

From Discovery to Decision: The Behaviors & Beliefs Driving Health & Wellness CPG Growth

Co-located with



Product Discovery Powered by



By Informa Markets

From Discovery to Decision: The Behaviors & Beliefs Driving Health & Wellness CPG Growth



Erika Craft

Nutrition Business Journal



Scott Dicker

SPINS

From Discovery to Decision: The Behaviors & Beliefs Driving Health & Wellness CPG Growth



Erika Craft

Nutrition Business Journal



From Discovery to Decision: The Behaviors & Beliefs Driving Health & Wellness CPG Growth

Erika Craft

Market Research Analyst

Nutrition Business Journal

Erika.craft@informa.com





Macro shifts in health mindsets
and behaviors

The rise of tech-enabled, self-
directed health management

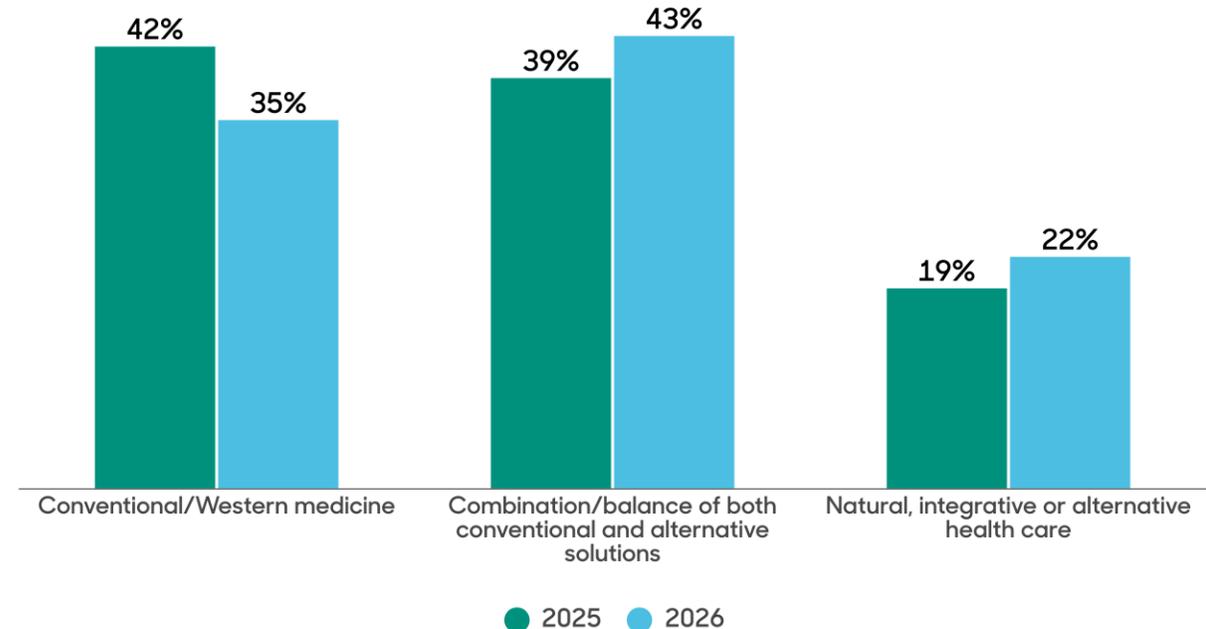
How consumers discover and
evaluate wellness products

Where consumers shop and how
channel dynamics are evolving

Consumers are redefining healthcare with a more holistic and multi-modal mindset

- Millennials (49%) are driving the sentiment of combining both conventional and natural solutions when it comes to choosing health approaches
- While Gen Z (31%) are choosing Natural or alternative solutions, the highest of any age group

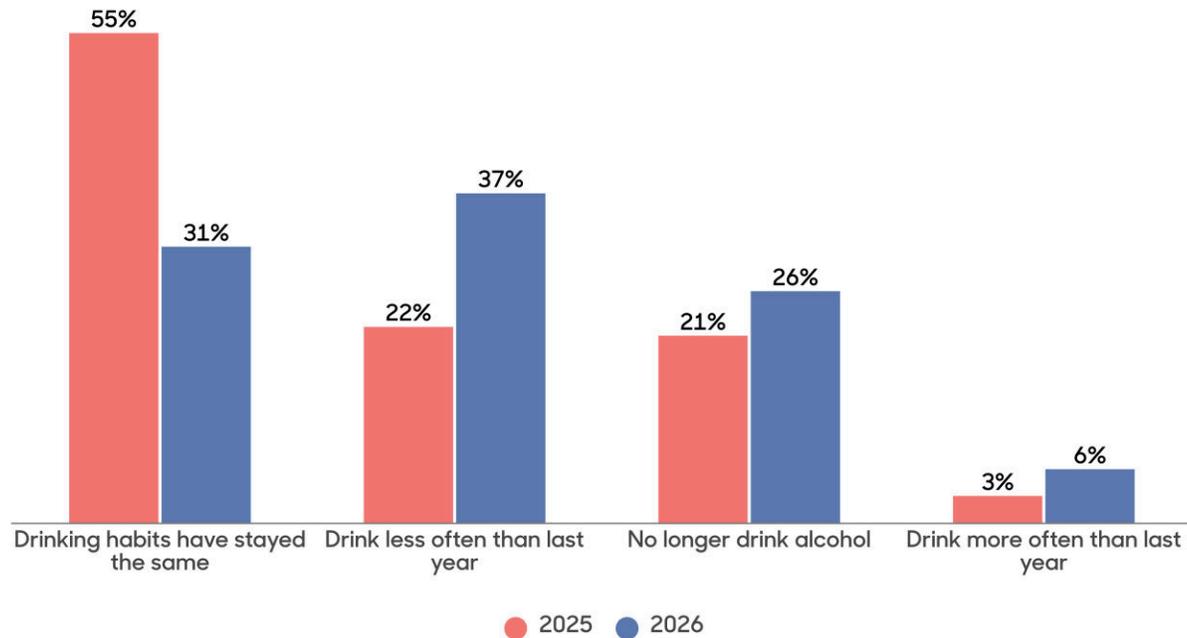
Health solutions consumers turn to first



Source: *Nutrition Business Journal* surveys targeting average consumers, aged 20-75. Completed February 2025 with N=1,010; and January 2026 with N=1,000, powered by the Suzy online platform.
Question: "When seeking solutions for your health, which approach do you typically turn to first?"

Consumers continue shifting toward more mindful consumption habits

How alcohol consumption has changed compared to prior year

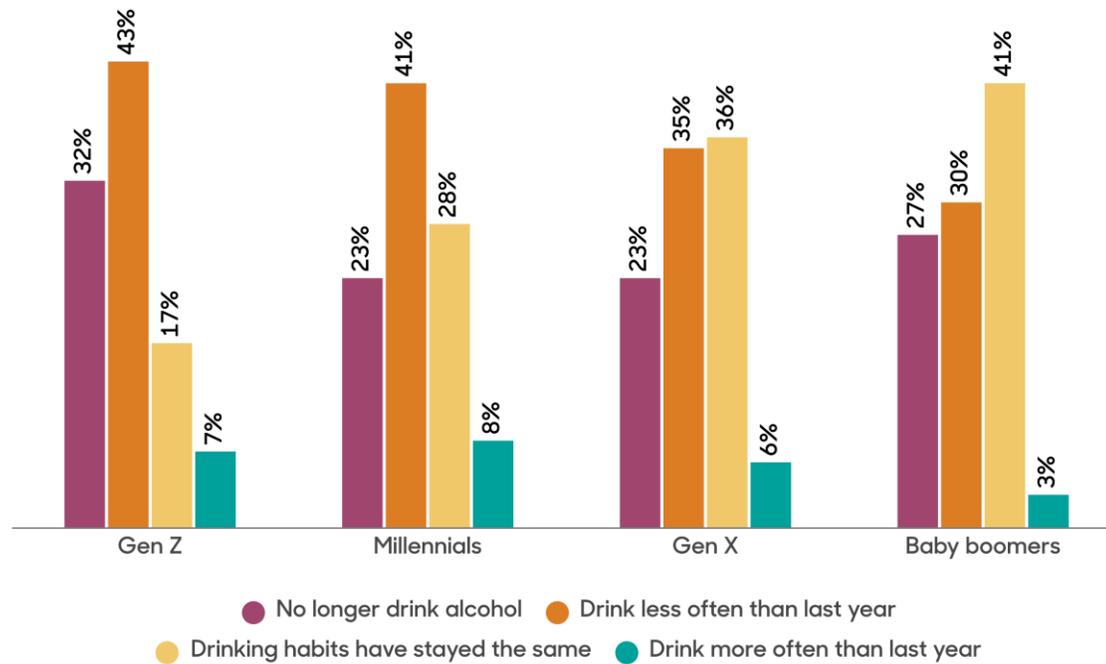


Source: *Nutrition Business Journal* surveys targeting average consumers, aged 19-75. Completed February 2025 with N=1,006; and January 2026 with N=1,000; powered by the Suzy online platform. Question: "In the past year, how has your alcohol consumption changed?"

- The sustained pullback in alcohol suggests consumers are reallocating spending and attention toward products and habits that align more closely with long-term health and wellness goals

Structural shifts in alcohol habits are strongest among Gen Z and Millennials

How alcohol consumption has changed compared to last year, by generation (2026)

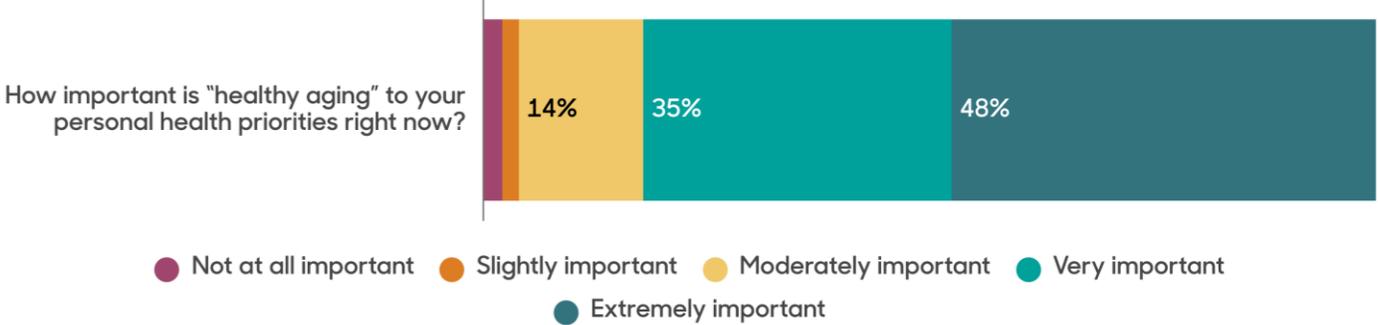


Source: Nutrition Business Journal surveys targeting average consumers, aged 20-75. Completed January 2026; N=1,000; powered by the Suzy online platform.
Question: "In the past year, how has your alcohol consumption changed?"

- Comparing to 2025 totals, +18% increase in Gen Z who no longer drink alcohol (highest among all age groups)
- +8% increase for Millennials
- While moderation is occurring across all age groups, the magnitude of change is highest among Gen Z, indicating a longer-term cultural shift rather than a temporary behavioral fluctuation

Healthspan optimization is becoming a key driver of consumer health decisions

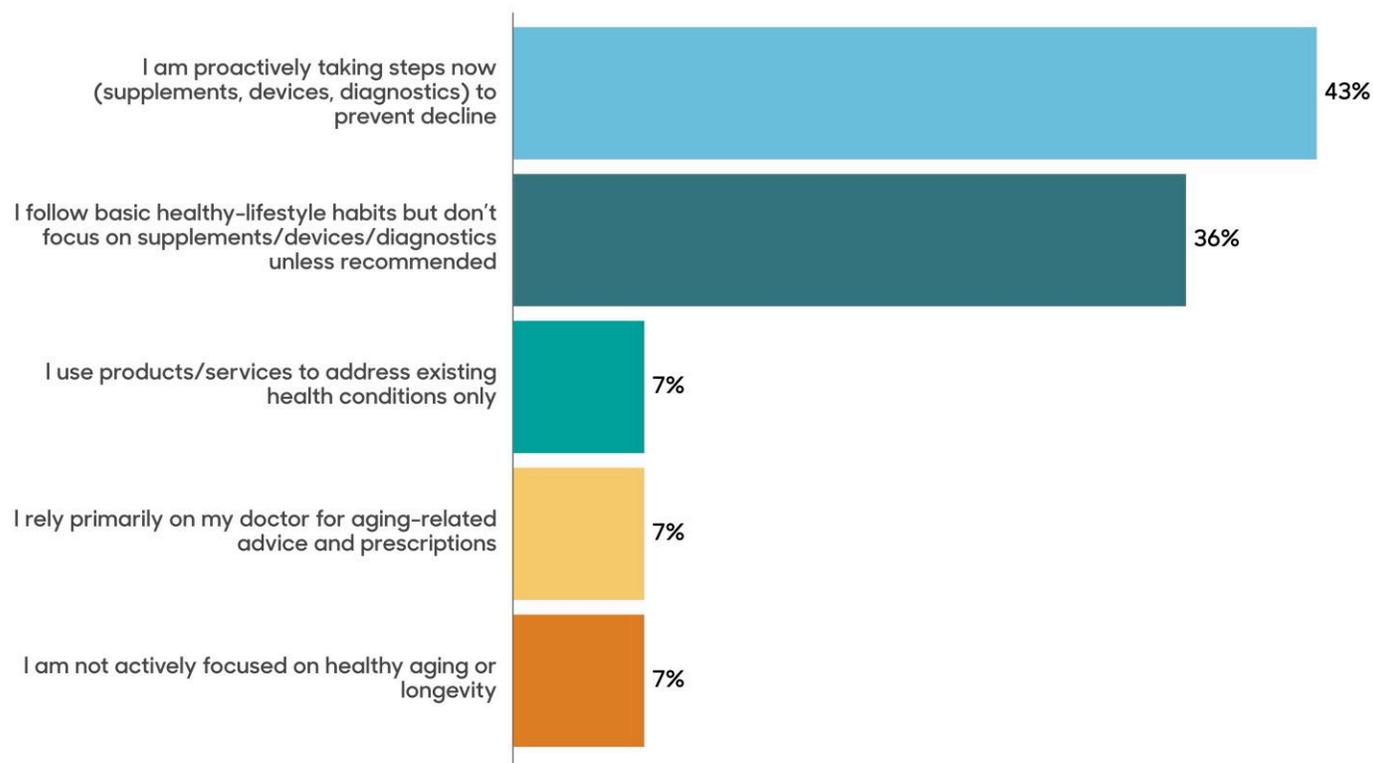
Importance of healthy aging priorities in general consumers



Source: *Nutrition Business Journal* survey targeting average U.S. consumers, age 18-75. Completed in January 2026; N=1,000 powered by the Suzy online platform.
Question: "How important is "healthy aging" to your personal health priorities right now? (Select one.)"

Consumers are engaging earlier and more actively in longevity support

Consumer approaches to healthy aging and longevity support

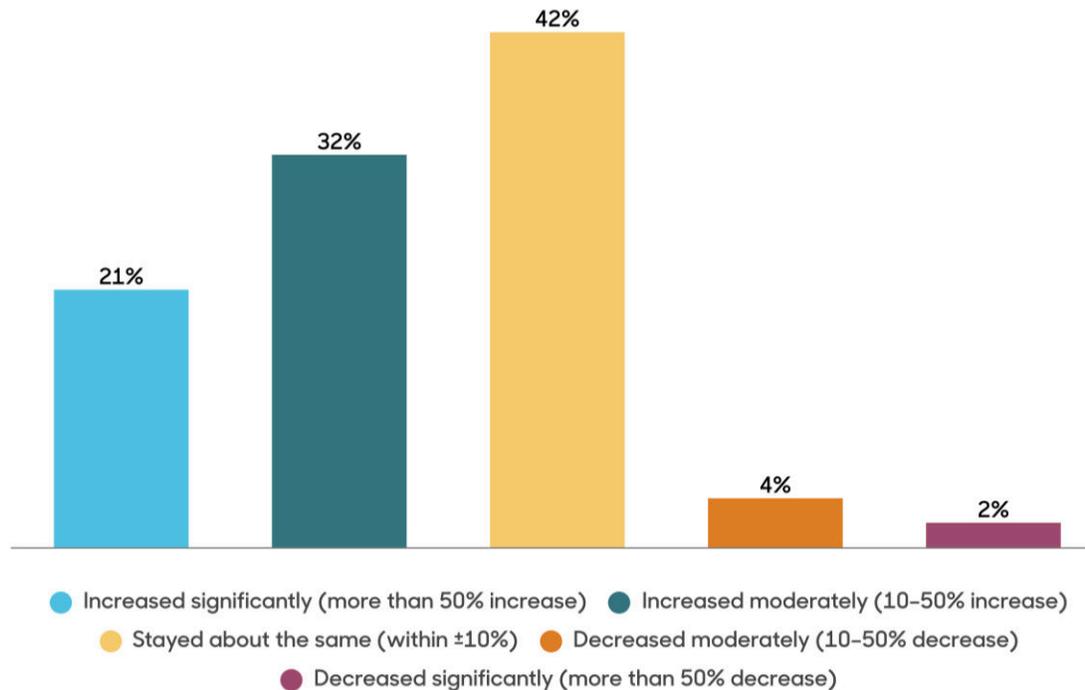


Source: Nutrition Business Journal surveys targeting general consumers, aged 18-75. Completed January 2026; N=1,000; powered by the Suzy online platform.
Question: "Which statement best describes the products, supplements, devices or services you currently use to support healthy aging or longevity? (Select one.)"

