The Next Generation of Consumers

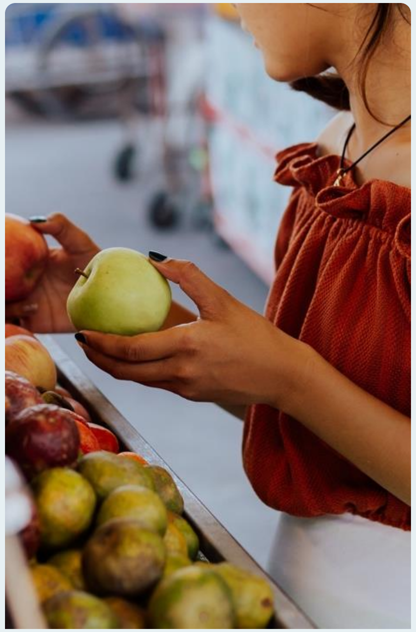
HOW MILLENNIALS & GEN Z ARE REDEFINING THE CPG INDUSTRY

Research Methodology

- **Approach overview**: *Understanding the next generation of consumer is key to seeing what's coming—as they are driving the industry into the future. In understanding the trends shaping the CPG industry; preferences with staying power, the art and science of being ready (the modern kitchen), and the media of the moment (the evolving landscape in which consumers discover and interact with CPG products, we used a wide variety of data sources to understand consumer trends. We chose to focus on younger consumers (millennials and gen z) as they continue to have growing purchasing power and will be leading the industry for the foreseeable future. This report indicates their shopping and product preferences, giving signals on what's to come.*
- *Research came from SPINS:*
  - July 2025 SPINS survey of U.S. Gen Z & Millennial shoppers (n=1,000).
  - *May 2025 SPINS survey of total U.S. Vitamin & Supplement shoppers (n = 1000).*
  - SPINS POS Data | Total US Natural Expanded & Mulo Conv (Powered by Circana) | WE 07/13/2025
  - SPINS TriLens Panel . Total US- All Outlets
  - Price Intelligence

The Next Generation Consumer

Millennials and Gen Z have a large and growing influence on the industry. In this report, SPINS takes a look at who they are, what they look for and how they are helping shape the mega trends of today and tomorrow.



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Next Generation Consumers

Inside the Minds of the Next Generation of Buyers

02

Preferences with Staying Power

A generation of consumers unlocking health & nutrition in new, personalized ways

03

Art (and Science) of Being Ready

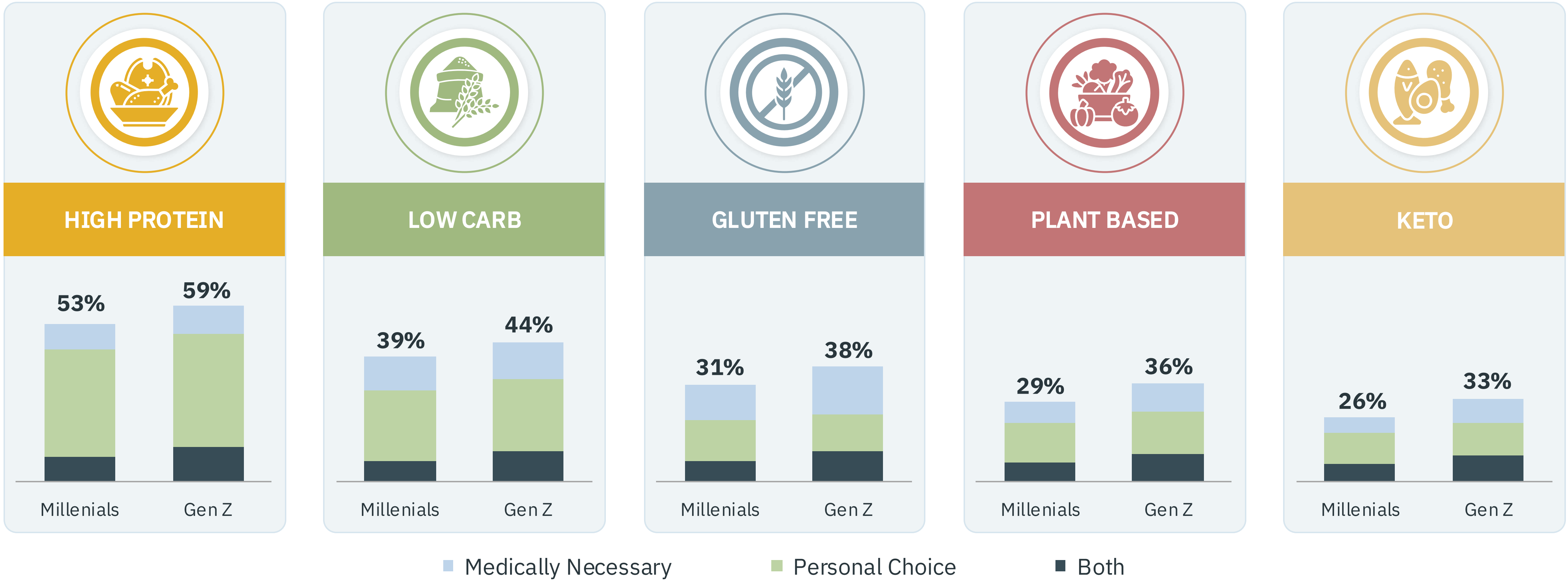
A rising imperative for sustainable innovation in the modern kitchen

Next Generation Consumers

Inside the Minds of the Next Generation of Buyers

The next generation of consumers is dialed into their diets

Nearly 40% of Millennials & Gen Z are choosing to follow one of the diets by choice



July 2025 SPINS survey of total U.S. Gen Z and Millennial shoppers aged 13-44 (n = 1000)
“Do you follow any of the following dietary restrictions?”

Consumers are cutting out unwanted ingredients from their consumption

~90% of Gen Z & Millennials are actively looking to avoid using or consuming certain ingredients

