

NBCUniversal

A man with dark skin and curly hair, wearing a light brown t-shirt, is standing in a grocery store aisle. He is looking down at a can of food he is holding in his right hand. He is holding a shopping cart with his left hand. The aisle is filled with various grocery items on shelves in the background.

# CPG QUARTERLY UPDATE 3Q'25

Industry *Highlights* & Media Trends

# Agenda

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## CPG Landscape

Current Landscape & 3Q'25 Media Trends

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## CPG @ NBCU Update

Media Trends, Creative Showcase, & Case Studies

3

## CPG Upcoming Opportunities At NBCU



# Current CPG Category Dynamics

Despite pressures from inflation and private label competition, premium demand, health & wellness, and hyper-personalization are sustaining category growth

## Headwinds:

- **Rising costs for commodities** (e.g., cocoa, sugar), and labor are squeezing margins. Inflation is re-accelerating in select categories (e.g., coffee, prepared foods), creating renewed **volume pressure**
- **Value-conscious consumers are trading down**, being more selective, and responding only to deep promotions
- CPG companies are **increasing promotional spending** to drive volume, which puts additional pressure on margins and operational efficiency
- **Private labels are gaining ground** and innovating rapidly, closing the price/quality gap with national brands

## Tailwinds:

- While overall inflation is mixed, **select categories** (e.g., Personal Care, Yogurt) are showing volume resilience or price strength **due to essential status or affordable luxury**
- Consumers, especially younger generations, are focused on **functional benefits and preventative health**, willing to pay a premium
- **Hyper-personalization is redefining customer loyalty** and generating valuable first-party data through tailored products and experiences
- Mass reach media (e.g., live events, sports, etc.) remains important to maintain **top-of-mind awareness and cultural status**



# CPG Category Round Up



## Industry Marketplace Intelligence

Consumers prioritize **value and well-being**, reshaping the CPG market



As more consumers start GLP-1 treatments, some CPG brands must work harder to stay in shopping carts. Food spending among GLP-1 users has declined by over \$6.5 billion [\(eMarketer\)](#)

US consumers are prioritizing health and wellness more than they did in the past. 49% report that their focus on health and wellness has increased at least somewhat [\(eMarketer\)](#)

Six in ten private label shoppers feel like savvy consumers, and 55% take pride in using store brand items [\(Mintel\)](#)

## Latest News

Tariff/policy and market uncertainty **cloud CPG outlook**



Restrictions and cuts to SNAP waivers will significantly impact retailers and brands [\(Retail Brew\)](#)

Chocolate prices have surged nearly 30% since last Halloween due to inflation, tariffs, and a global cocoa shortage. [\(CNBC\)](#)

CPGs diversify pack sizes to reach cost-pressed consumers. “we do see signs of more caution with the trend towards larger pack sizes” [\(Packaging Dive\)](#)

