

NBCUniversal

CPG 2025 YEAR IN REVIEW

Industry *Highlights* & Media Trends

as of March 2026

Agenda

1

CPG Landscape

Current Landscape & FY 2025 Media Trends

2

CPG @ NBCU Update

Media Trends, Creative Showcase

3

CPG Upcoming Opportunities At NBCU



Current **CPG** Category Dynamics

CPG faces macro pressure from pricing, trade-down, and GLP-1; retail media, innovation, and health demand support growth

Headwinds



Cost-of-living pressures are **limiting pricing power** and pushing CPGs toward volume growth

Value-seeking behavior is fueling private label growth and pressuring national brands

GLP-1 adoption is reducing food intake, leading to sustained grocery spend declines

Trade volatility and tariffs create earnings drags and operating income hits

Tailwinds



Retail media meets shoppers at the point of purchase, fostering a new ecosystem

Nostalgia-driven product innovation is re-engaging lapsed consumers and driving incremental volume

Health-driven demand is opening new growth for brands that innovate beyond processed foods

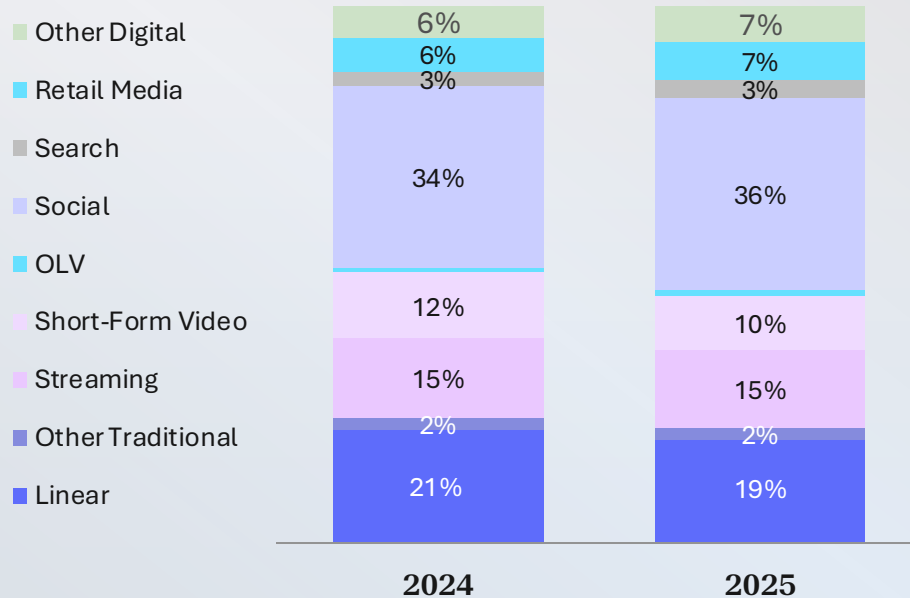
Hispanic and multicultural cohorts are driving cultural trends and taste preferences

CPG Marketplace Spend

The category continues to tap into cultural moments, but sees increased prioritization in performance-led channels

CPG Category Media Mix

Share of Spend, in %



Traditional vs. Digital % Split	2024	2025
	23% / 77%	21% / 79%

Total Spend

-5% YoY

Driven by Linear (-14%) and Short-Form Video (-22%) declines

Premium Video

34%

Of total channel mix, continuing to maintain a healthy share of spend

Retail Media

+9% YoY

As brands continue to lean more heavily into performance-driven channels

Social

36%

of total media spend (45% of digital), with overall growth remaining flat YoY, gains were seen by the Personal Care, Food, and VMS subcategories

