

A man with short dark hair and a beard, wearing a light brown V-neck t-shirt, is standing in a grocery store aisle. He is holding a small can of food in his right hand and looking at it. A shopping cart with green leafy vegetables is in the foreground. The background shows shelves stocked with various products, including snacks and canned goods.

NBCUniversal

CPG

QUARTERLY UPDATE 3Q'25

Industry Highlights & Media Trends

Agenda

1

CPG Landscape

Current Landscape & 3Q'25 Media Trends

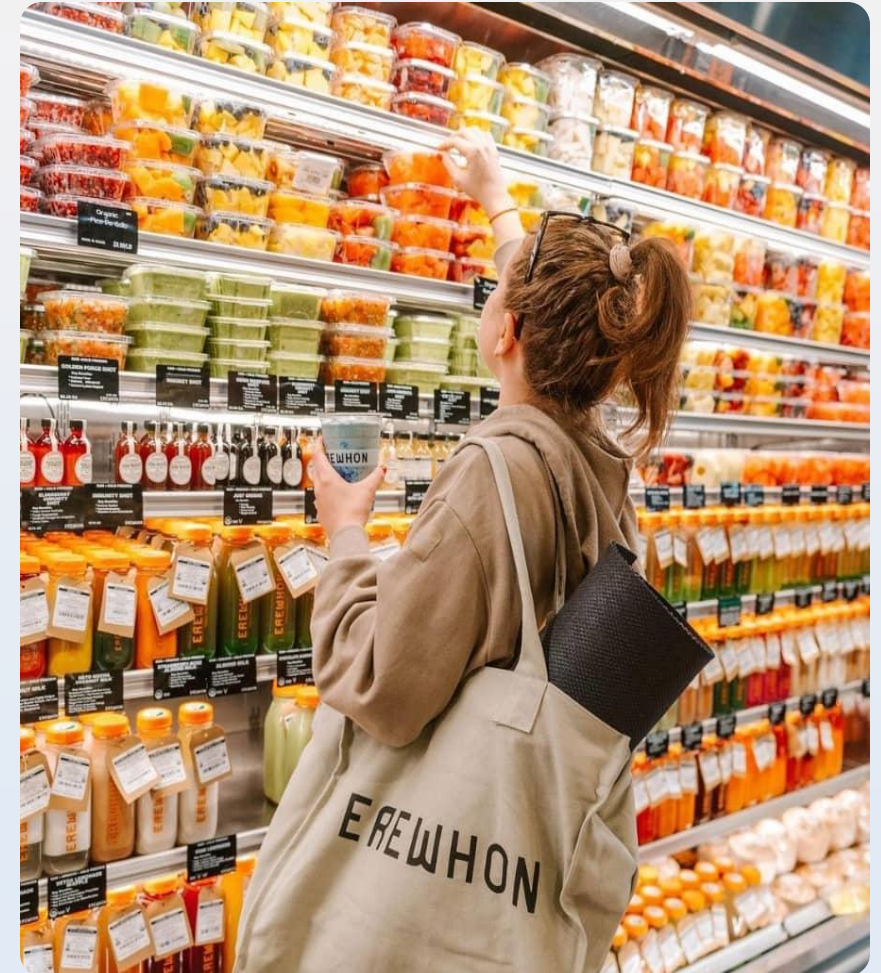
2

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-pressured consumers. “we do see signs of more caution with the trend towards larger pack sizes”
[\(Packaging Dive\)](#)