- Consumers are increasingly taking proactive steps to support healthy aging, with many investing in supplements, diagnostics, and lifestyle tools to prevent decline rather than waiting to address health issues reactively

53% of general consumer say spending increased significantly or moderately in the last 12 months

Change in consumer spending on healthy aging and longevity products over the last 12 months



Source: NBJ surveys targeting general consumers, aged 18-75. Completed January 2026; N=832; powered by the Suzy online platform.
Question: "Over the last 12 months, how has your spending on healthy aging / longevity products, supplements, devices and services changed? (Select one.)"

- Increased longevity spending and proactive health behaviors indicate a shift toward prevention-first wellness, where consumers actively invest in maintaining healthspan rather than managing decline



Macro shifts in health mindsets
and behaviors

The rise of tech-enabled, self-
directed health management

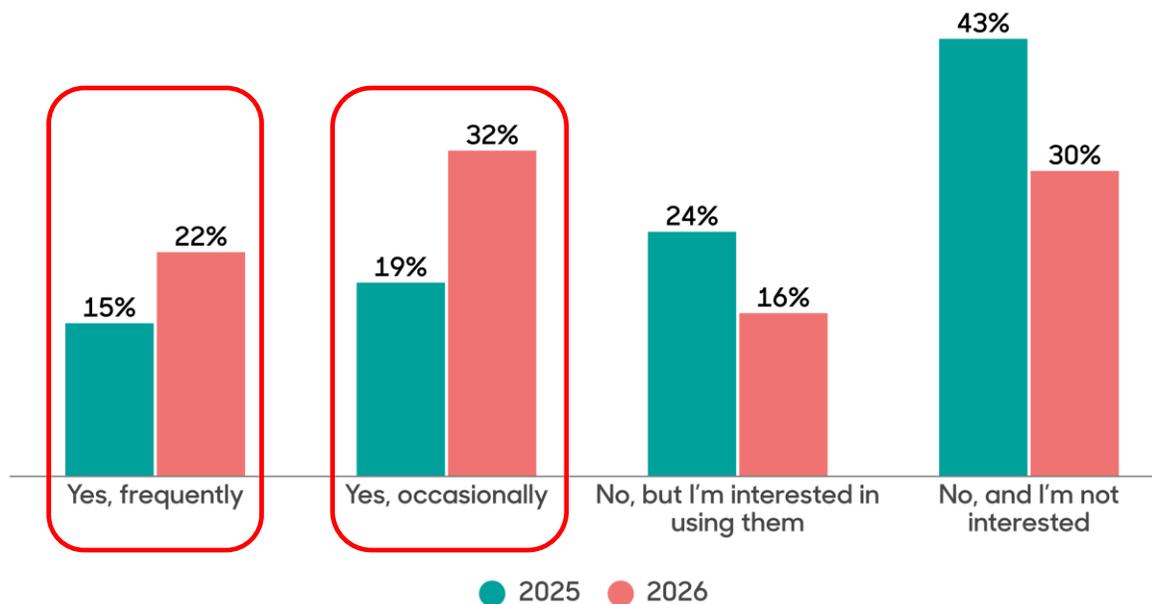
How consumers discover and
evaluate wellness products

Where consumers shop and how
channel dynamics are evolving

AI Technology is becoming a core tool in everyday health management

And of course, is driven by younger consumers

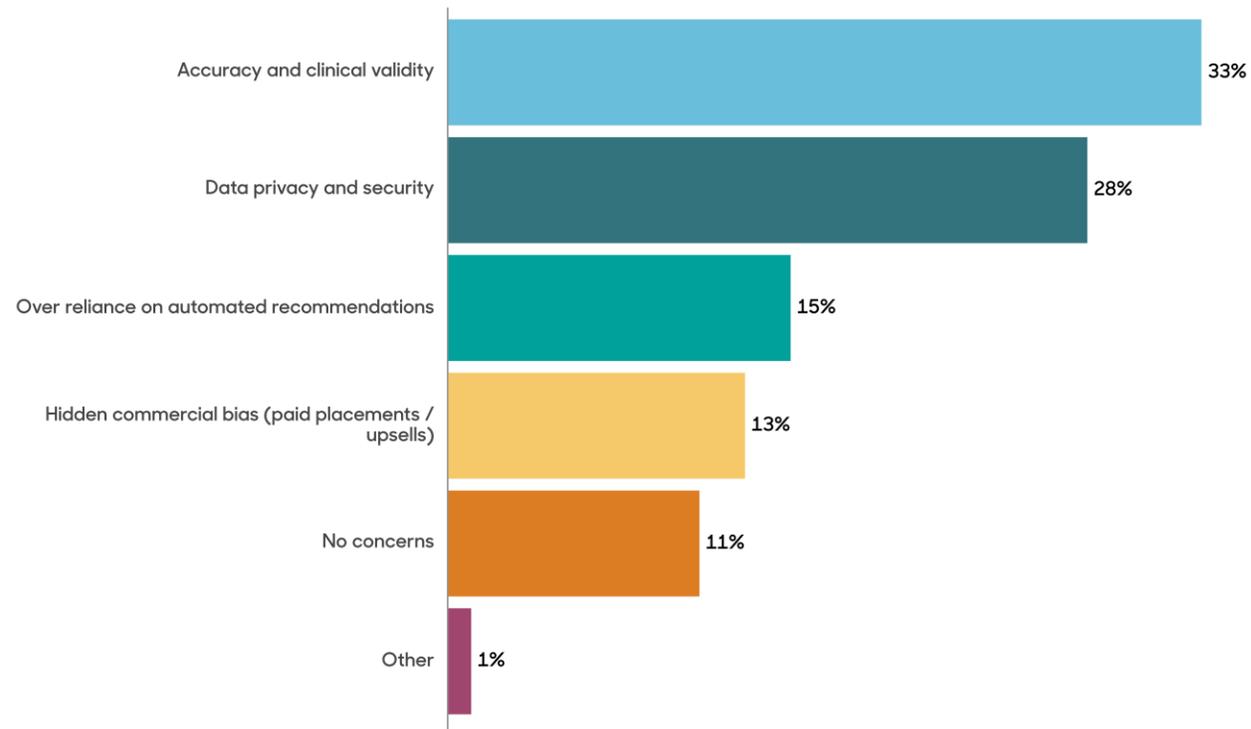
Consumers using AI tools for health and wellness advice, suggestions or protocols



Source: Nutrition Business Journal survey targeting average U.S. consumers, age 18-75. Completed in January 2026 & 2025; N=1,000 powered by the Suzy online platform.
Question: "Do you use AI-powered tools for health and wellness (e.g., diets, exercise plans, mindfulness) advice, suggestions or protocols?"

AI health adoption is rising, but trust remains a critical hurdle

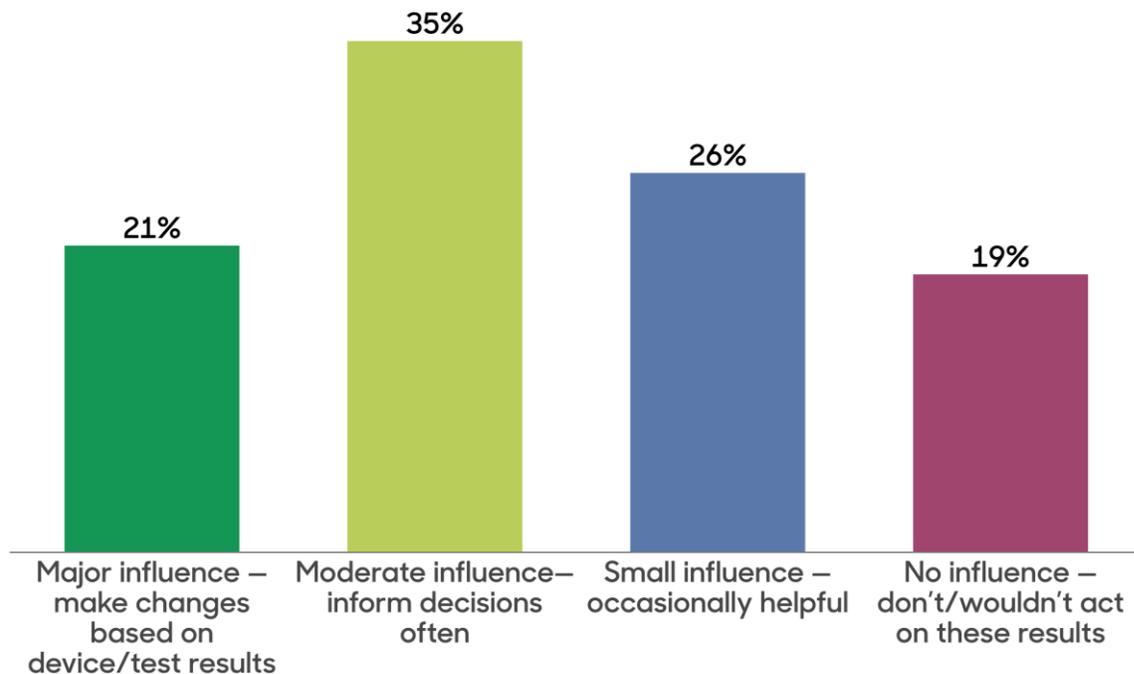
Concerns about AI-generated personalized health recommendations



Source: Nutrition Business Journal surveys targeting general consumers, aged 18-75. Completed January 2026; N=1,000; powered by the Suzy online platform. Question: 'Which risk, if any, concerns you most about AI-personalized health recommendations? (Select one.)'

Data-driven health management is moving from insight to action

Influence of wearable data or at-home test results on lifestyle changes and product purchases



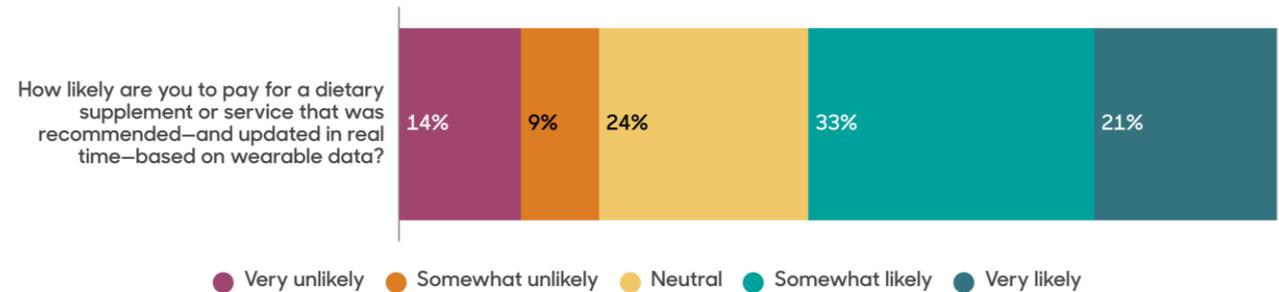
Source: Nutrition Business Journal surveys targeting general consumers, aged 18-75. Completed January 2026; N=1,000; powered by the Suzy online platform.
Question: "How much do (or would) wearable data or at-home test results influence decisions you make about products or lifestyle changes? (Select one.)"

- 56% of consumers say wearable or home testing data have a moderate or major influence on health
- With younger consumers particularly changing behavior (68% of Gen Z and 66% of Millennials say there's a moderate or major influence)

Consumers are not just engaging with health data, they are increasingly willing to act on it

- 54% of consumers report being somewhat or very likely to purchase a supplement or service based on wearable data than unlikely, indicating growing trust in data-informed health guidance

Likelihood of purchasing a supplement or service recommended based on wearable data

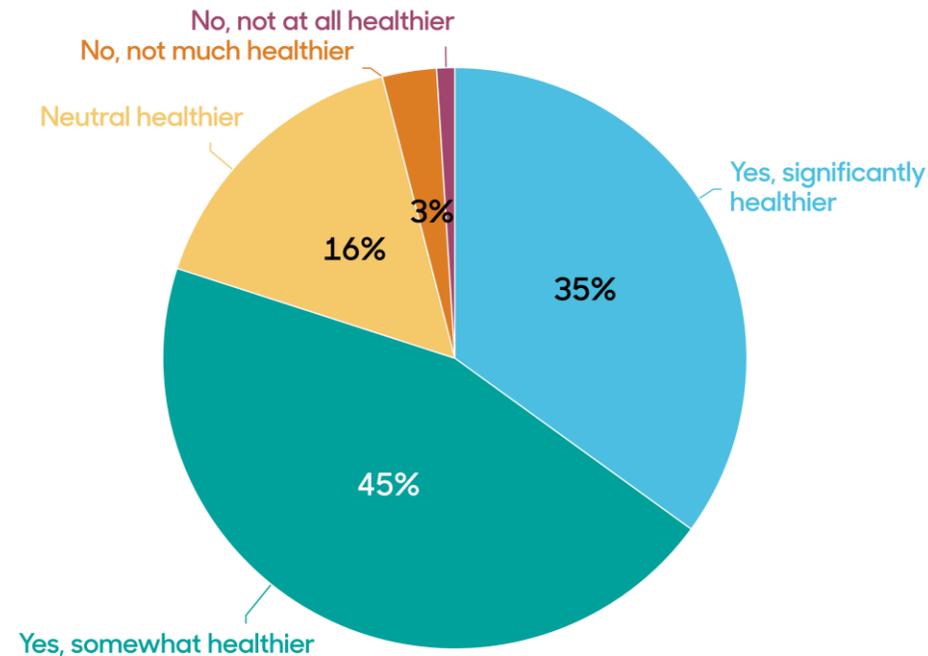


Source: Nutrition Business Journal surveys targeting general consumers, aged 18-75. Completed January 2026; N=1,000; powered by the Suzy online platform.

Question: "How likely are you to pay for a dietary supplement or service that was recommended—and updated in real time—based on wearable data? EX: if your wearable detects high intensity workouts, it suggests a specific product (like magnesium) to help recovery"

Self-tracking tools and real-time data are contributing to perceived health improvements

Consumer-perceived health impact of using real-time data to influence lifestyle and purchasing habits



Source: NBJ surveys targeting general consumers, aged 18-75. Completed January 2026; N=455; powered by the Suzy online platform.
Question: "Do you believe you're healthier or have better habits now that you have real-time data to influence your lifestyle or purchase habits?"

