NIQ

Understanding GLP-1 and Wellness Shifts Impacting C-store

CLVG
CONVENIENCE LEADERS VISION GROUP

James Hunt, SVP NA Retail
Sherry Frey, VP Total Wellness
April 24, 2025

Agenda

- *A look at the shifting GLP-1 shopper and the impact to c-store categories*
- *The increased legislative and consumer scrutiny on food impacting c-store categories*

healthline
Health Conditions
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'Ozempic Babies': How
Drugs Can Interfere wi
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Ozempic is coming f
industries next
THE WALL STREET JOURNAL.
Ozempic Might Help You Drink and Smoke Less
Animal studies suggest GLP-1 drugs alter behaviors associated with reward and pleasure
F.D.A. Seizes Thousands of Units of Counterfeit Ozempic
The agency and Novo Nordisk, the company that makes Ozempic, are testing the seized medications to determine what is in them.
THE WALL STREET JOUR
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They Thought Ozempic Would Help Them Lose Weight. It Didn't Work.
There is a wide range in how much weight people lose on GLP-1 medications
By Sumathi Reddy
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April 1, 2024 5:30 am ET
FOODDIVE
OPINION
Weight loss drugs pose a real threat to the indust
opportunities for producers to expand
Published Feb. 26, 2024
TikTok, Facebook and Instagram are supplanting physicians as authorities on weight-loss drugs, often without providing complete picture of the hazards
Latest
World
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Weight-Loss Drugs
se Suicidal Though
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Agonists for Obesity—A New
access?
Dariush Mozaffarian, MD, DrPH1,2
Author Affiliations
JAMA. 2024;331(12):1007-1008. doi:10.1001/jama.2024.2252
Bloomberg
The Ozempic Effect:
What You Need to Know
Shortages Explained
Obesity Drug Alternatives
Not Just Weight Loss
Markets
Ozempic to Send Foodmakers Looking for Healthier Offerings
Companies should consider smaller portions, fresh ingredients or offloading unhealthy brands as weight-loss drugs take off, respondents say.
Gift unlocked article
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OZEMPIC OR BUST
America has been trying to address the obesity epidemic for four decades now. So far, each new "solution" has failed to live up to its early promise.
By Daniel Engber
MAY 8, 2024, 7 AM ET
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Most People Stop Using Ozempic and Wegovy After a Year, What Ex
By Meagan Drillinger on July 26, 20
Treatments to Keep Weight Off After Ozempic
esity researchers and companies turn toward helping people maintain losses
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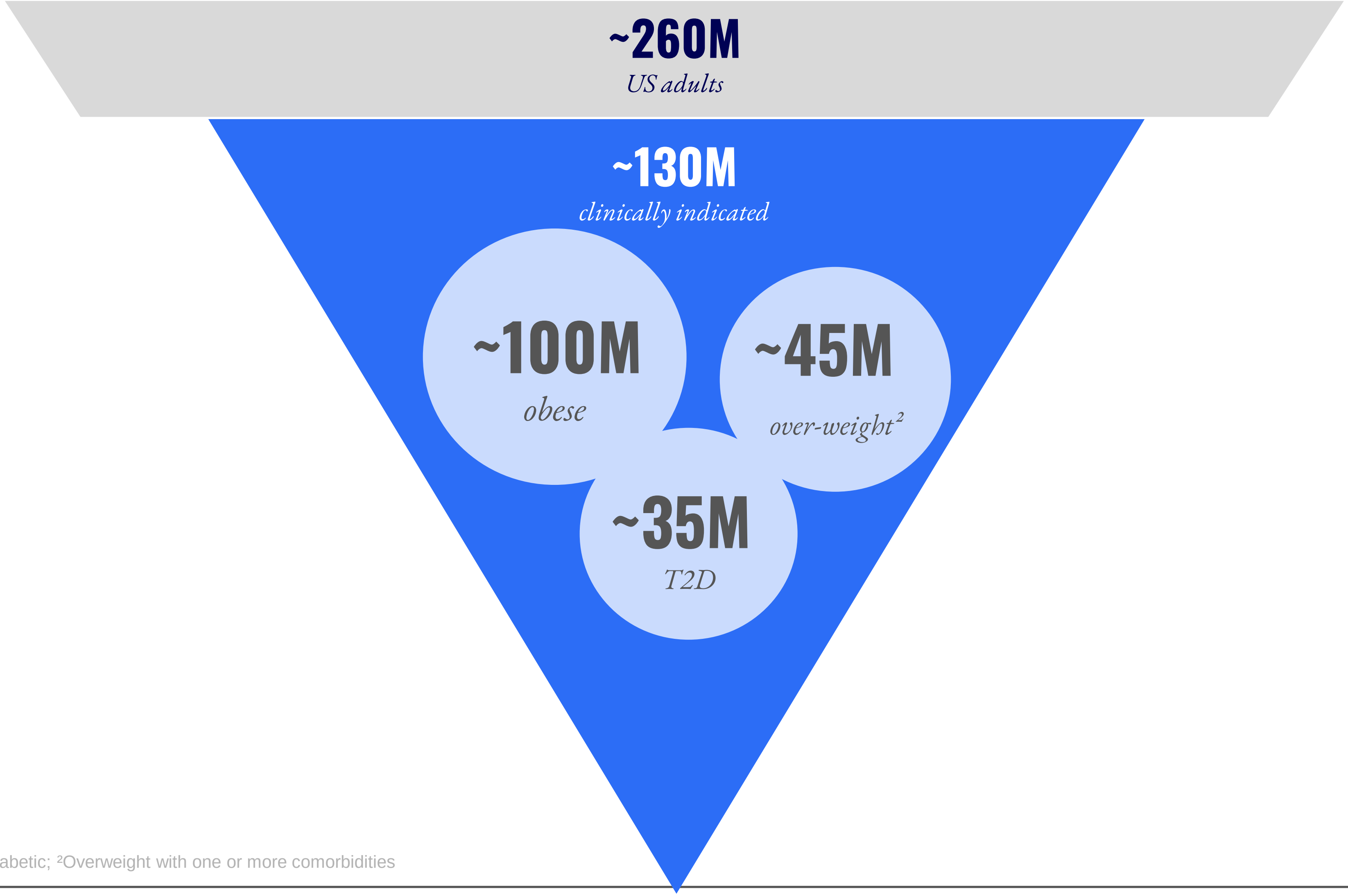
WELLNESS
YOUR HEALTH
ere's No Easy Way to Stop Taking
oss drugs risk regaining weight, but staying
Is the Era of 'Brozempic' Upon Us?
Some telehealth start-ups are playing up masculine stere
market medications that have been more widely associate
How Supplement Stores Are Trying to Tap Into the Ozempic Boom
GNC and the Vitamin Shoppe are redesigning displays and
A New Match for Menopausal Weight Gain: Ozempic
Weight gain is one of the most common concerns among women going through menopause. New drugs could change that

The market is large



Source: Centers for Disease Control
Note: [1]Defined as overweight/obese/diabetic; [2]Overweight with one or more comorbidities

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

Weight management supplements are down -10% in sales over the last four years, however, ***berberine***, which went viral on many social media platforms, ***up 438% in the last year***[1]

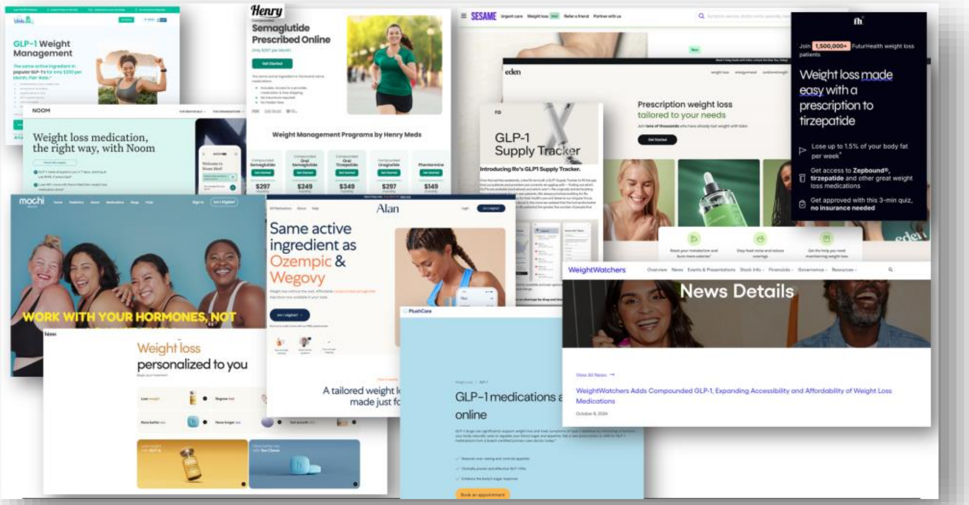
Source: NIQ Health Shopper Survey, 2016 to 2024; Q. What influenced the decision for you/your household member to treat or manage the [ailment] in the ways mentioned? Select all that apply.
1 – Source: NIQ, Retail Measurement Services; Total US xAOC; Total Supplements; $ % Change vs year ago; 52 week ending June 15, 2024

