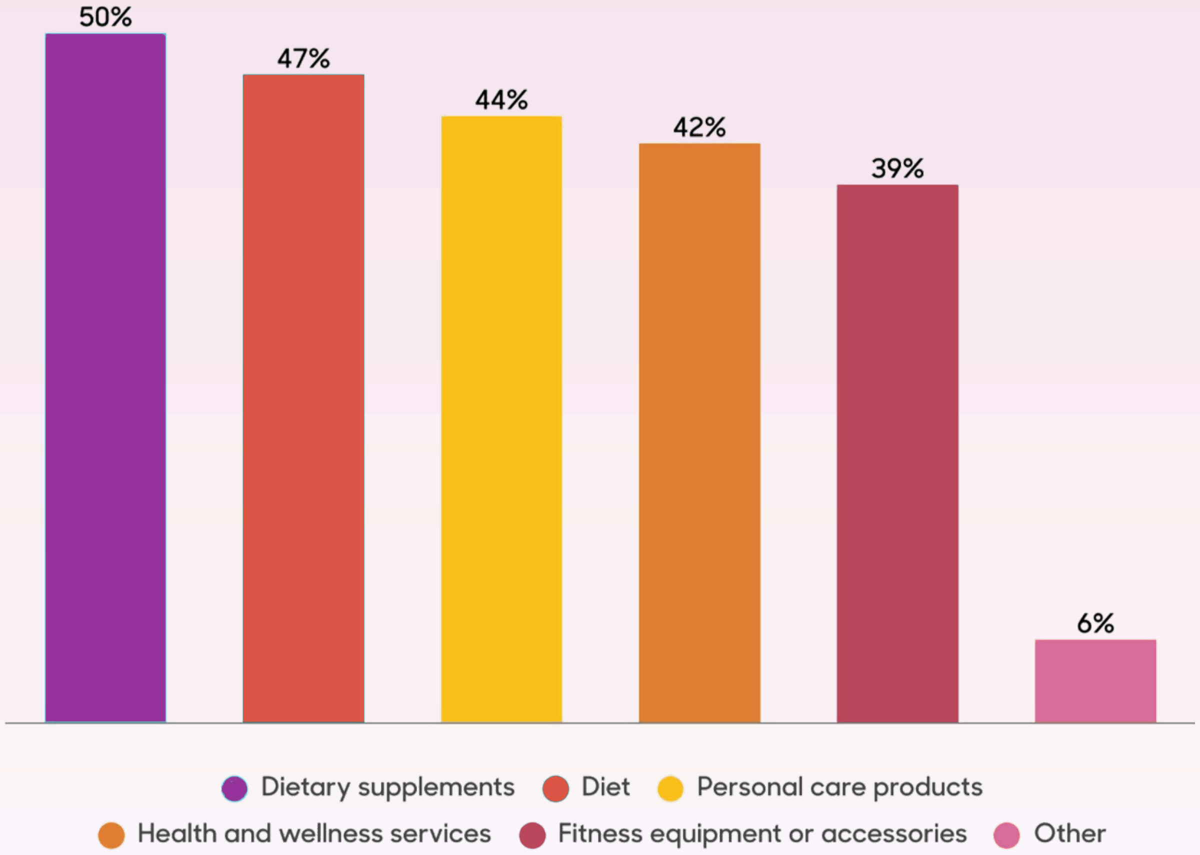
Despite low intent, wearable use drives meaningful nutrition behavior change

Behavior change as a result of using a wearable[1]