- Real-time health data is not just informative, it is perceived as health-enhancing
- This reinforces the broader shift toward prevention-first, self-directed health, where consumers use real-time data to optimize daily health behaviors



Macro shifts in health mindsets
and behaviors

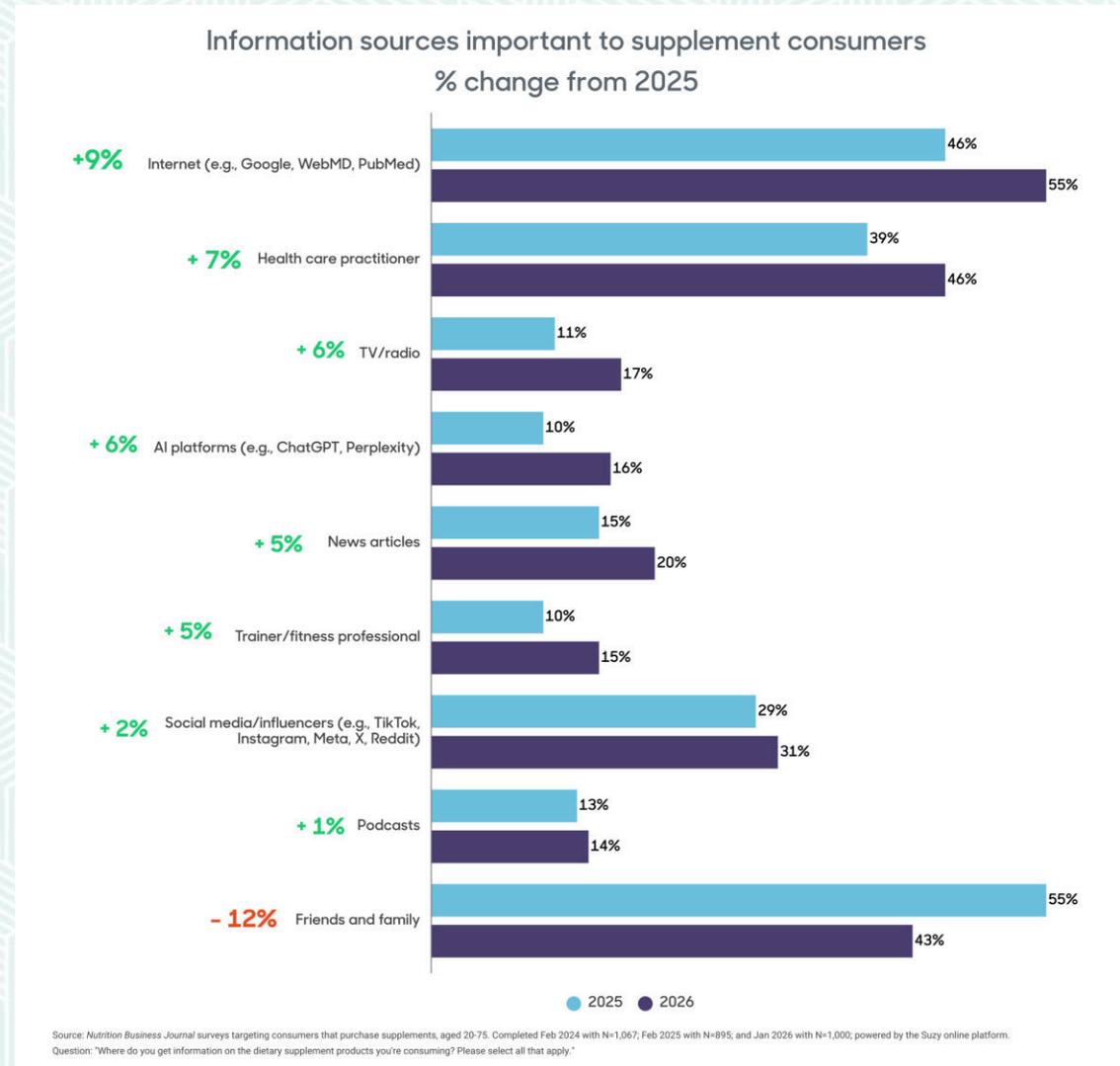
The rise of tech-enabled, self-
directed health management

How consumers discover and
evaluate wellness products

Where consumers shop and how
channel dynamics are evolving

Information sources for supplement education are rapidly evolving

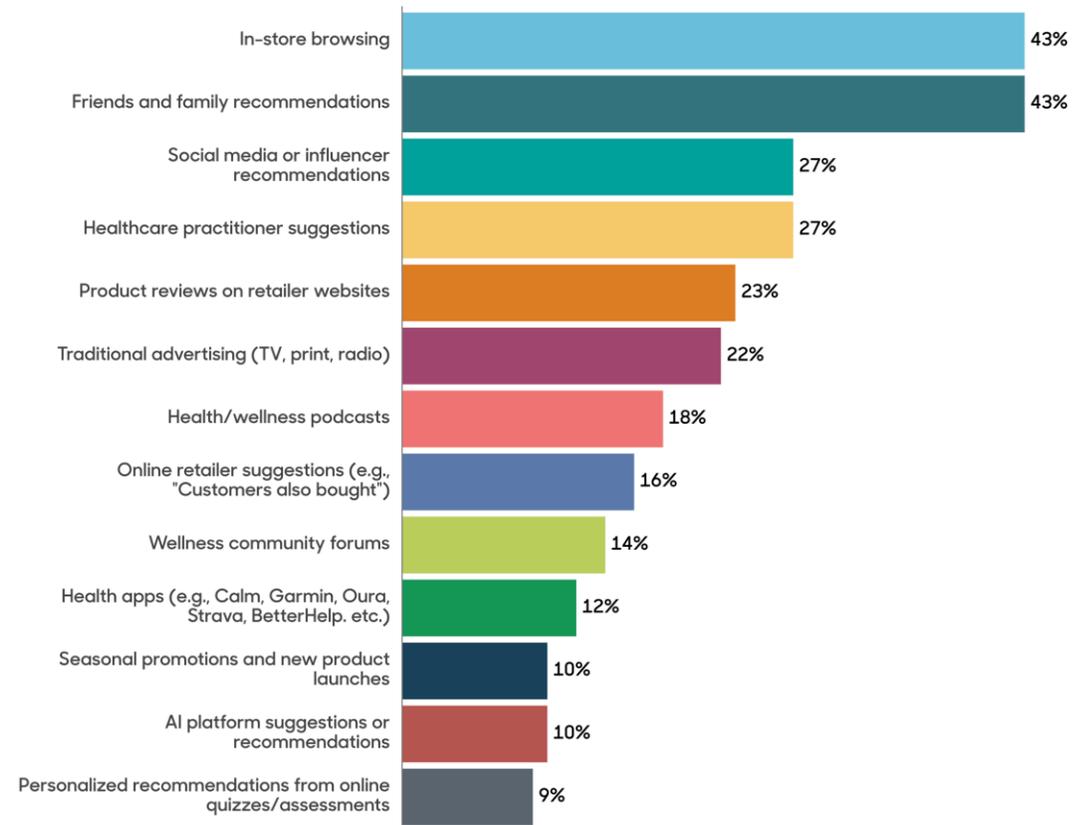
- Discovery and education are becoming more AI focused, expert-led, and research-driven
- As consumers become more data-driven in their health management, they are also turning to more research-oriented and technology-enabled sources to learn about supplements



Consumers research digitally and with experts, but discover products across retail and social touchpoints

- Consumers are separating where they build trust from where they discover products — turning to digital and expert sources for validation, but relying on retail and social ecosystems for awareness

How supplement consumers typically discover new products

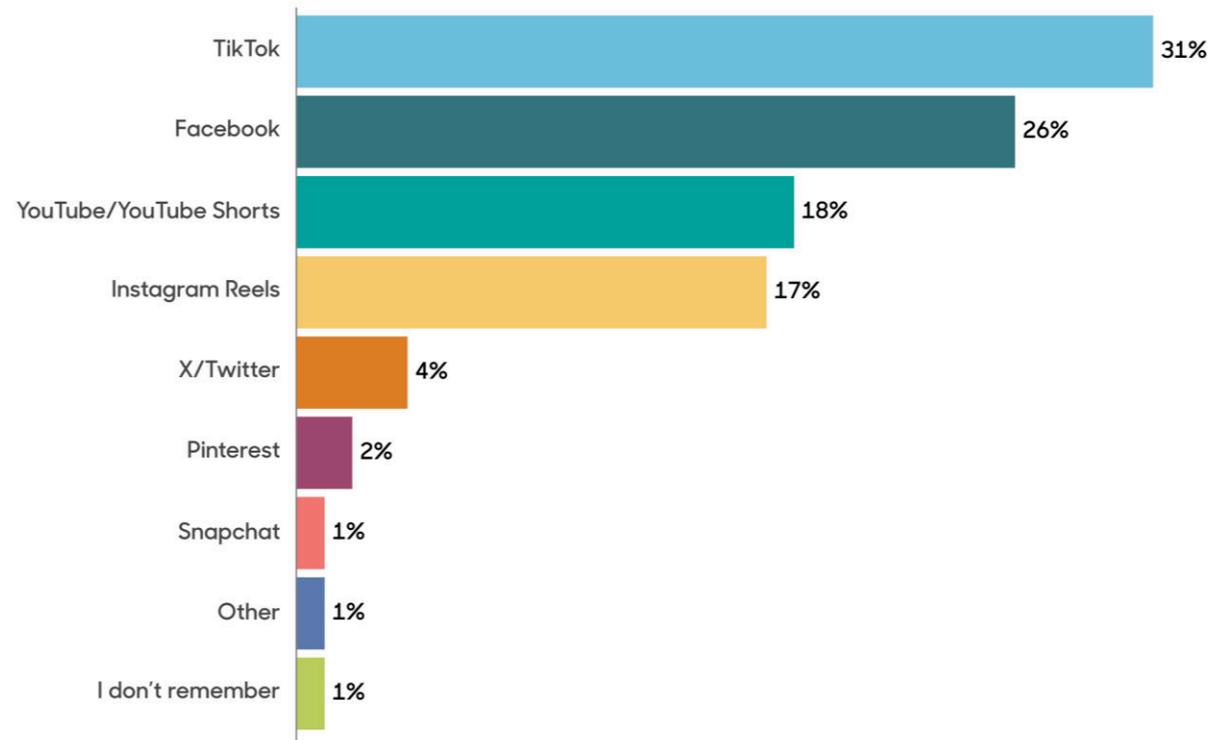


Source: Nutrition Business Journal surveys targeting supplement consumers, aged 19-75. Completed July 2025; N=1,000; powered by the Suzy online platform. Question: "How do you typically discover new supplement products? Select all that apply."

Younger consumers were first influenced by TikTok/YouTube, with older consumers also citing Facebook

- 39% of women discover on TikTok vs only 23% of men
- 23% of men discover on YouTube while only 13% of women do the same

Where consumers first saw social content influencing their purchase

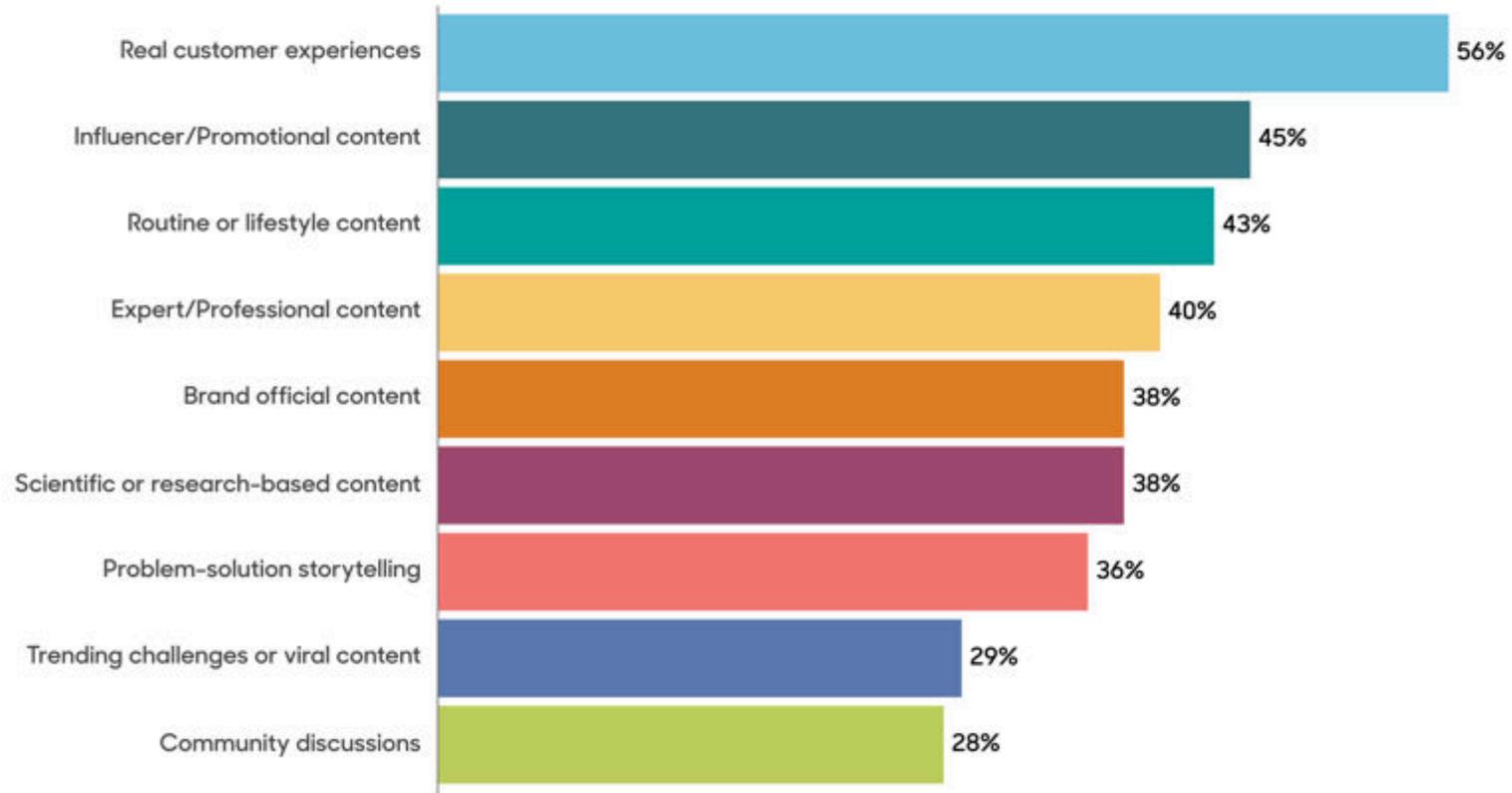


Source: *Nutrition Business Journal* surveys targeting consumers who were influenced by social content to purchase supplements, aged 18-60. Completed December 2025; N=1,000; powered by the Suzy online platform.

Question: "Where did you first see the social content that influenced your supplement purchase?"

Authentic content is winning consumers, but 40% also say experts/professional content is influential

What type of content influenced your decision to buy the supplement?



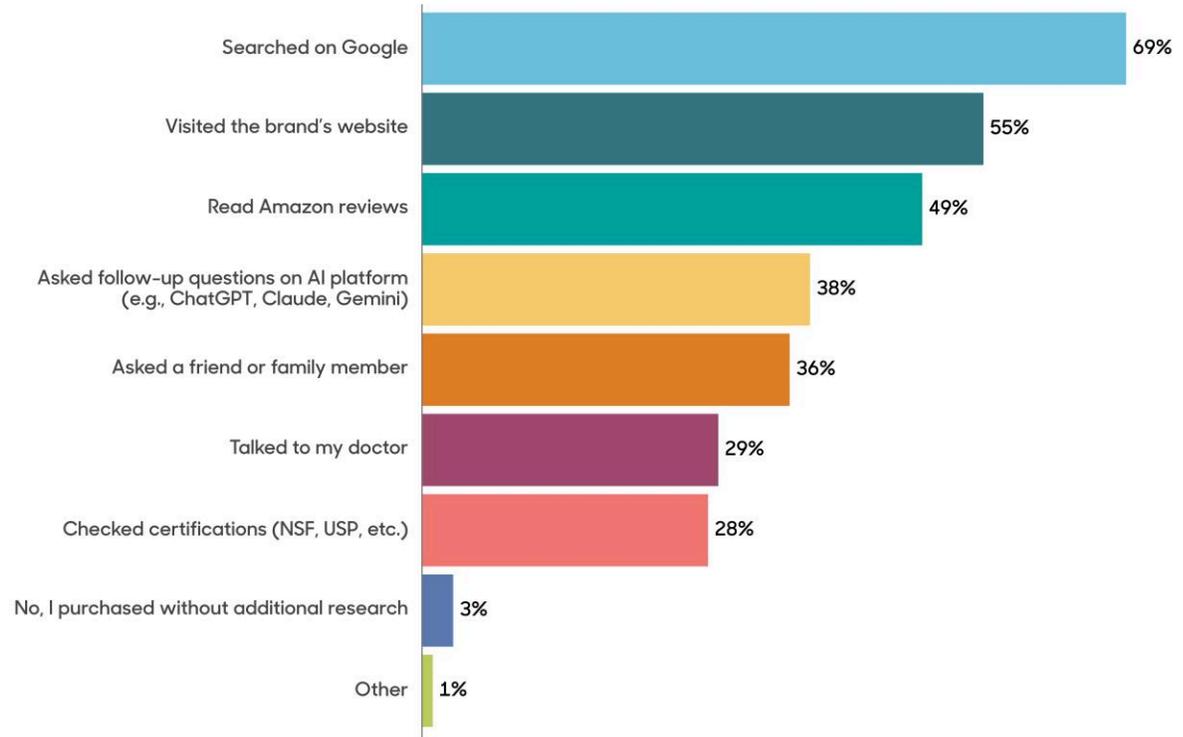
Source: Nutrition Business Journal surveys targeting consumers who were influenced by social content to purchase supplements, aged 18-60. Completed December 2025, N=1,000; powered by the Suzy online platform.