The GLP-1 players

Current players

Name	Dosage and form	Approved use	Other benefits
Ozempic Semaglutide injection	Injection 1 weekly	Type 2 diabetes	Heart, kidneys, weight loss *Indicated for reduction of CV in T2D*
Wegovy Semaglutide injection	Injection 1 weekly	Weight loss	
Rybelsus Semaglutide tablets	Oral, 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 to 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 extended-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 consumer panel research indicates

- ***Ozempic*** has largest share of GLP-1 users followed by…
- ***Mounjaro***
- ***Trulicity***
- ***Wegovy***
- ***Generic/Compound***
- ***Zepbound***

What's coming

New delivery mechanisms (e.g., oral, 1/month)

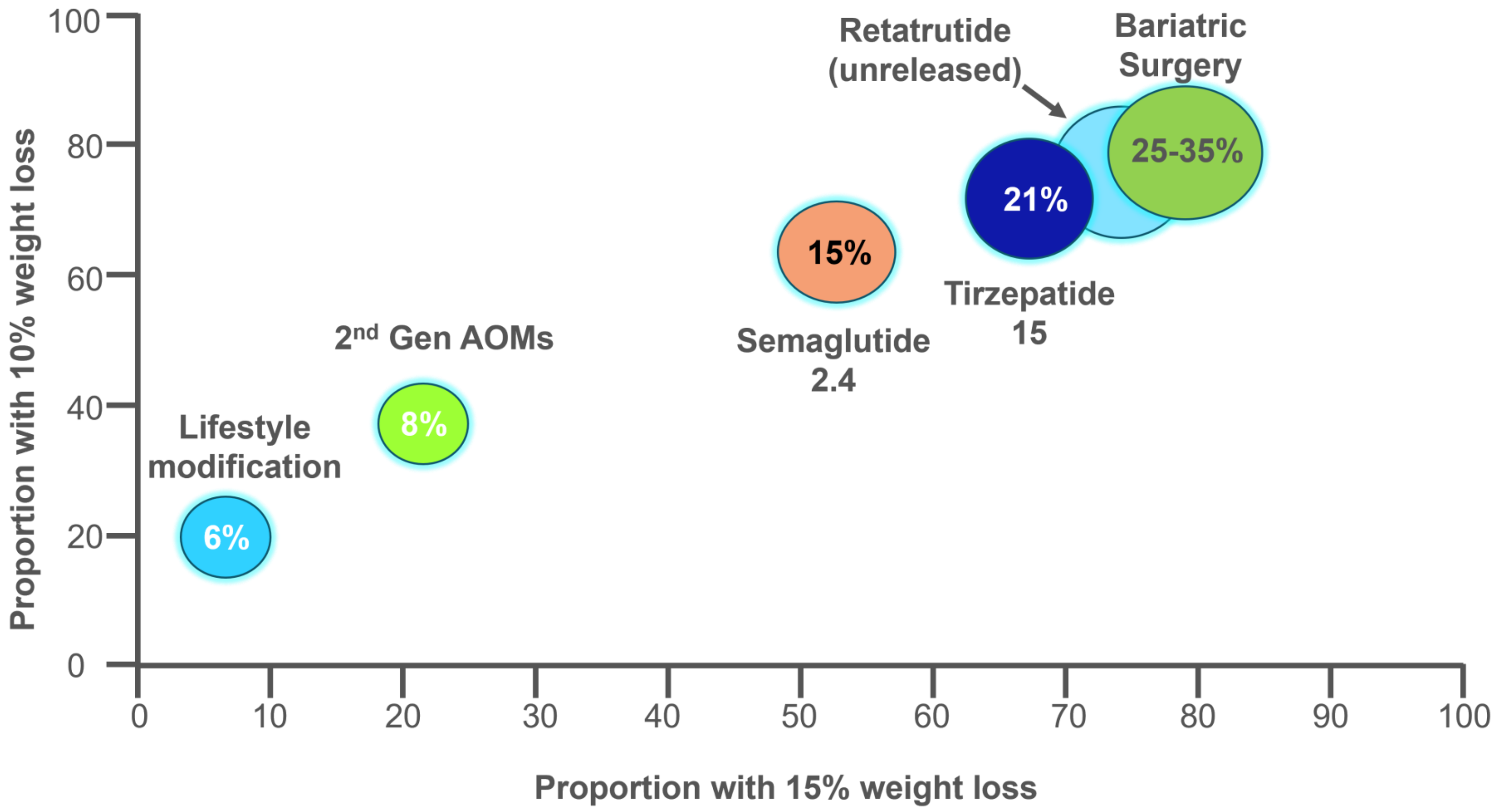
Approved conditions beyond weight loss (CV, CNS)

Reduced side effects

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

How Effective are GLP-1 Agonists?

Relative to other known interventions

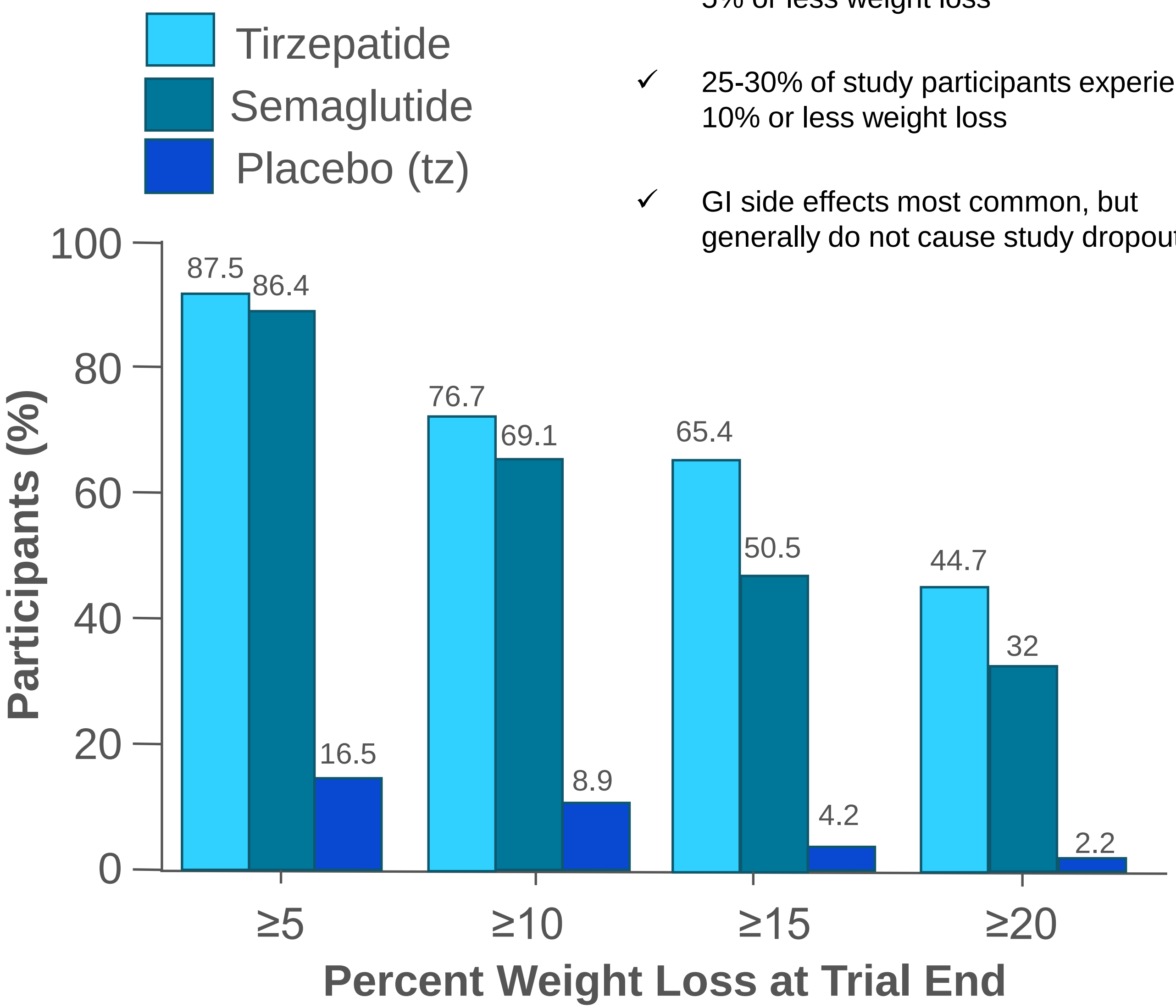


These new medications are able to drive substantial weight loss in patients

Next focus: Quality of weight loss

A Deeper Dive Into Clinical Outcomes

Weight Loss at Trial End



- ✓ 10-15% of study participants experience 5% or less weight loss
- ✓ 25-30% of study participants experience 10% or less weight loss
- ✓ GI side effects most common, but generally do not cause study dropouts