# CPG | 🛍️

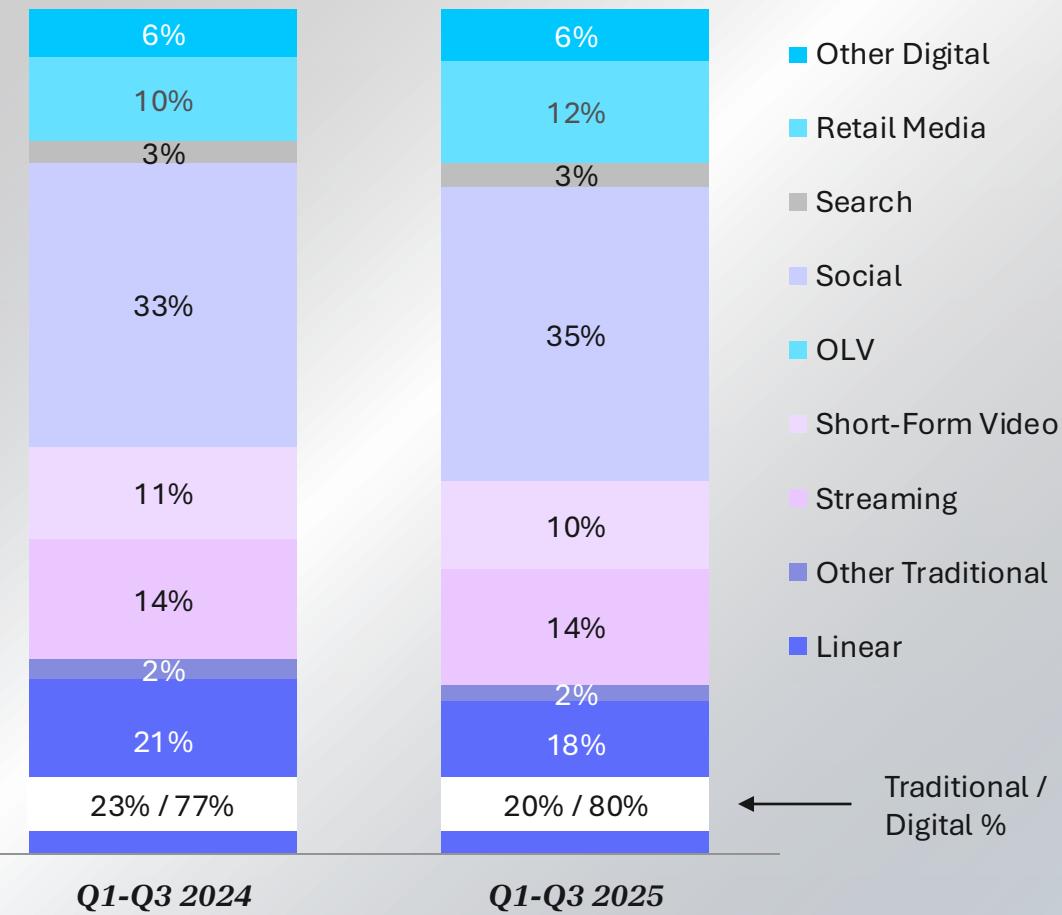
## Marketplace Spend

Facing headwinds, the category continues to prioritize performance, following consumer behaviors to drive growth across consideration and conversion channels

- **Retail Media remains a strategic priority**, surging +17% YoY, primarily fueled by Personal Care (+32%) and Household Supplies (+22%)
- Overall **Linear TV spend decreased** by -15% YoY, however, **major sports were a bright spot**, with the NFL (+11%) and College Basketball (+33%) showing significant growth
- **Streaming decreased** -7% YoY, a decline largely driven by a slowdown in Programmatic Streaming (-7%)