Question: "What type of content influenced your decision to buy the supplement? (Select all that apply)"

Research is happening outside of social media discovery

- Millennials and Gen X both using AI platforms more than any other ages
- Gen Z and Millennials both over-index on following up with a doctor

Where consumers research social media-influenced supplement purchases



Source: *Nutrition Business Journal* surveys targeting consumers who were influenced by social content to purchase supplements, aged 18-60. Completed December 2025; N=1,000; powered by the Suzy online platform.
Question: "Did you do any research about this supplement outside of social media? (Select all that apply.)"



Macro shifts in health mindsets
and behaviors

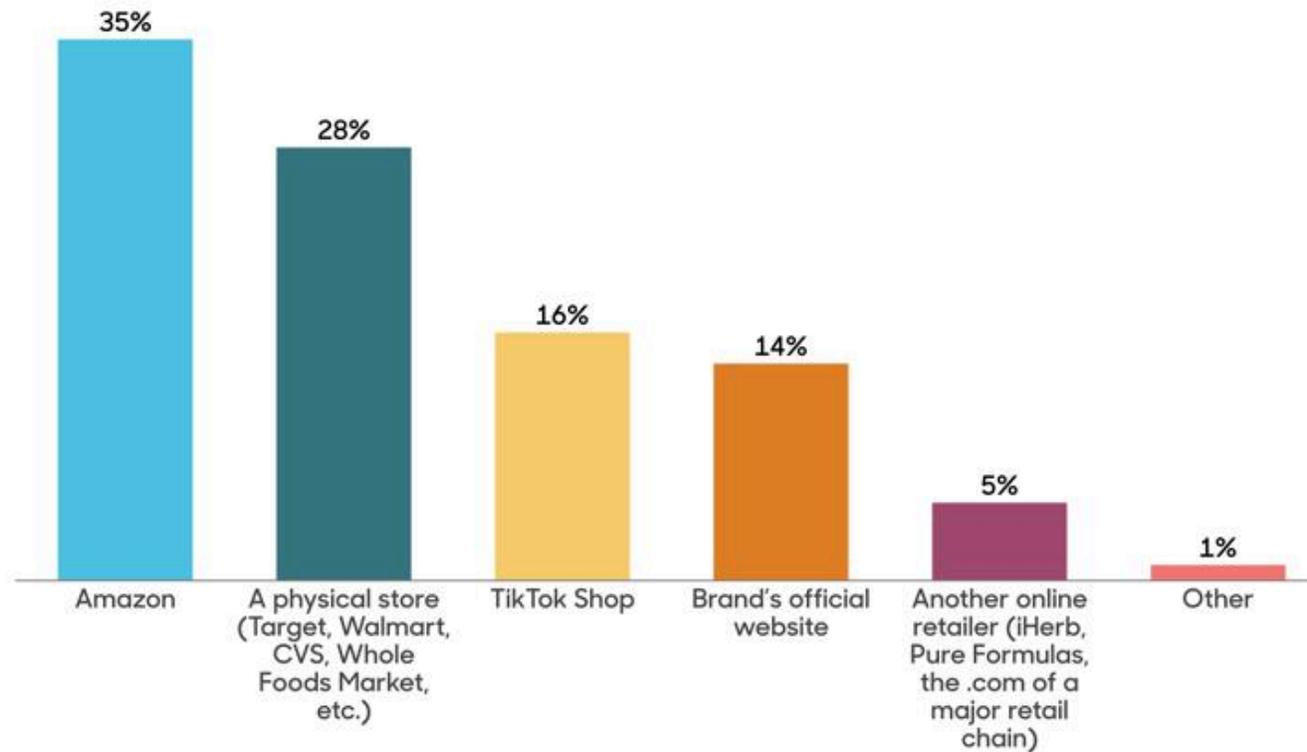
The rise of tech-enabled, self-
directed health management

How consumers discover and
evaluate wellness products

Where consumers shop and how
channel dynamics are evolving

Regardless of where content is being consumed, social media influenced purchases are happening more on Amazon

Where consumers are purchasing supplements they discovered through social content



Source: *Nutrition Business Journal* surveys targeting consumers who were influenced by social content to purchase supplements, aged 18-60. Completed December 2025; N=1,000; powered by the Suzy online platform.

Question: "Where did you end up purchasing the supplement you discovered through social content?"

Retail channel behavior differs across supplement and natural product shoppers

Supplement consumers:

- Gen Z driving top 5 channels listed, except for Amazon (under index significantly). Also rank practitioner offices highest for any age group

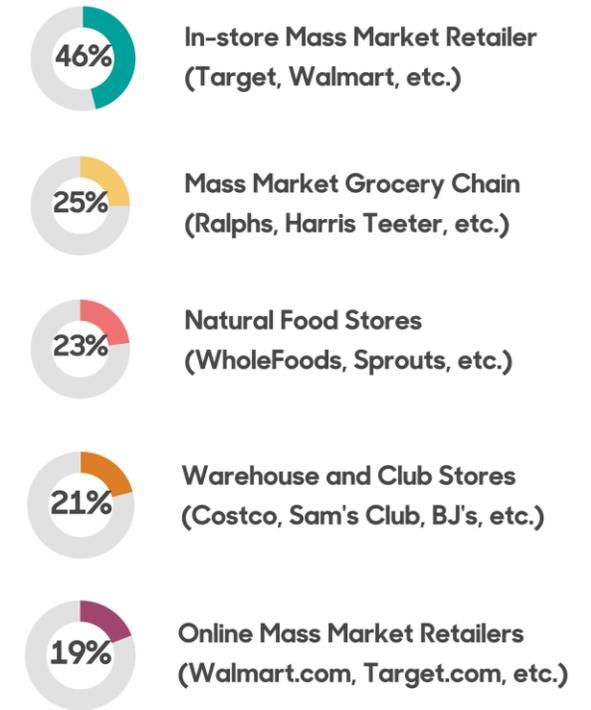
Nat & Org Food and Bev Consumer:

- Gen Z preferring Warehouse/Club stores, Millennials driving Natural Food Stores visits, with older consumers focusing more on Mass Market Grocery Chains

Where supplement consumers primarily shop



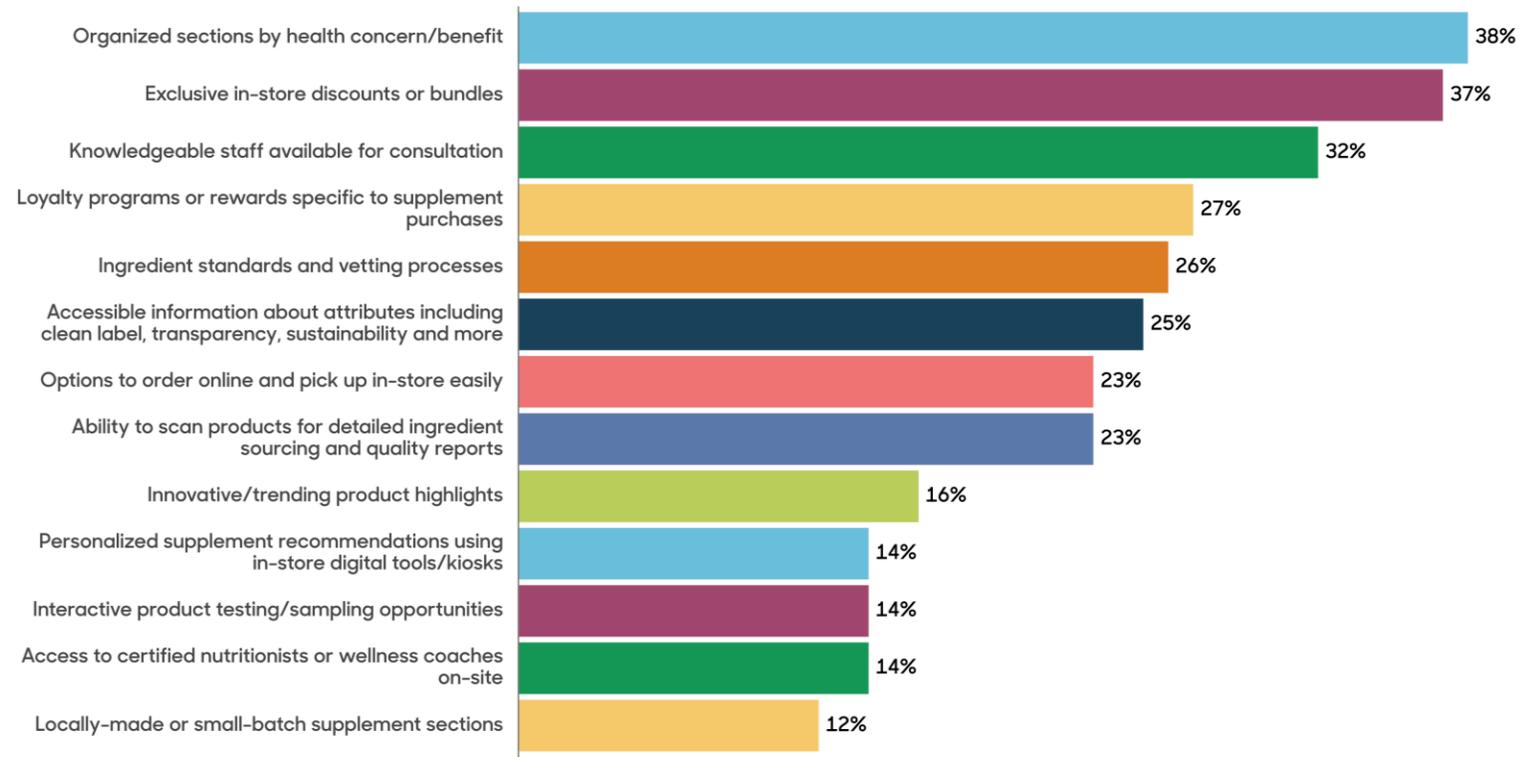
Where NOFB consumers primarily shop



Younger consumers are driving the return to retail, what's behind that motivation?

- Retail's resurgence is being fueled by curated shopping experiences that combine education, trust, and savings
- Younger consumers over-indexing on accessible info about clean-label, transparency, sustainability and detailed sourcing/quality reports

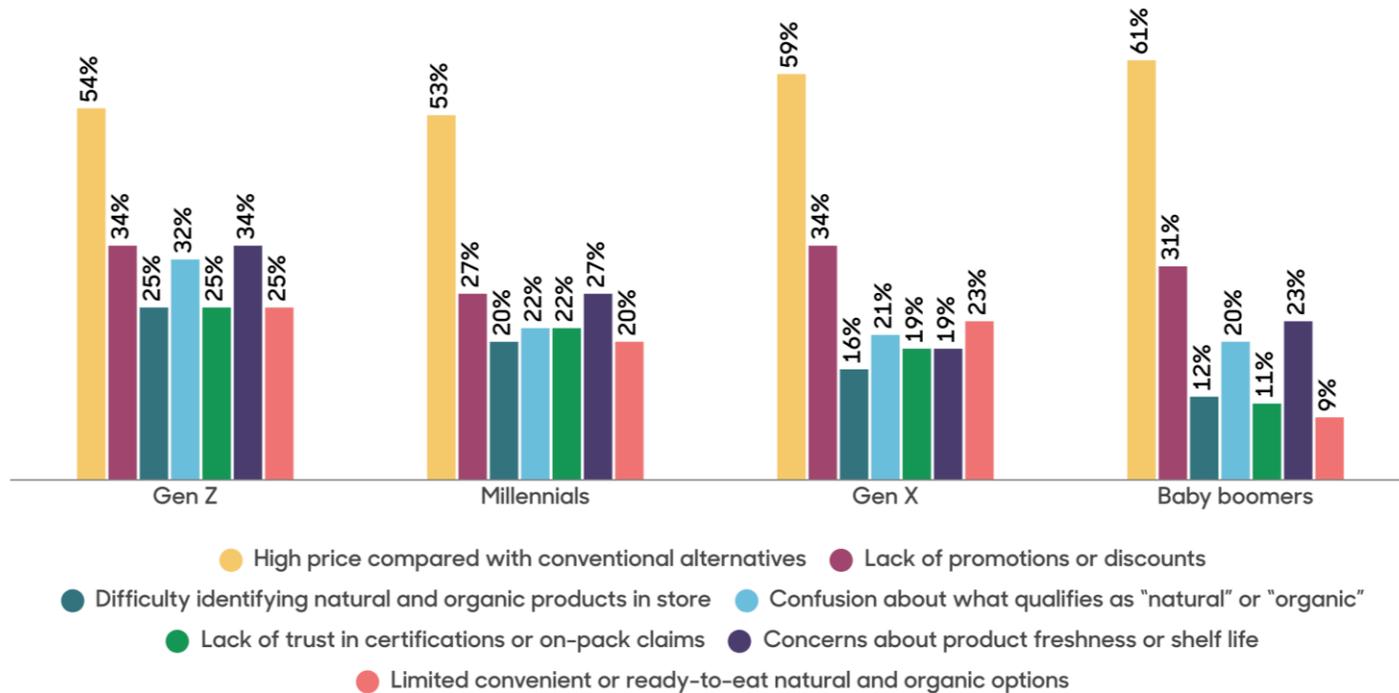
In-store experiences most appealing to consumers



Source: Nutrition Business Journal surveys targeting supplement consumers, aged 19-75. Completed July 2025; N=1,000; powered by the Suzy online platform. Question: "Which of the following aspects of an** in-store** shopping experience do you find most appealing when buying supplements? Select all that apply."

While price is a main concern, younger consumers over-index on lack of trust in certification/claims and confusion on what qualifies "natural" or "organic"

Factors discouraging NOFB consumers from buying more often

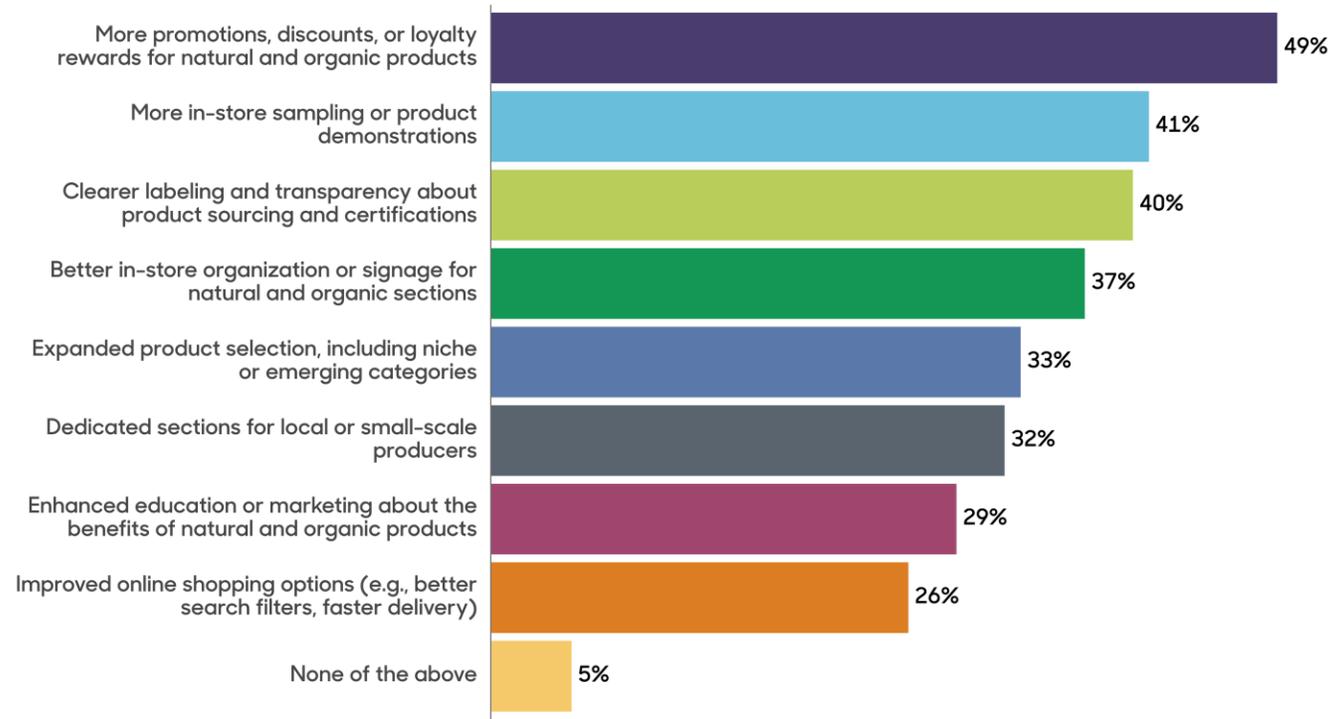


Source: Nutrition Business Journal surveys targeting consumers who purchase natural or organic food or beverage products, aged 19-75. Completed January 2026; N=1,000; powered by the Suzy online platform.
 Question: "What factors, if any, discourage you from purchasing natural and organic food and beverage products more often? (Select all that apply)"