	Placebo (%) SURMOUNT 1	Semaglutide (%) STEP 1	Tirzepatide (%) SURMOUNT 1
Nausea	10	44	31
Diarrhea	7	30	23
Constipation	6	23	12
Dyspepsia	4	9	11
Vomiting	2	24	12
Headache	7	15	7
Alopecia	1	3	6
Eructation	<1	7	6
Dizziness	4	8	4
Fatigue	5	11	NR

Wilding JP, Batterham RL, Calanna S, et al. Once-weekly semaglutide in adults with obesity. New Eng J Med. 2021;384:11, Jastreboff AM, Aronne LJ, Ahmad NN. Tirzepatide once weekly for the treatment of obesity. New Eng J Med. 2022; 387:3

What we know today…

A Whole New Ballgame

- GLP-1s work through multiple pathways, influencing hunger and taste perception, making them more effective than many past AOMs

Not a Homogenous Response and GLP-1 drugs not as cost-effective compared to lifestyle-based interventions

- The GLP-1 medications do not work for everyone, with ~30% of study participants not losing >10% of body weight on semaglutide and ~25% not losing >10% on tirzepatide
- The majority of GLP-1 users are female, especially for non-T2Ds weight loss, furthermore women tend to lose more weight on GLP-1s over the course of a year

Significant side effects for some consumers, particularly those newly on the drugs and those taking higher doses

- Side effects include lean body mass loss (upwards of 40% lean mass loss on GLP-1s versus 25% with traditional weight loss), nausea, diarrhea, vomiting, constipation, abdominal pain, heart burn, dehydration, and for some, serious side effects like pancreatitis and bowel obstructions.

Long-term Usage

- Weight loss plateaus about 1 yr post treatment, and without chronic therapy, it appears participants regain a major portion of the lost weight; potential impact of cycling

Cost

- Hefty price tag, can cost more than $10K per year

Our approach to tracking GLP-1 shopper behavior

Annual NIQ Health Shopper Survey

NIQ GLP-1 Survey
(Nov/Dec 2023)
(Feb/Mar 2024)
(Aug/Sept 2024)

NIQ + Management Science Associates, Inc.

Partnership with Management Science Associates

MSA measures electronic medical records using their multi-patented de-identification and matching technology (HIPAA compliant)

- **National consumer purchase panel data**
  - **~330K lives**
- **Lab test results** (e.g., HbA1C and cholesterol)
  - **~200 million lives**
- **Electronic health records** (e.g., GLP-1 Medications)
  - **~80 million lives**
- **Client first-party data**

NIQ GLP-1 segmentation[2]

Segment by treatment start date

- Started GLP-1 1-3 months ago
- Started GLP-1 4-6 months ago
- Started GLP-1 7-11 months ago

Segment by purpose

(weight loss, diabetes or both)

- **48% of GLP-1** are diabetes only
- **31% of GLP-1** are for weight-loss only
- **19% of GLP-1** are both diabetes *and* weight loss

Source: NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024); Total US; Total Outlets; Total Store (excluding General Merchandise and Tobacco); Unit % Change, 13 weeks ending September 28, 2024
NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024)

Varying consumer need states create distinct GLP1 user groups

GLP-1 consumer varies based on usage; newest GLP-1 weight loss users trending younger

GLP-1 Only Diabetes

58% age 55-74
(Index 163)

81% have no children
(Index 116)

36% HH income <$50K
(Index 107)

GLP-1 for Weight Loss

23.4% age 45-54
(Index 139)

21% kids aged 6-17
(Index 116)

13% kids aged <6
(Index 201)

29% HH income $150K+
(Index 143)

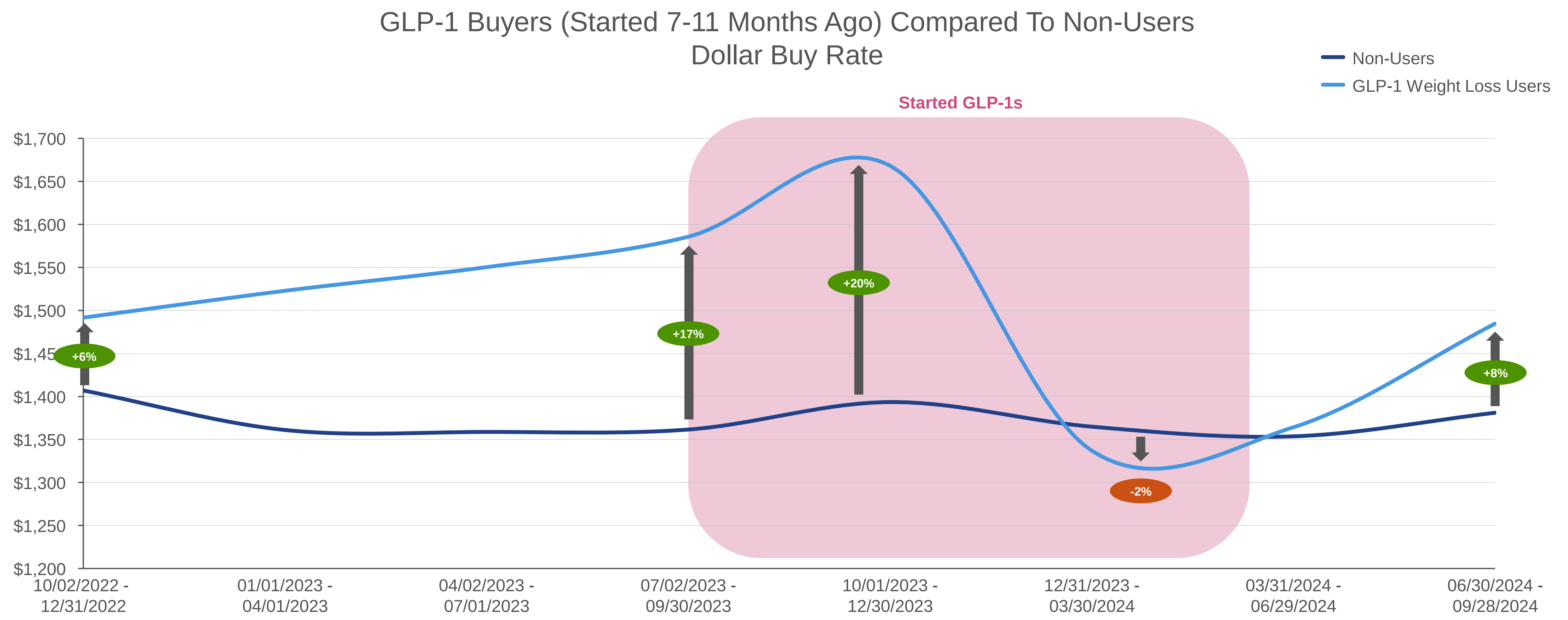
GLP-1 for Weight Loss, Started 1-3 months ago

Trending younger with younger children with income under $100K

Source: NielsenIQ, Spectra – Homescan, 2024 Census Household base; Consumer profile demographics; NIQ GLP-1 Survey (Aug/Sep 2024) buyer groups

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

GLP-1 users are more valuable before starting treatment, they are more valuable during the early stages of treatment, and their value begins to rebound after several months of treatment