Top Ingredients Actively Avoiding

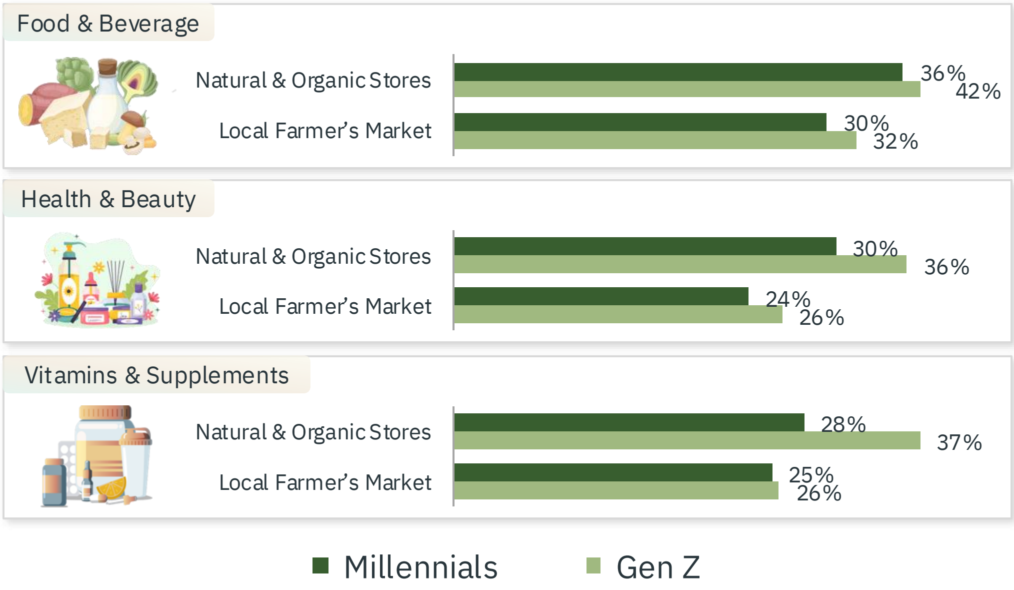
BEVERAGE	SNACK & CONFECTIONARY	BODY CARE	VMS
Artificial Sweeteners	High Fructose Corn Syrup	Synthetic Fragrance & Scent	Hormone Disruptors
High Fructose Corn Syrup	Artificial Sweeteners	Harsh Surfactants	Sugar Alcohols
Sugar Alcohols	Artificial Colors	Petroleum-Derived	Artificial Colors

July 2025 SPINS survey of total U.S. Gen Z and Millennial shoppers aged 13-44 (n = 1000)
"Within each of the following categories, are there any ingredients you are actively looking to avoid using or consuming? Select all that apply"

Consumers are choosing where they shop with intent

Next generation consumers are seeking higher quality products with ~1 in 3 consumers shopping at Natural & Organic stores and Local Farmer's Markets frequently/regularly, with Gen Z outpacing Millennials

Channels Frequently & Regularly Shopped



WEEKLY STORE HOPPING

Millennials & Gen Z are not sticking to one store for regular household items. **~80% of consumers visit 2-3 stores in a typical week**

STORE VISITS SPARK PRODUCT DISCOVERY

In-store discovery was the #1 avenue for new product discovery among Millennials (54%) and Gen Z (36%)– beating social media (44%, 29%) and online commercials (37%, 29%)

DISCOVERED ON SCREEN

Younger generations are turning to digital platforms for product discovery. **Gen Z is turning to modern platforms** like TikTok (57%) & Instagram (54%) to find new products, while **Millennials are leaning on more traditional channels** like Google (70%), Facebook (69%), & YouTube (69%)

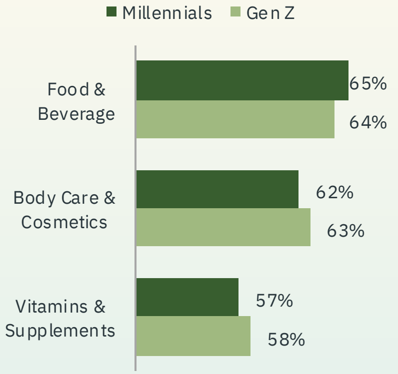
July 2025 SPINS survey of total U.S. Gen Z and Millennial shoppers aged 13-44 (n = 1000)
"How often do you shop at each of the following types of stores or channels for Food & Beverage, Health & Beauty, and Vitamins & Supplement products?" ; "In a typical week, how many different stores or markets do you visit to purchase regular or repeatable household items (e.g., groceries, cleaning supplies, toiletries)?; Which websites or social media platforms do you typically use to learn about new products? Select all that apply

Consumers are leveraging price to drive decisions

PRICE DRIVES DESTINATION

Price frequently impacts where younger consumers shop. Prices in Meat, Seafood, & Dairy are most likely to drive retailer choice for Millennials, Beverage prices for Gen Z

% Price Always or Often Influences Retailer Choice in:



#1 Category: Meat/Seafood/ Dairy

68% of Millennials' retailer choice is influenced by price.

Meat's Grocery Price Index vs 2019 is 35% higher and grew +5pts in Last 3 months alone. [1]

TOTAL SHELF PRICE TRIUMPHS

The next generation of shoppers **focuses more on total shelf price than unit price**. Millennials prioritize total shelf price even more than Gen Z

PROMOS HOOK MILLENIALS

Promotion is the #1 key driver of new product trial for Millennials. **46% of Millennials** identified sale price as a top 3 motivator

SPLURGE FOR SELF-CARE

Younger consumers lean towards private label for everyday essentials like Pantry Staples. Higher preference name brands for lifestyle and self-care products

Least Likely to Purchase Private Label: Body Care & Cosmetics; Vitamins & Supplements; Beverages

Most Likely to Purchase Private Label: Pantry Staples; Produce; Bread & Baked Goods

[1] Datasembly Grocery Price Index for Meats/Alternative Meats in week ending 8/17/2025, indexed to price from week ending 10/7/2019

July 2025 SPINS survey of total U.S. Gen Z and Millennial shoppers aged 13-44 (n = 1000)
"When deciding where to shop for a product, how often does price influence your choice of retailer?"
"Which price do you consider most important when purchasing an item in the categories below?"
"What would motivate you to try a new product? Select up to 3 reasons or factors"
"Please rank your likelihood of purchasing store brand/ private label products (e.g., Great Value, Good & Gather, Kirkland) in the following categories)"