### CPG Category Media Mix

*Share of Spend*



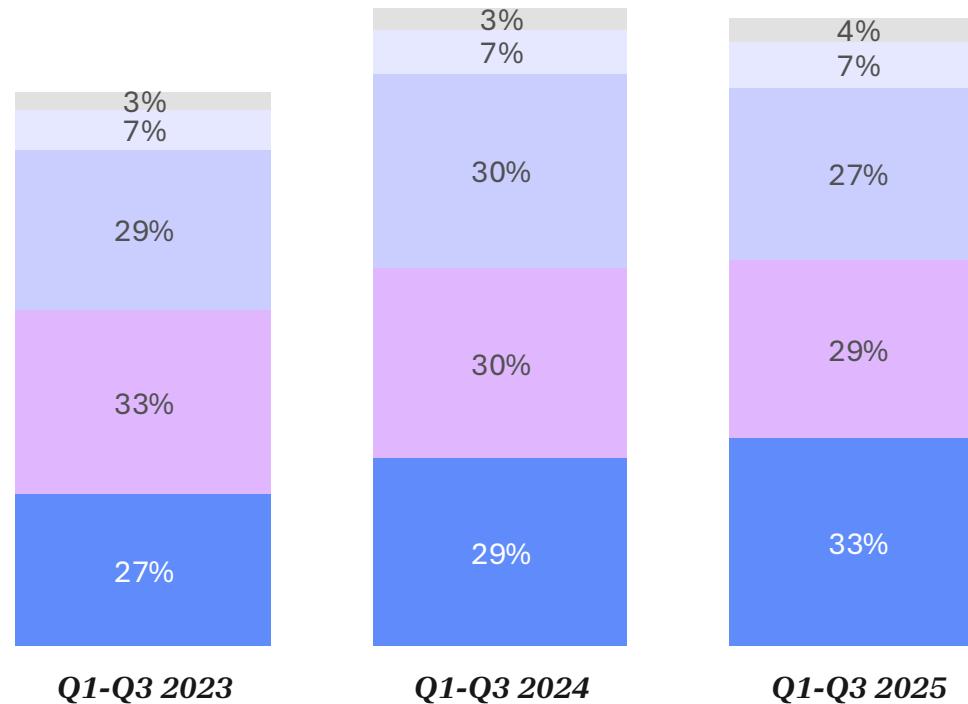
# CPG

Personal Care now accounts for the largest share of marketplace spend

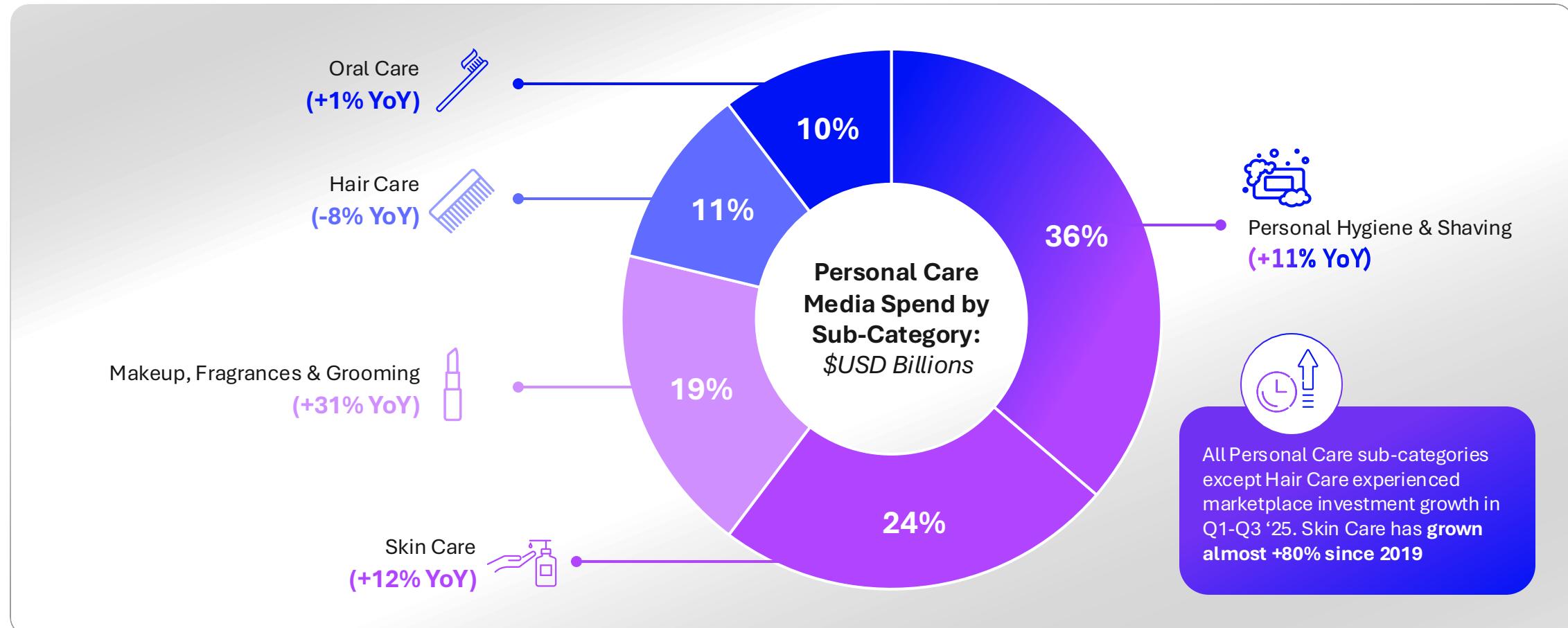
CPG media investment declines were fueled by the **Food** (-6%) and **Household Supplies** (-11%) categories, partially offset by growth from **Personal Care** (+11%), **OTC** (+2%), and the **VMS** (+10%)