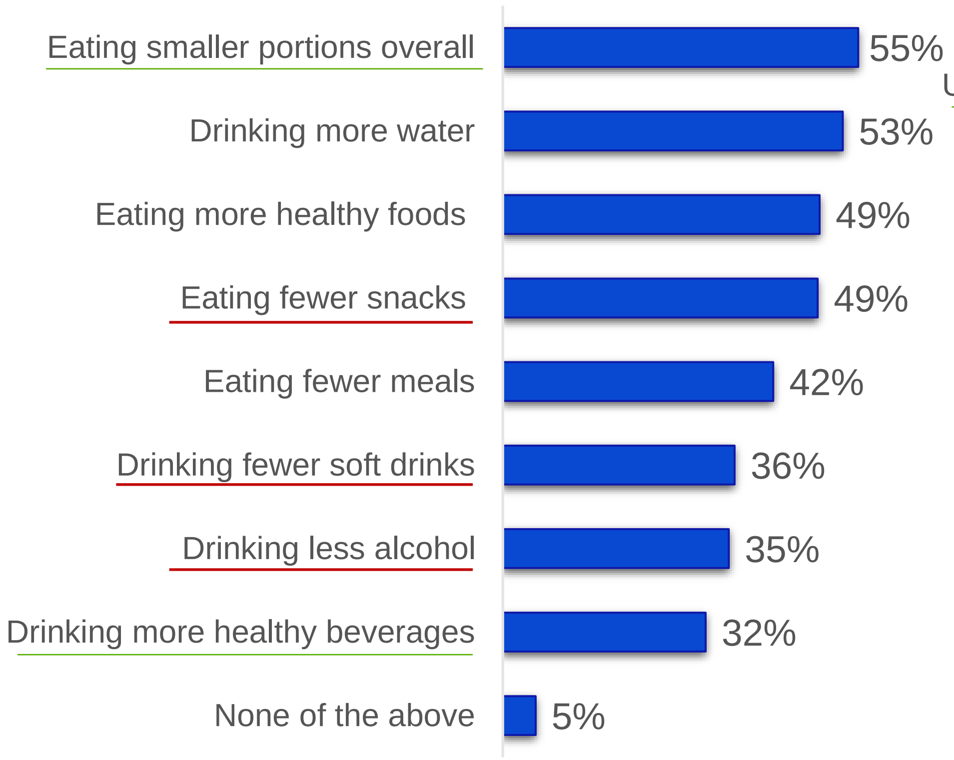
Source: NIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024); Total US; Total Outlets; Food & Beverages; $ per buyer; Quarterly periods through 13 weeks ending September 28, 2024

NIQ

GLP-1 shopper reported behavior changes

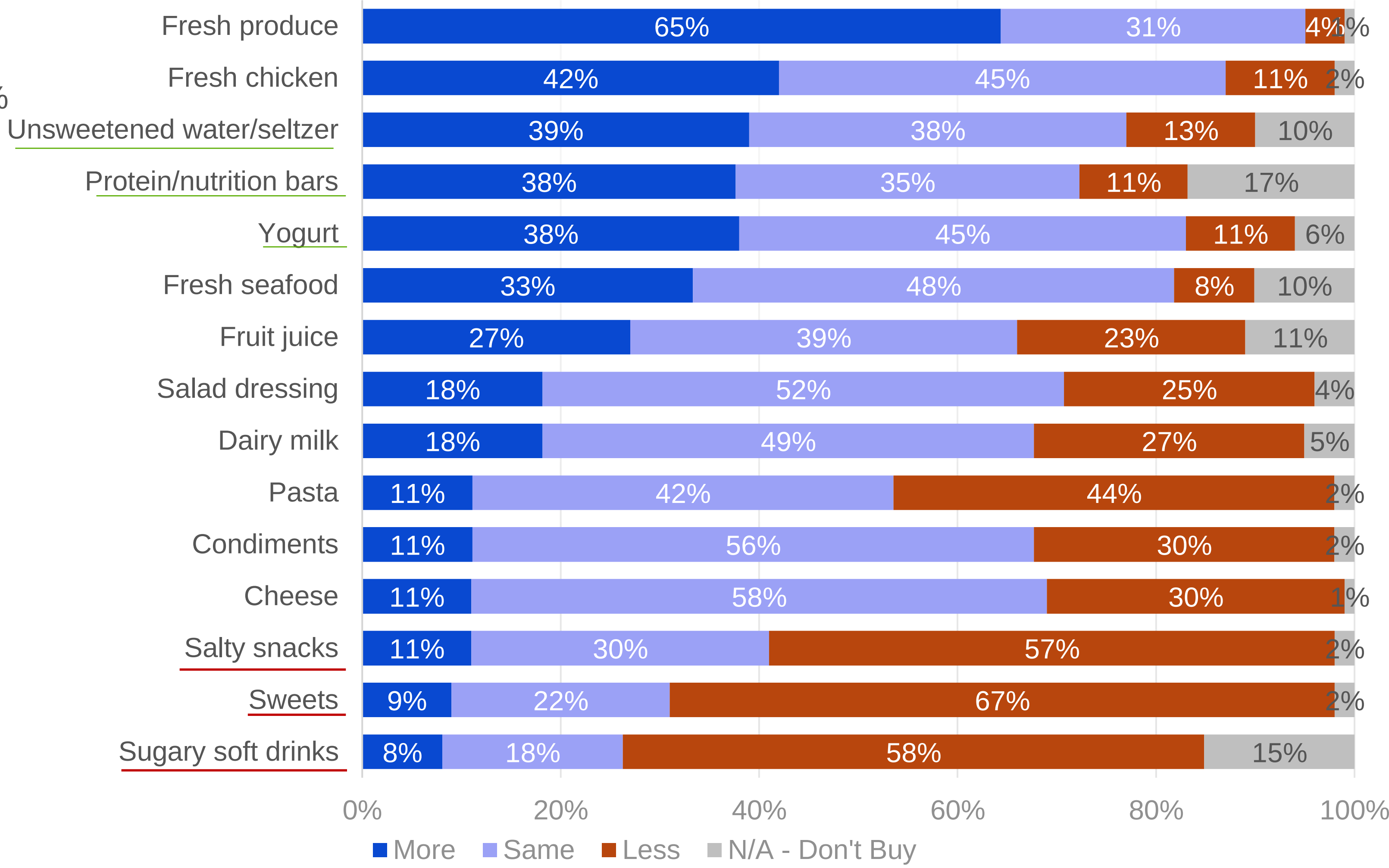
Impact of GLP-1 on Eating Habits

% of Current GLP-1 Users



Changes in Category Buying – More vs. Less

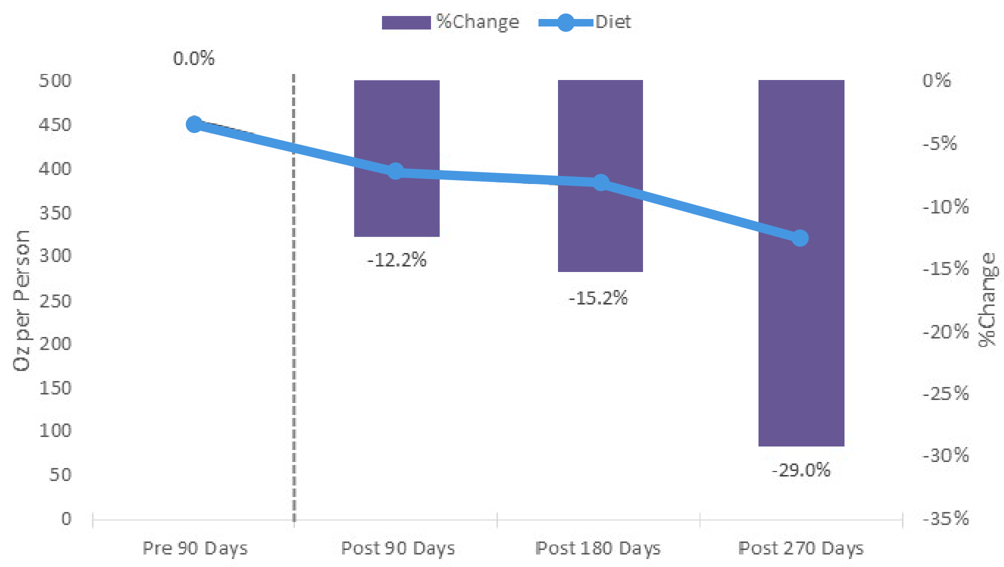
% of Current GLP-1 Users



Source: Acosta Group Shopper Community GLP-1 Survey - Feb 2025

Behavior shifts often counter to expectations and illustrate opportunities for exploration

GLP-1 Impact on *Diet* Soft Drinks

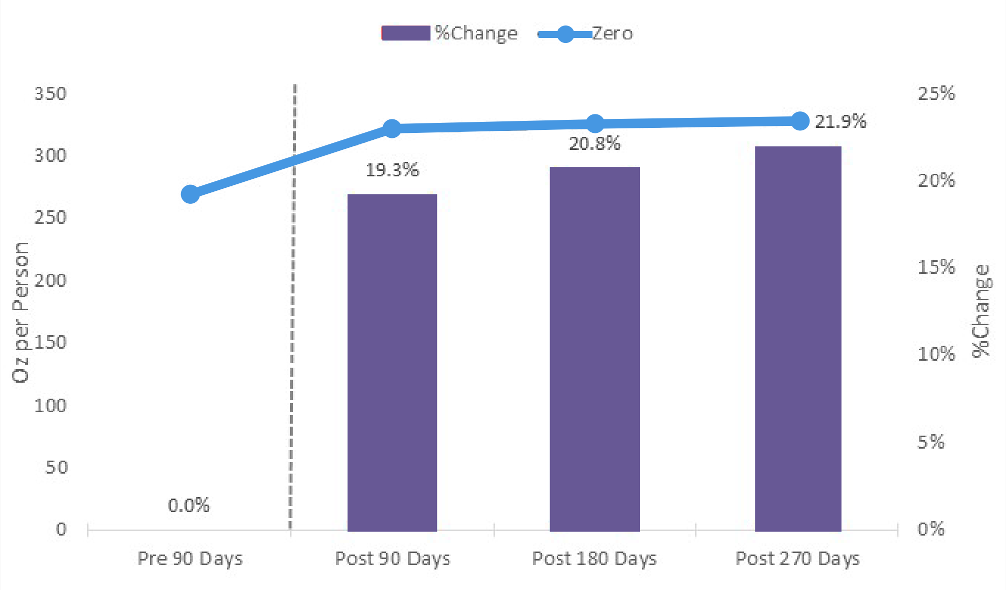


-18.8% Avg Vol Chg.