KEY TRENDS

Preferences with Staying Power

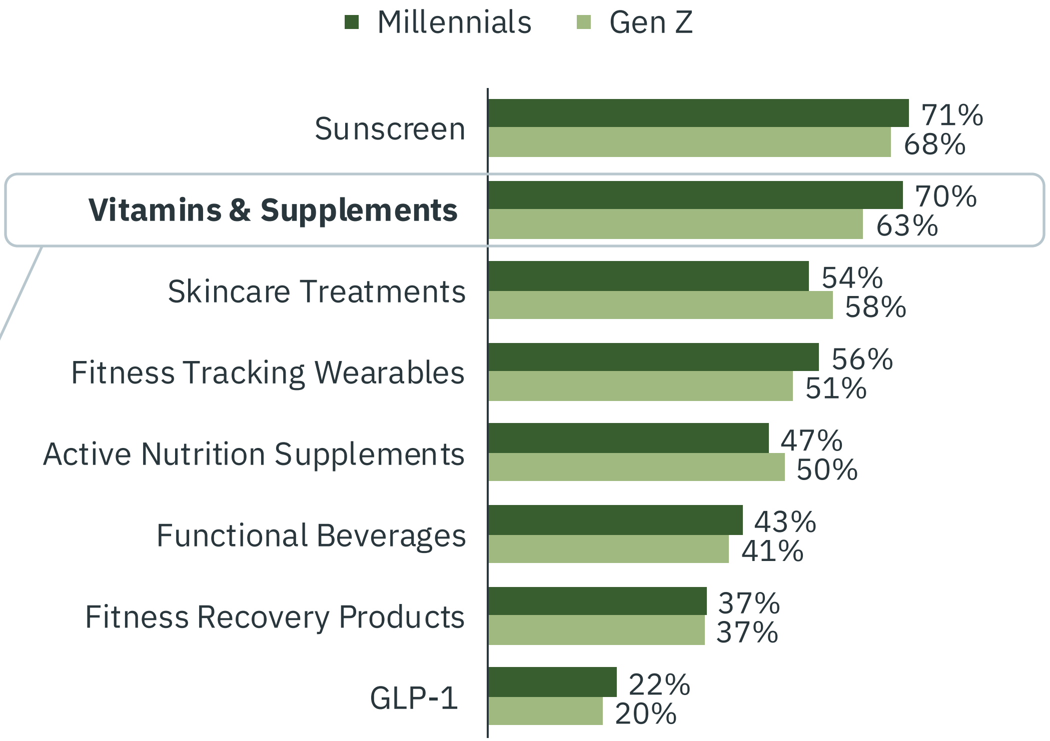
Earlier this year, SPINS' Industry Outlook detailed the **rise of personalization across health & wellness**. We continue to see this take hold, especially among **younger generations**, with supplementation & new avenues of AI accessibility rising alongside a renewed focus on nutrients.

Personalized Routines with Staying Power

Younger Shoppers are embracing Vitamins & Supplements at a *faster* rate, with +1.5% more Millennial households buying this year *(2x the growth of total households)*

Younger Generations' Personalized Health Routines

(% Currently Using/Consuming)



July 2025 SPINS survey of total U.S. Gen Z and Millennial shoppers aged 13-44 (n = 1000) "Have you used or consumed the following?"

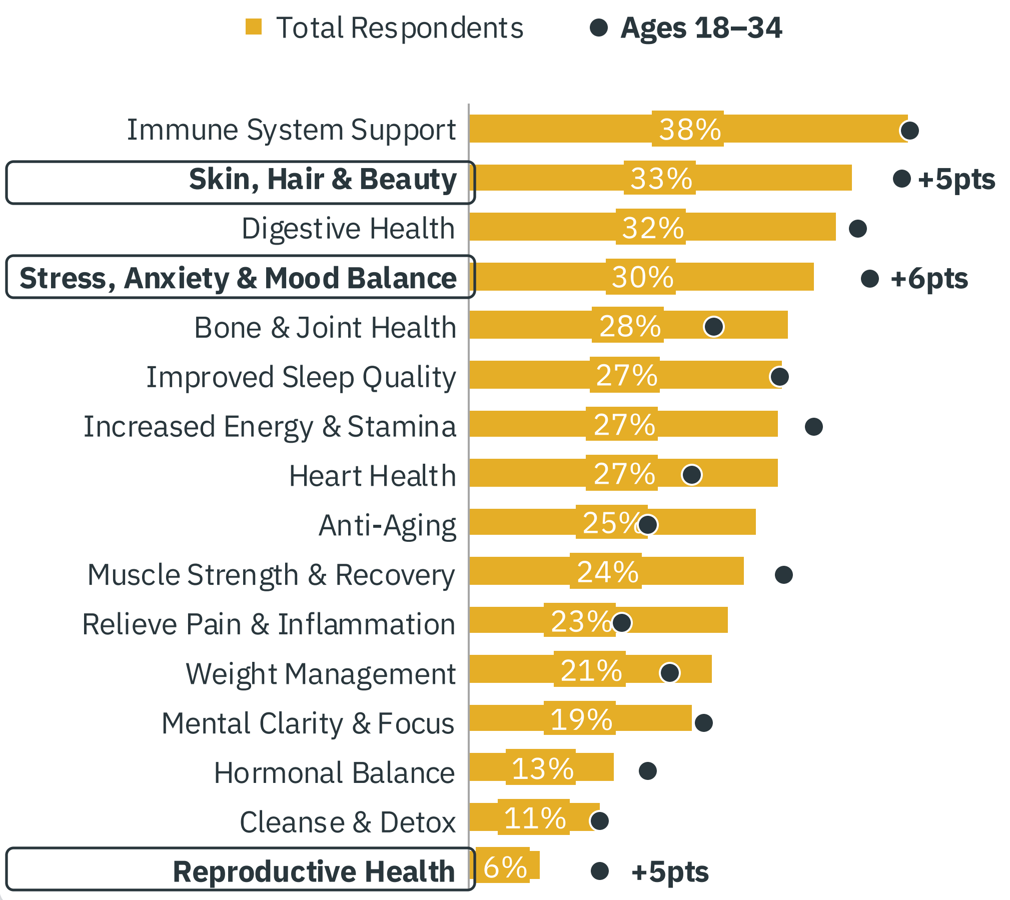
PREFERENCES WITH STAYING POWER

Health & Wellness concerns across Generations

While Immune Support is universal, other wellness goals are closely tied to life stages.

Compared to the total population, Gen Z and Millennials are less concerned with aging and managing inflammation but over-index when it comes to both **managing stress & approaching skin/haircare**. This reinforces trends we saw in McKinsey's Future of Wellness survey.[1]

Top Health Goals When Buying Supplements



May 2025 SPINS survey of total U.S. Vitamin & Supplement shoppers (n = 1000)
"What are your top health goals when choosing a supplement?"
1. Reinforced by Nov 2024 McKinsey Future of Wellness Survey, where these same 3 health goals over-indexed with Gen Z and Millennials vs total

PREFERENCES WITH STAYING POWER

Skincare Gets Personal and Generational

With Skin/Hair/Beauty as a top health goal, shoppers face an overload of options. **31% of those under 45 use social media to find new products**, heavily influencing their research journey.

Younger consumers are also reshaping skincare trends. 'Sephora tweens' are entering the industry earlier than ever. And Gen Z shoppers are adopting injectables earlier, normalizing acne patches, and focusing on makeup-based vs traditional suncare, among other shifts.

Acne treatments **+17%** *$ sales*

29% *of Gen Z and Millennials report **not** using traditional Sunscreens*

Prose

Cetaphil

SIMPLIFIED SKIN JOURNEYS

Shoppers are using data-driven quizzes, virtual skin scans, and even subscriptions for custom, dermatologist-backed regimens that make their search less overwhelming.

GEN Z NOT SHOWING THEIR AGE

Gen Z has access to medical-grade, anti-aging solutions like fillers much younger than their predecessors. Their use is more beauty-focused than it is reactive to aging.