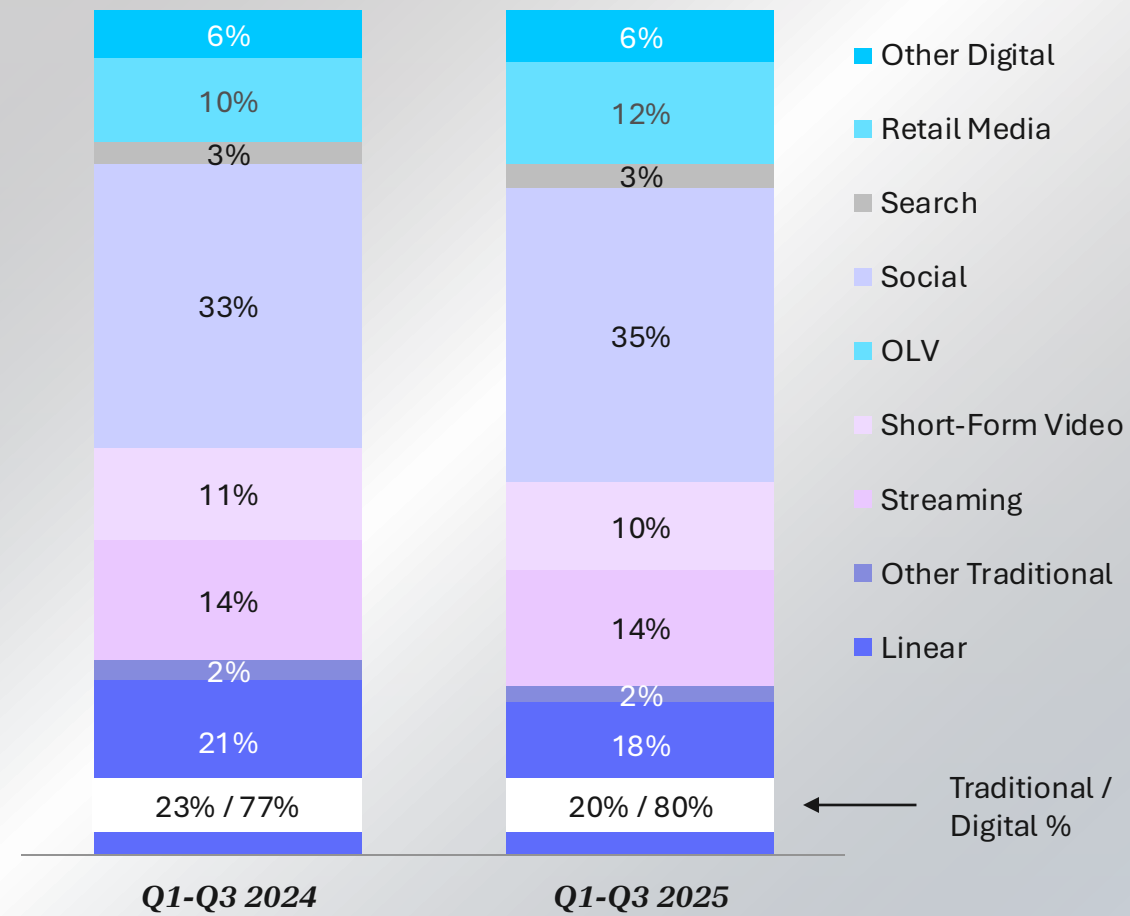
CPG |

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*



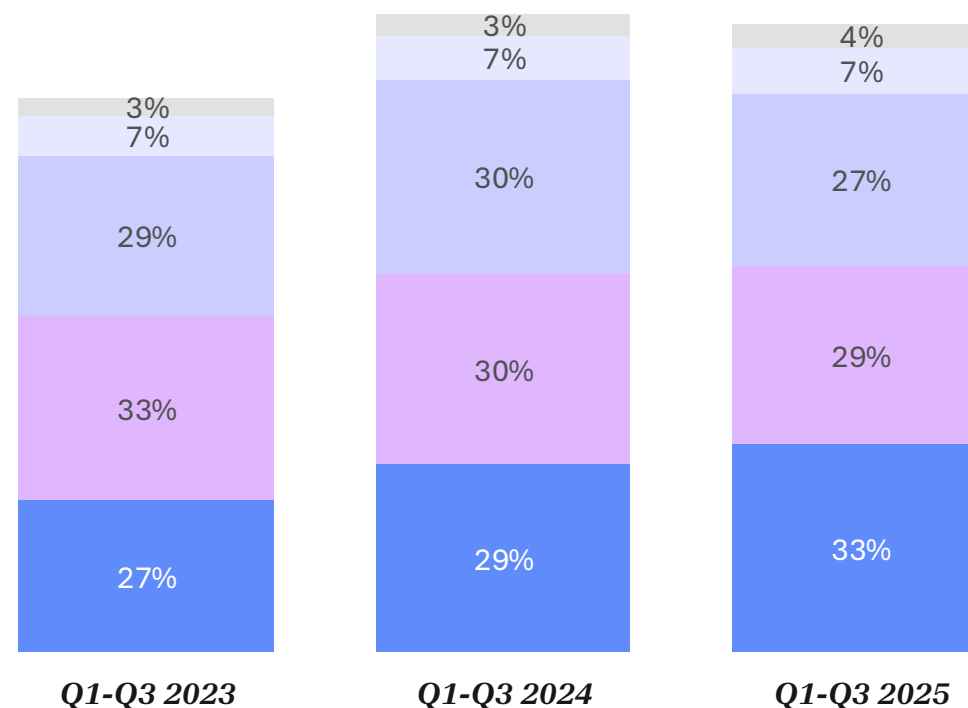
CPG

Personal Care now accounts for the largest share of marketplace spend