Consistent decrease in consumption during therapy

After therapy, consumption increases after 90 days

GLP-1 Impact on *Zero* Soft Drinks



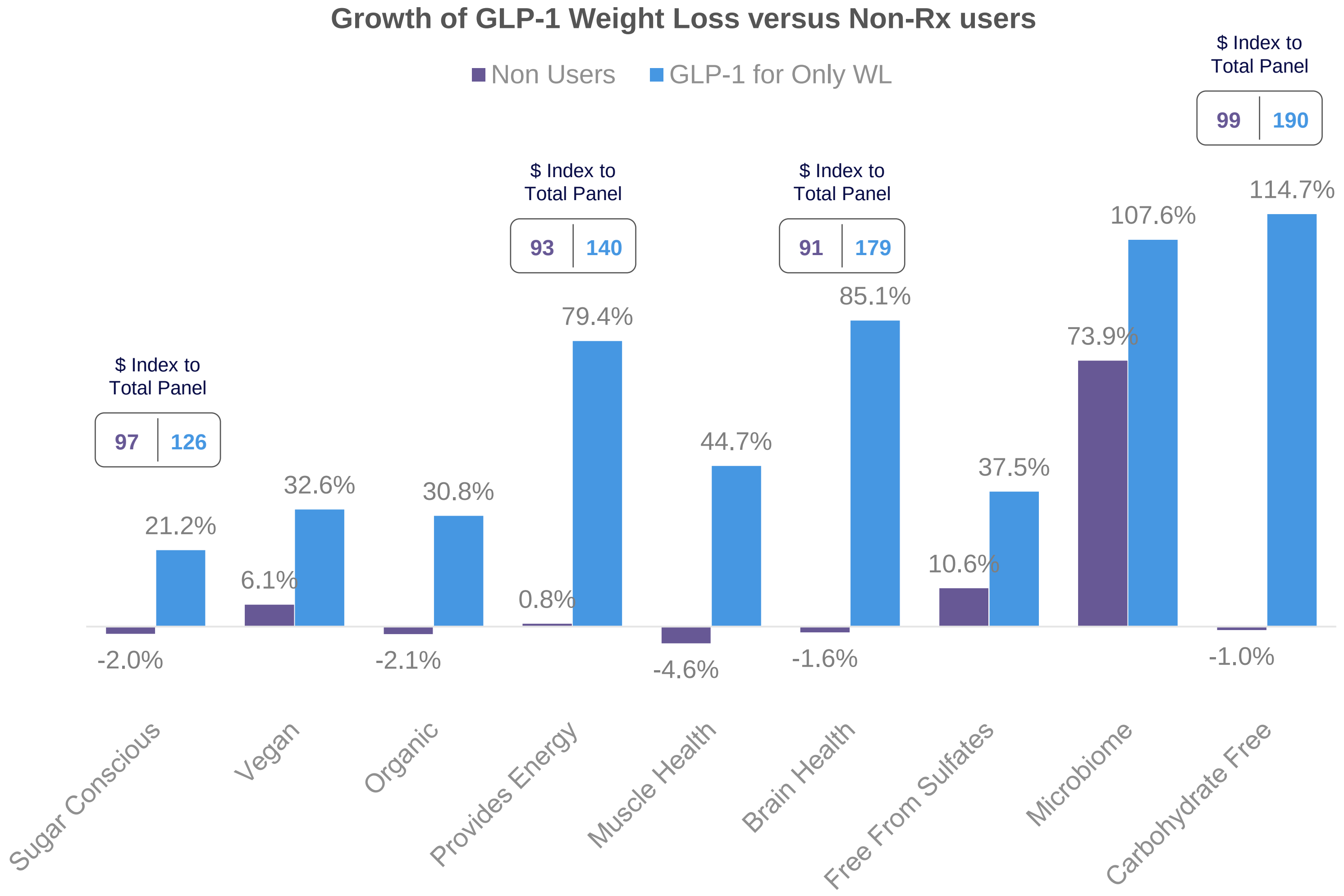
20.7% Avg Vol Chg.

Consistent increase in consumption during and after therapy

After therapy consumption is higher than during therapy

GLP-1 weight loss shoppers seem to be increasingly intentional

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



Some attributes GLP-1 weight loss users showing stronger growth

- *Immune health*
- *Joint health*
- *Muscle health*
- *Osteoporosis*
- *Bone Health*
- *Digestive Health*
- *Hair, Skin Nail support*
- *Clinically tested*
- *Free from aluminum*
- *Free from antibiotics, hormones*
- *Free from high fructose corn syrup*
- *Free from artificial colors, flavors, fragrances, ingredients*
- *Free from parabens and phthalates*
- *Free from sulfates*
- *Natural, natural flavors*
- *Calorie conscious, fat conscious*
- *Sodium conscious (especially very low sodium)*
- *Contains added sugar*
- *Nutrient dense*
- *Antioxidants stated*
- *Paleo*
- *Non-GMO*
- *Plant-based*
- *Free from gluten*
- *Excellent and good source of protein*

Source: NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024); Total US; Total Outlets; Total Food & Beverage; Product Insight stated claims on package; Unit % Change, 52 weeks ending September 28, 2024

Categories of interest for GLP-1 users and c-stores

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

Categories of opportunity

Hydration powders, sports drinks (especially sugar free, no calories)

Caffeinated beverages (especially energy drinks, coffee)

High protein drinks

Beverages: water (regular, sparkling), soft drinks, tea

Meatless protein: dairy cheese (cottage cheese), eggs, low fat yogurt, beans

High protein, low fat prepared foods (i.e., convenient and healthy fully cooked meat), meat snacks

Fruits and vegetables, dried fruit

Candy, gum, mints

Personal care: deodorant, GI care (anti-nausea, anti-diarrhea), lotion, breath fresheners, lip balms, digestive aids/supplements, sleep aids

When I want a cookie, I go get the very best one.

Reddit GLP-1 user

GLP-1 shopper category behavior in the c-store

	INDEX to NON Rx USERS - YA	INDEX to NON Rx USERS – L52
BAKERY – Doughnuts		
BAKERY – Rolls and Buns		
BAKERY – Sweet Goods		
DAIRY – Beverages		
DELI – Beverages		
DELI – Pizza		
DELI – Prepared Foods		
FROZEN – Desserts		
GROCERY – Beverages		
GROCERY – Cookies & Crackers		
GROCERY – Salty Snacks		
GROCERY – Sweet Snacks		
PRODUCE – Fruit		
PRODUCE – Vegetables		
ALCOHOL – Beer, FMB, Cider, Seltzer		
TOBACCO - Tobacco		
TOBACCO – Tobacco & Tobacco Alt		
TOBACCO – Smoking accessories		

Buy Rate index to Non Rx Users, C-store channel
Survey respondents who stated that someone in their household began taking any of the GLP-1 injection prescription, with the purpose of only treating weight loss
Source: NielsenIQ, Homescan GLP-1 Panel Survey (Jan/Feb 2025); Total US; Convenience Stores; Food & Beverage categories, $ Buy Rate Index to Non GLP-1 Users; 52 weeks ending January 4, 2025