Next-generation retail experiences must prioritize clarity, value, and product guidance

- Retail improvement priorities signal a shift toward experience-led environments, where promotions, sampling, and transparency work together to support more informed and confident purchasing decisions

How retailers can improve shopping experience for NOFB consumers

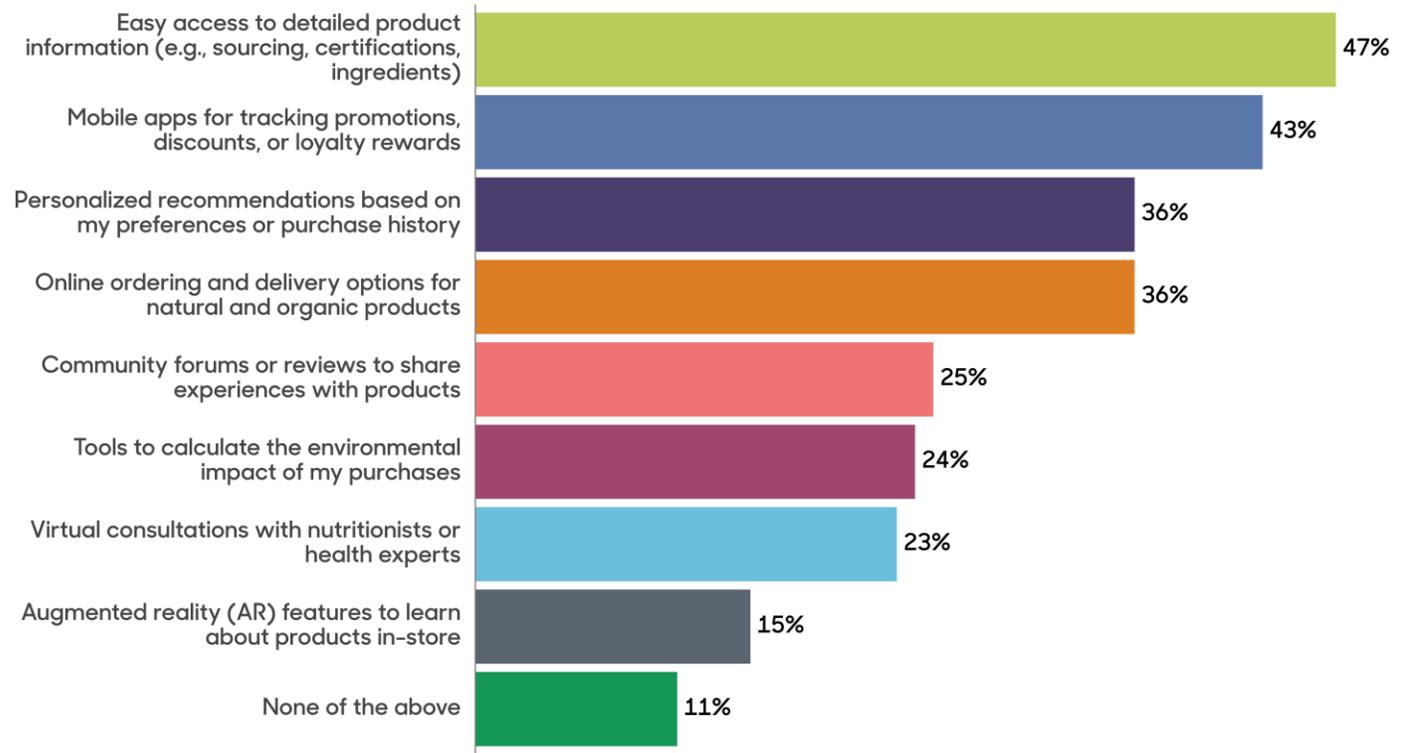


Source: Nutrition Business Journal surveys targeting average consumers, aged 20-75. Completed January 2026; N=1,000; powered by the Suzy online platform.
Question: "Which of the below do you feel retailers could do to improve the shopping experience for natural and organic products?"

The future of discovery is informed, personalized, and transparency-led

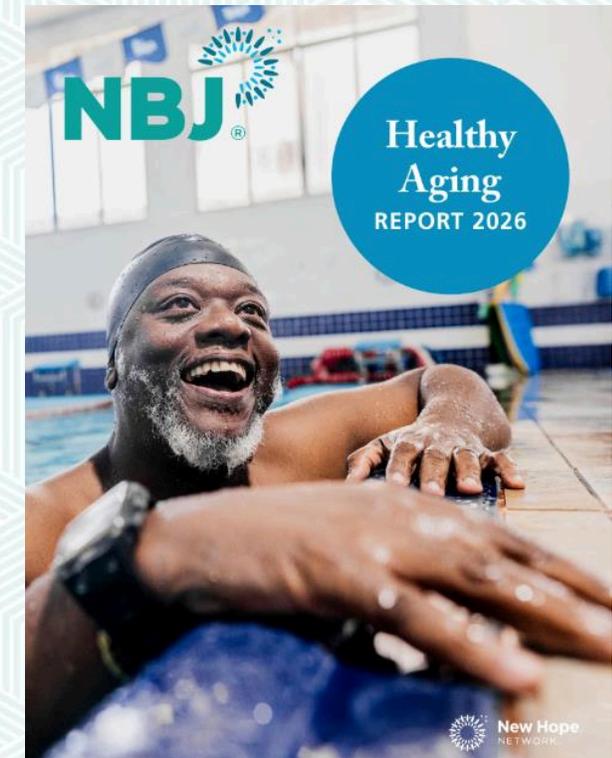
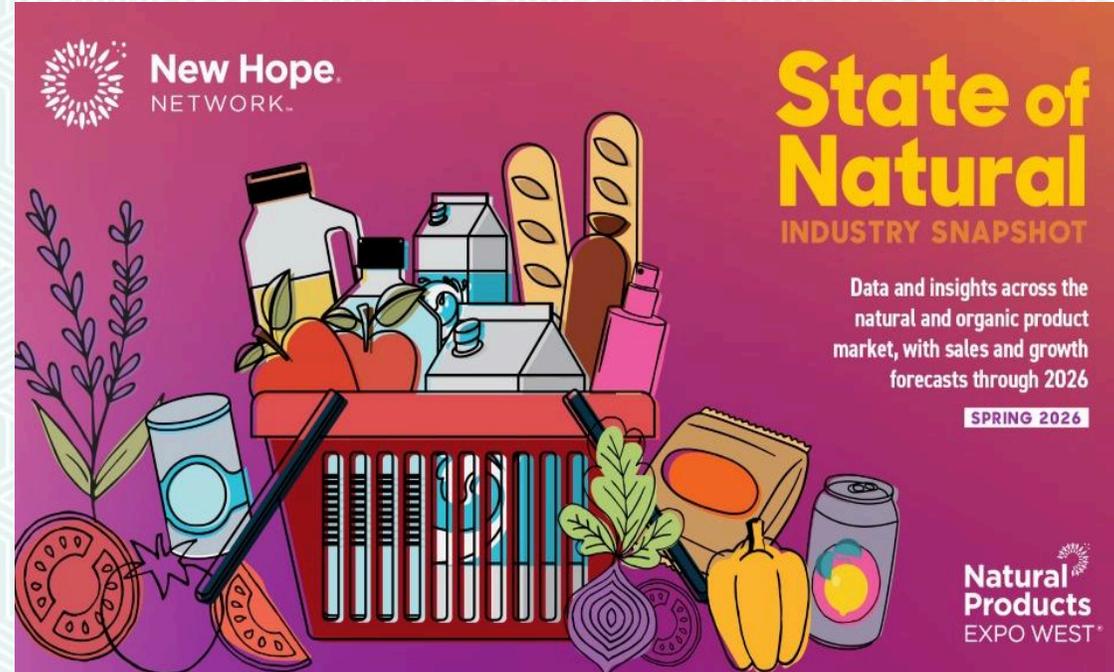
- The strong preference for product details, expert guidance, and personalization signals a shift toward more intentional, trust-driven discovery
- Technology is expected to make discovery smarter, more transparent, and more personalized, not more complex

How NOFB consumers feel technology should help them discover products



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?"

Reports referenced in this presentation



From Discovery to Decision: The Behaviors & Beliefs Driving Health & Wellness CPG Growth



Scott Dicker
SPINS



From Discovery to Decision:

The Behaviors & Beliefs Driving Health &
Wellness CPG Growth

Agenda

Vitamins & supplements

Market overview

01

Who is the Active Nutrition Consumer:

From Performance to Lifestyle

02

Category insights:

Evolving essentials and innovation

03

Things I'm looking out for:

What's on my mind

04

Meet your Presenter



Scott Dicker

Sr. Director, Head of Research and
Insights SPINS

The Changing landscape

Three Big Forces Reshaping our Industry (and Beyond)

2026 Trend Predictions

A values-driven approach to health, sustainability, and transparency

Preference-based consumption



Anywhere commerce

Non-human participation

- >90%** of US shoppers seek to buy values-oriented products: good for people, planet and animals¹
- 90%** of Gen Z and Millennials are actively looking to avoid using or consuming certain ingredients³
- 63%** of 2025 CPG unit growth across channels driven by Naturally Positioned products alone

2026 Trend Predictions

A **values-driven approach** to health, sustainability, and transparency



Decoding data to resonate and unlock opportunity

SPINS 2026 EXECUTIVE PULSE SURVEY

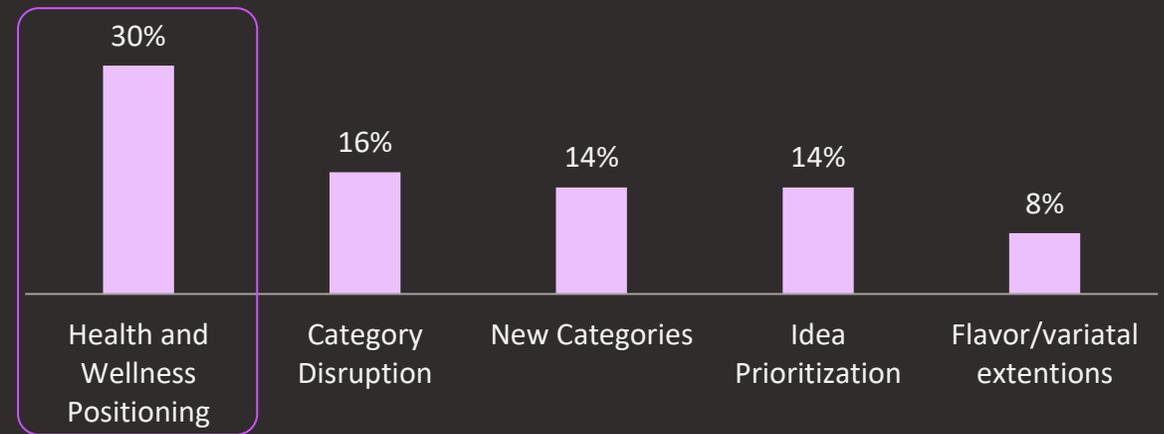
1 in 5

Believe that changing consumer preferences will be the MOST disruptive force in 2026

86%

Increased or maintained investment in R&D and innovation in 2025

Health and wellness drive innovation investment



Q: What is the top focus of your innovation strategy?

2026 Trend Predictions

The rise of frictionless, omnichannel, and ambient shopping experiences

Preference-based consumption



Anywhere commerce

Non-human participation

15% of total retail was eCommerce in Q2 2025 (+5.3% YoY)¹

\$100B Social commerce market by 2026²

\$67.3B Retail media ad spend forecasted for 2025³

2026 Trend Predictions

The rise of frictionless, omnichannel, and ambient shopping experiences

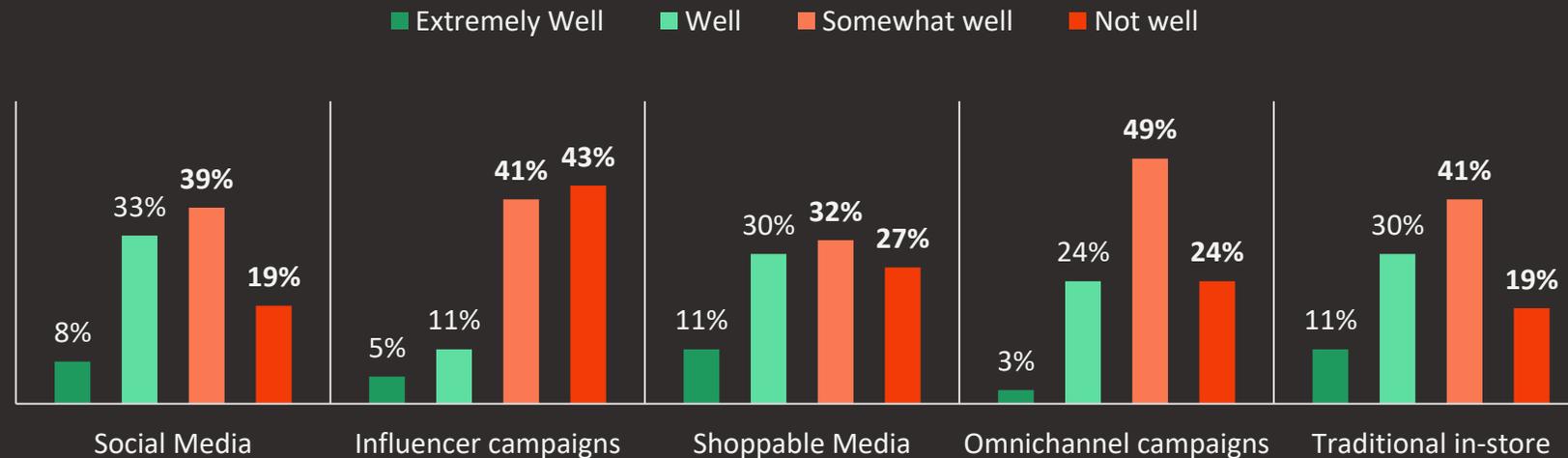


Engage with shoppers wherever they are

SPINS 2026 Executive Pulse Survey

68%

Increased spend in non-traditional media (e.g. social, e-commerce)

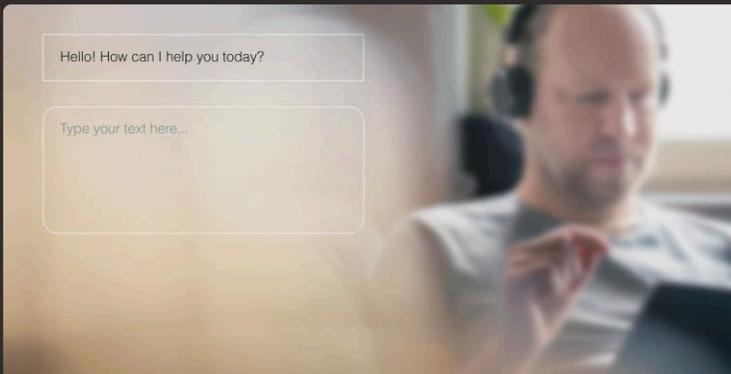


Q: How well are you able to track consumer engagement activities?