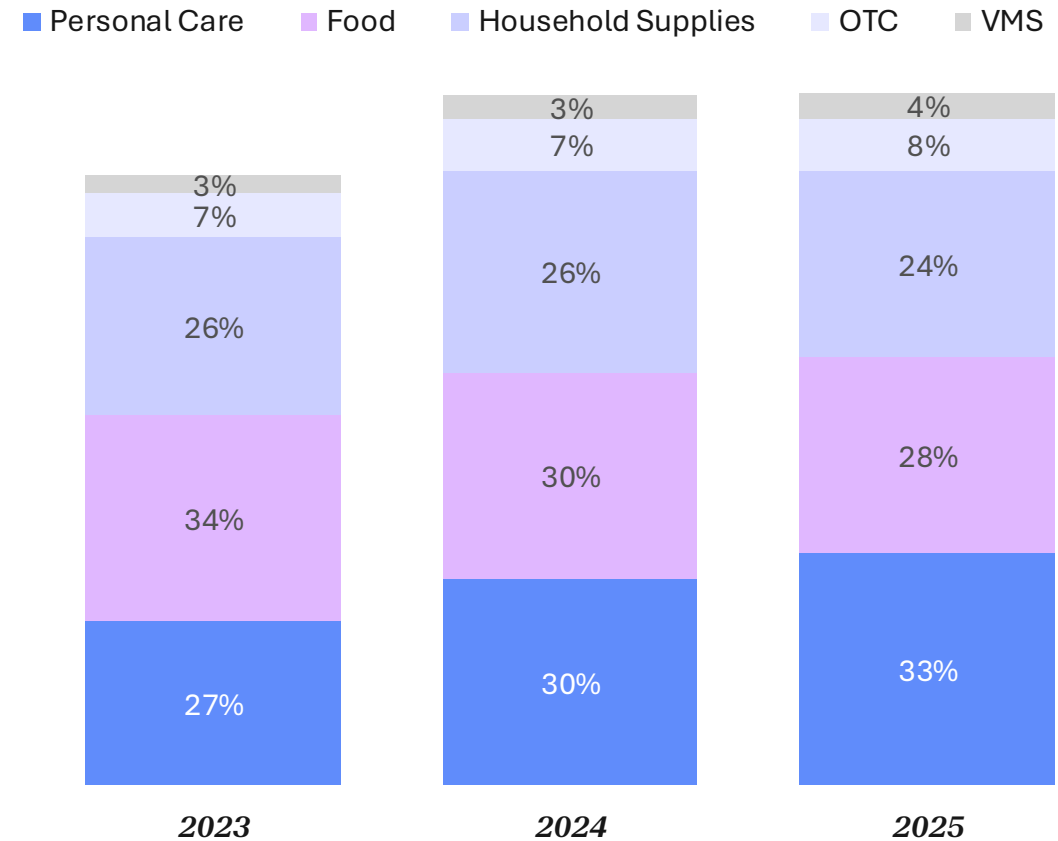
CPG

Personal Care continues to grow share of CPG spend

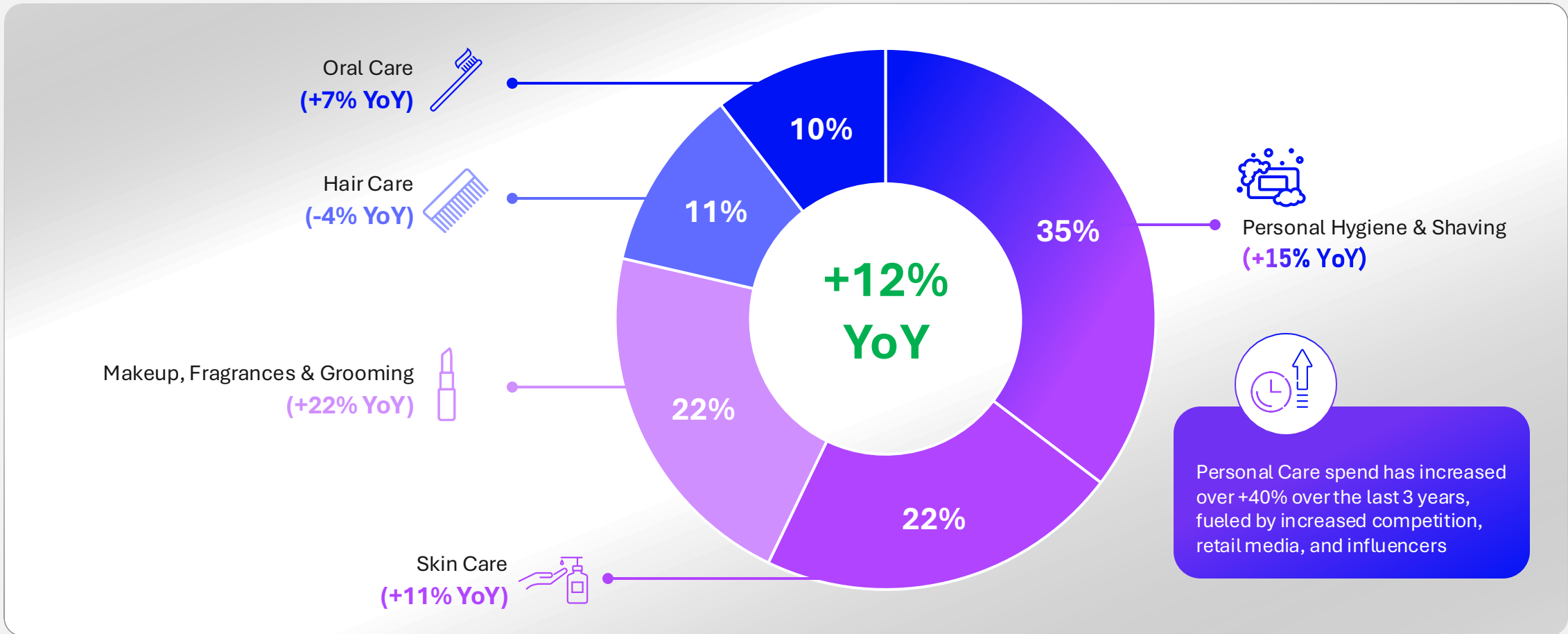
CPG media investment growth was fueled by Personal Care (+12%), the only CPG subcategory to record a double-digit increase YoY.

