555 Reasons to Rethink Health & Wellness

Understand health & wellness better than before

July 2025

NIQ

Important Housekeeping Notes

This webinar is being recorded

Recording will be emailed out after the webinar!

NielsenIQ

Have you downloaded NIQ's '*Made in Canada'* series?

Made in Canada:

- How are Canadians responding to U.S. Tariffs?
- Tariffs, Tensions, and the Rise of the "Buy Canadian" Consumer
- The Retail Ripple of Patriotic Sentiment

Agenda

- **Welcome**
  - Isabel Morales
- **Going Deep**
  - What is going on in Health & Wellness in our industry?
    - State of Health & Wellness
    - Your New Innovation Engine
    - Activating Health and Wellness
- **Questions & Answers**

Next: Samantha Doyle

A view of the State of Canadians' Health & Wellness

Navigating the shift from health trends to lifestyle choices

Presented by Samantha Doyle, Director, Insights

July 2025

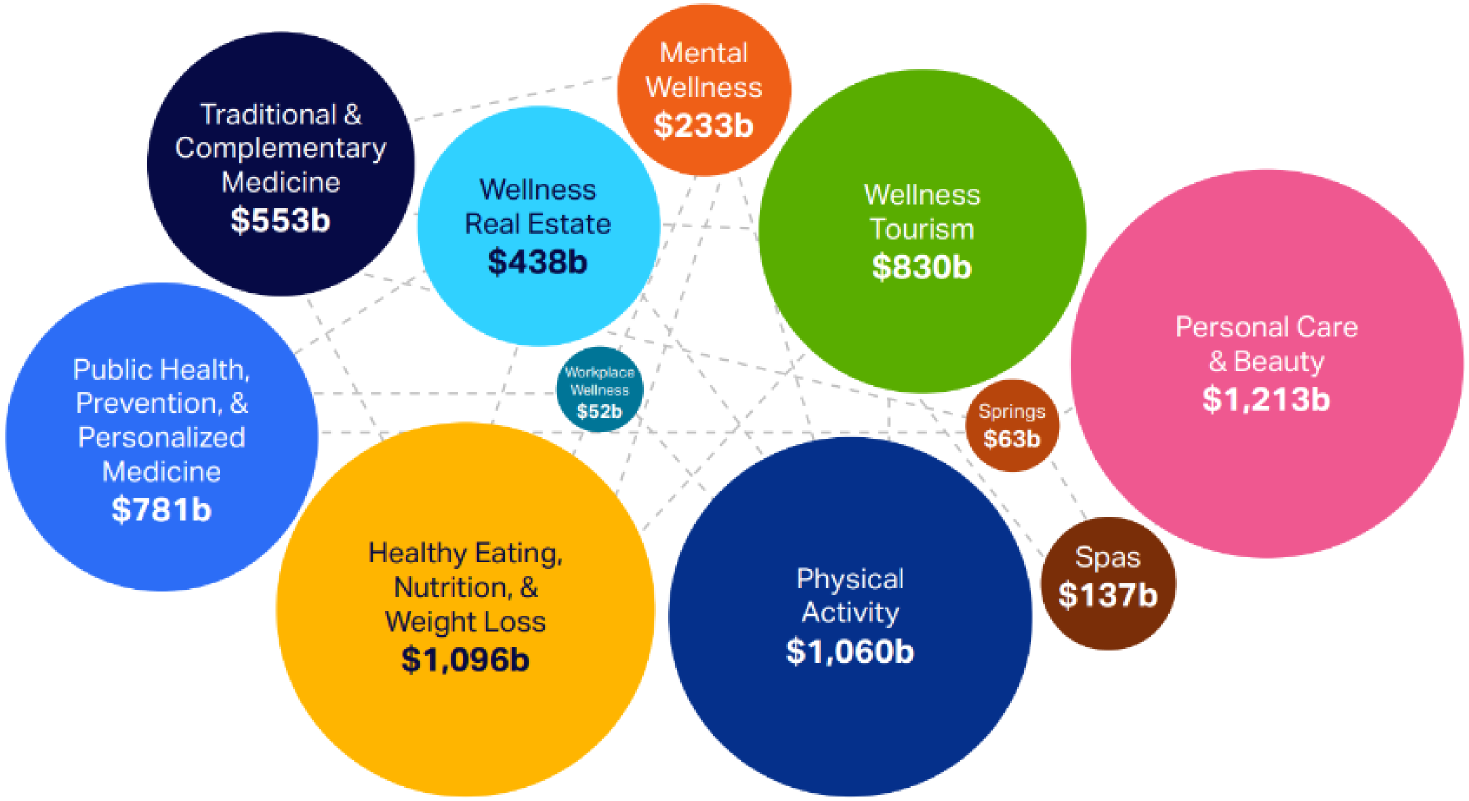
NIQ

Health & wellness is becoming a constant presence in consumers' thinking and daily routines

In 2023, the global wellness economy stood at $6.3 trillion (USD). Today, it is 26% larger than pre-pandemic. By 2028, it will reach nearly $9 trillion.

