NielsenIQ

# Roundtable on Obesity Solutions

NATIONAL ACADEMIES Sciences Engineering Medicine

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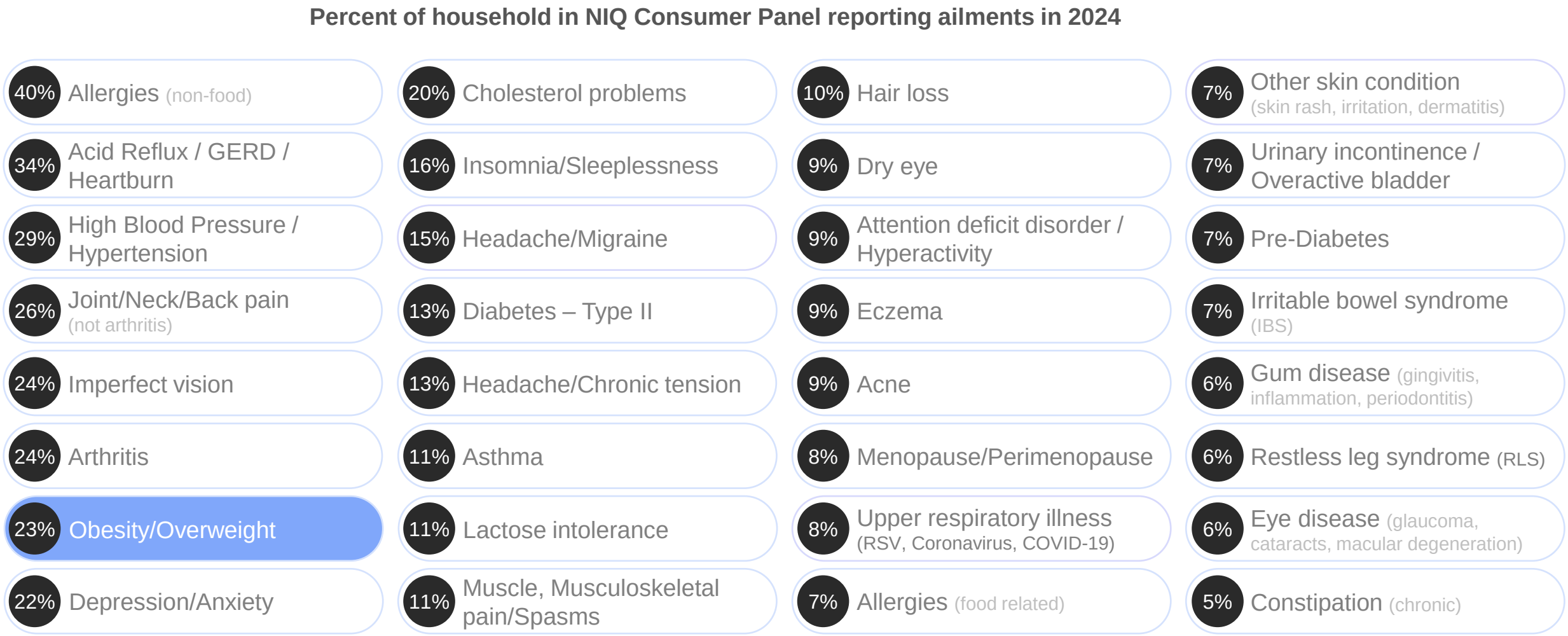
# Obesity/overweight is one of the top consumer household self-reported health conditions




Source: NIQ Annual Shopper Health Study, 2024, Q. Below is a list of health-related conditions / ailments. Please read the list carefully and then select the condition(s) that anyone in your household, including yourself, has experienced during the past 6 months. Please select all that apply