YoY growth levels moderated across all subcategories relative to the year prior as the category continues to battle headwinds from macroeconomic uncertainties including inflationary pressure and tariff-related impacts.

CPG Media Spend by Subcategory

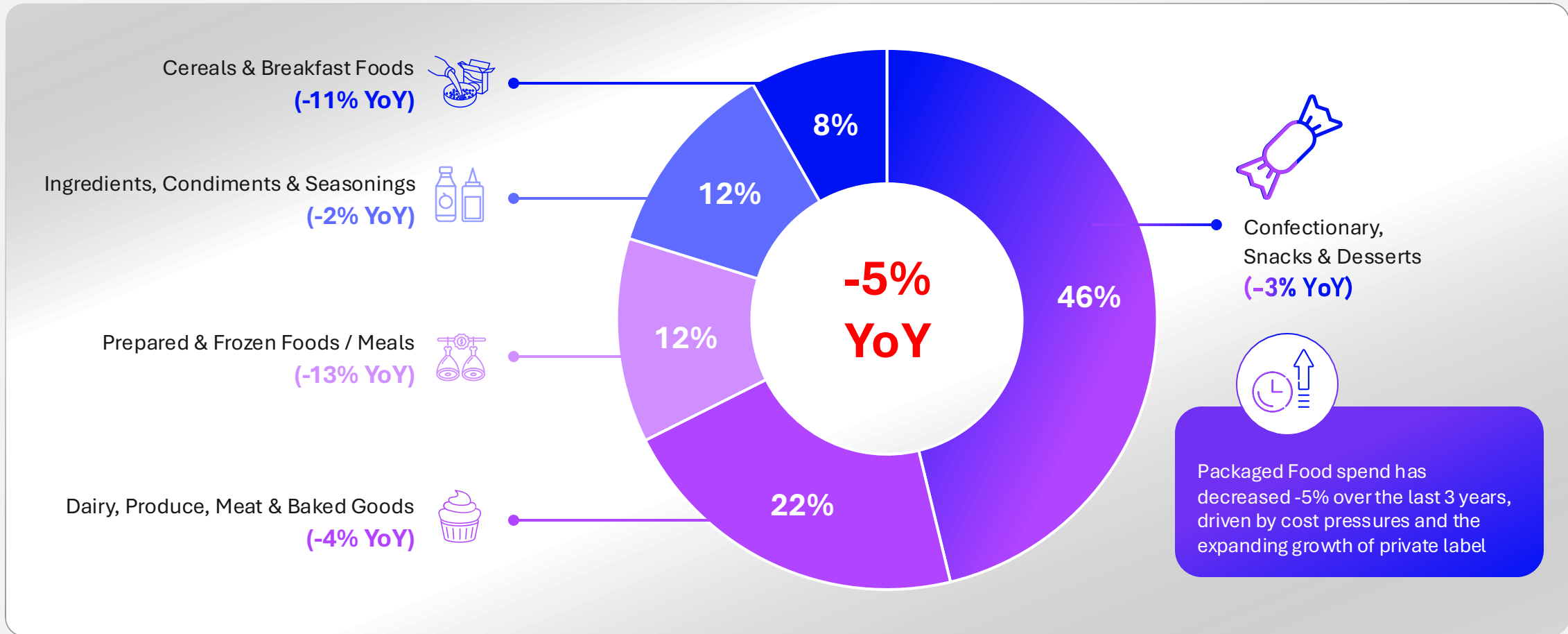


Over a third of **Personal Care Media** investment is driven by Personal Hygiene & Shaving