Global Wellness Economy

$6.3 trillion in 2023



Note: Numbers do not add due to overlap in sectors.
Source: Global Wellness Institute

NIQ

85%

of Canadians think about their overall health & wellness regularly

81% Global

Source: NIQ's 2025 Global Health & Wellness survey – Canadian figures

19%

of Canadians say they are happy with their current H&W and don't feel the need to actively improve it

52%

of Canadians say they are taking active steps to improve their H&W

26%

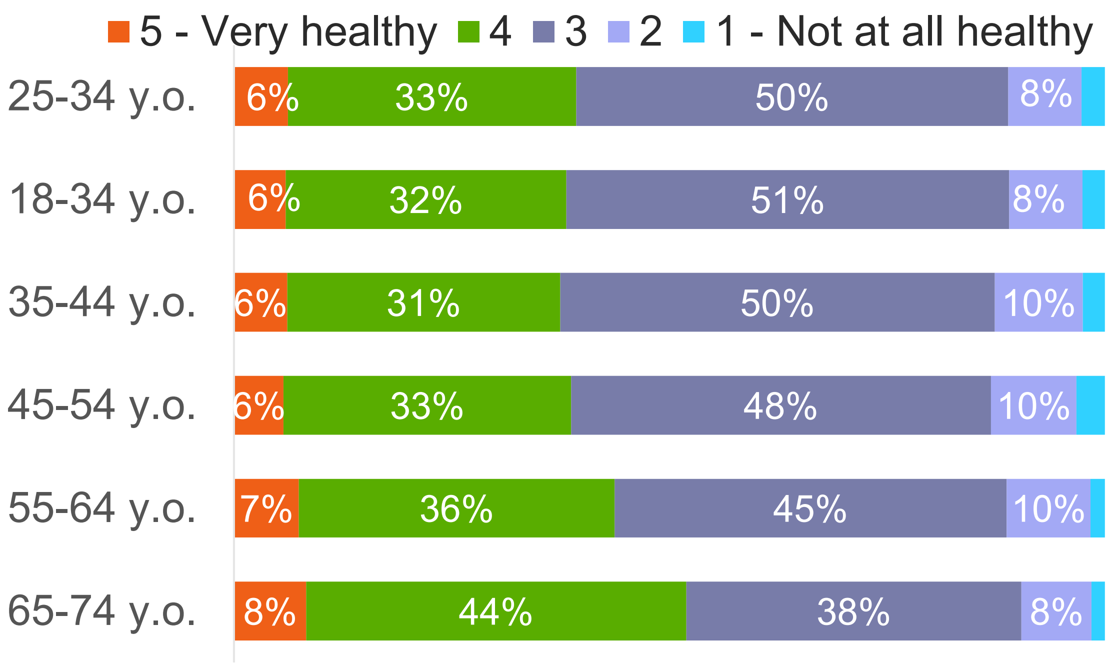
of Canadians say they are not satisfied with their current H&W and don't feel they are doing enough to improve it

Source: NielsenIQ Canada, 2024 Health & Wellness Survey

The older you get, the healthier you are?

43% of Canadians consider themselves healthy, with Boomers and Great Gen feeling more positive than Millennials and Gen Z