2026 Trend Predictions

The growing influence of **AI, automation, and synthetic agents** in shaping consumer decisions and product development

Preference-based consumption



Anywhere commerce

Non-human participation

75% of consumers say they're open to a trusted AI personal shopper that understands their needs¹

~9 in 10 retailers are adopting or piloting AI²

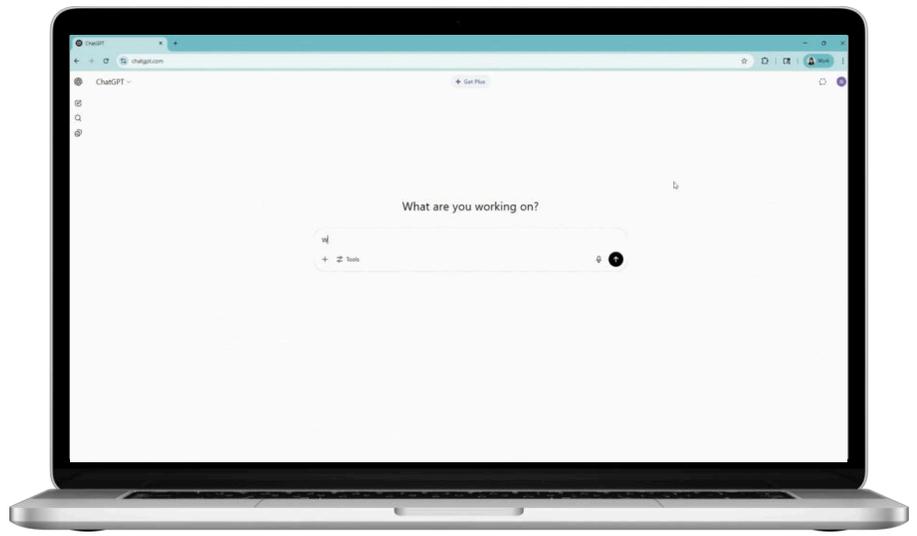
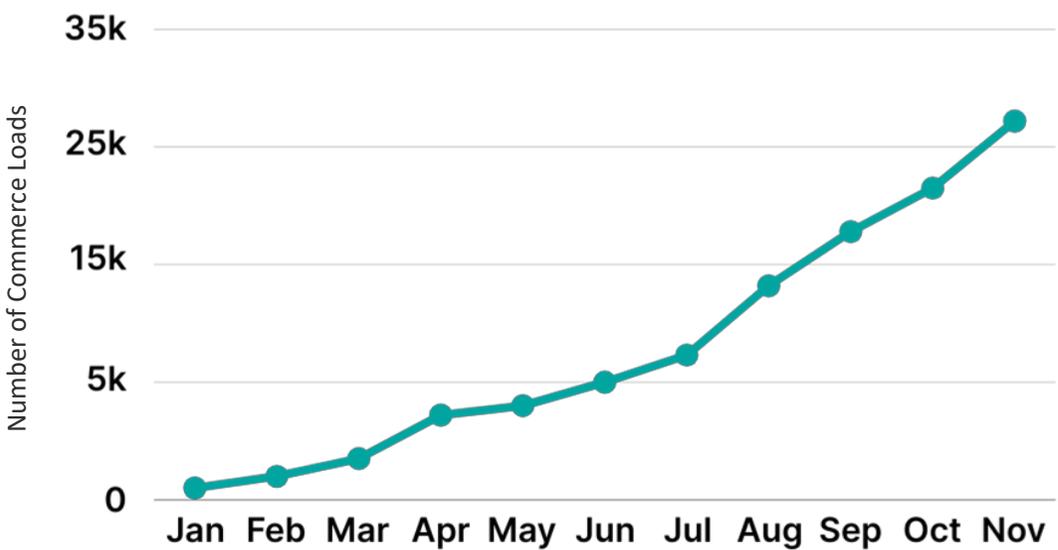
68% of retailers want gen-AI to transform marketing/content³

2026 Trend Predictions

Agentic shopping moves mainstream

MikMak customers have seen a more than 30x rise in ChatGPT referral traffic since January 2025

Share of ChatGPT Traffic Over Time | 2025

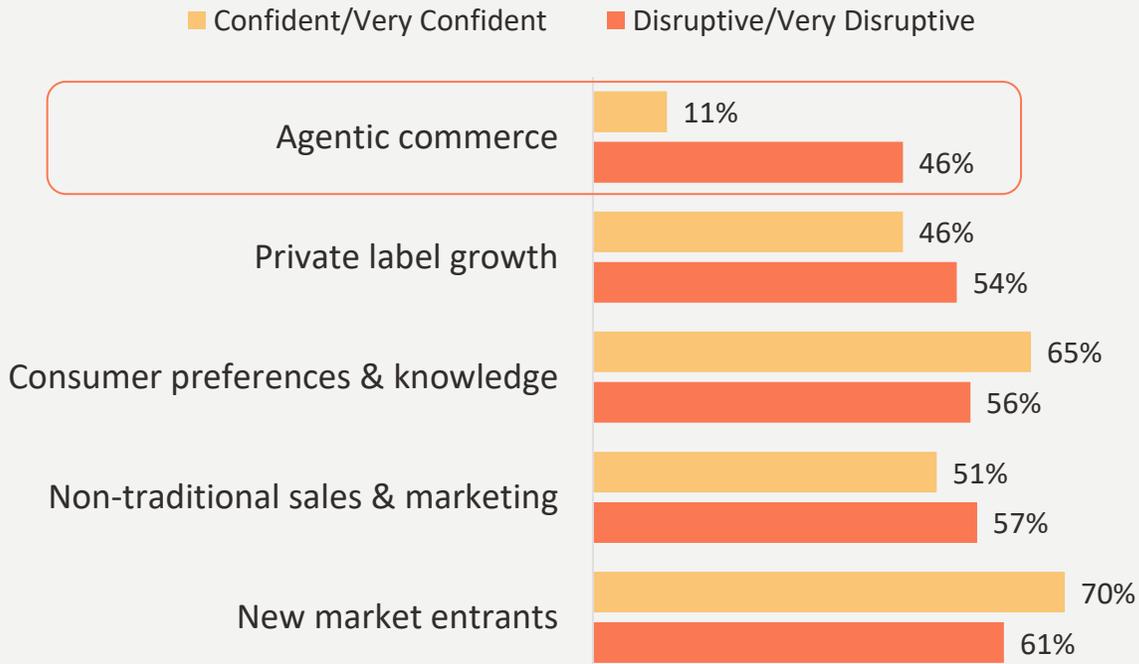


2026 Trend Predictions

A tension between disruption, and preparedness

A surprising gap between those who are certain of impending disruption, and general confidence in being ready

SPINS 2026 Executive Pulse Survey



A state of exploration and experimentation



Conscious Consumers

Product Discovery and Loyalty are Shifting

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

Facing Financial Headwinds

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

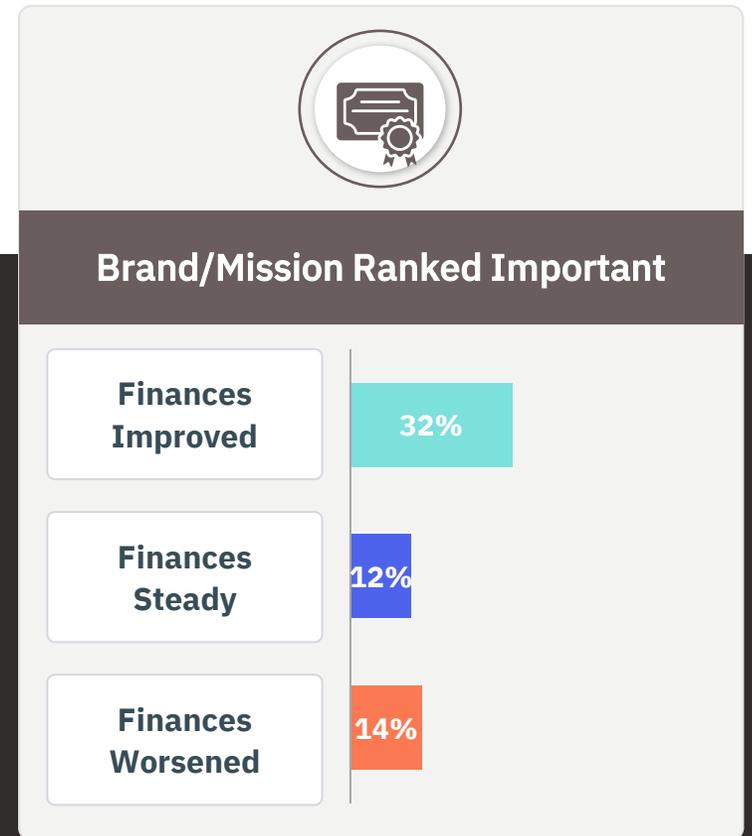
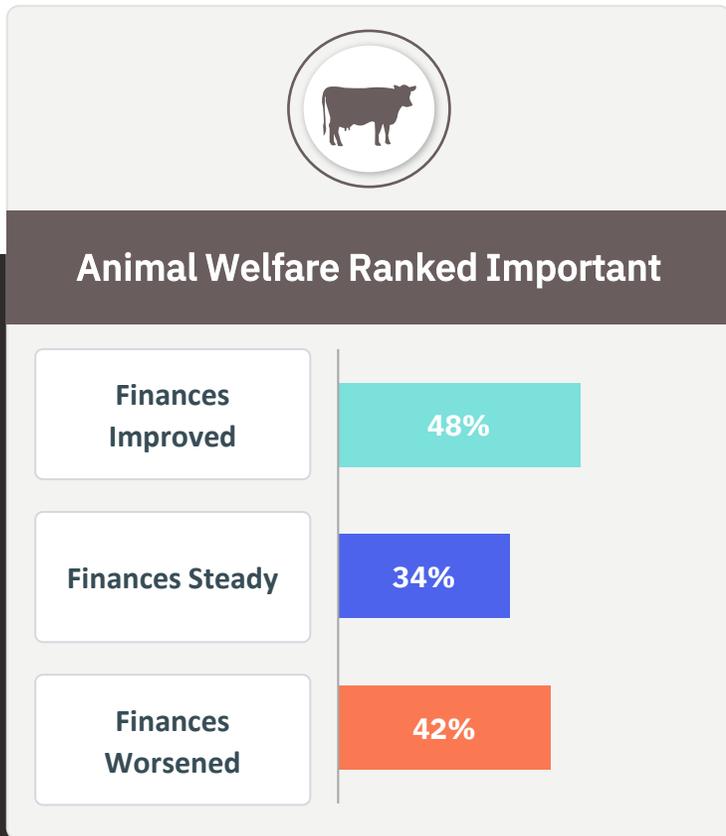
43% **Decreased Their Trips**
Fewer trips to consolidate and reduce impulse exposure

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%)

Values and Financial Status

Even among fiscally constrained shoppers, values remain sticky.



Younger Consumers More Likely to Purchase on Animal, Worker, and Brand Mission Values

Animal Welfare garners higher rankings for every age group except those aged 25-34

“Please rate the level of importance of each of the following statements in influencing or as fundamental to your purchasing decisions.”



The Modern Marketplace of Brand Discovery

Consumers are more open to experimentation, driven by visual and sensory cues, and fragmented in how they discover new brands. Traditional avenues still matter, but digital influence—especially among younger shoppers—is accelerating.

Discovery is still traditional—but Gen Z is pushing it digital

	Total	Boomers	Generation X	Millennials	Gen Z
Grocery store ads	56%	56%	56%	60%	45%
In-Store Promotion/ Sampling	52%	56%	55%	49%	43%
Friends & Family	49%	50%	48%	49%	49%
Social media (Twitter, YouTube, TikTok, etc)	30%	13%	25%	41%	54%
Digital research	16%	9%	11%	22%	29%
Social media influencers	14%	4%	10%	23%	25%
Digital marketing	13%	4%	10%	23%	22%
Online forum (e.g., reddit)	12%	3%	9%	21%	21%
Agentic AI Tools (e.g., ChatGPT)	8%	2%	5%	13%	15%

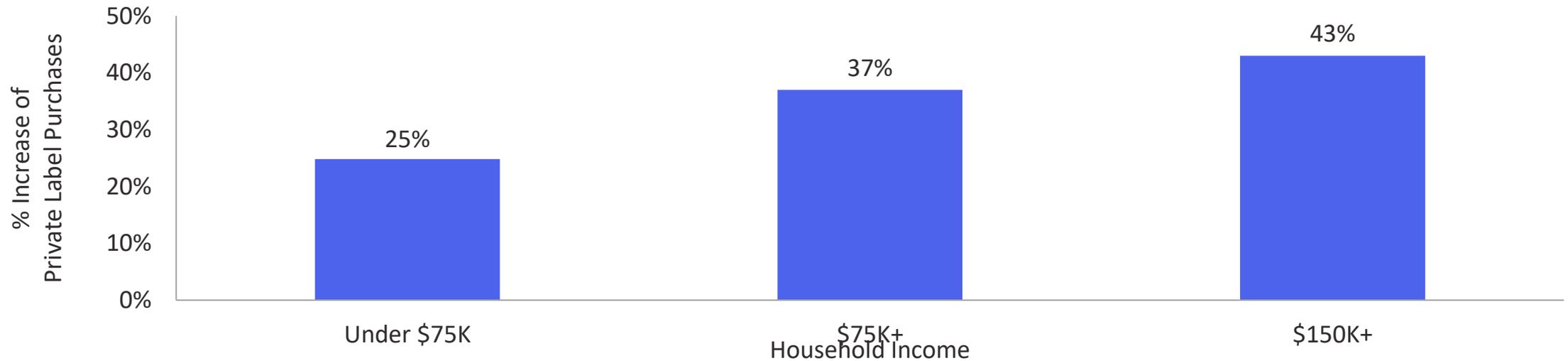
Index	Boomers	Generation X	Millennials	Gen Z
Grocery store ads	100	100	107	80
In-Store Promotion/ Sampling	108	106	94	83
Friends & Family	102	98	100	100
Social media (Twitter, YouTube, TikTok, etc)	43	83	137	180
Digital research	56	69	138	181
Social media influencers	29	71	164	179
Digital marketing	31	77	177	169
Online forum (e.g., reddit)	25	75	175	175
Agentic AI Tools (e.g., ChatGPT)	25	63	163	188

Trade-down behavior isn't limited to value shoppers

Private label purchase growth is not confined to lower-income households — 37% of \$75K+ households and 43% of \$150K+ households increased purchases, signaling choice-driven adoption.

Choice, Not Constraint

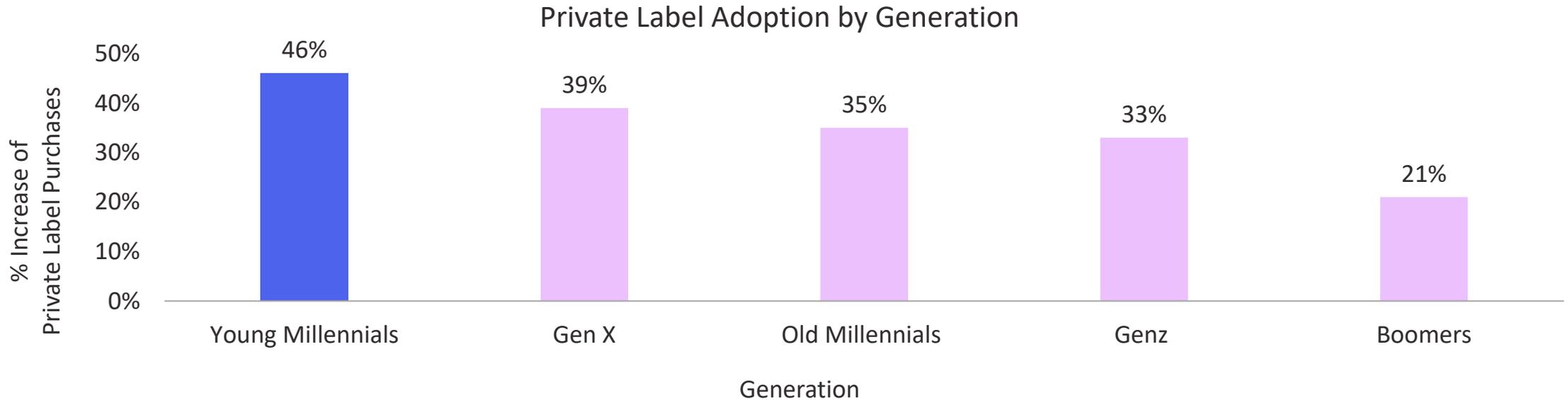
Private Label Adoption by Income Bracket



Who's Driving Private Label Growth?

Young Millennials are the primary growth engine, but an increase in private label purchases among Gen X (39%), Old Millennials (35%), and Gen Z (33%) demonstrate that private label growth extends well beyond a single cohort.