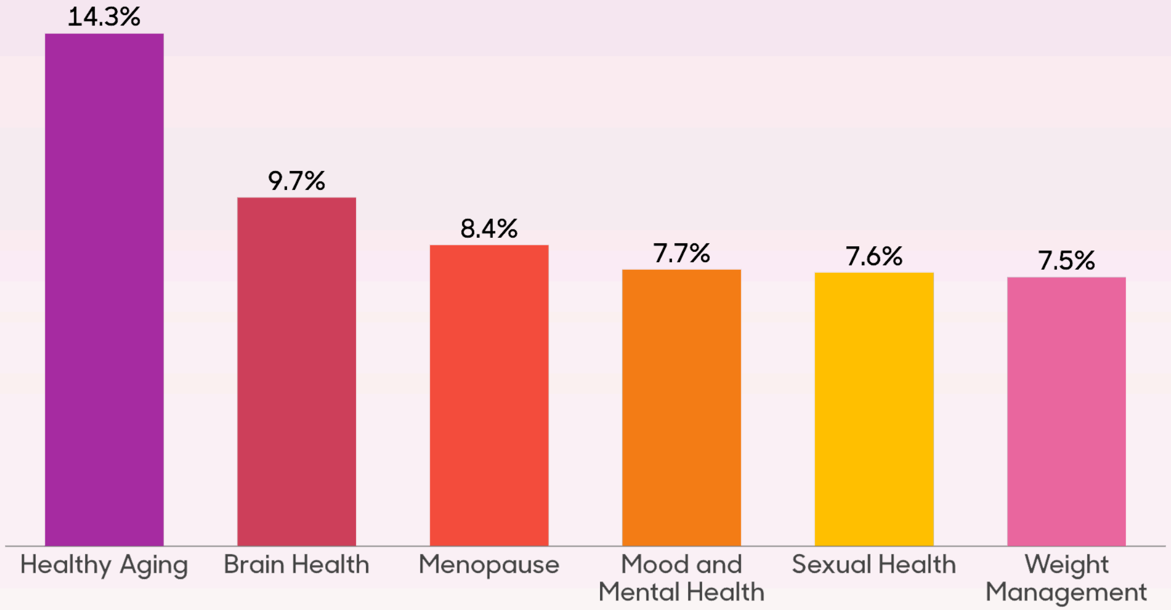


1) NielsenIQ, December 2025

Consumers are making intentional lifestyle choices to support healthy aging



Source: Nutrition Business Journal surveys targeting general consumers, aged 18-75. Completed January 2026; N=832; powered by the Suzy online platform.
Question: "Does the data from your fitness tracking wearable or health tech product(s) influence your purchasing decisions in any of the following categories?"



Source: *Nutrition Business Journal*

Mind Over Matter –Cognitive Health Evolves

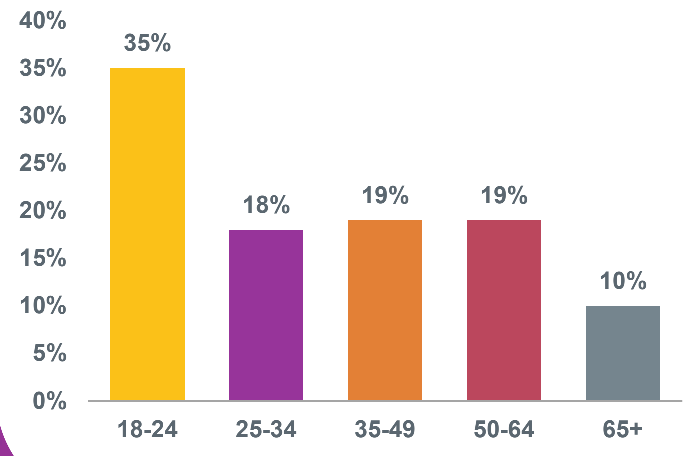
Brain health interest keeps expanding: From memory support to everyday focus, mood, and stress resilience.

Focus is ‘Mental Wealth’ - Beyond cognitive preservation to pre-emptive mental resilience and digital mitigation.