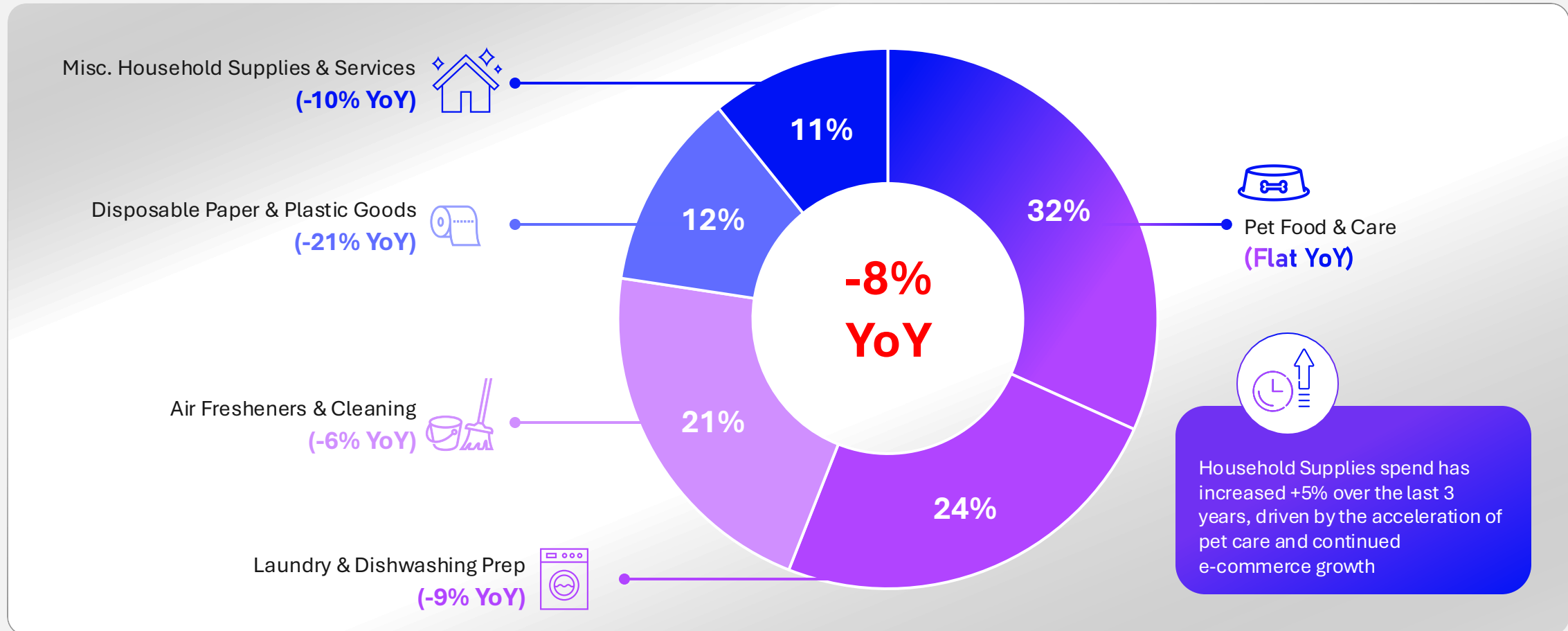


Source: SMI Core 2.0; Personal Care

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



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



2025 CPG Advertiser Spend Volume Growth by Subcategory
 \$USD Millions

The largest 2025 CPG spend growers were in the
Personal Care
 and **OTC**
 categories



CPG NBCU SPEND

2025 vs. 2024

NBCU CPG spend is outpacing the marketplace

leaning into big moments, premium environments, innovations, and creating shoppable opportunities.



ENTERTAINMENT

remains the focal point of linear investment, with Broadcast Entertainment + ELG accounting for 60% of FY 2025 Linear spend.

+21%

growth in Broadcast Entertainment YoY



RETAIL MEDIA

is a growing priority for CPG brands, leveraging 1P retailer data & targeting capabilities across NBCU premium content to drive full-funnel results.

3x

spend growth in campaigns using Retail Media data YoY



STREAMING

continues as a key area to engage audiences, accounting for 83% of all digital spend, as brands tap into advanced buying paths and seek out premium content opportunities.

+28%

in Peacock Premier

62%

of all streaming spend is in Peacock AX



AD INNOVATIONS

continue as an integral part of the category's streaming strategy – capturing attention and sparking inspiration for new recipes, new looks, and new routines.