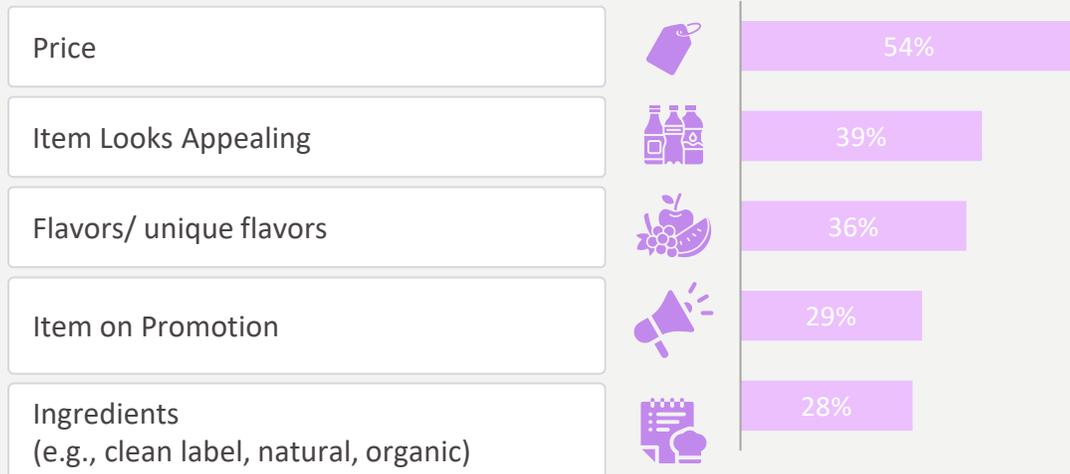
Cross-Generational Momentum



Beyond taste and price, ingredients continue to be an important factor when choosing a new or premium brand



Top 5 Purchase Drivers When Buying A New Brand



Top 5 Characteristics Willing To Pay Premium For

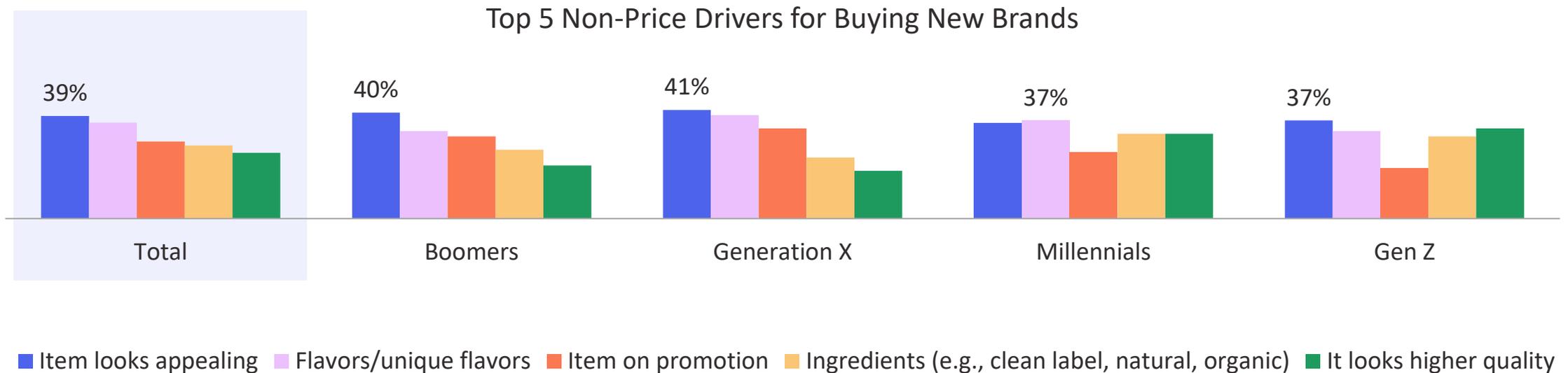


Source: Value Conscious Consumer Survey, N = 1,042, "Thinking about the last time you purchased a new brand (one you purchased for the first time) at the grocery store or a retailer where you purchase food and beverages, what was the primary reason for purchasing this new brand?" "Which of the following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

The Modern Marketplace of Brand Discovery

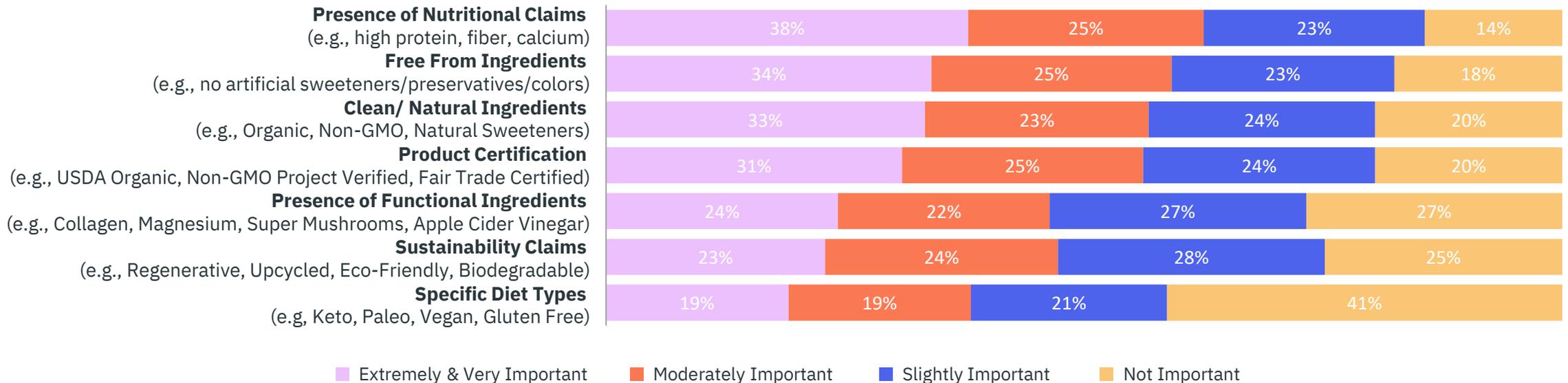
Consumers are more open to experimentation, driven by visual and sensory cues, and fragmented in how they discover new brands. Traditional channels still matter, but digital influence—especially among younger shoppers—is accelerating.

Beyond Price: Visuals First, Flavor and Quality Follow



Nutritional Claims and Ingredients are top of mind for the Conscious Consumer

“For each of the product and packaging characteristics, please rate the level of importance to you when shopping for groceries.”

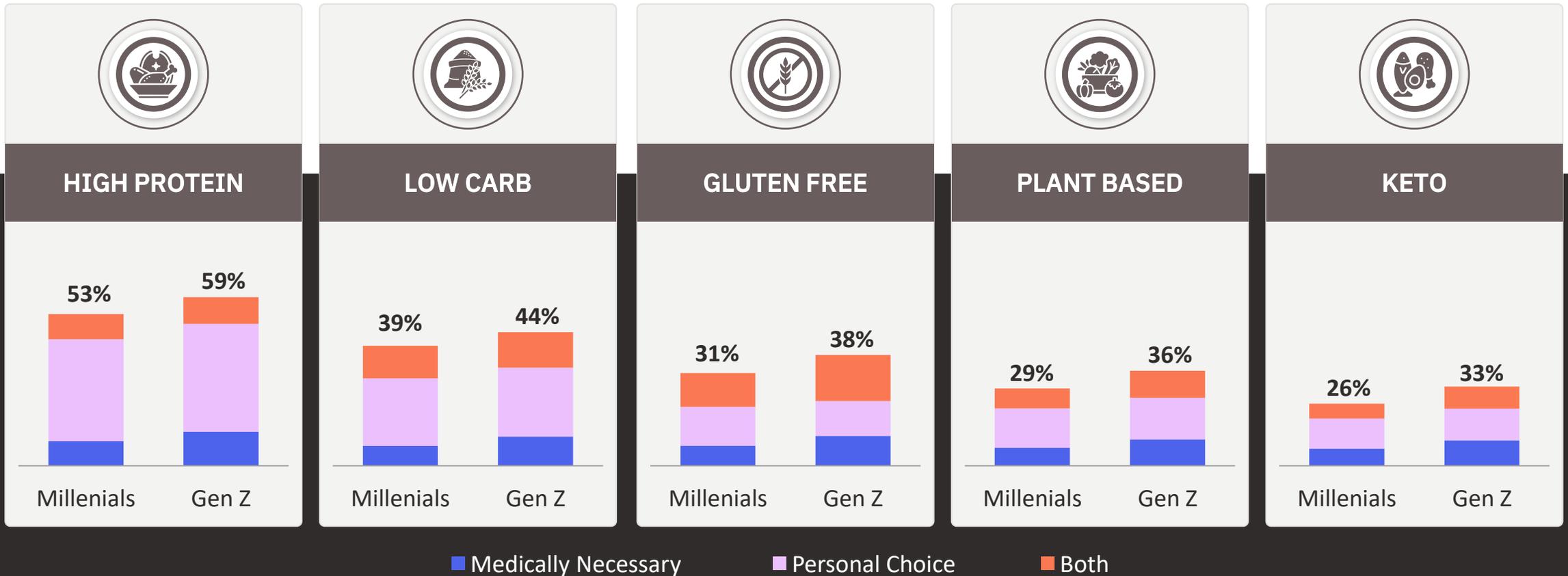


The Next Generation of Consumers

How Millennials & Gen Z are Redefining the CPG Industry

The next generation of consumers is dialed into their diets

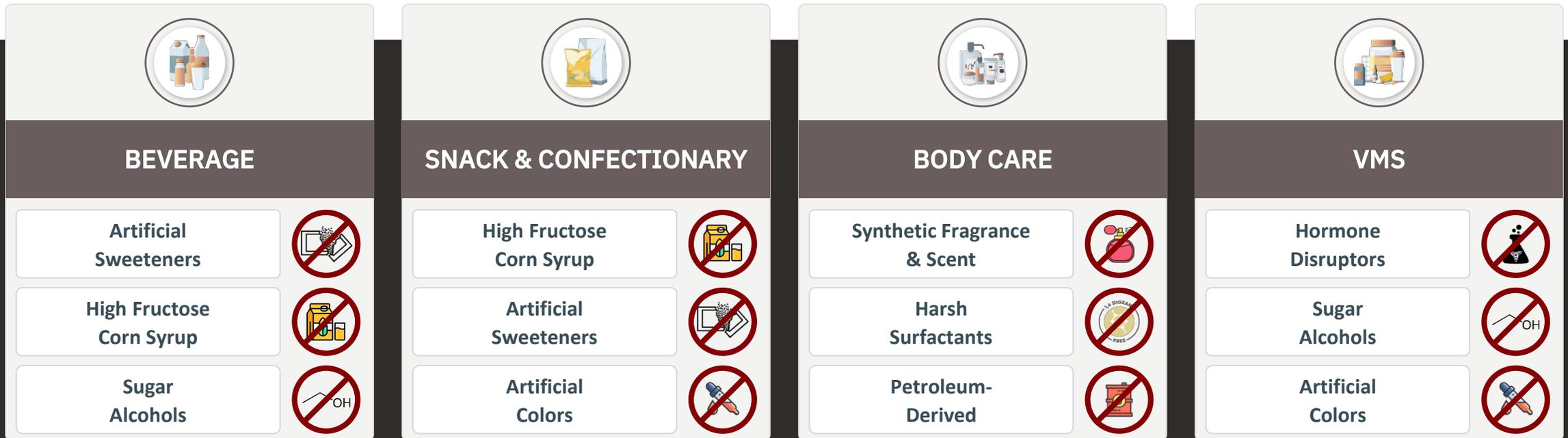
Nearly 40% of Millennials & Gen Z are choosing to follow one of the diets by choice



Consumers are cutting out unwanted ingredients from their consumption

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

Top Ingredients Actively Avoiding

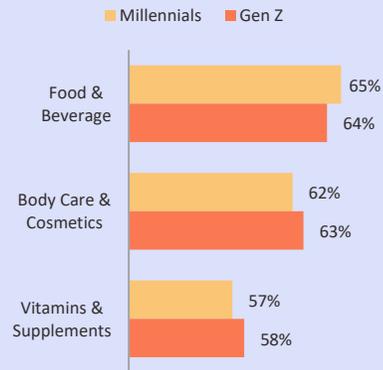


Consumers are leveraging price to drive decisions

PRICE DRIVES DESTINATION

Price frequently impacts where younger consumers shop. Prices in Meat, Seafood, & Dairy are most likely to drive retailer choice for Millennials, Beverage prices for Gen Z

% Price Always or Often Influences Retailer Choice in:



#1 Category: Meat/Seafood/Dairy



68% of Millennials' retailer choice is influenced by price.
Meat's Grocery Price Index vs 2019 is 35% higher and grew +5pts in Last 3 months alone. ¹

TOTAL SHELF PRICE TRIUMPHS

The next generation of shoppers **focuses more on total shelf price than unit price.** Millennials prioritize total shelf price even more than Gen Z



PROMOS HOOK MILLENIALS

Promotion is the #1 key driver of new product trial for Millennials. **46% of Millennials** identified sale price as a top 3 motivator



SPLURGE FOR SELF-CARE

Younger consumers lean towards private label for everyday essentials like Pantry Staples. Higher preference name brands for lifestyle and self-care products

Least Likely to Purchase Private Label



Body Care & Cosmetics



Vitamins & Supplements



Beverages

Most Likely to Purchase Private Label



Pantry Staples



Produce



Bread & Baked Goods

July 2025 SPINS survey of total U.S. Gen Z and Millennial shoppers aged 13-44 (n = 1000)
 "When deciding where to shop for a product, how often does price influence your choice of retailer?"
 "Which price do you consider most important when purchasing an item in the categories below?"
 "What would motivate you to try a new product? Select up to 3 reasons or factors"
 "Please rank your likelihood of purchasing store brand/ private label products (e.g., Great Value, Good & Gather, Kirkland) in the following categories"

Preferences with Staying Power

Earlier this year, SPINS' Industry Outlook detailed the rise of personalization across health & wellness. We continue to see this take hold, especially among younger generations, with supplementation & new avenues of AI accessibility rising alongside a renewed focus on nutrients.

Personalized Routines with Staying Power

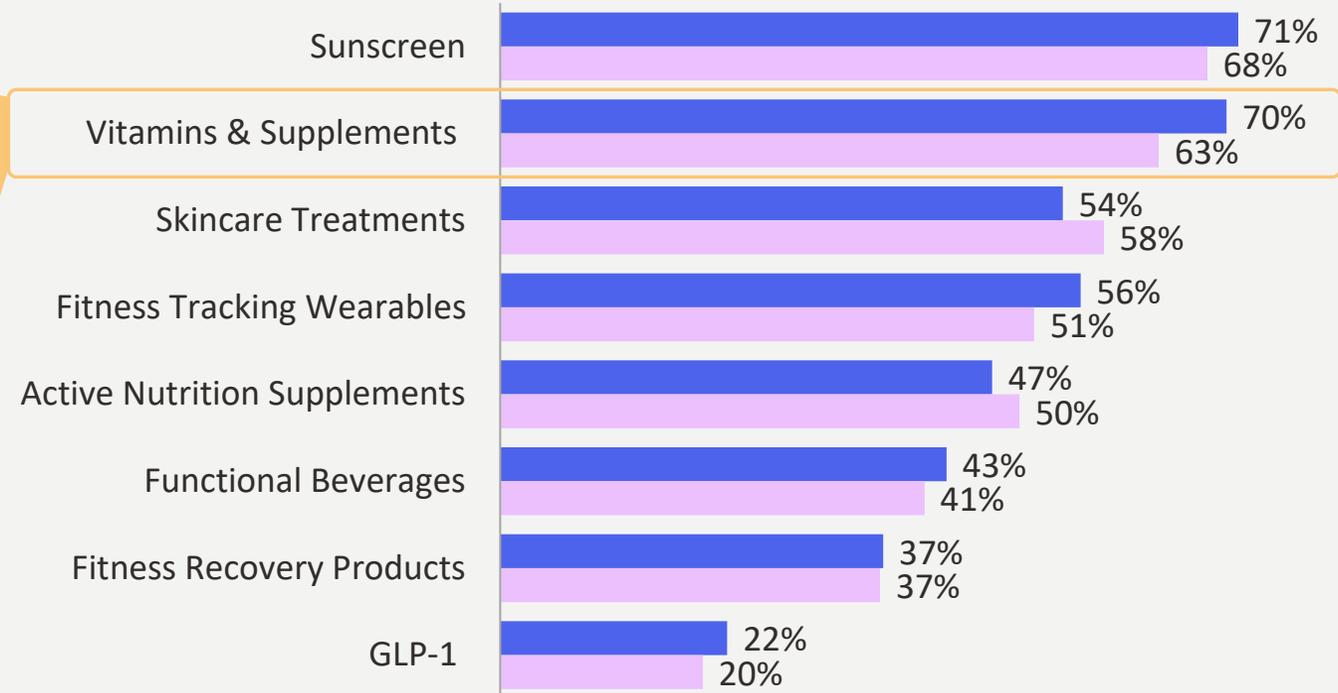


Younger Shoppers are embracing Vitamins & Supplements at a *faster* rate, with +1.5% more Millennial households buying this year (*2x the growth of total households*)