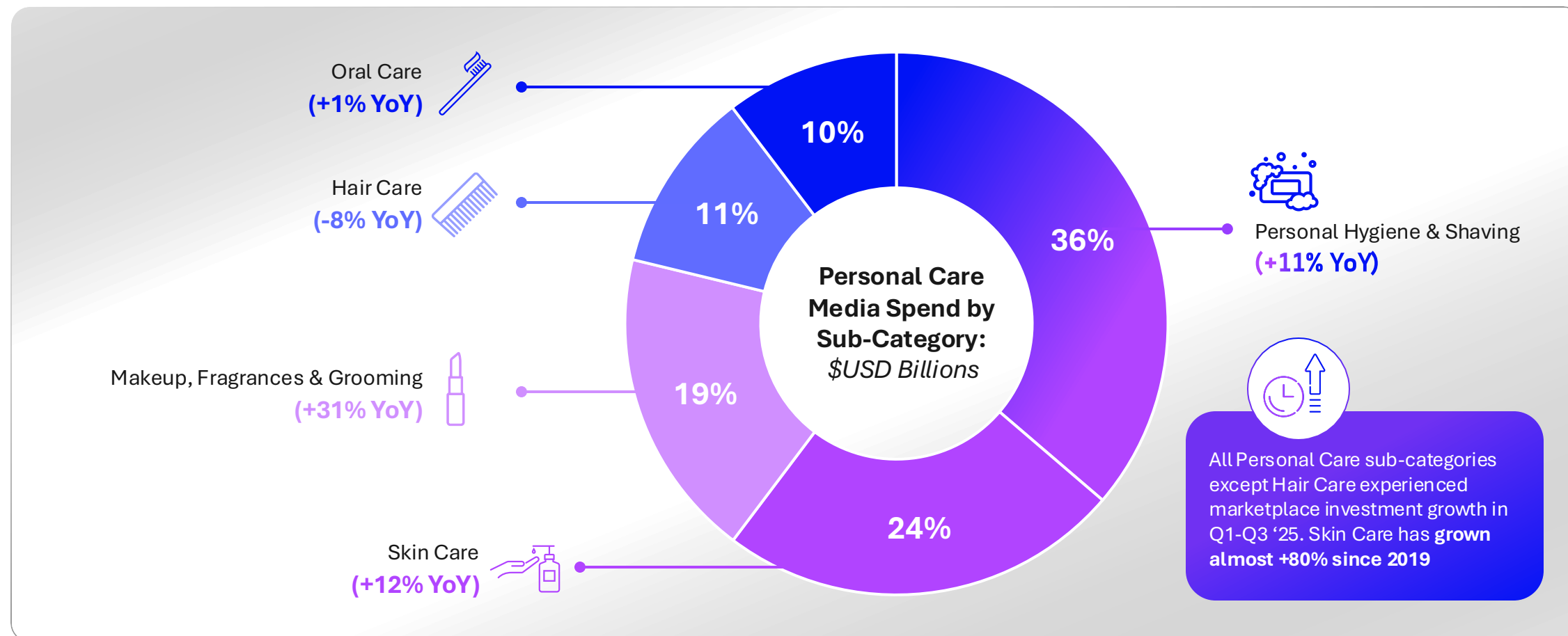
CPG media investment declines were fueled by the **Food (-6%)** and **Household Supplies (-11%)** categories, partially offset by growth from **Personal Care (+11%)**, **OTC (+2%)**, and the **VMS (+10%)**