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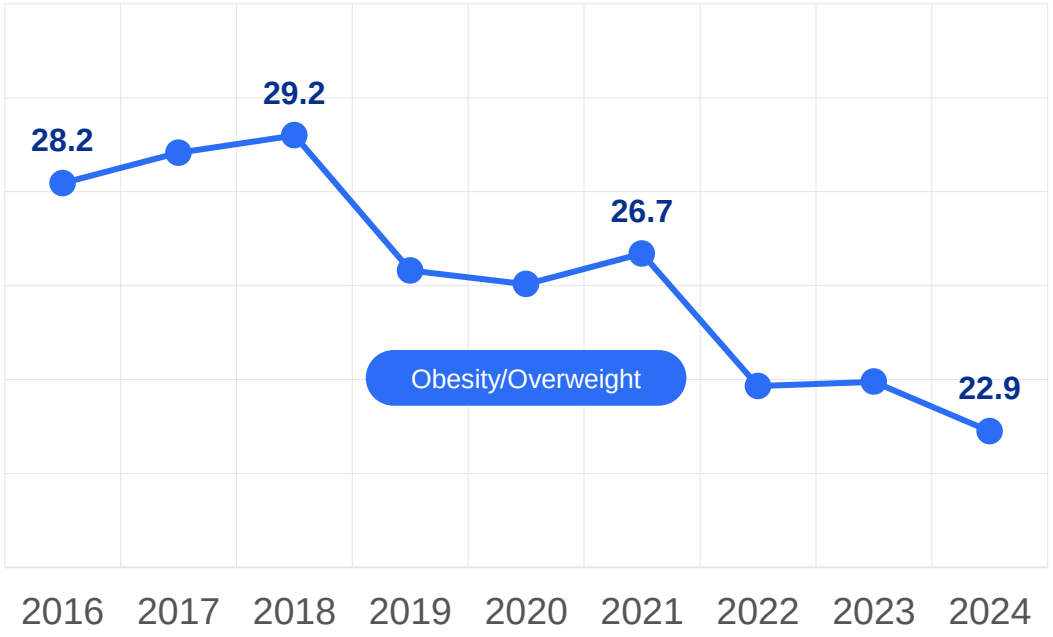
# Households with self-reported obesity/overweight is surprisingly declining but those households also have higher likelihood to report other ailments

**Percent of NIQ Panel self-reporting Overweight/Obese member(s) in their household**




## Households reporting obesity/overweight are *2-3 times more likely* to also report the following health conditions:

- Pre-diabetes
- Urinary incontinence/overactive bladder
- Type II Diabetes
- Menopause/perimenopause
- Restless leg syndrome
- Irritable bowel syndrome
- Gum disease
- Hair loss

**61%** were diagnosed by a health professional

**66%** having been diagnosed more than 5 years ago

Source: NIQ Health Shopper Survey – 2016 to 2024; Q: Select the condition(s)/ailment(s) that anyone in your household, including yourself, has experienced during the past 6 months. Please select all that apply.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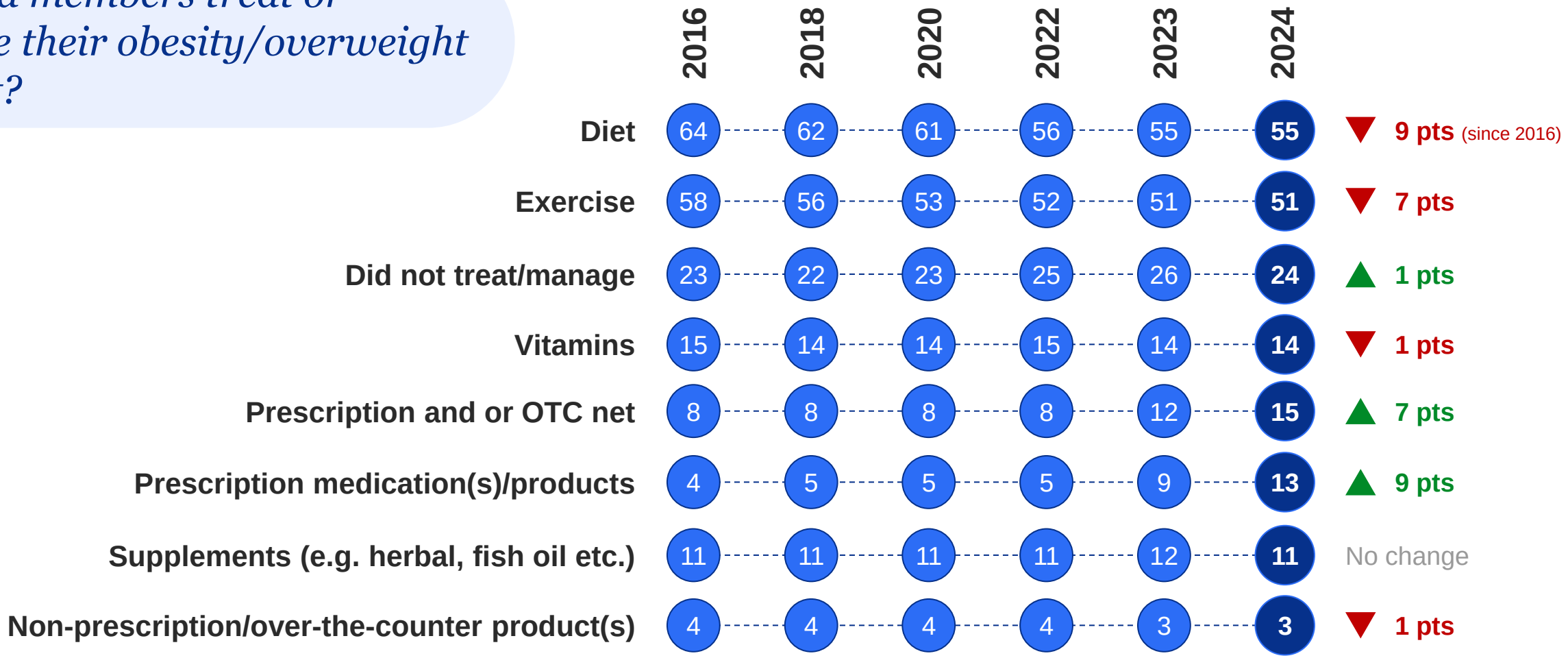
# Treatment and management has shifted over time