## CPG Media Spend by Subcategory \$USD Billions

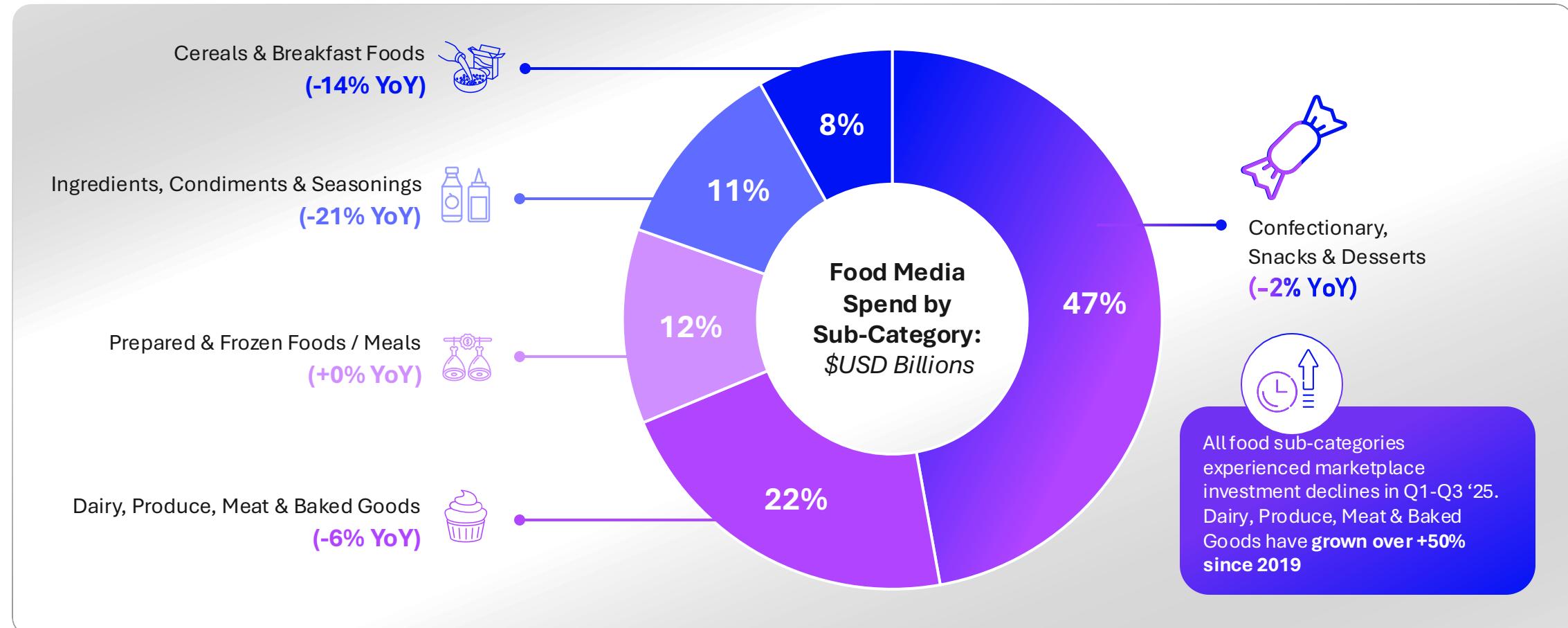
■ Personal Care  
■ Household Supplies  
■ Vitamins & Supplements  
■ Food  
■ OTC Medicines & Remedies