Olly's new body care lineup

VMS GETS SKIN-DEEP

What consumers put *on and in* their bodies are increasingly intertwined. Skincare with mood-boosting benefits will keep blurring the line.

Source: July 2025 SPINS survey of total U.S. shoppers aged 13-44 (n = 1000)
SPINS POS Data | Total US Natural Expanded & Mulo Conv (Powered by Circana) | WE 07/13/2025
Photos: Prose, Cetaphil, Olly Brand websites

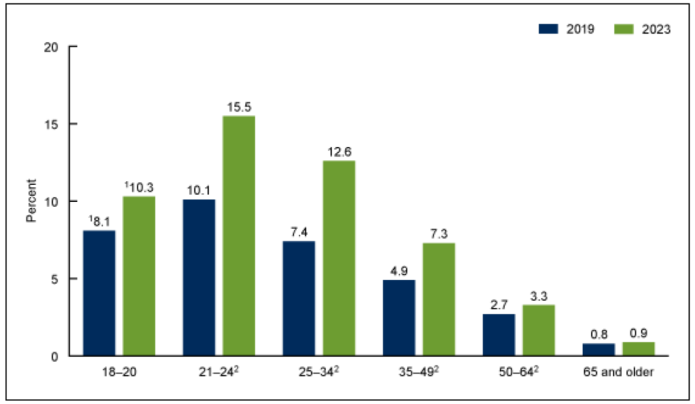
PREFERENCES WITH STAYING POWER

Managing Stress & Anxiety

Younger generations are searching for ways to manage stress and mental health, which ranks as their #3 health goal when shopping supplements. But nicotine has also become a go-to habit for younger generations across many formats.

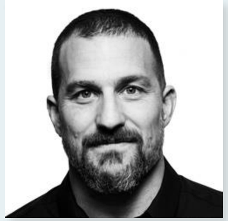
E-cigarette use has increased across the board, but especially with Millennial & Gen-Z users

Figure 3. Percentage of adults who used electronic cigarettes, by age group: United States, 2019 and 2023



SOCIAL INFLUENCE

Disposable Vapes and nicotine pouches continue trending as “zynfluencers” and other influencers show off nicotine use, despite a recent study that identified the possibility of lead exposure in vapes2



MIXED MESSAGING

The New Yorker reported that “in 2022, the wellness podcaster Andrew Huberman said that the effects of nicotine create almost ‘the optimal state for getting mental work done.’”1

AN OPPORTUNITY FOR CHANGE

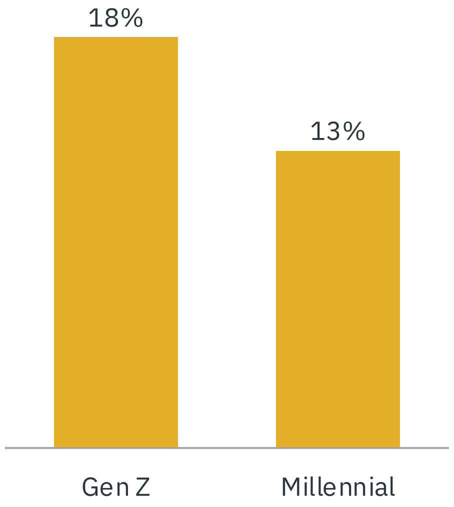
Since some younger shoppers haven’t yet adopted a health-first mindset, this leaves room for wellness-focused stress solutions like Magnesium or L-Theanine to fill the gap.

Sources: July 2025 SPINS survey of total U.S. shoppers aged 13-44 (n = 1000)
Fig. 3. Electronic cigarette use among adults in the US, 2019–2023. NCHS Data Brief, no 524. National Center for Health Statistics. 2025
https://www.newyorker.com/magazine/2025/03/17/zyn-and-the-new-nicotine-gold-rush
https://pubs.acs.org/doi/10.1021/acscentsci.5c00641

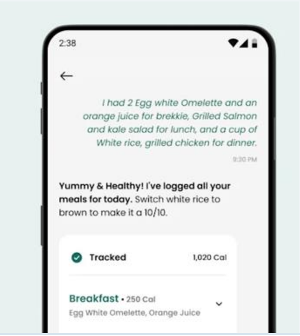
AI as the New Personal Nutritionist

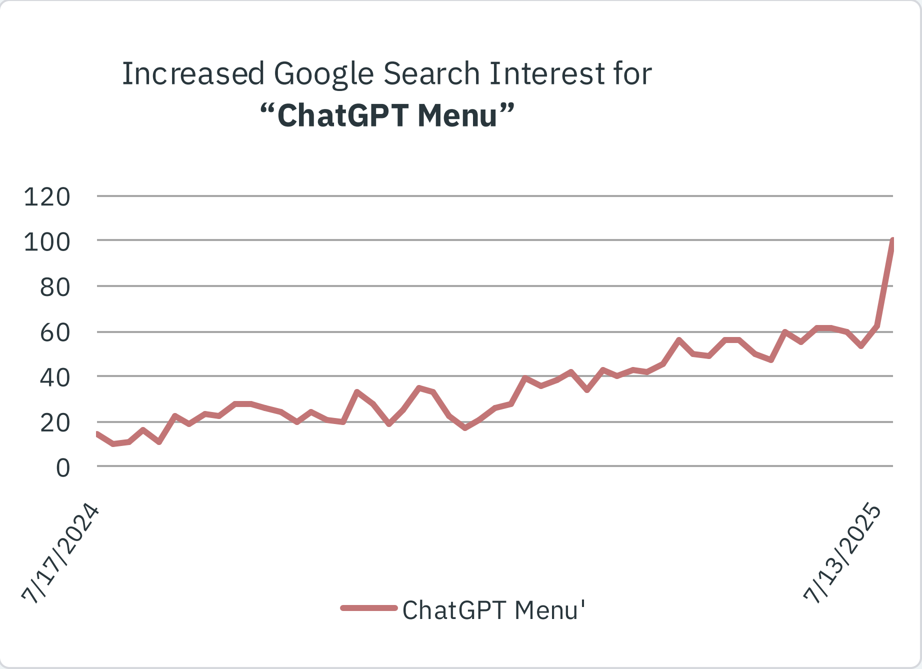
For everyday shoppers with health targets yet budgets that stop short of nutrition coaches or wearables, AI tools are increasingly becoming the go-to solution to personalize nutrition and diet choices in a meaningful, price sensitive, and easily accessible way.

% of Younger Shoppers using AI chatbot tools to learn about new products:



e.g., Healthify tracking app, powered by OpenAI





Source: July 2025 SPINS survey of total U.S. shoppers aged 13-44 (n = 1000)
Source: Google Trends, interest in search term “ChatGPT Menu” indexed over last 12 months (7/13/2025)

Key Nutrients Take Center Stage

As shoppers' personal nutrition tools evolve, they are tailoring their nutrient intake through even more of the daily foods they eat. **Foods fortified with vitamins and nutrients**, beyond just dairy and cereal, are growing in demand across aisles

Frozen Brands Breaking the Mold

More Frozen products are hitting the shelf with front-of-pack call outs for fiber, protein, and other vitamins & nutrients.