CPG Media Spend by Subcategory \$USD Billions

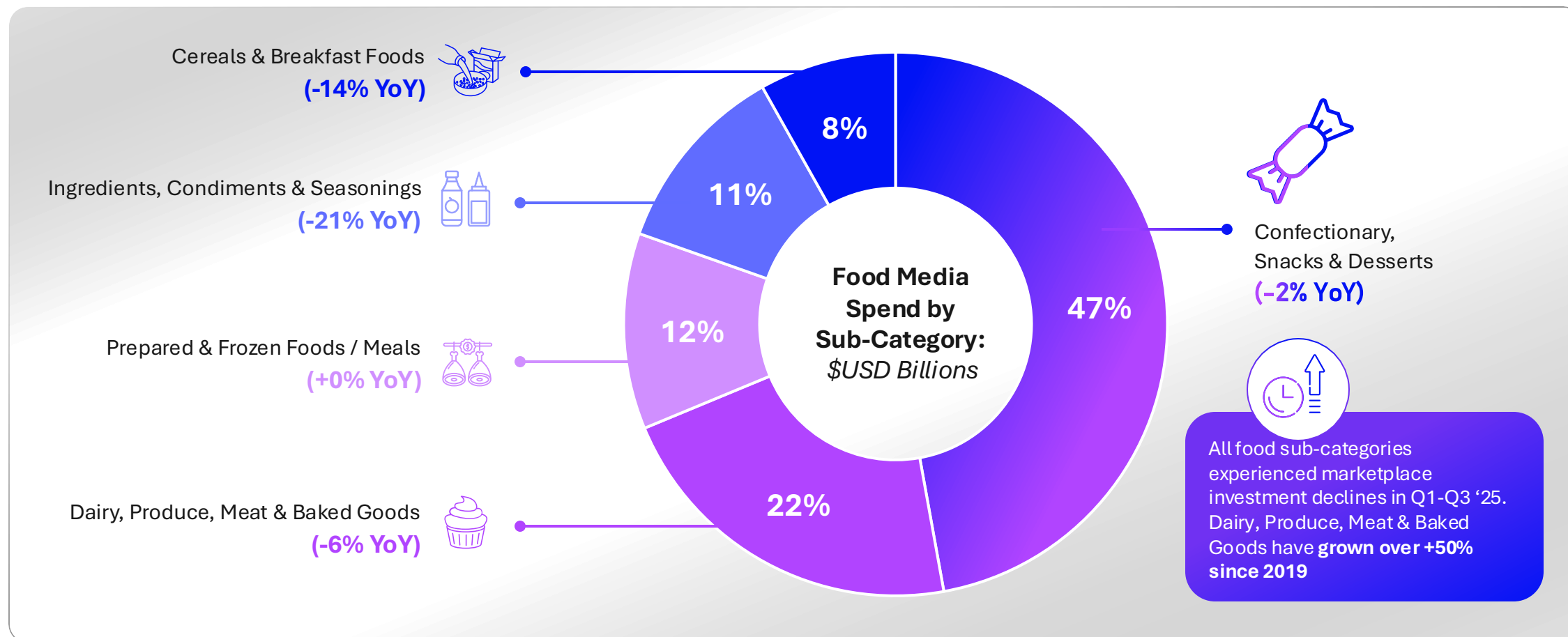
- Personal Care
- Household Supplies
- Vitamins & Supplements
- Food
- OTC Medicines & Remedies



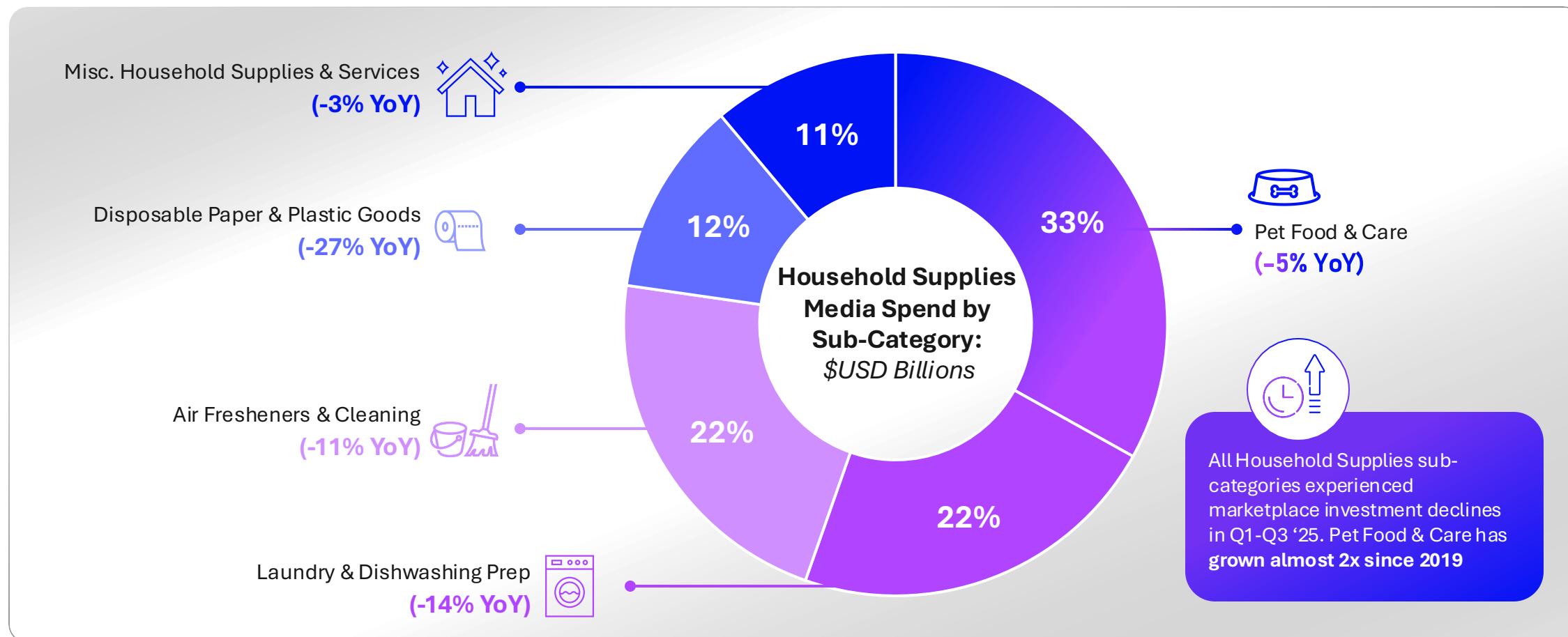
Over a third of **Personal Care Media** investment is driven by Personal Hygiene & Shaving