+36%

in ad innovations YoY

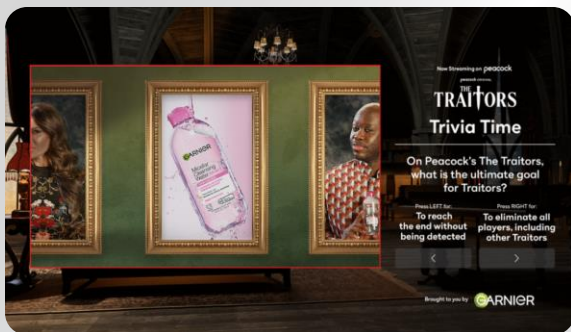
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category in total ad innovation spend volume

Creative & Innovation

Across NBCU

NBCU Spotlight



L'Oréal x The Traitors

Garnier partnered with smash hit *The Traitors* to bring a one-of-a-kind interactive fan experience to life to promote the premiere of the new season, supported by custom content featuring engaging trivia ads on Peacock.



NBCU Spotlight



Perdue x TODAY

Perdue teamed up with The Grill Dads on *TODAY* for a sponsorship and an in-show segment featuring their Air Fryer Ready Crispy Wings leading into Super Bowl Sunday.



NBCU Spotlight



CPG x Milan Virtual Concessions

Hershey's, Smartwater, and Kraft were featured in a multi-element shoppable Virtual Concession execution, powered by Instacart, running across in-program Milan-Cortina Olympic coverage and commercials.



2026 CPG Predictions

Beyond regulation & tariffs, these **5 key topics** highlight how brands are adapting to new consumer needs for value and tech-driven convenience.



The Fiber Frenzy

While protein remains a staple, fiber has become the most talked-about macronutrient as a primary tool for weight management, satiety, and metabolic health.

Driven largely by the mainstream use of GLP-1 medications, shoppers are looking for "natural" ways to maintain fullness and stabilize blood sugar.

54%

are interested in foods and beverages that are high in fiber, with Gen Z at 60% who are pioneering the "fibermaxxing" trend on social media.¹

Texture-First Snacking

Consumers are seeking "texture layering"—products that offer high-contrast experiences like crispy + creamy or chewy + airy (e.g., Dubai-style chocolate bars).

For brands, texture is the new frontier of innovation to combat "flavor boredom" among Gen Z shoppers.

69%

of consumers agree that texture influences their snack cravings, making it a key consideration for innovation and product development.²

"Newstalgia" Mixed with Global Flavor

Shoppers are prioritizing the safety of childhood flavors but through a modern, sophisticated lens, blending the comfort of the familiar with the thrill of global exploration. Nostalgia acts as an emotional anchor. However, to keep it from feeling stale, brands are remixing these memories with third-culture influences (e.g. miso-caramel).

85%

of consumers say familiar or comforting flavors most influence their choices.³

Retail Media Convergence

Retail Media Networks are moving beyond the "sponsored search" bar on site to integrating into physical stores and living rooms via Shoppable CTV.

By moving into Shoppable CTV and streaming, brands can collapse the funnel—turning a lean-back living room experience into an immediate transaction.

40%

Retail Media CTV ad spend is forecasted to grow 40% in 2026.⁴

Agentic Commerce Goes Mainstream

Consumers are finding meal inspiration via GenAI, and delegating their shopping lists to "Agentic AI"—smart assistants that compare prices, check ingredients, and auto-refill essentials.

Traditional brand loyalty is under threat of AI agent recommendations rather than human-centric packaging.

63%

of consumers agree that using AI improves the shopping experience, and 84% anticipate AI will continue to change the shopping experience.⁵

2026 Opportunities for the **CPG Category**

The Kelly Clarkson Show



NBCU 100



The Tonight Show



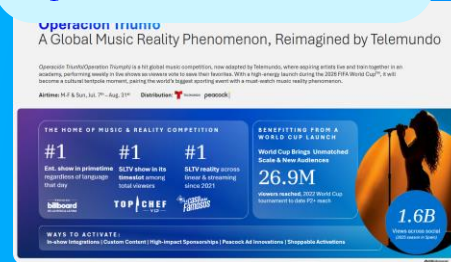
Love Island



Bravo Fan Fest



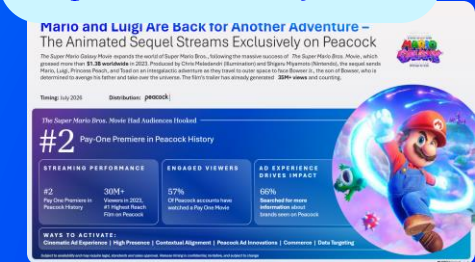
Operación Triunfo



TODAY



Super Mario Galaxy Movie





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THANK YOU

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