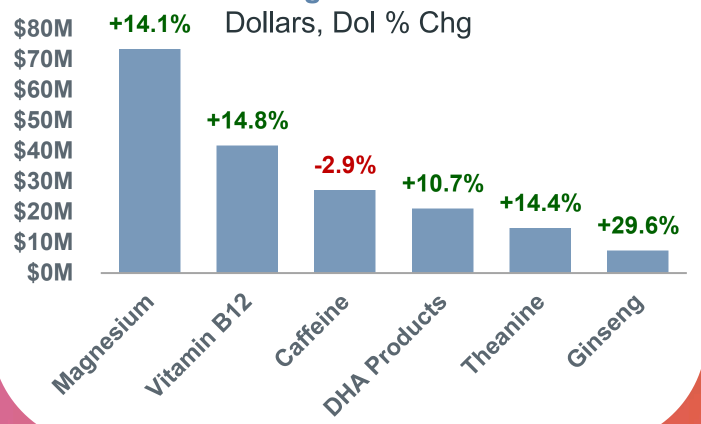
- Managing the high-speed data stream of today’s life

<u>Next:</u> Understanding the ‘muscle-brain axis’, More advanced wearables features, Digital phenotyping for early detection

Top Health Goal: Mental Clarity & Focus by Age Group[1]



Functionality In Perspective



Creatine for Cognitive Health

Creatine $648.2M | +76.2%

There is an opportunity for brands to lean more heavily on cognitive health messaging

Source: SPINS Natural Channel + Multi-Outlet (MULO) (Powered by Circana) + SPINS Amazon Market Measurement (Powered by Stackline) Dept: Vitamins & Supplements, Functional Ingredients, 52 Weeks Ending 12/28/25 1:VMS Attitude & Usage Survey, N = 1,000 VMS Consumers; Fielded May 9th – 21st, 2025, Survey Run Independent From Sales Data “What are your top health goals when choosing a supplement? By Age Demographic”2: https://www.supplysidesj.com/market-trends-analysis/10-emerging-supplement-trends-2026

Bone Health: Evolution of the Strong, Not Skinny Movement

Moving from reactive treatment to lifelong, proactive longevity.

Strength Training: The “heavy lifting” era

- **NOW:** Body composition; Progressive Overload --from walking and aerobics to resistance and strength training
- **NEXT:** Biohacking, mainstreaming of Vibration Therapy

Foods & Beverages: Beyond the Milk Carton

- **NOW:** Beyond basic Calcium. More fortifications.
- Collagen Overload:
- **NEXT:** Linking Regen Ag - Soil health to mineral density; Seeking produce grown in mineral rich soil

Supplements: K2 + D3 Revolution

- **NOW:** Single ingredient calcium moving to the “Bone Trio”: Calcium + D3 + K2
- **NEXT:** Growing trace mineral interest; New delivery formats

Bone Health products with **Vit D + K**

+45%

Sales vs Year Ago

Younger Consumers are engaging in Bone Health

+8%

Millennials Spending

Largest increase in spend per buyer vs Year Ago in Bone Health products

Source: 1. SPINS Natural Channel + Multi-Outlet (MULO) (Powered by Circana) + SPINS Amazon Market Measurement (Powered by Stackline).
2. Trilens Consumer Panel (Powered by Circana). Vitamins & Supplements with “Bone Health” as health focus, 52 Weeks Ending 12/28/25

Peptides support a broad range of health applications

Metabolic, weight & energy regulation

Focus: weight & glucose control, energy balance

Peptides & primary use case:
- GLP-1 & 2: metabolic health, weight reduction,
- insulin balance
- MOTS-c, SS-31 & NAD+: mitochondrial health and
- energy

Cognitive, mood & aesthetic health

Focus: brain & mental health, skin health

Peptides & primary use case:
- Semax & Selank: mental performance & anxiety
- Oxytocin: mood regulation, social stimulant
- GHK-CU: skin regeneration, hair growth, anti-aging
- Melanotan I&II: tanning and skincare

Longevity, growth hormone & performance

Focus: avoiding chronic disease, energy balance

Peptides & primary use case:
- GLP-1 & 2: diabetes, heart disease, dementia
- Tesamorelin, Ipamorelin, Sermorelin: growth hormone stimulation
- PNC-27: anti-caner