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



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

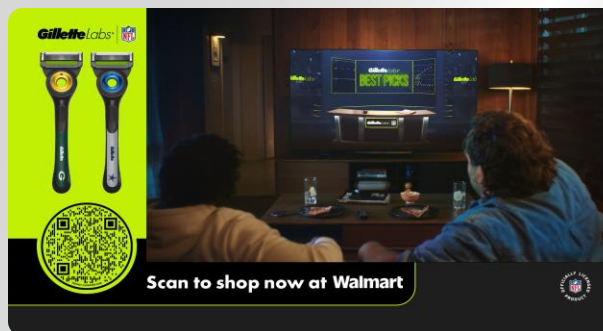


Mrs. Meyers x Bravo

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



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



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



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

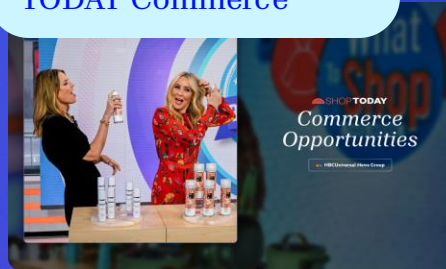
Content & Audiences to drive impact for your brand & business

2026 Opportunities On The Horizon For the CPG Category

Q1'26 Peacock Opportunities



TODAY Commerce



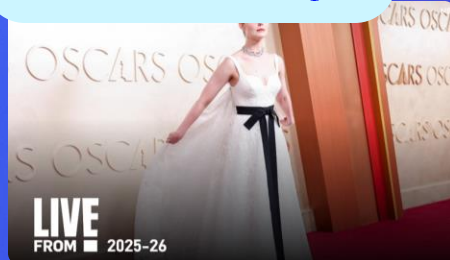
Billboard Latin Women In Music



La Casa de los Famosos, S6



Live from E! Red Carpet



Peacock Top 10 Rail

Peacock Top 10 Rail Targeting Opportunity

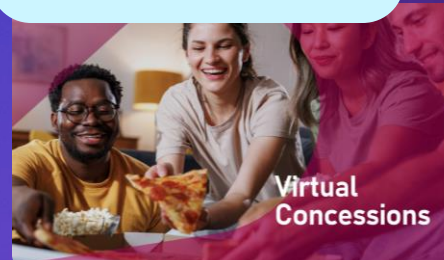
Leverage the power of Peacock's Top 10 rails—a curated, highly visible destination where viewers go to discover what's trending right now.

This exclusive sponsorship surrounds our 10 most-watched topical/new shows and movies with premium media placements, ensuring high-impact exposure and deeper brand alignment with content that viewers are actively choosing to watch.

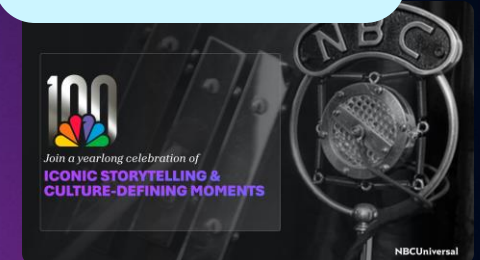
With rotational impressions across Peacock's biggest hits, advertisers can maximize reach, scale, and awareness among viewers who are deeply invested in the stories they love.



Virtual Concessions



NBCU 100



A man with short dark hair and a beard, wearing a light brown V-neck t-shirt, is standing in a grocery store aisle. He is holding a small can of food in his right hand and looking at it. In the foreground, a shopping cart with a green handle is visible, containing some green leafy vegetables. The background shows shelves stocked with various products, including boxes and bags, and a sign for 'The Greenery' is visible in the distance.

NBCUniversal

THANK YOU

NBCU CPG Category Strategy Team:

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