Pasta: Evolution of a Pantry Staple

Pasta brands are arriving on shelf with front-of-pack callouts for fiber & protein, increasing the nutrient density of this pantry staple

$224M | +4.4%
SS Pasta with 10 to <15G Protein

$7.3M | +59.4%
SS Pasta with 10G or More Fiber

Millennials over-index when purchasing pastas higher in fiber and protein

Dollar index	10 to <15G Protein	6 TO <10g Fiber
Millennials	143	132
Gen X	104	90
Boomers	65	80
Seniors & Retirees	37	54

Source: SPINS TriLens Panel (Powered by Circana), Total US All Outlets, 52 weeks ending 06/15/2025
Total US Natural Expanded & Mulo Conv (Powered by Circana) | WE 07/13/2025

PREFERENCES WITH STAYING POWER

Back to Protein Basics

Over half (56%) of younger shoppers report following a "high protein" diet, while 32% follow a plant-based diet. Many shoppers have shifted back to inherently nutrient dense, animal-based products to fulfill nutrition goals alongside plant proteins.

+12.6%	+11.3%	-1.3%
Animal Protein Functional Ingredient	**Plant Protein** Functional Ingredient	**Plant Based** Diet Friendly

Millennials and Gen Z over-index in spend on items with Protein functional ingredients.

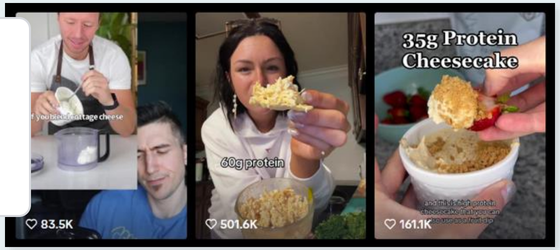
While Gen Z only makes up 4% of buyers, they spend 17% more than Gen X (31% buyer share).

Inherently High Protein Growth

$1.9B | +20.3%	Cottage Cheese
$11.8B | +12.1%	Yogurt
$14.8B | +53.6%	Eggs
$15B | +12.3%	Fresh Meat, Poultry, Seafood
$3.2B | +15.3%	Jerky & Meat Snacks
NEW | NEW	RTE Packaged Meat

Tik Tok

Viral recipes abound as users share ways to maximize taste & nutrient density



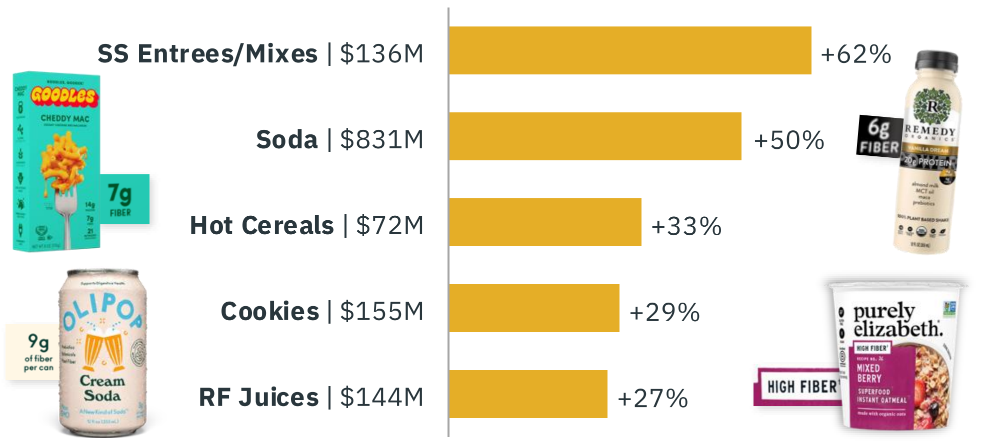
'cottage cheese protein' top video results 7/31/25

Total US Natural Expanded & Mulo Conv (Powered by Circana) | WE 07/13/2025
SPINS TriLens Panel (Powered by Circana), Total US All Outlets, 52 weeks ending 06/15/2025
Source: July 2025 SPINS survey of total U.S. shoppers aged 13-44 (n = 1000)

Next in Nutrient Density

Beyond protein's satiety-boosting sidekick, Fiber is having its own renaissance. Consumers are focusing on "**fibermaxxing**" for its digestion benefits (a benefit that ranks #3 in shoppers' overall supplement goals).

Growth in 6-9g Fiber



Supplementing Nutrient Needs *Off* the Plate

$7.1B | +12.3% Protein & Meal Replacements

$813M | +13.6% Minerals

$254M | +12.7% Digestive Aids & Enzymes Other

$123M | +24.6% Green Food Supplements

Whether via personal research or doctors' suggestion, consumers are using VMS routines to support nutrient goals and gaps on their plates.

Source: July 2025 SPINS survey of total U.S. shoppers aged 13-44 (n = 1000)
Total US Natural Expanded & MULO Channels (Powered by Circana) | WE 07/13/2025

Consumers' supplement focuses are ever-evolving

Building on our yearly report, we can see how supplement needs have shifted and who the shoppers are driving them, helping unlock continued cross-over potential and formulation considerations

What's Breaking Through in Supplements

Hydration
+$85M | +12.7%

- Driven by More Buyers, Repeats, Trips
- Gen Z & Millennials
- Multi-Minerals, Potassium

Performance
+$56M | +6.8%

- Driven by More Buyers & Repeats
- Gen Z & Millennials
- Protein – Whey, Creatine

Mood Support
+$54M | +18.2%

- Driven by More Buyers, Repeats, Trips
- Millennials & Gen X
- Ashwagandha, Magnesium

Heart Health ▲ *vs YA*
+$41M | +5.4%

- Driven by Increased Trips
- Boomers, Seniors, Retirees
- Beet Root, Fish Oil

Reproductive ▲ *vs YA*
+$25M | +15.4%

- Driven by Increased Trips
- Millennials & Gen X
- Probiotics, Vitamin C

Source: Dollar sales trends for SPINS Natural Channel, SPINS Conventional Channel (powered by Circana) data 52 Weeks Ending 7.13.25 Vitamins & Supplements Department,

Consumers’ supplement focuses are ever-shifting

In addition, knowing what shoppers are looking for outside of supplements today helps us understand what’s truly a declining trend vs where needs are being met elsewhere in the store (or outside of it)

What’s Fading in Supplements?