Younger Generations' Personalized Health Routines

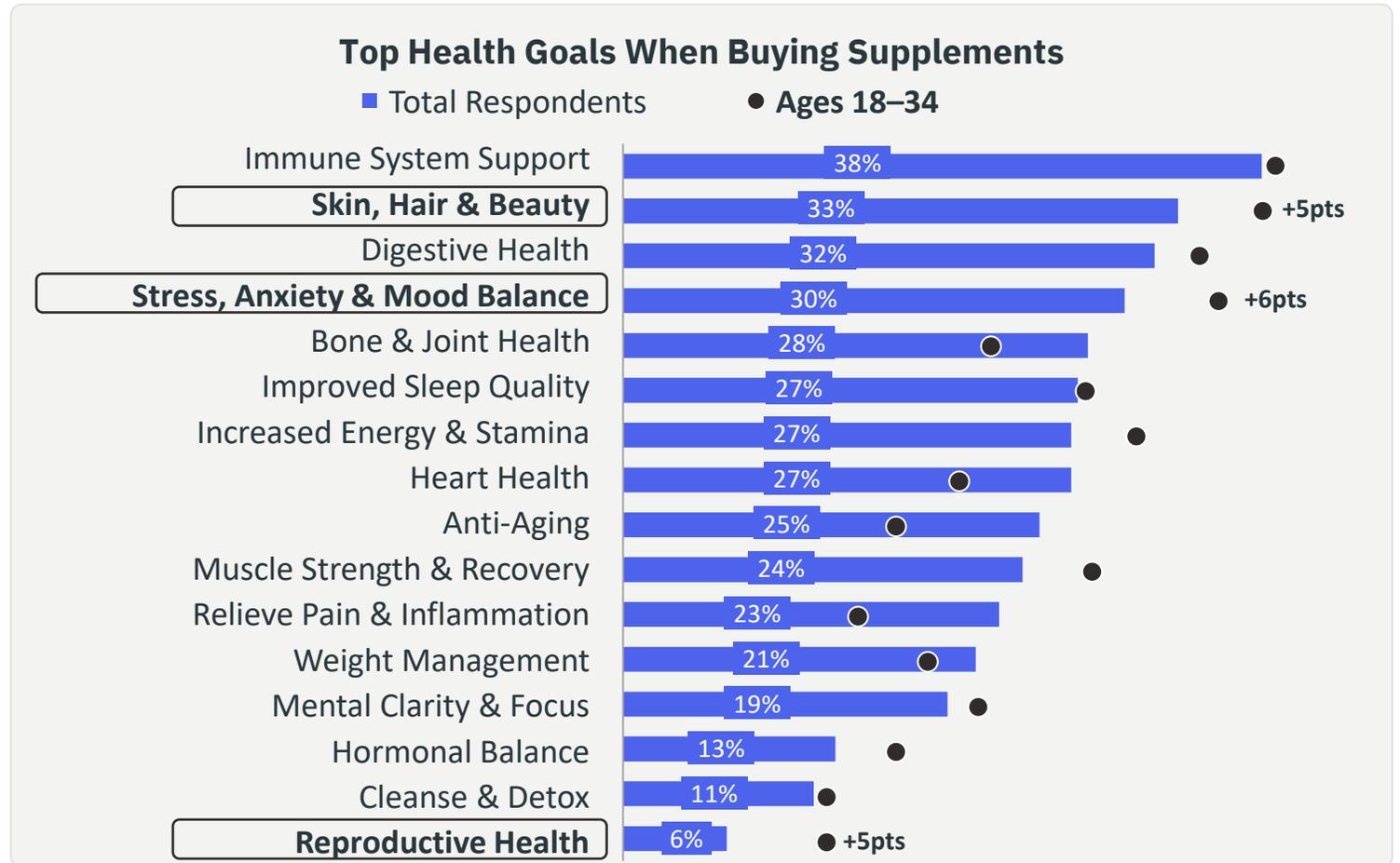
(% Currently Using/Consuming)

■ Millennials ■ Gen Z



Health & Wellness concerns across Generations

While Immune Support is universal, other wellness goals are closely tied to life stages. Compared to the total population, Gen Z and Millennials are less concerned with aging and managing inflammation but over-index when it comes to both **managing stress & approaching skin/haircare**. This reinforces trends we saw in McKinsey’s Future of Wellness survey.¹



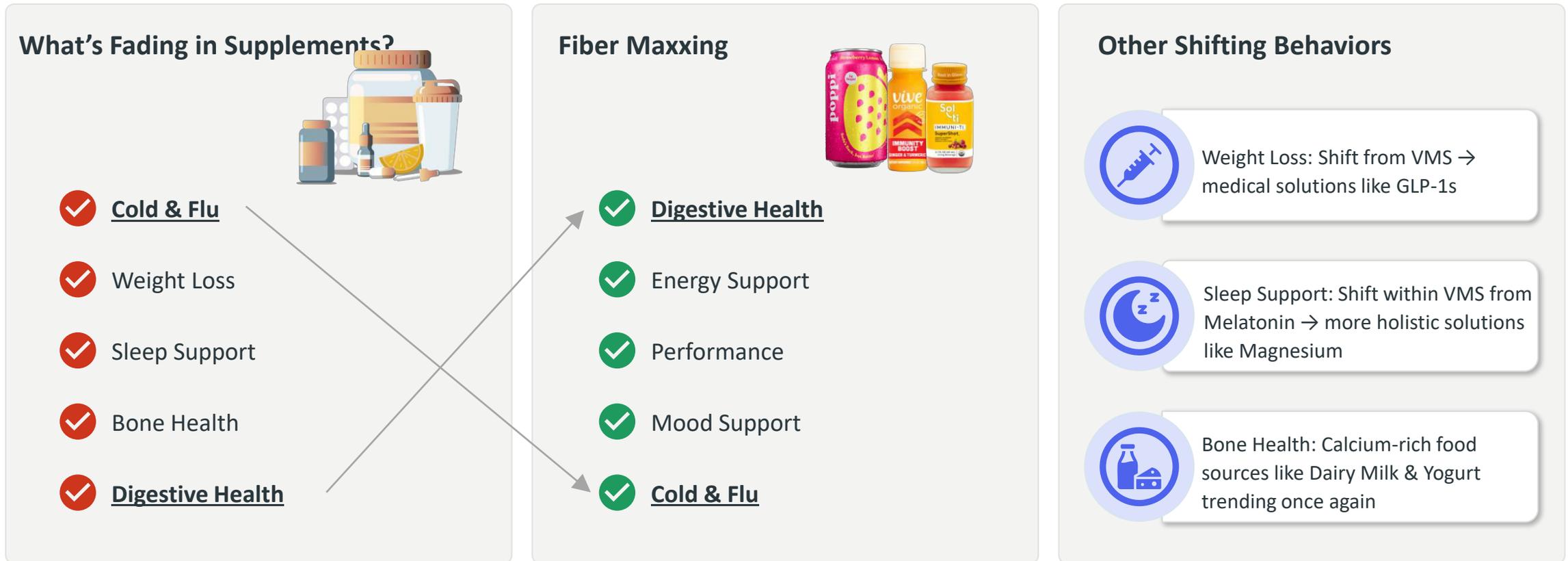
May 2025 SPINS survey of total U.S. Vitamin & Supplement shoppers (n = 1000)

"What are your top health goals when choosing a supplement?"

1. Reinforced by Nov 2024 McKinsey Future of Wellness Survey, where these same 3 health goals over-indexed with Gen Z and Millennials vs total

Consumers' supplement focuses are ever-shifting

In addition, knowing what shoppers are looking for outside of supplements today helps us understand what's truly a declining trend vs where needs are being met elsewhere in the store (or outside of it)



The Art (and Science) of Being Ready

A rising imperative for sustainable innovation in the modern kitchen

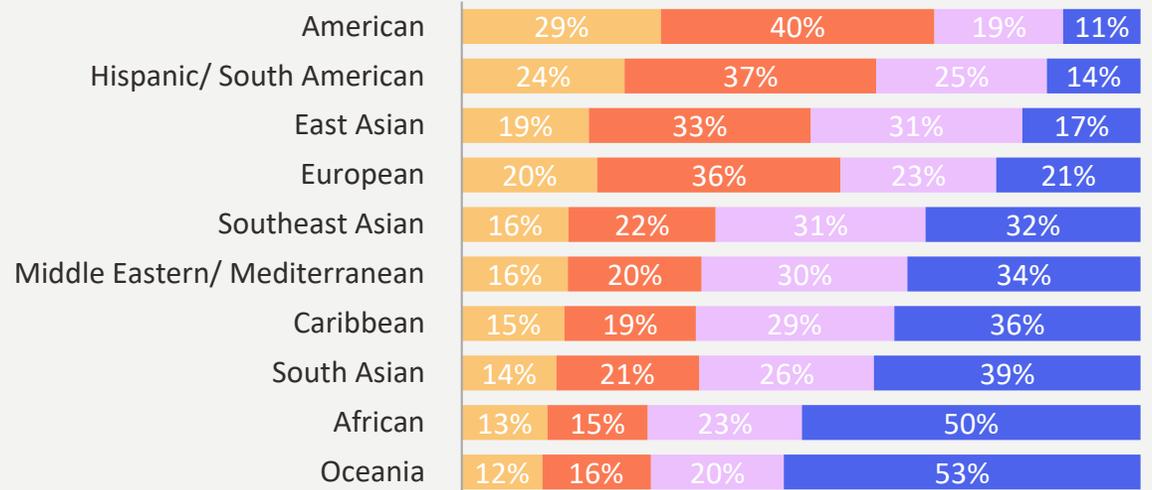
Global Inspiration Unlocks New Possibilities

Consumers are increasingly seeking out bold and globally inspired food experiences whether on a night out or in the comfort of their home. Merging new and unique flavors with preferred flavor and texture combinations represents an opportunity to tap into future growth that align with shifting consumer preferences.

% Flavor and Texture Preference Combinations in Snacking Categories for Millennial and Gen Z respondents

Category	Chewy	Creamy	Crunchy	Smooth
Sweet	20%	13%	23%	10%
Tangy / Sour	14%	13%	14%	12%
Savory	16%	12%	24%	15%
Fruity	19%	19%	17%	14%
Spicy	13%	9%	20%	9%

% of Consumption Preference by Global Flavor/Cuisine for Millennial and Gen Z respondents

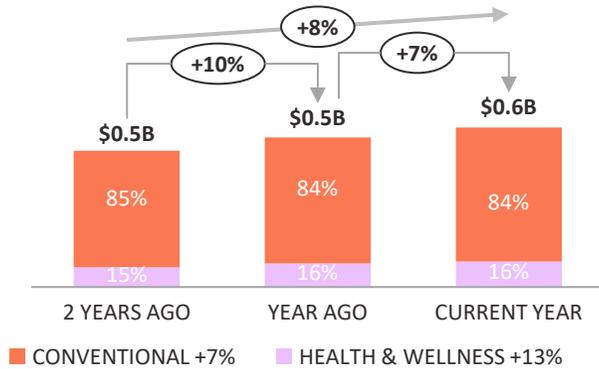


- At-Home Consumption
- Both At-Home Consumption & Eating Away from Home
- Eating Away from Home (e.g., Restaurant Dining)
- I do not consume this global flavor or cuisine

Art (and Science) of Being Ready

The Ideal Assortment

SALT DOLLAR SALES & CAGR BY POSITIONING



CATEGORY REDEFINITION

Hydration continues to drive use of salt as an ideal electrolyte source and base

141
GENERATION Z

133
YOUNG MILLENNIAL

130
OLDER MILLENNIAL

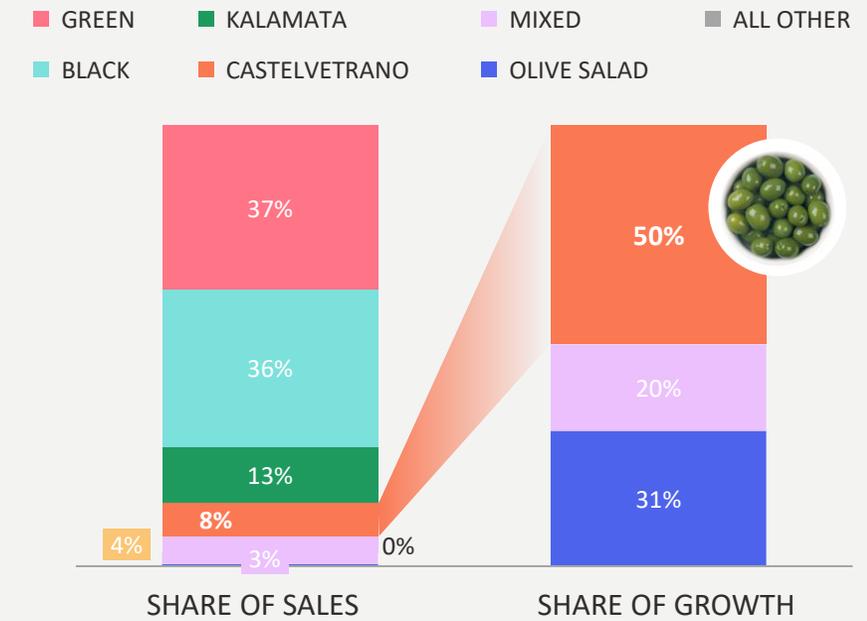
Hydration & Electrolyte Buyer Index by Generation

- Everyday Elevation
- Finishing Flaky
- Cooking Prep
- Regional Specialty
- Mineral Supplement

Bring on the Brine

Consumers are elevating their olive inclusions

OLIVE DOLLAR SALES & GROWTH



GROWTH THROUGH EXPERIENCE

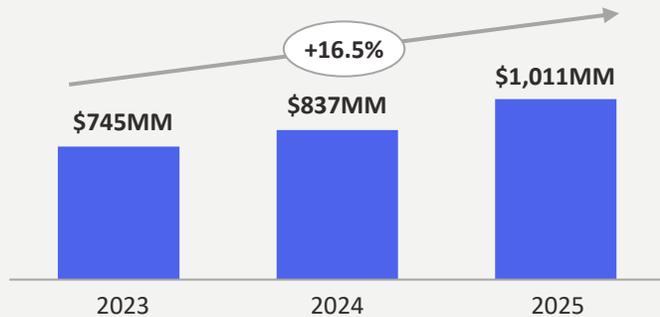
Growth of Castelvetro Olives came from Seniors & Retirees are making 52% more frequent trips increasing unit purchases per buyer 101%

Art (and Science) of Being Ready

Acidic Flavors & Expanding Applications

FERMENTATION EFFECT

Sourdough Bread 3-YR Growth (\$MM)



Pre/probiotics and digestive appeals continues to be a powerful platform for product success

PICKLED PERSISTENCE

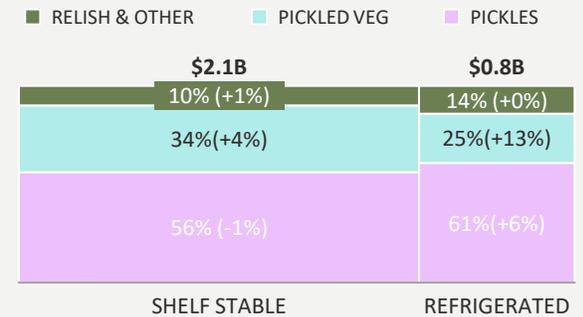
Perimeter placement continues to be a space for premiumization of staples.



+59%

RF Pickles Vs. SS Pickles PPV

Subcategory Share of Pickles (\$B)



DIGESTIVE HEALTH PREFERENCE

DOLLAR INDEX BY GENERATION

GENERATION	GROCERY	REFRIGERATED	VITAMINS & SUPPLEMENTS
Generation Z	175	61	76
Millennials	145	127	67
Generation X	105	107	92
Boomers	56	79	133
Seniors and Retirees	20	49	162



Thank you!

Contact me at sdicker@spins.com