Tissue repair & bone/joint health

Focus: structural health, inflammation response

Peptides & primary use case:
- BPC-157: tendon & ligament repair
- TB-500: muscle & soft tissue repair
- Collagen: structural support

Several thousand peptides are currently being studied for therapeutic use – with 100 - 200 estimated to be approved or in late-stage research

1) *Drugs@FDA, 2026*

18% of consumers have either taken or are currently on a GLP1, and changing their behaviors

Injectables: Beyond A Quick Fix[1,2]

12% Of adults have taken an injection for weight loss

17% Boomer's inject rates vs. 7-10% of Gen Z & Millennials

+85% Gen Alpha's increased use in 24', followed by Gen Z (+68%)

Started with GLP-1s
- Protein-rich foods (25%)
- Fresh produce (25%)
- Fiber (23%)
- Supplements (21%)

Stopped with GLP-1s
- Alcohol (21%)
- Sugary foods (20%)
- Salty snacks (16%)

Sources:
1. https://news.gallup.com/poll/696599/obesity-rate-declining.asp
2. https://www.evernorth.com/sites/default/files/2025-03/2025-pharmacy-in-focus-report.pdfx

As these health-related trends continue to evolve, we see **significant future headroom** for growth

PROTEIN

Early adopters may have maxed, but **foundational growth** will continue.

GLP-1 Compensation

Smaller portions require higher nutrient density

$2.2B +24.7% Meat Snacks

$2.0B +22.3% RF Yogurt Drinks

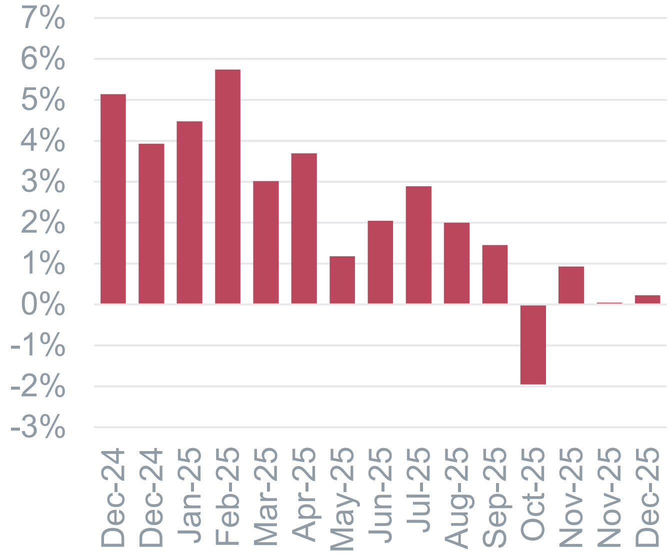
$2.1B +19.6% Cottage Cheese

$5.6B +9.6% Liq. Meal Replacement

FIBER

Recognition is growing of the Fiber **gap in American diets.**

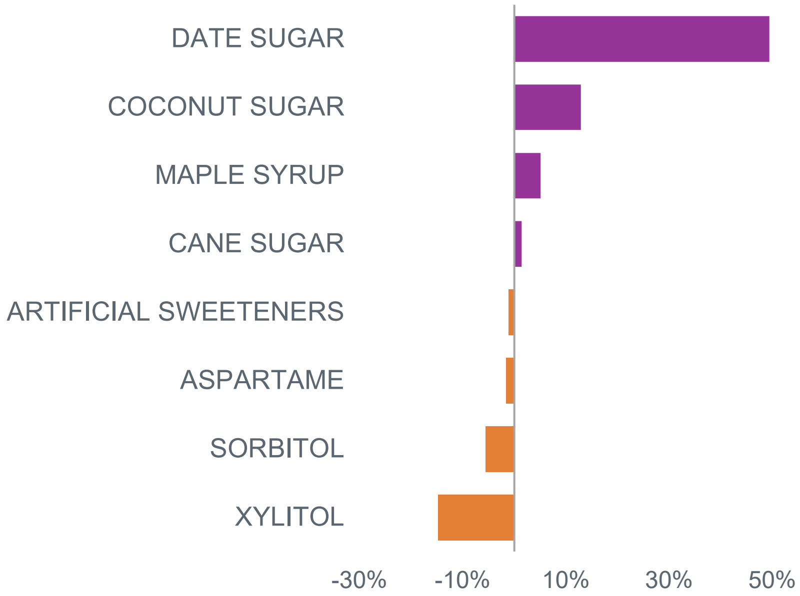
Designated FDA-High Fiber Product Sales, % Chg vs Yago