- **Cold & Flu**
- Weight Loss
- Sleep Support
- Bone Health
- **Digestive Health**

Trends That Have *Shifted* to Beverage

- **Digestive Health**
- Energy Support
- Performance
- Mood Support
- **Cold & Flu**

Other Shifting Behaviors

- *Weight Loss:* Shift from VMS → medical solutions like GLP-1s
- *Sleep Support:* Shift within VMS from Melatonin → more holistic solutions like Magnesium
- *Bone Health: Calcium-rich food sources like Dairy Milk & Yogurt trending once again*

Source: SPINS Natural Channel, SPINS Conventional Channel (powered by Circana) data 52 Weeks Ending 7.13.25 Vitamins & Supplements Department, Custom Beverage Definition

The Art (and Science) of Being Ready

A rising imperative for sustainable innovation in the modern kitchen

Reinventing the Modern Kitchen

Global flavors and unique textures are reshaping how people think about food, fueling curiosity and experimentation at home. What was once a pantry built on familiar staples is now evolving to include bold sauces, spice blends, international ingredients, and novel formats. The modern kitchen is no longer just about convenience or tradition—it's a space for discovery, where consumers mix global inspiration with everyday cooking to create fresh, adventurous meals.

Salt

Salt has emerged from a seasoning tool to an appreciated strategic ingredient for depth and complexity

Fat

Attitudes have pivoted to view fat as a source of both flavor and function, broadening range of accepted and preferred cooking mediums.

Acid

Acidic flavors have entered new occasions and culinary practices, reinforcing desire for brightness.

Heat

Consumers are pushing the limits of spiciness and have an appetite for intensely adventurous and globally inspired eating experiences.

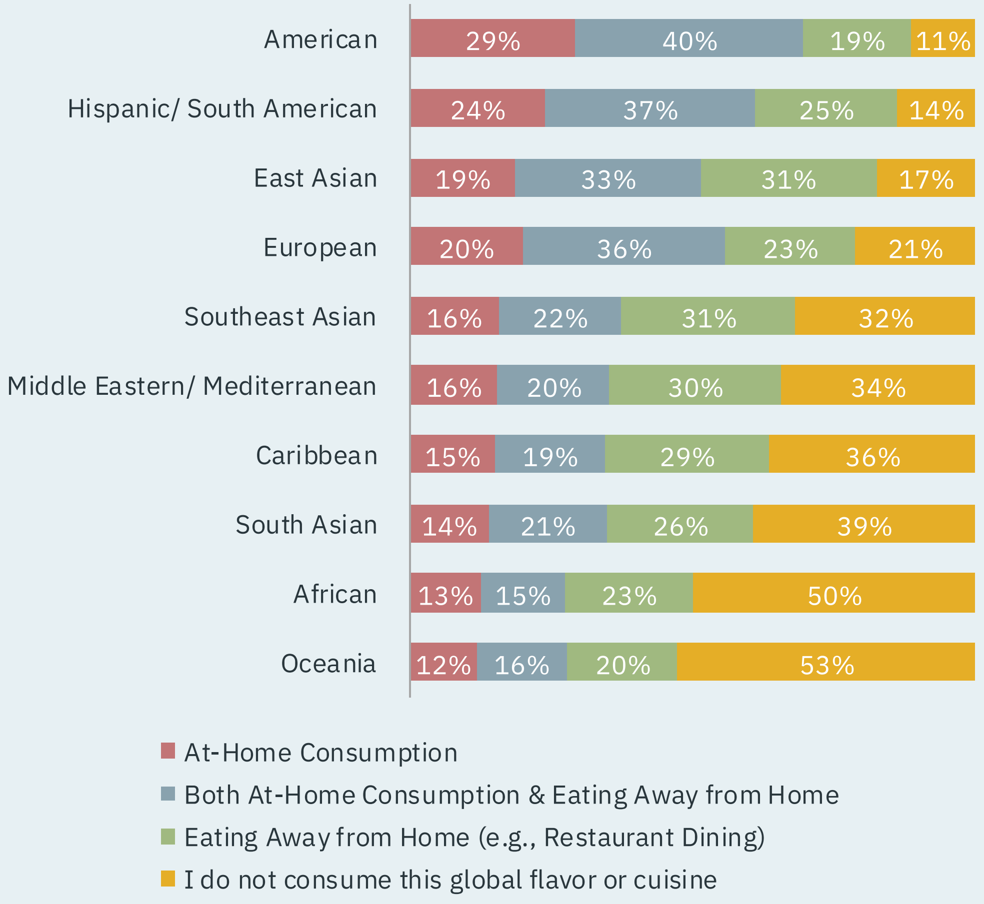
Global Inspiration Unlocks New Possibilities

Consumers are increasingly seeking out bold and globally inspired food experiences whether on a night out or in the comfort of their home. Merging new and unique flavors with preferred flavor and texture combinations represents an opportunity to tap into future growth that align with shifting consumer preferences.

% Flavor and Texture Preference Combinations in Snacking Categories for Millennial and Gen Z respondents

Category	Chewy	Creamy	Crunchy	Smooth
Sweet	20%	13%	23%	10%
Tangy / Sour	14%	13%	14%	12%
Savory	16%	12%	24%	15%
Fruity	19%	19%	17%	14%
Spicy	13%	9%	20%	9%

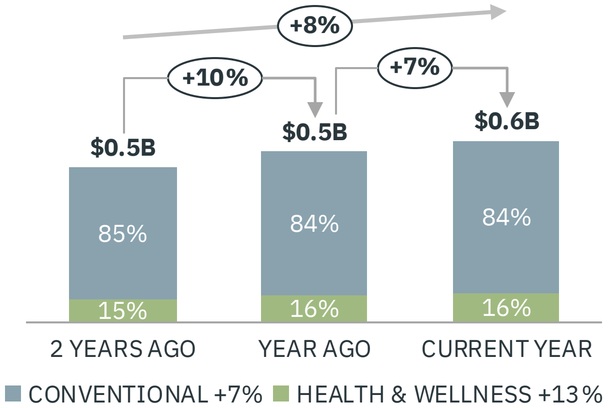
% of Consumption Preference by Global Flavor/Cuisine for Millennial and Gen Z respondents



Source: July 2025 SPINS Survey (Flavor and Texture Preferences; Global Flavor consumption)