Do you consider yourself healthy?
Canada



Source: NielsenIQ Canada, 2024 Health & Wellness Survey

63%

of Canadians say they are very/ somewhat concerned about stress

30%

of Canadians say they are very/ somewhat concerned about mental health

Source: NielsenIQ Canada, 2024 Health & Wellness Survey

25%

of Canadians say their household finances will worsen by the end of 2025

23%
Global

30%

of Canadians say their household finances will improve by the end of 2025

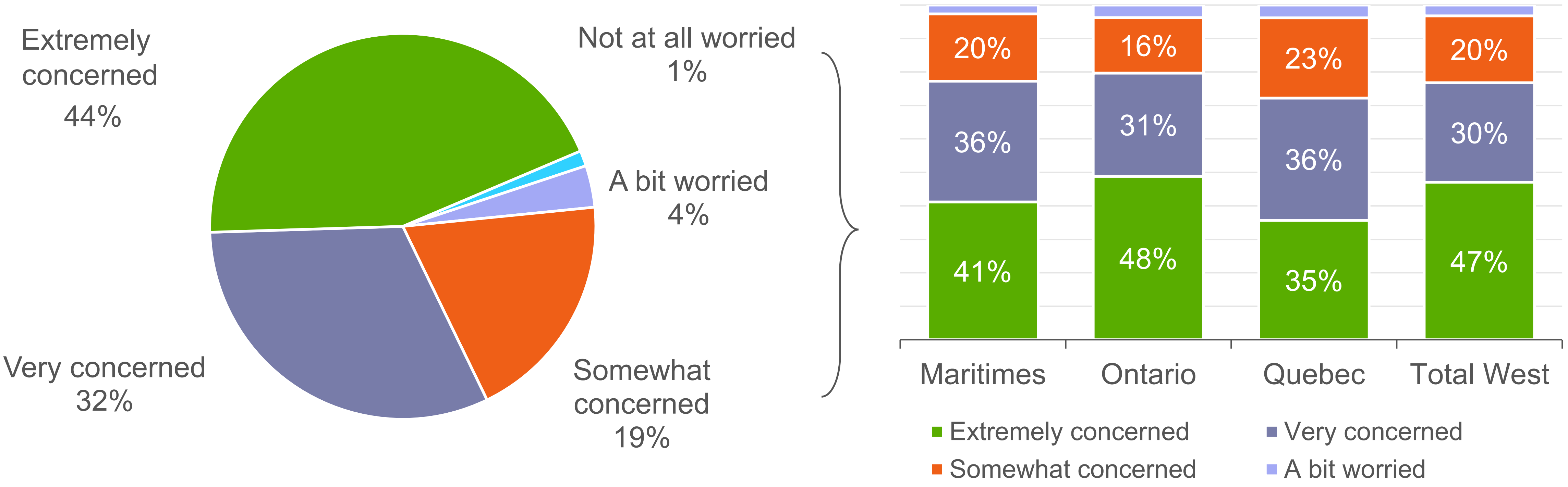
46%
Global

Source: Étude NIQ, Finding Harmony on the Shelf – Outlook on Private Label and Branded Products, mai 2025

Canadian consumers remain (really) concerned about possible price increases

Quebecers are the least concerned about such an increase over the next 12 months

Concerns about a possible rise in food prices over the next 12 months
Canada



Source: NIQ Canada, Home Meal Replacement Study, May 2025

Five global health trends impacting Canada

Global trend #1: Nutrition and gut health

Consumers are becoming more conscious of the nutritional value—and potential downsides—of what they eat and drink.

53%

of Canadians say say healthy nutrition has become more important to them in the last five years

42%

of Canadians are planning to buy more fiber in the next year (30% → high protein, 28% probiotic)

76%

of Canadians are familiar with superfoods such as kale, berries, nuts, green tea

Source: NIQ's 2025 Global Health & Wellness survey – Canadian figures

NIQ

Nutrition and gut health - High-fiber foods

Snapshot of consumers' awareness, perception, and future buying intentions around key food types

Products labeled as a good source of fiber saw sales value grow **8%** in the UK this year.

Source: NIQ Product Insights, UK, latest 52 weeks ending March 15, 2025, vs. same period previous year

Definition	Primarily plant-based foods with proven health benefits such as improved digestion, weight management, and heart health
Examples	• Beans • Nuts • Vegetables • Fruits • Seeds • Whole grains
Awareness	**40%** of Canadians are very familiar (vs 54% global) **49%** of Canadians are somewhat familiar (vs 36%)
Perception	**84%** of Canadians have a very or somewhat positive perception (vs 83% global)
Purchase plans	**42%** plan to buy more high-fiber foods in the next year (vs 53% global)

Source: NIQ 2025 Global Health & Wellness survey

Nutrition and gut health - Superfoods

Snapshot of consumers' awareness, perception, and future buying intentions around key food types

Definition	Nutrient-rich foods that deliver maximum health benefits
Examples	• Berries • Kale • Salmon • Green tea • Nuts
Awareness	**27%** of Canadians are very familiar (vs 36% global) **49%** of Canadians are somewhat familiar (vs 43%)
Perception	**71%** of Canadians have a very or somewhat positive perception (vs 74% global)
Purchase plans	**33%** plan to buy more in the next year (vs 42% global)

Source: NIQ 2025 Global Health & Wellness survey

Nutrition and gut health - Probiotic foods

Snapshot of consumers' awareness, perception, and future buying intentions around key food types

Products promoting themselves as probiotic saw demand grow **6.6%** in the US this year.