NATURAL SWEETENERS

Continued **growing interest in Clean Label Sugars** while overall down

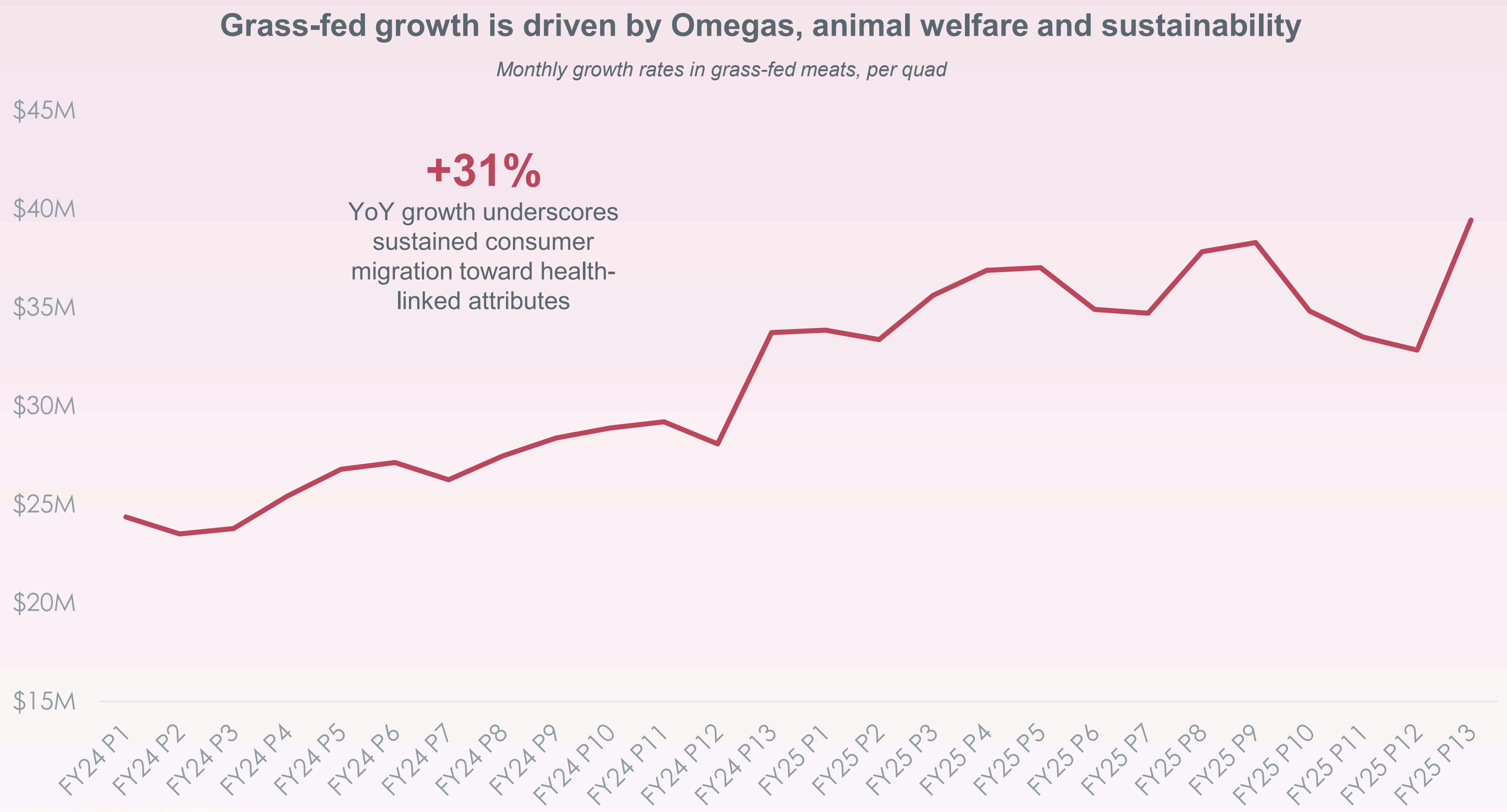
Sweetener Unit Sales % Chg vs Yago



Source: SPINS MultiOutlet (powered by Circana) and Natural Enhanced Channel, Latest 52 weeks ending 12/28/25, Food and Beverage categories.

Future of Health & Wellness

Consumers are actively trading into products with Functional Health attributes



1. SPINS, MULO + Natural + Convenience, RF Meat, Poultry, & Seafood; Labeled Grass-Fed, 4 WE 2/23/25 – 1/28/25

Pantry staples can bring healthy disruption

Nutrient dense products are disrupting categories. Raising the bar on **traditional favorites** with **healthy convenience** and **functional and flavorful ingredients** is an opportunity while fitting a need to cook more at home with **tighter budgets**

Beans and Nut Butters

Beans	Nut Butters
✓ Fiber-maxxing ✓ Beyond the can	✓ High protein ✓ Versatile vehicle ✓ Beyond seed oils
Globally-inspired. Culture blending. Ready-to-heat	More nut bases, more spice

Turkish Candy +255%

Pistachio & walnut

Chili crisp +22%

Chili or "swicy" peanut spreads

Building a Better Sandwich

Natural Deli Meats	Bread & Bakery
6% of sales, 100% of growth	+16% Specialty Loaves and Buns