The Ideal Assortment

SALT DOLLAR SALES & CAGR BY POSITIONING



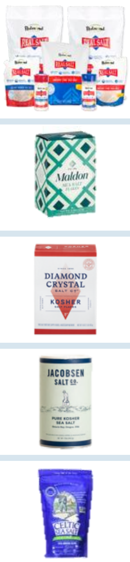
Everyday Elevation

Finishing Flaky

Cooking Prep

Regional Specialty

Mineral Supplement



CATEGORY REDEFINITION

Hydration continues to drive use of salt as an ideal electrolyte source and base

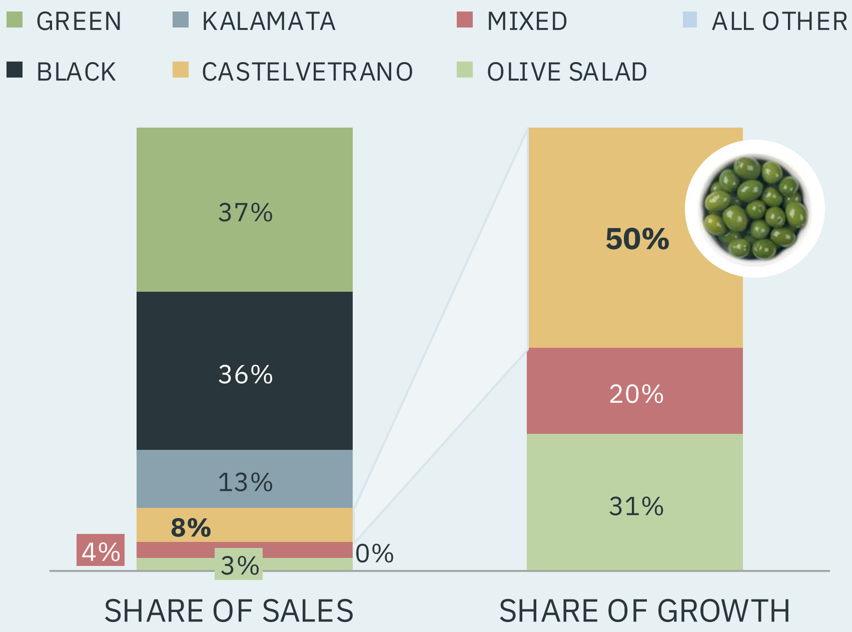
141 GENERATION Z	**133** YOUNG MILLENNIAL	**130** OLDER MILLENNIAL

Hydration & Electrolyte Buyer Index by Generation

Bring on the Brine

Consumers are elevating their olive inclusions

OLIVE DOLLAR SALES & GROWTH



GROWTH THROUGH EXPERIENCE

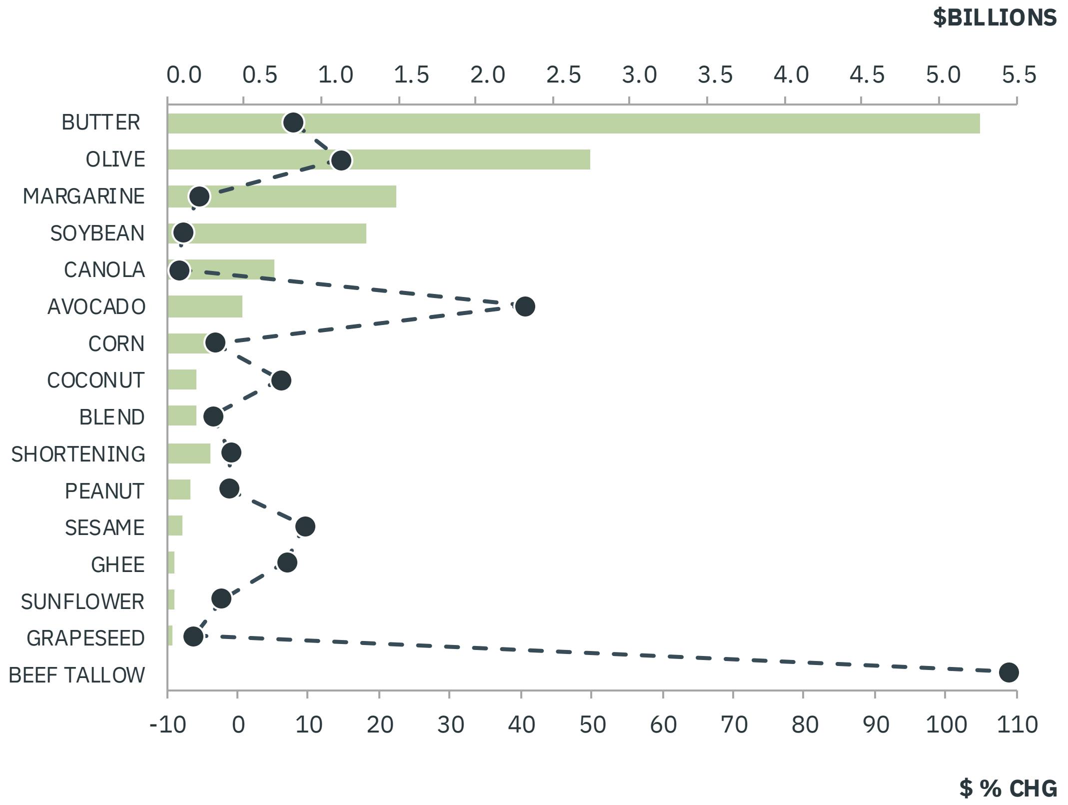
Growth of Castelvetrano Olives came from Seniors & Retirees are making 52% more frequent trips increasing unit purchases per buyer 101%

Source: SPINS Satori. 52 Weeks ending 7.13.2025. Total US Natural Expanded and MULO (Powered by Circana). SPINS TriLens Panel (Powered by Circana) . Total US- All Outlets 52 Weeks Ending 7.13.2025

Broadened Cooking Mediums & Product Bases

Fats are bringing unique flavor and differing textural formats to align to meal goals

OIL TYPES AND FAT SOURCES $MM AND $ % CHG

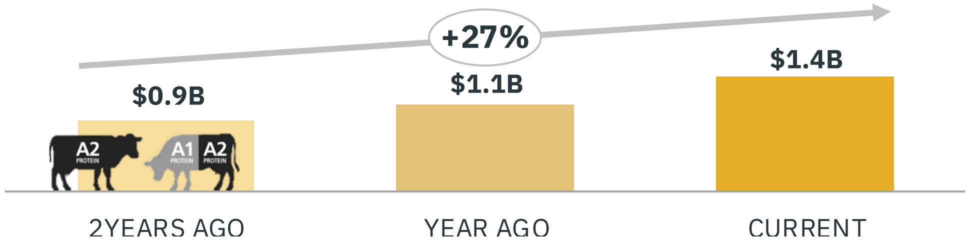


Source: SPINS Satori. 52 Weeks ending 7.13.2025. Total US Natural Expanded and MULO (Powered by Circana).

ART (AND SCIENCE) OF BEING READY

Reclaiming Nutritional Value

Dairy's comeback is fueled by clean-label protein, indulgent innovation, and a renewed embrace of full-fat varieties—celebrated not as a guilty pleasure, but as a source of rich flavor, satiety, and balanced nutrition.