Source: NIQ Product Insights, UK, latest 52 weeks ending March 15, 2025, vs. same period previous year

Definition	Food and beverages that contain beneficial live microorganisms that support gut health
Examples	• Kefir • Kimchi • Miso • Sauerkraut • Yogurt
Awareness	**23%** of Canadians are very familiar (vs 33% global) **48%** of Canadians are somewhat familiar (vs 44%)
Perception	**68%** of Canadians have a very or somewhat positive perception (vs 71% global)
Purchase plans	**28%** plan to buy more in the next year (vs 39% global)

Source: NIQ 2025 Global Health & Wellness survey

36%

of Canadian consumers are trying to incorporate more proteins in their diets (P3M)

47%

of Canadians say the 'high protein' claim appeals to them when they are looking for healthy food options

Source: NielsenIQ Canada, 2024 Health & Wellness Syndicated Survey

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Global trend #2: Weight loss

A new era in weight management

68% of Canadians cite health reasons as a very important motivator for shedding pounds

51% of Canadians place more importance on having healthy body weight than they did five years ago

27% of Canadians want to lose weight but they are not actively taking steps to do so

Source: NIQ's 2025 Global Health & Wellness survey – Canadian figures

NIQ

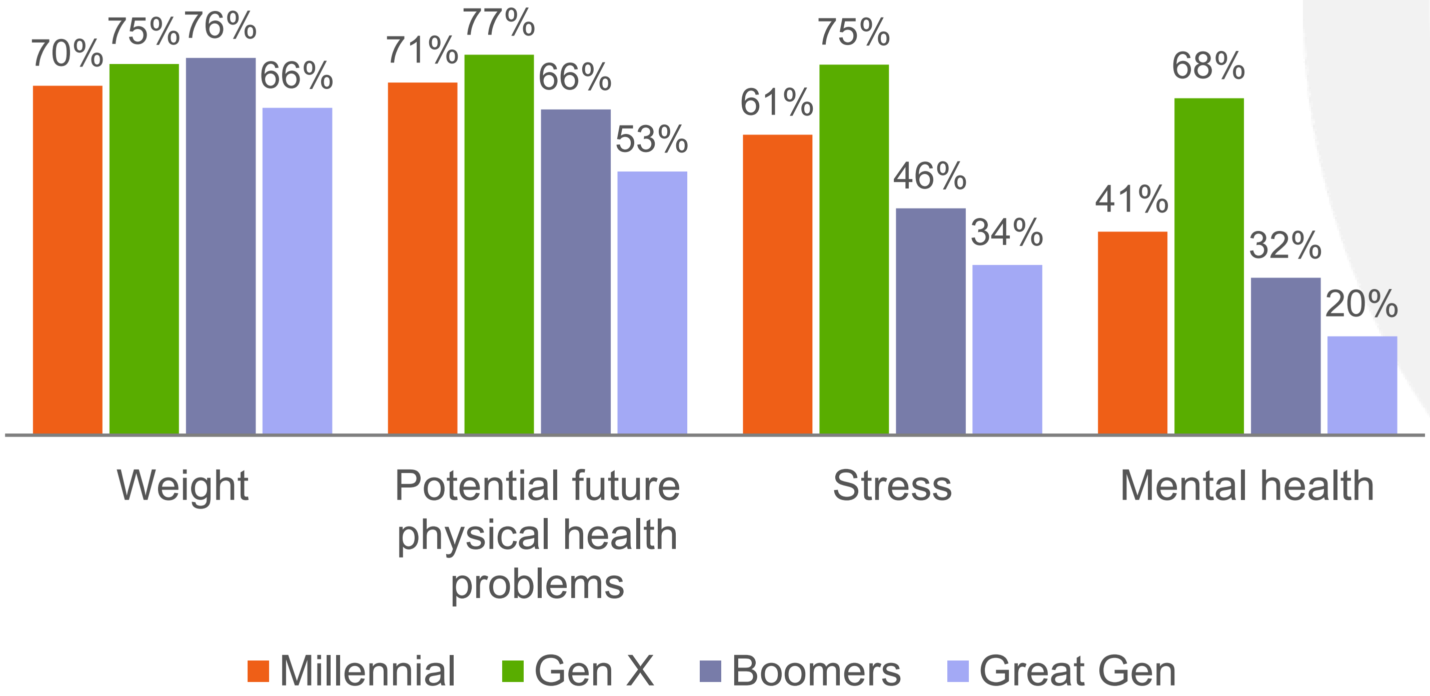
31%

of Canadians **took actions in the past year to lose weight** while 24% are taking steps to maintain their weight

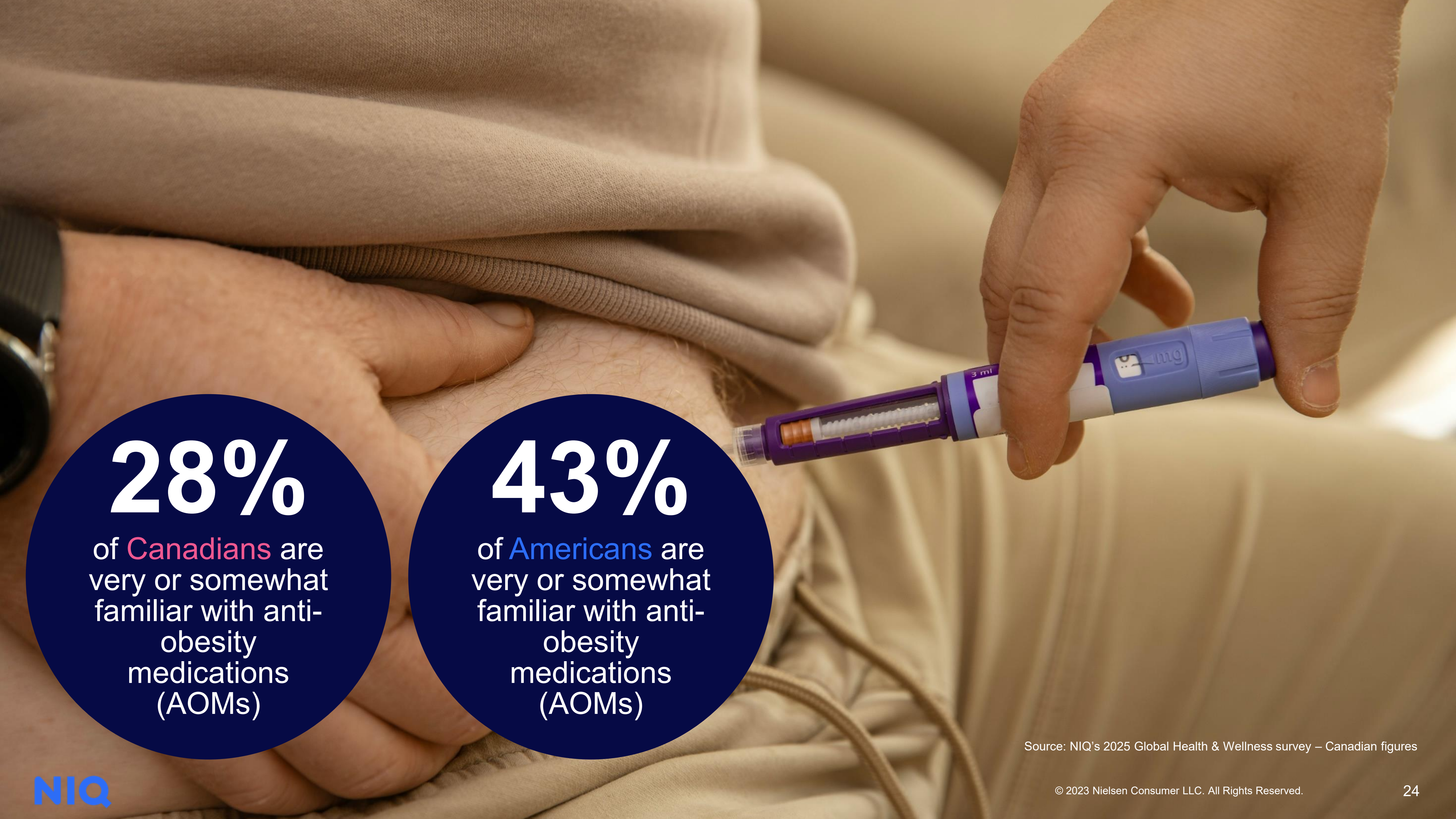
Source: NielsenIQ Canada, Health & Wellness 2024 Study