CLEANER OPTIONS Learn from other meats: organic, uncured, humane sourcing	**CLEANER OPTIONS** True fermentation, regenerative, sustainable
VARIETY EXPANSION Global varieties	**VARIETY EXPANSION** Sourdough adjacencies

Condiment Refresh

Mayo **-1.3%** Avocado Oils **+19%**	➡	*Intersection of BFY bases + bold spice*
Ketchup **-0.2%** Organic Ketchup **+3%**	➡	*Hidden veggies, layered flavors*
Salad Dressing **-3.9%** Natural Dressings **+1%**	➡	*Digestive health benefits*

Source: SPINS Natural Expanded Channel + MULO + C (powered by Circana), Grocery and Refrigerated Categories identified as stagnant and ripe for disruption. 52 Weeks Ending 12.28.2025

How we shop is entering a period of rapid transformation

Non-Human Participation The growing influence of **AI, automation, and synthetic agents** in shaping consumer decisions and product development	**75%**	Of consumers say they're open to a trusted AI personal shopper that understands their needs[1]
	~9 in 10	Retailers are adopting or piloting AI
	68%	Of retailers want gen-AI to transform marketing/content[3]
Anywhere Commerce The rise of **frictionless, omnichannel, and ambient** shopping experiences	**15%**	Of total retail was eCommerce in Q2 2025 (+5.3% YoY)[1]
	$100B	Social commerce market by 2026[2]
	$67.3B	Retail media ad spend forecasted for 2025[3]