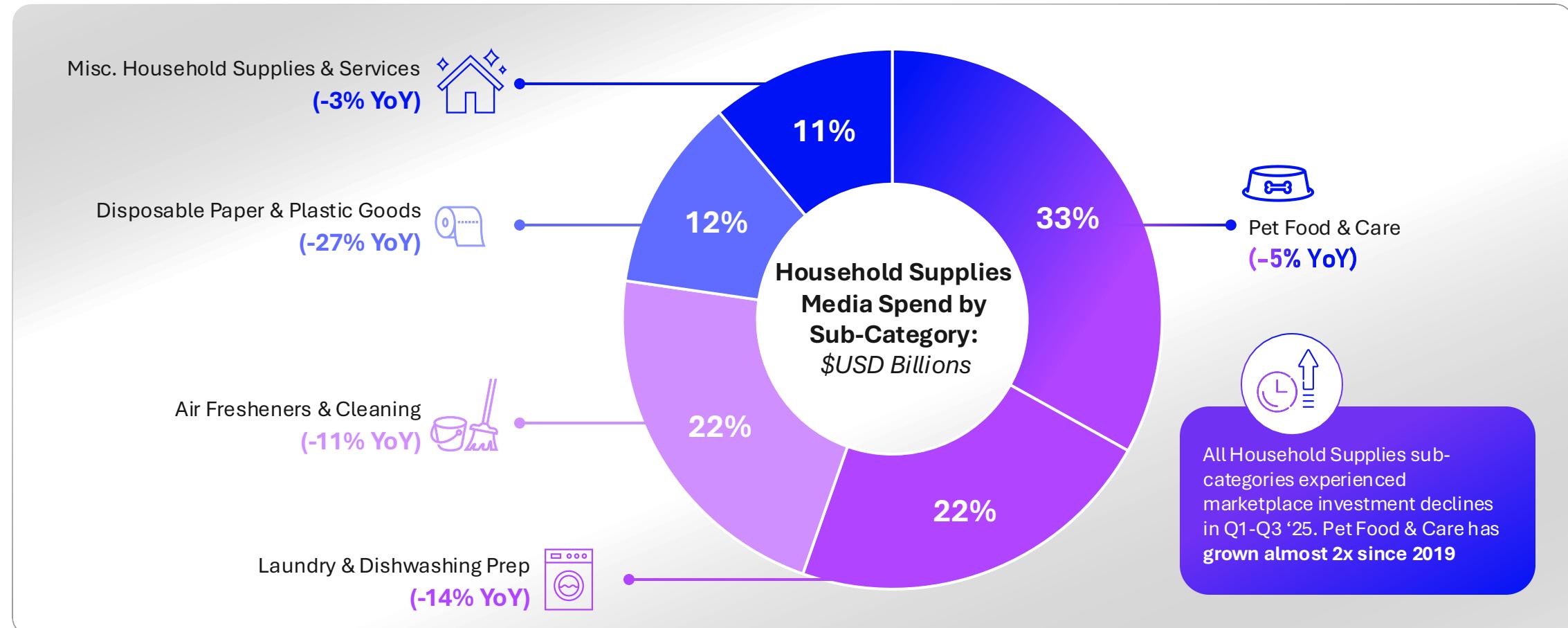
# Over a third of **Personal Care Media** investment is driven by Personal Hygiene & Shaving



# Almost half of **Food Media** investment is driven by confectionary, snacks, & desserts



# A third of **Household Supplies Media** investment is driven by Pet Food & Care



The largest Q1-Q3 '25 CPG spend growers to date are in the **Personal Care and Snack Categories**

2025 Q1-Q3 CPG Advertiser Spend Volume Growth by Sub-Category  
\$USD Millions

Personal Care

	\$55		\$50
<b>NATIVE</b> Cosmetics	\$30		<b>NATIVE</b> Body Wash
<b>Gillette</b>			
\$24	\$21	\$20	\$20
<b>OLAY</b>			
\$23	\$19	\$19	\$17
<b>Dove</b> Whole Body Deodorant			
\$23	\$19	\$17	\$17
			\$16

Food

	\$43		\$21		\$20
	\$40		\$17		
					\$17
					\$16

Household Supplies

	\$23		\$20		\$19		\$18		\$16
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# CPG NBCU Spend

At NBCU, our CPG partners are leaning into big moments, premium environments, innovations, & growth audiences



## Entertainment

is the focal point of linear, with Broadcast Entertainment + ELG accounting for 61% of Q1-Q3 '25 CPG Linear spend

Broadcast Entertainment grew +21% in Q1-Q3 '25 vs. Q1-Q3 '24



## Cross-Platform Investment

balancing broad reach with strategic audiences, at scale. Linear maintains the dominant share, while digital remains steady with increased interest in social