Weight concerns are pretty equal between all age groups in Canada

Concerned re: specific health matters
Canada



Source: NielsenIQ Canada, 2023 Health & Wellness Syndicated Survey



28%

of Canadians are very or somewhat familiar with anti-obesity medications (AOMs)

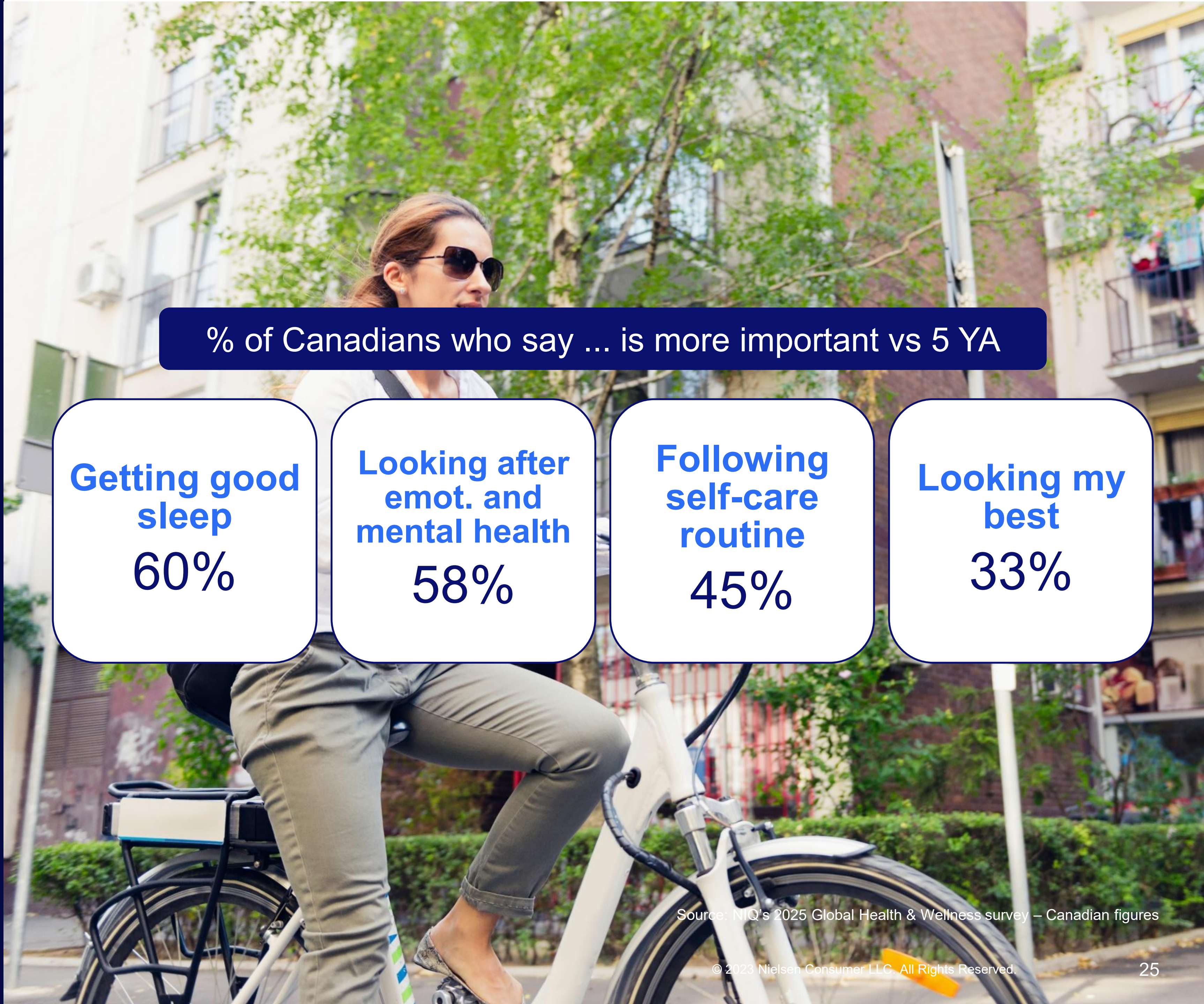
43%

of Americans are very or somewhat familiar with anti-obesity medications (AOMs)