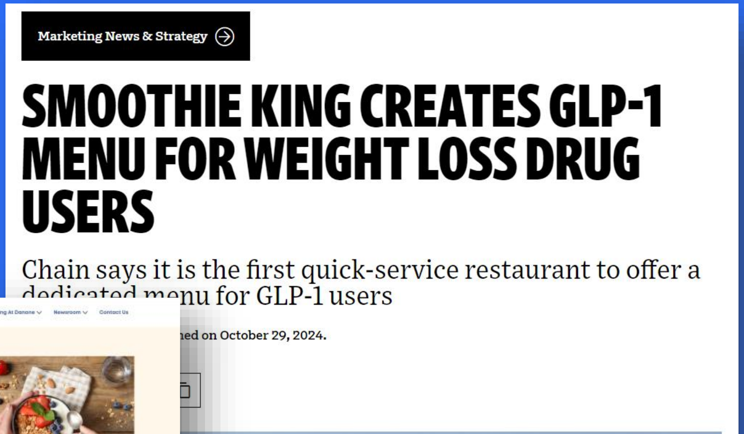
Pathways

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


SEP 18, 2024

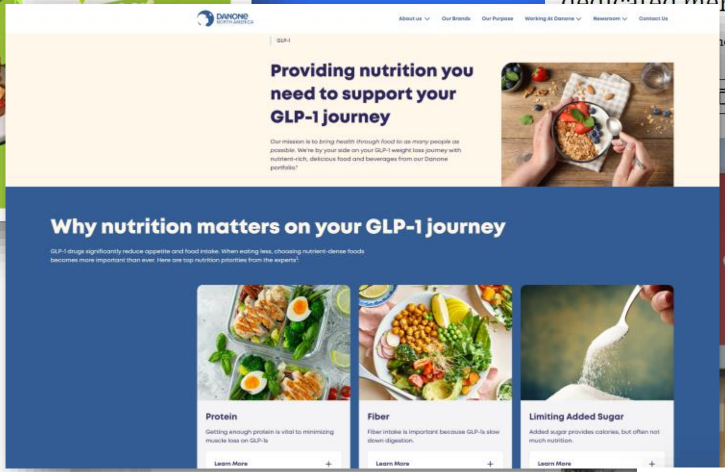
Vital Pursuit Hits Shelves Nationwide as First-to-Market Nestlé Brand Designed for GLP-1 Users

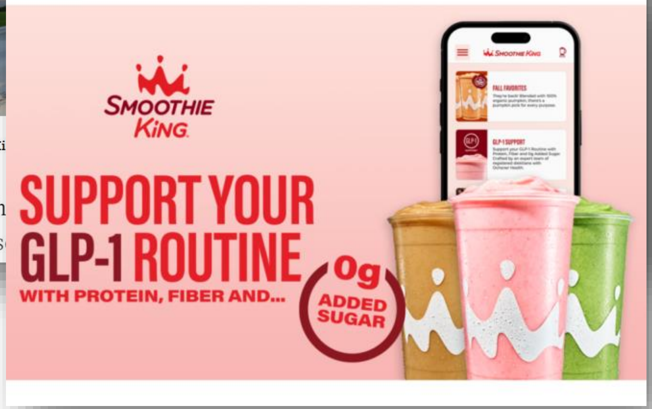
Introducing a line of delicious, high protein meals with essential nutrients; Vital Pursuit lands at national retailers to provide dietary support for GLP-1 users and consumers focused on weight management

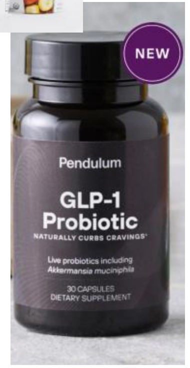

Marketing News & Strategy

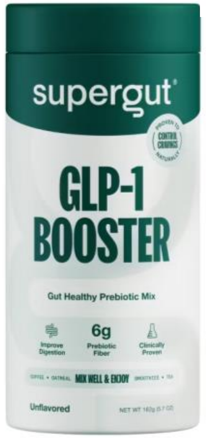
SMOOTHIE KING CREATES GLP-1 MENU FOR WEIGHT LOSS DRUG USERS

Chain says it is the first quick-service restaurant to offer a dedicated menu for GLP-1 users









Current patient barriers will be improved

A robust pipeline of innovative drugs and generics signals growing competition in the market, benefiting patients with greater choice, accessibility, and lower prices

69% have been using the medication for fewer than two years and 53% expect to discontinue use in less than two more years[1]

Coverage/access constraints

- **GLP-1s can cost >$10K** annually; and coverage (particularly for weight loss) remains limited
- Current proposal introduced to **allow Medicare to cover** weight loss drugs (obesity redefined as a chronic disease)
- Ozempic among 15 drugs **selected for IRA negotiations** this year
- **Eli Lilly** offering lower-cost versions through **direct purchase programs** ($399-650/month)

Adherence hurdles

- GLP-1s have a potentially distressing side-effect profile (e.g., nausea)
- Some patients dislike self-injecting themselves
- Others don't have easy access to medical support to help them access the drug, optimize their outcomes or manage side effects

NIQ survey[2] found top reasons for stopping GLP-1 use:

Too expensive

Experiencing too many side effects

Difficult to get the drugs

Using a different approach

Lost the weight needed

Sources: FDA, CMS Report, Reuters, WebMD, New York Times, Ohio Cardiovascular and Diabetes Health Collaborative, American Medical Association, BioProcess International, CDC, Kaiser Family Foundation,
Source: 1 -Acosta 2025 GLP-1 Shopper Community study 2 – NIQ GLP-1 Shopper Survey, February 2025

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

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

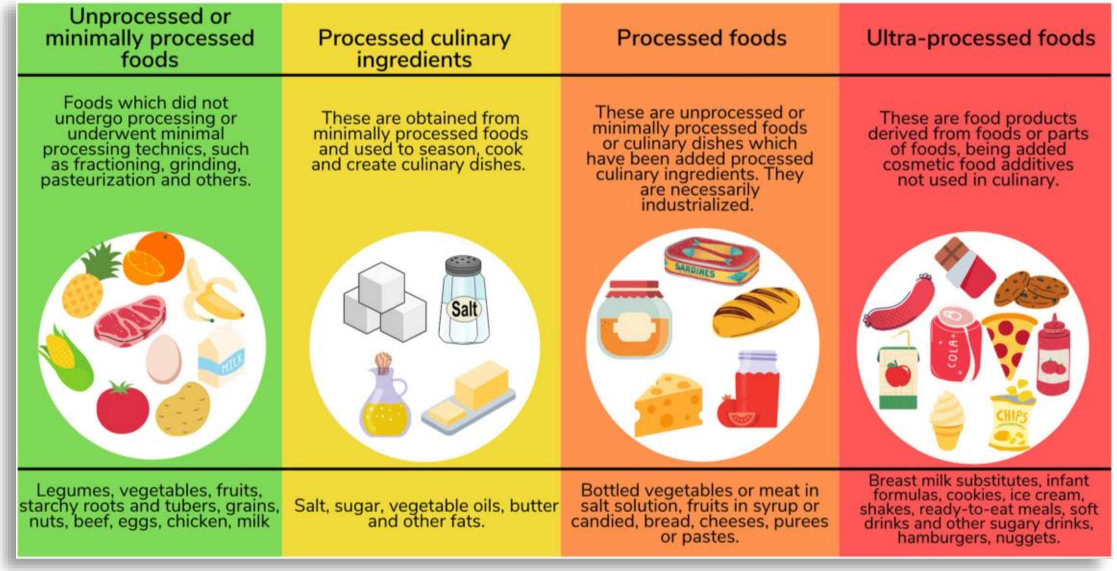
GLP-1s are not a weight-loss fad:

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

UBS Evidence Lab GLP-1 Survey

With an increased attention to food comes and increased confusion on ultra-processed foods

NOVA definition



Identifies **78%** of food and beverage as ultra-processed
(Northeastern University's Network Science Institute)

NIQ Product Insight definition

NIQ NPI ULTRA-PROCESSED QLFD: Use nutrition facts panels (NFP) and ingredient declaration:

Products with NFPs containing one of the following: *1.5g or more of sodium per 100g, 5 grams or more of saturated fat per 100g, 22.5g or more of sugar per 100g, or 17.5g or more of total fat per 100g.*

And

Products with at least three of the following: *Added Sugar, Hydrogenated Oil, Formaldehyde Releasing Preservatives, Artificial Colors, Artificial Flavors, Artificial Sweeteners, Hydrogenated Oils, Artificial Fragrances, Added Sulfites, Color Additives, or Sequestrates.*

Products eligible for this attribute cannot make organic certification claims.