*How did members treat or manage their obesity/overweight ailment?*

Percent of households self-reporting how they treat/manage obesity/overweight ailment




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.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# Diet, nutrition and supplementation is shifting

Households with reported obesity/overweight **index high among heavy 'ultra-processed' buyers** *and* also among **heavy fresh produce buyers**

**Food and Beverage products** with claims around 'weight management' or 'obesity support' are limited and are seeing declines in units (-1%) and items selling (-9%) over the last four years

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

*Note: Berberine is coded across multiple supplement categories (diabetes, general health, etc). The calculation is to show size relation only.*

Households with ***obesity/overweight self-report prioritizing*** the following food attributes most when making food choices[2]:

- ***Low sugar*** *(125 index to total panel)*
- ***Low sodium*** *(122)*
- ***High protein*** *(127)*
- ***Free from high fructose corn syrup*** *(116)*
- ***Low fat*** *(123)*

*While only **17%** of households with obesity/overweight prioritize high fiber when making food choices, the households index at 120*

1 – Source: NIQ, Retail Measurement Services; Total US xAOC; Total Supplements; $ % Change vs year ago; 52 week ending June 15, 2024
2 – Source: NIQ Health Shopper Survey, 2016 to 2024; Q. Which of the following food attributes are important to you when deciding what to buy for your household? Please select all that apply.