Source: NIQ's 2025 Global Health & Wellness survey – Canadian figures

Global trend #3: Wellness

The new frontier of self-care



% of Canadians who say ... is more important vs 5 YA

Getting good sleep	Looking after emot. and mental health	Following self-care routine	Looking my best
60%	58%	45%	33%

Source: NIQ's 2025 Global Health & Wellness survey – Canadian figures

NIQ

22%

of Canadians say they've experienced insomnia or sleeplessness in the past year

Source: NielsenIQ Canada, 2023 Health & Wellness Syndicated Survey

NIQ

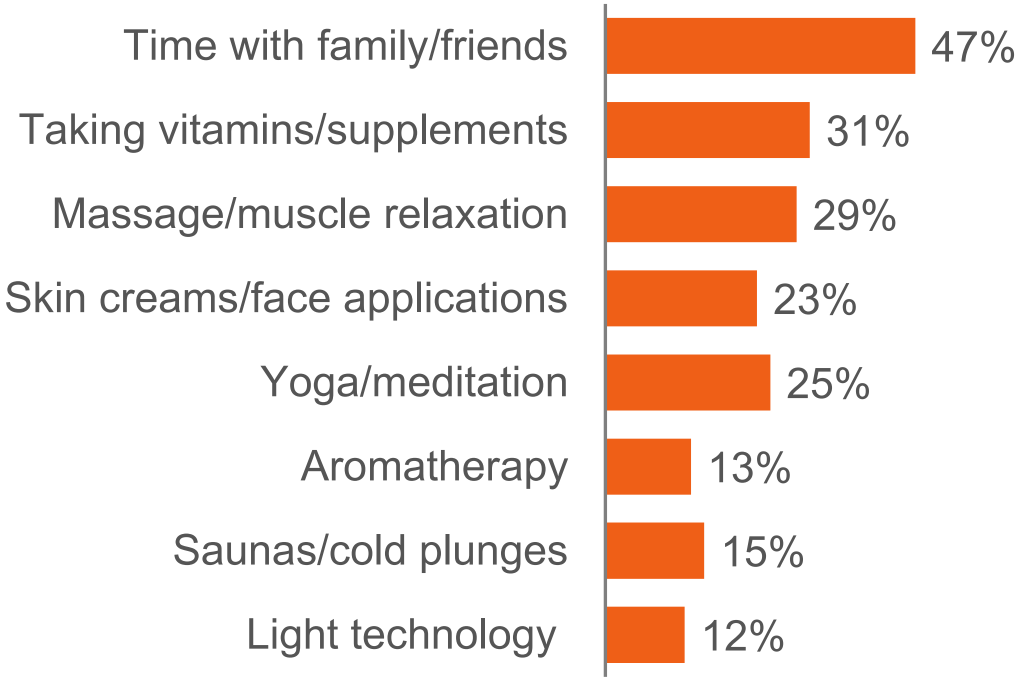
48%

of Canadians say they **plan to spend more time in nature** in the next year as part of their self-care routine

Source: NIQ's 2025 Global Health & Wellness survey – Canadian figures

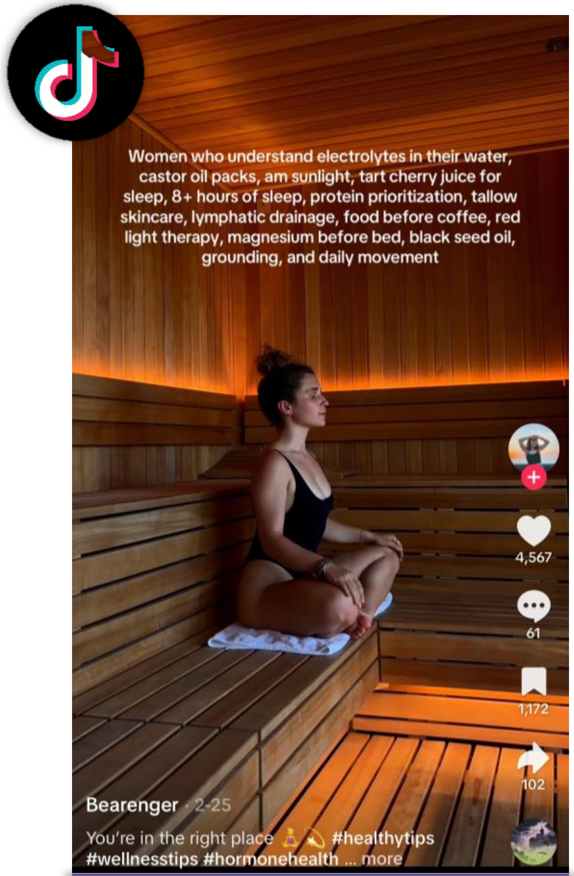
Canadians are planning to spend more time to improve their levels of personal wellness