Identifies **22%** of food and beverage as ultra-processed

Top 10 categories for *"ultra-processed"*

1. Prepared Foods
2. Salty Snacks
3. Desserts
4. Candy, Gum, Mints
5. Cookies and Crackers
6. Processed Meat
7. Cereal and Granola
8. Sweet Snacks
9. Cheese
10. Bread

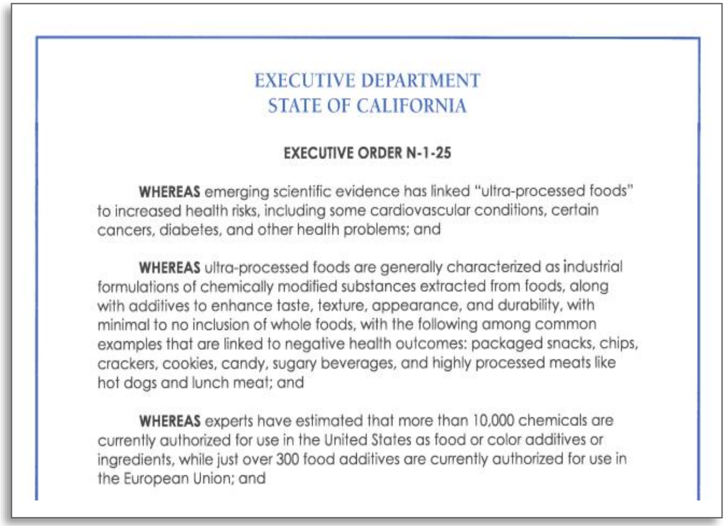
87% of consumers agree that eating fewer processed foods is better for health

75% try to limit their intake of processed foods

Source: NIQ Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage; $ Share, 4-year $ CAGR; 52 weeks ending November 30, 2024
MRI Simmons, Health and Wellness study

NIQ

Ultra-processed sales vary across the country



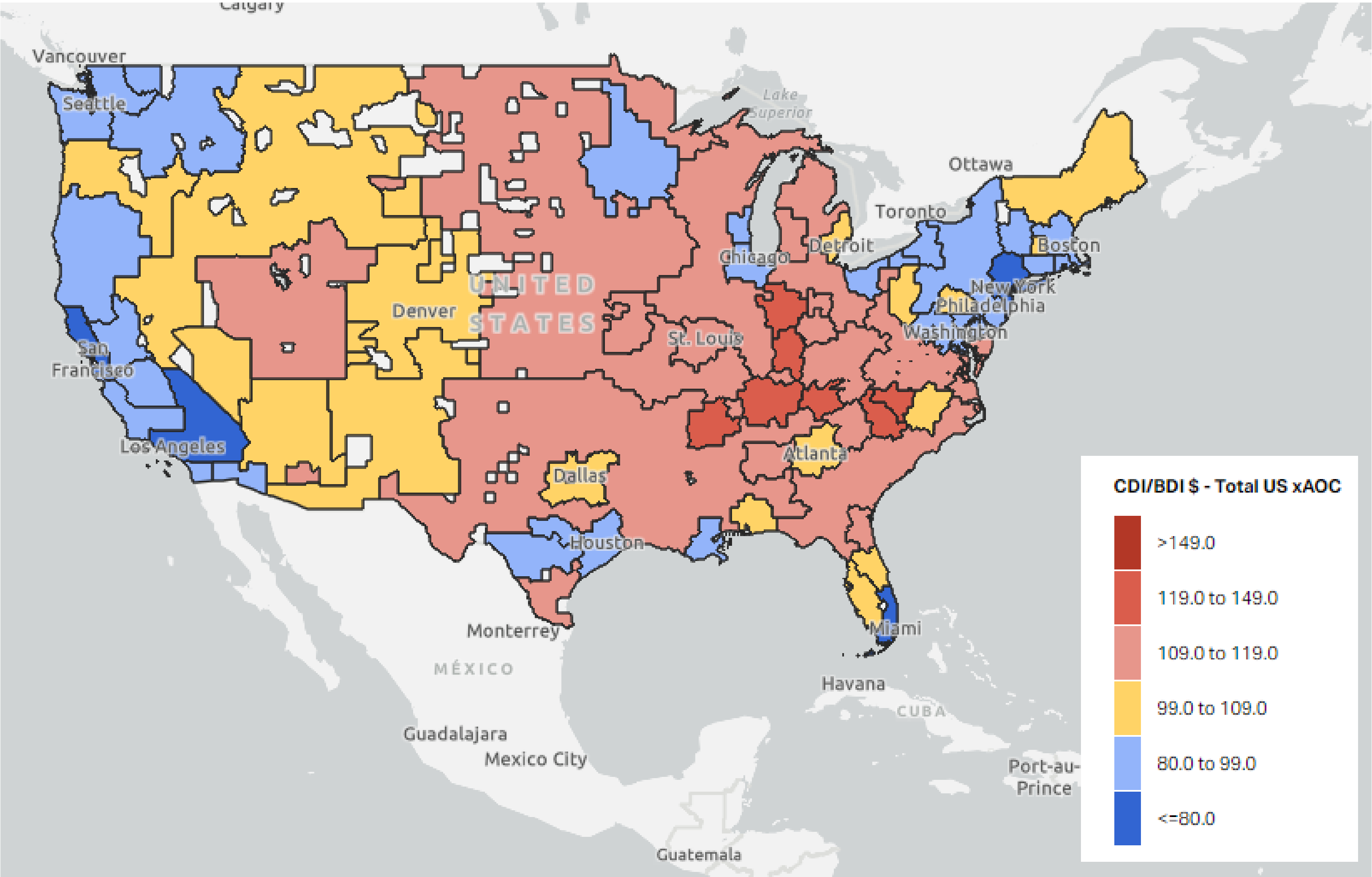
EXECUTIVE DEPARTMENT
STATE OF CALIFORNIA

EXECUTIVE ORDER N-1-25

WHEREAS emerging scientific evidence has linked "ultra-processed foods" to increased health risks, including some cardiovascular conditions, certain cancers, diabetes, and other health problems; and

WHEREAS ultra-processed foods are generally characterized as industrial formulations of chemically modified substances extracted from foods, along with additives to enhance taste, texture, appearance, and durability, with minimal to no inclusion of whole foods, with the following among common examples that are linked to negative health outcomes: packaged snacks, chips, crackers, cookies, candy, sugary beverages, and highly processed meats like hot dogs and lunch meat; and

WHEREAS experts have estimated that more than 10,000 chemicals are currently authorized for use in the United States as food or color additives or ingredients, while just over 300 food additives are currently authorized for use in the European Union; and



Source: NIQ, Retail Measurement Services – CDI/BDI Report; NIQ Product Insight; Total US xAOC – 62 Syndicated Major Markets; Total Food & Beverage, PI Ultra-Processed Qlfd; $ % Change vs year ago; 52 weeks ending December 28, 2024

The consumer is reactionary but not necessarily in the c-store


THE WALL STREET JOURNAL.

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HEALTH | HEALTHCARE

FDA Bans Artificial Dye Red 3 From Food

Consumer-advocacy groups petitioned agency to restrict additive initially approved for use in 1969

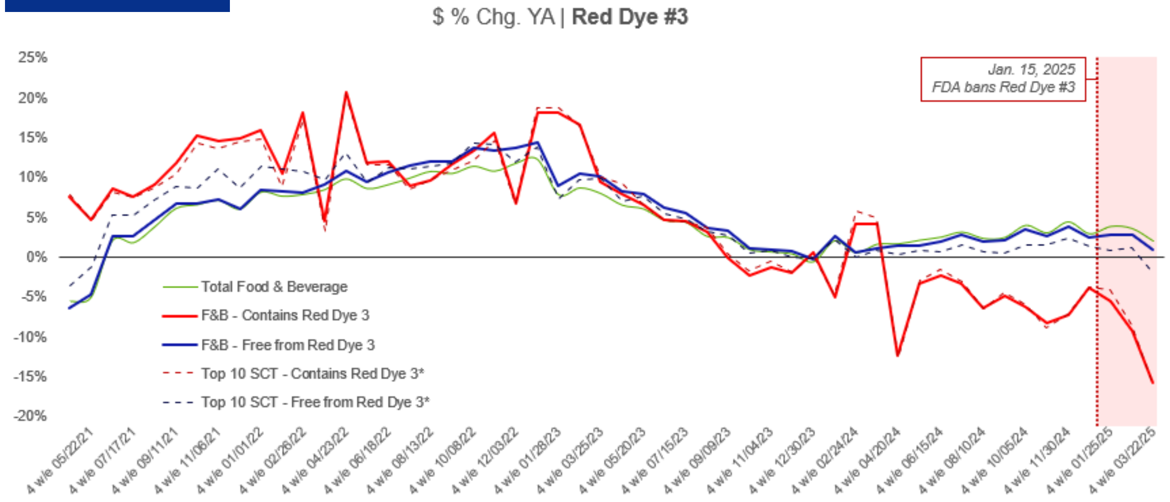
By Roshan Fernandez Follow *and Jesse Newman* Follow