Linear / digital holds steady around 70/30% & social continues to grow +21% vs. Q1-Q3 '24



## Streaming

continues as a key area to engage audiences, accounting for 86% of all digital spend, as brands tap into advanced buying paths and seek out premium content opportunities

Peacock Premier media spend increased +25% YoY



## Ad Innovations

continue to provide CPG brands with an opportunity to capture attention and drive consideration in a crowded market

Category spend in ad innovations +53% in Q1-Q3 '25 vs. Q1-Q3 '24

# Creative & Innovation Across CPG @ NBCU

## NBCU Spotlight

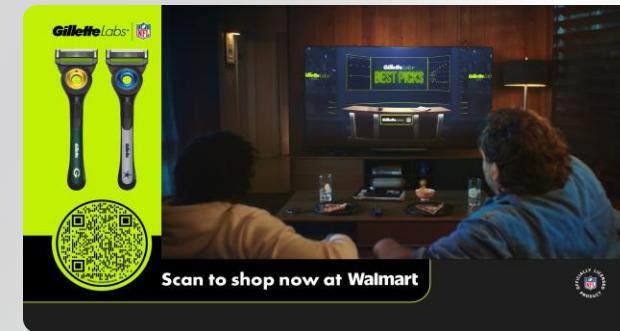


### Mrs. Meyers x Bravo

Mrs. Meyers Pet Car/SCJ partnered with the Real Housewives franchise in a campaign that included custom content with Bravo talent and the Pets of Kyle Richardson, Browyn Newport, and Shannon Beador

Mrs. MEYER'S  
CLEAN DAY

## NBCU Spotlight



### P&G x SNF + Walmart Connect

P&G teamed up with NBCU and Walmart Connect to convert programming moments into immediate, shoppable experiences during commercial breaks, featuring talent-led custom stories, powered by Walmart Connect for easy fulfillment

**P&G**

## NBCU Spotlight



### Pillsbury x On Brand with Jimmy Fallon

General Mills' Pillsbury brand was one of ten integrated partners in the one-of-a-kind series featuring Jimmy Fallon and Bozoma St. John that included experiential activation with the iconic Doughboy

Pillsbury  General Mills 

Global frozen yogurt brand saw **significant ROAS** and drove **meaningful penetration to new households**, thanks to NBCU's Peacock campaign with Instacart



NBCUniversal

instacart

7X

return on every dollar spent  
on the targeted campaign

59%

of buyers were **new brand buyers**

47%

of all attributed sales came  
from **new brand buyers**

International CPG brand saw **significant ROAS**, an increase in **memorability**, and drove **penetration** to **new households** thanks to NBCU's Peacock campaign with Instacart



NBCUniversal

instacart

# 6X

return on every dollar spent  
on the targeted campaign

# +60%

lift in brand memorability  
vs. category norm

# 38%

of all attributed sales came  
from new brand buyers

Global cleaning brand  
**saw significant ROAS**  
**and full-funnel impact**  
thanks to NBCU's first-to-market linear campaign with Instacart – the only place to access shopper outcomes from your DDL investment



NBCUniversal

instacart

**4X**

return on every dollar spent  
on the targeted DDL campaign

**+14%**

Lift in  
purchase intent

**+28%**

Lift in search  
engagement

**55%**

of attributed  
buyers were  
new brand users

Leverage the power of NBCUniversal's

# Content & Audiences to drive impact

## for your brand & business

**2026 Opportunities** On The Horizon For the CPG Category

## Q1'26 Peacock Opportunities



## TODAY Commerce



## Billboard Latin Women In Music



## La Casa de los Famosos, S6



## Live from E! Red Carpet



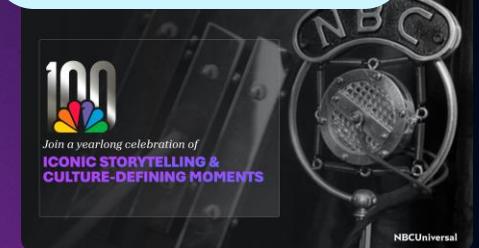
## Peacock Top 10 Rail



## Virtual Concessions



## NBCU 100



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# THANK YOU

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