We're not feeling ready

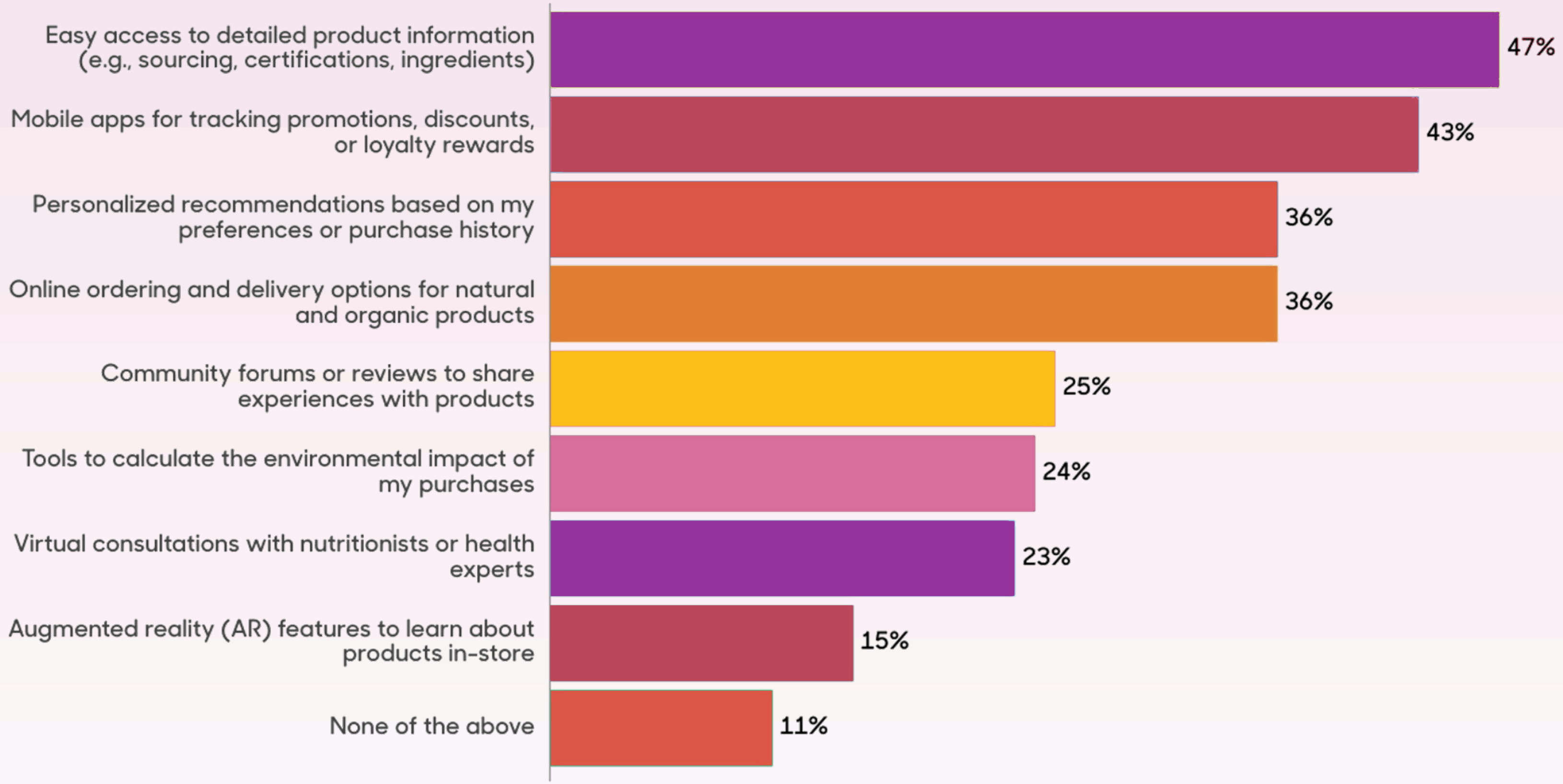
46% of industry executives feel Agentic Commerce will soon be **very/disruptive**, but only **11% are very/confident** of their **company's readiness**

Sources 1-SPINS Survey Conscious Consumption: How Values Shape the Basket, ,January 2026, N = 1,042, 2 - SPINS - The Next Generation of Consumers, 3-SPINS MultiOutlet (powered by Circana) and Natural Enhanced Channels, 52 weeks ending December 28, 2025

Technology that would assist NOFB shoppers

What role do you think technology (e.g., apps, online platforms) could play in helping you discover and purchase natural and organic products?