Updated Jan. 15, 2025 4:52 pm ET

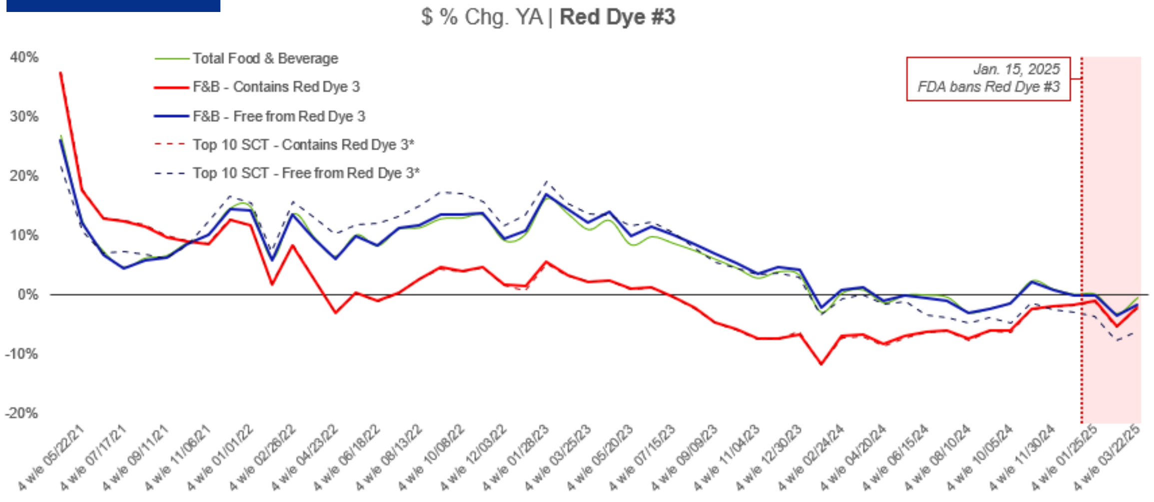
5,416 items total with 1,284 in the c-store channel

Candy, gum, mints
Baking supplies
Desserts
Salty Snacks
Cookies and Crackers
Sweet snacks
Milk products

xAOC



C-Store



*Top 10 super categories that contain Red Dye #3
Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC vs Total US Conv; Total Food & Beverage vs Better For segment; $ % Change vs year ago; 4-week trended through week ending March 22, 2025

"Regulatory" changes moving quickly…what's next?

THE WALL STREET JOURNAL.

World Business U.S. **Politics** Economy Tech Markets & Finance Opinion Arts Lifestyle

RFK Jr. Unveils Plan to Phase Out Artificial Food Dyes

Trump administration aims to eliminate petroleum-based dyes in food by the end of 2026; food companies have vouched for dyes' safety

By Jesse Newman Follow

Updated April 22, 2025 7:26 pm ET

Gift unlocked article Listen (6 min)

Artificial color additives[2] – # of Food & Beverage items

Red Dye 3 – 5.4K items - ~1.2K in c-store

Red Dye 40 – 23.9K items - ~9.5 in c-store

Blue Dye 1 – 18.9K items - ~7K in c-store

Blue Dye 2 – 4.1K items - ~1.4K in c-store

Yellow 5 – 22.5K items - ~8.3K in c-store

Yellow 6 – 16.3K items - ~6.3K in c-store

Green 3 – 82 items

Orange B*

Red 2*

**NIQ is coding but not currently reporting*

Candy, gum, mints
Beverages
Baking supplies
Desserts
Salty Snacks
Cookies and Crackers
Sweet snacks
Milk products
Diet and nutrition
Processed meats
Beverage enhancers
Cereal and granola
Fruit snacks
Toaster pastries
Prepared foods
And many others…

Food Additives Potential Bans Impact

Brominated Vegetable Oil *~300 items*

Propyl Paraben *~ 250 items*

Potassium Bromate *~500 items*

Titanium Dioxide *~ 7K items*

High Fructose Corn Syrup *~ 26K items*

Propyl Paraben

1. Sweet Snacks (46% share)
2. Wraps and Tortilla shells (23%)
3. Baking supplies (14%)
4. Salty Snacks (5%)
5. Prepared Foods (5%)

Potassium Bromate

1. Prepared foods (45% share)
2. Rolls and Buns (13%)
3. Cookies & Crackers (10%)
4. Pizza (10%)
5. Bread (9%)

Titanium Dioxide

1. Sweet Snacks (29% share)
2. Prepared Foods (17%)
3. Candy, Gum, Mints (15%)
4. Desserts (7%)
5. Pizza (6%)

High Fructose Corn Syrup

1. Beverages (48% share)
2. Cookies and Crackers (10%)
3. Desserts (8%)
4. Prepared Foods (5%)
5. Condiments (3%)

Bromated Vegetable Oil

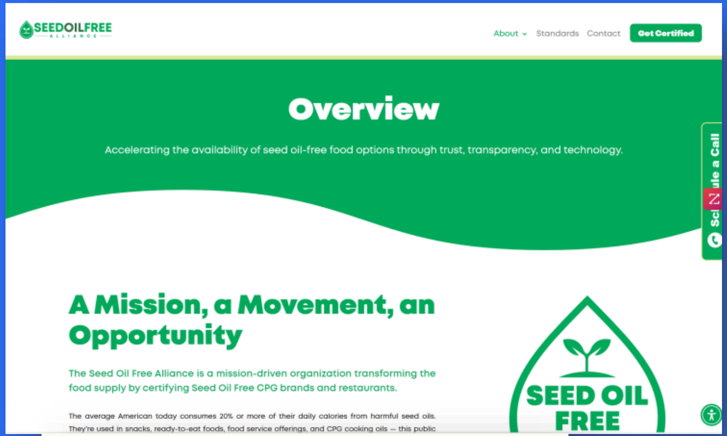
1. Beverages (99.9% share)

Share of additive

Source: NIQ Retail Measurement Services, NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage; $ Share, Number of UPCs selling impacted; Total US xAOC, Total Food & Beverage; 52 weeks ending December 28, 2024

[2] NIQ Retail Measurement Services, NIQ Product Insight, powered by Label Insight; Total US Convenience; Total Food & Beverage; $ Share, Number of UPCs selling impacted; Total US xAOC, Total Food & Beverage; 52 weeks ending March 22, 2025

There is a growing conversation on seed oils being bad



Harmful Seed Oils are…

The following seed oils are designated as "Harmful Seed Oils" and are disallowed ingredients for Seed Oil Free Certification purposes:

- Soybean oil
- Corn oil
- Canola (rapeseed) oil
- Sunflower oil
- Peanut oil
- Grapeseed oil
- Safflower oil
- Rice bran oil
- Cottonseed oil
- Flaxseed oil

Harmful seed oils are high in omega-6 linoleic acid or other polyunsaturated fats and are also highly refined. Today, a growing number of companies are replacing harmful seed oils with healthier oils and fats to honor the preferences of health-conscious consumers.

NIQ Product Insights:

Seed Oils F&B Ingredients

- 44K – soybean oil
- 31K items – canola oil
- 25K – sunflower
- 4K – peanut oil
- 4K – safflower
- 172 – flaxseed oil

Lard sales +9%

Butter sales +5%

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

SPATE

Source: NIQ Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage, 8/2024 and 12/2024; SPATE: US TIkTok ending September 8, 2024

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the world's most **complete** and **clear** understanding of consumer buying behavior that reveals new pathways to growth.

GLP-1 – Potential based on addressable market

- More Than Half of U.S. Adults Could Benefit from GLP-1 Medications, Researchers Find | BIDMC of Boston
  - *In a new analysis of national data, researchers at the Richard A. and Susan F. Smith Center for Outcomes Research at Beth Israel Deaconess Medical Center (BIDMC) estimated that 137 million U.S. adults, more than half of all adults, are eligible for semagludtide for weight loss, diabetes management, or prevention of recurrent cardiovascular events. The findings, which were presented at the American Heart Association Scientific Sessions and simultaneously published in JAMA Cardiology, underscore the need to increase equitable access to this new class of pharmaceuticals.*
  - *They found that of the 136.8 million US adults eligible for semaglutide, 35.0 million adults would be eligible for the medication for diabetes management, 129.2 million adults for weight loss, and 8.9 million adults for secondary prevention of cardiovascular disease. The semaglutide-eligible population includes 26.8 million adults covered by Medicare, 13.8 million covered by Medicaid, and 61.1 million covered by commercial insurance.*

Fills for Weight-Loss Medications Increase Despite High Costs - GoodRx