NIQ

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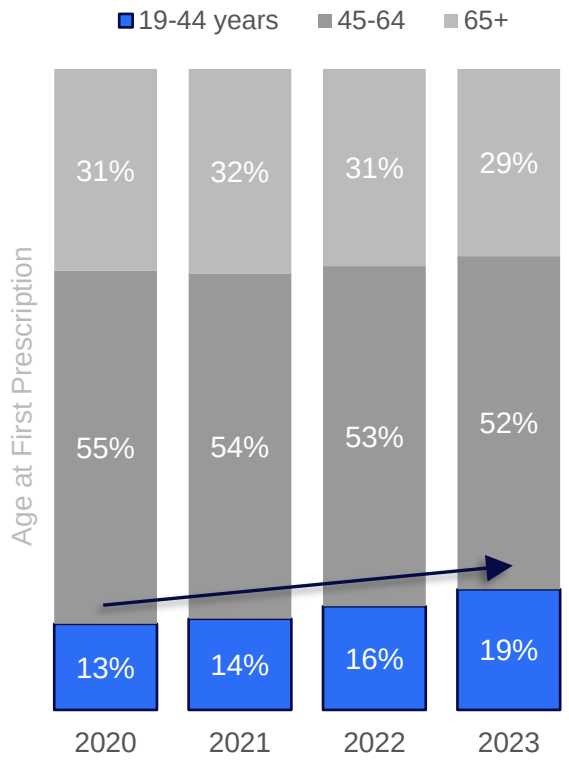
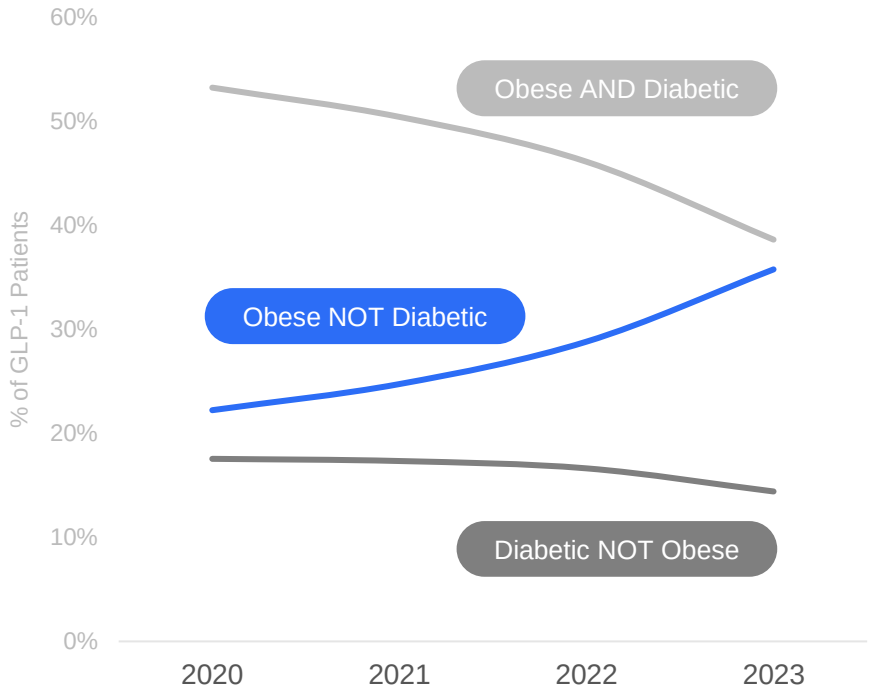
# GLP-1 for weight loss is on the rise

## Age at first prescription is trending younger




## Obese, Non-Diabetic GLP-1 users are trending up




## Average days on prescription lower for GLP-1 for obesity, not diabetic

| | Obese NOT Diabetic | Obese AND Diabetic |
|---|---|---|
| Number of Prescriptions | 8.5 | 12.9 |
| Avg. Days | 673.0 | 776.5 |
| Single Prescription % | 3.8% | 0.6% |

Source: MSA through integration of NCP and EMR data

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# Nutrition of food and beverage can create challenges for healthy eating

## Added Sugar per serving*

| $ Share of Food & Beverage | | Sales growth |
|---|---|---|
| 45% | 0g per serving | +2.6% |
| 14% | 1g to <2.5g | +2.2% |
| 5% | 2.5 to <5g | +1.6% |
| 5% | 5g to <7.5g | +4.8% |
| 4% | 7.5g to <10g | +3.2% |
| 9% | 10g to <15g | +2.7% |
| 9% | 15g to <25g | +2.1% |
| 9% | Over 25g | +2.4% |

## Sodium per serving*

| $ Share of Food & Beverage | | Sales growth |
|---|---|---|
| 11% | 0mg per serving | +3.0% |
| 8% | 1mg to <25mg | +2.5% |
| 7% | 25mg to <50mg | +3.3% |
| 16% | 50mg to <100mg | +1.4% |
| 12% | 100mg to <150mg | +1.0% |
| 9% | 150mg to <200mg | -0.1% |
| 12% | 200mg to <300mg | +1.4% |
| 12% | 300mg to <500mg | +2.1% |
| 13% | Over 500mg | -1.4% |

## Total Fat per serving*

| $ Share of Food & Beverage | | Sales growth |
|---|---|---|
| 29% | 0g per serving | +2.6% |
| 12% | 1g to <2.5g | +2.2% |
| 10% | 2.5 to <5g | +1.6% |
| 14% | 5g to <7.5g | +4.8% |
| 10% | 7.5g to <10g | +3.2% |
| 14% | 10g to <15g | +2.7% |
| 10% | Over 25g | +2.4% |

*Product Insight Qualified attribute derived from ingredient label

Source: NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight; Total US xAOC; Total Food & Beverage; $ share of Food & Beverage, $ % Change vs year ago; 52 week ending June 15, 2024


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# Coming *into view*

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