ULTRAFILTERED & A2 MILK

+5pts

Cottage Cheese
3 YR HH Penetration Growth

NATURALLY POSITIONED MILK
BUYER INDEX

+41

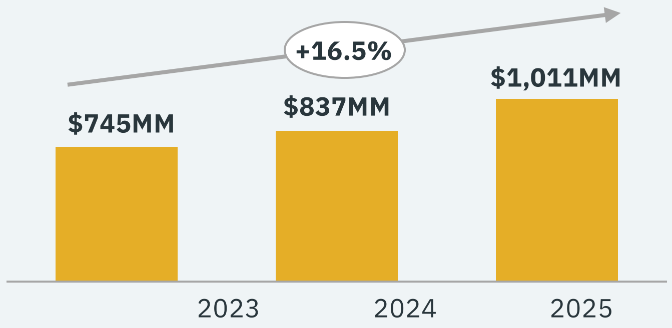
In households with children compared to those without

Source: SPINS Satori. 52 Weeks ending 7.13.2025. Total US Natural Expanded and MULO (Powered by Circana).
SPINS TriLens Panel (Powered by Circana) . Total US- All Outlets 52 Weeks Ending 7.13.2025

Acidic Flavors & Expanding Applications

FERMENTATION EFFECT

Sourdough Bread 3-YR Growth ($MM)

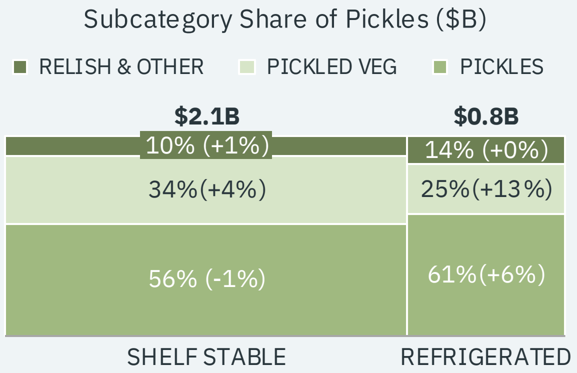


Pre/probiotics and digestive appeals continues to be a powerful platform for product success

PICKLED PERSISTENCE

Perimeter placement continues to be a space for premiumization of staples.

+59% *RF Pickles Vs. SS Pickles PPV*



DIGESTIVE HEALTH PREFERENCE

DOLLAR INDEX BY GENERATION

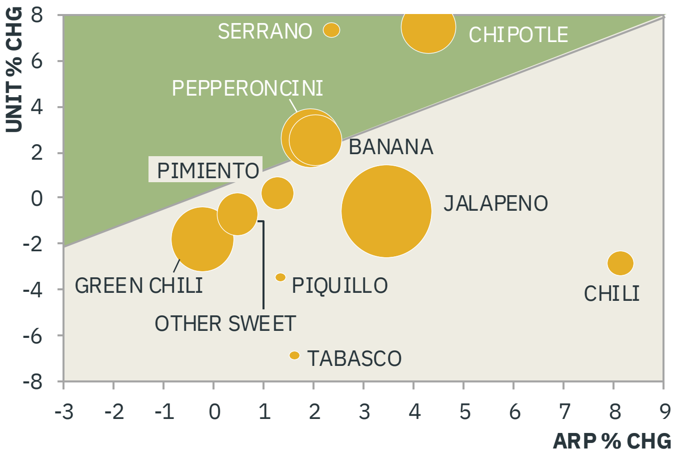
GENERATION	GROCERY	REFRIGERATED	VITAMINS & SUPPLEMENTS
Generation Z	175	61	76
Millennials	145	127	67
Generation X	105	107	92
Boomers	56	79	133
Seniors and Retirees	20	49	162

Source: SPINS Satori. Sourdough coded by product description 52 Weeks ending 7.13.2025. Total US Natural Expanded and MULO (Powered by Circana). SPINS TriLens Panel (Powered by Circana). Total US - All Outlets 52 Weeks Ending 7.13.2025

Heat : Mainstreaming of the Next Wave

SHELF STABLE PEPPER GROWTH

UNIT % CHG AND ARP % CHG



Alternative regional chilis and smoke forward chipotle offering differentiation

150

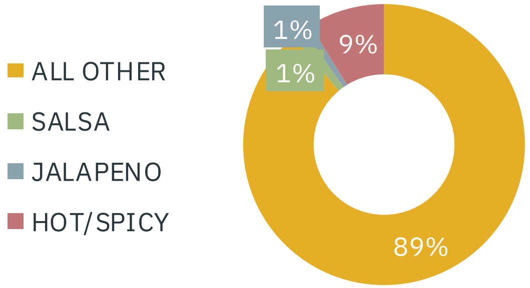
CHILI CRISP DOLLAR INDEX

FOR MILLENIALS

+93%

SAMBAL HOT SAUCE $ % CHG

REACHING $4MM IN SALES



TORTILLA & CORN CHIPS

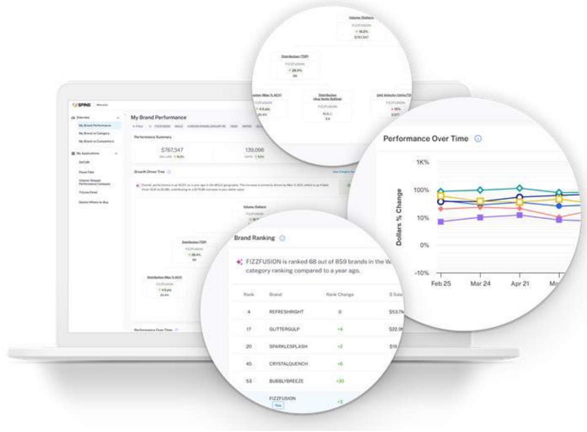
$ SHARE BY FLAVOR

+52%

GOCHUJANG $ % CHG

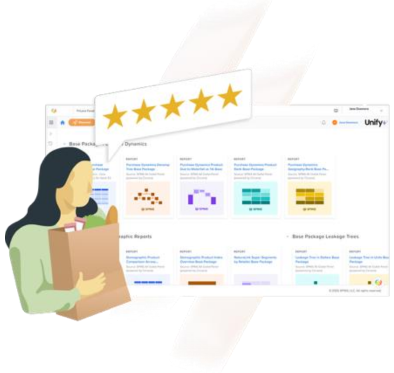
REACHING $8MM IN SALES

Explore your brand’s interaction with the next generation of consumers



Access complete market sales insights with SPINS Insights

- Complete sales performance for your most important accounts
- Segment performance by hundreds of product attributes, like sweeteners, scents, flavors, label claims and more



Identify your Gen Z (and beyond) buyers with SPINS TriLens Panel

- Visualize what is driving your shopper’s decisions
- Dial into your closest competitors and a more precise view of shelf with intelligent positioning attributes

Create your own survey and advanced analytics with SPINS Growth Consulting

- Pinpoint new consumer trends, motivations and perceptions with custom surveys
- Inform innovation and positioning

For more information contact us at
growth@spins.com