- Easy access to detailed product information (47%) ranks as the top tech need, reinforcing transparency and label literacy trends
- Mobile apps for promotions, discounts, and loyalty rewards(43%) highlight ongoing value sensitivity
- Personalized recom-mendations (36%) and online ordering (36%)show strong demand for guided and convenient discovery



Source: *Nutrition Business Journal* surveys targeting average consumers, aged 20-75. Completed January 2026; N=1,000; powered by the Suzy online platform.
Question: "Which of the below do you feel retailers could do to improve the shopping experience for natural and organic products?"

Retail of Tomorrow

Blending **preference-based consumption, non-human participation and anywhere commerce**.
Successful retailers of tomorrow will have these types of elements included in their shopper experience.

The Store

- Wellness Zones
- Max Technology
- Hybrid Formats
- Hyper-local and sustainable sourcing

The Trip

- Hyper-Personalized Nutrition
- Predictive Ordering
- Discovery and experience
- Smart shopping

The Products

- Longevity focused
- Functional 'Beauty from Within'
- Without cultural boundaries
- Freezer Chefs
- Private label

Deeply integrated online and in-store experiences
High price sensitivity due to transparency and ease of acquisition anywhere

Our industry will continue to push boundaries

What has long been the norm for our industry is now going mainstream. We can, and will, keep impacting positive outcomes.

Foods without Ultra Processing

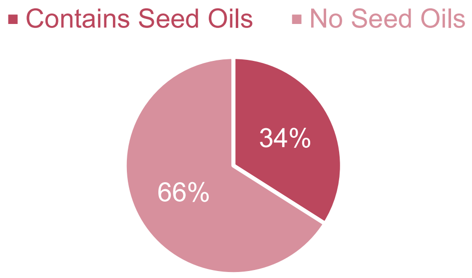
Product without Ultra Processed Ingredients increase that market edge

Avg. Retail Price	Unit Growth Vs. YAGO	Dollar Growth Vs. YAGO	PRODUCTS
$4.65	0%	+3%	Total Food & Bev
$5.28	+6%	+10%	NATURAL PRODUCTS
$45.01	+2%	+5%	SPECIALTY & WELLNESS
$4.22	-3%	-1%	CONVENTIONAL

Seedy Business: Moving On

Seed Oil Food & Bev[2]

Unit Contribution



	Seed Oil	No Seed Oil
Base ARP	$4.36	$4.32
$ % Change	-3%	+1%
Unit % Change	-4%	-2%

Units

Soybean Oil	Canola Oil	Sunflower Oil	Corn Oil
28B	17B	10B	5B
-4%	-4%	-3%	-4%

No Artificial Ingredients

Behind protein and sugar, no artificial ingredients is the third most sought after claim by shoppers[3]

Products With No Artificial Ingredients, By Category

Units % Chg, Vital Clean [2]

SS Rice Cakes	+25%
FZ Breakfast Foods	+16%
SS Jerky & Meats	+14%
RF & PB Yogurt	+10%
Creams Creamers	+7%

Sources: 1-2. SPINS Natural Expanded Channel + MULO (powered by Circana), Grocery, Refrigerated, Frozen Departments 52 Weeks Ending 12.28.2025 3. SPINS/FMI Healthy Eating Study

Perspectives on the Next 5 Years

Adrienne Smith
Content Director
New Hope Network

Karen Ivanis-Rogers
Senior Director of Business Ventures
Albertsons

Gary Hirshberg
Co-Founder & Chief Organic Optimist
Stonyfield Farm

Seth Goldman
Co-Founder & CEO
JUST Ice Tea

Alyssa Vescio
Chief Merchandising Officer
The Fresh Market

Pat Sheridan
President & CEO
INFRA

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