Plans to do more in the next 12 months as part of the regular wellness/self-care routine
Canada



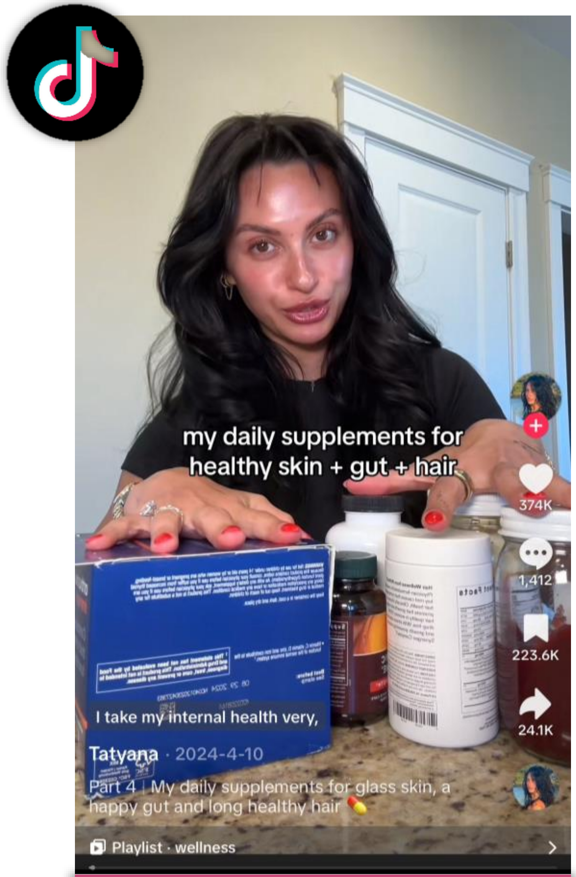
Source: NIQ's 2025 Global Health & Wellness survey – Canadian figures

Social Media continues to fuel Wellness trends

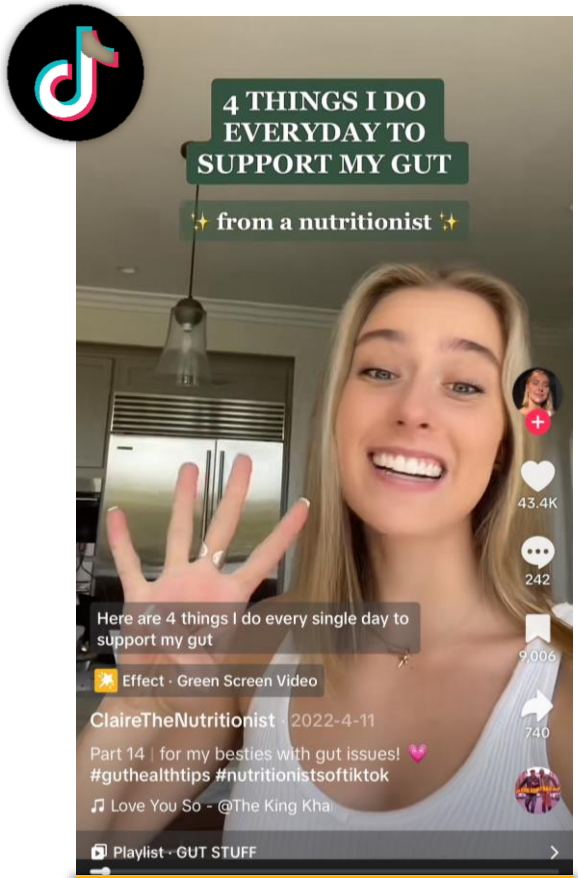


#Wellness
4.9M Posts

#Protein
2.2M Posts



#Supplements
1.7M Posts



#GutHealth
1.3M Posts

Global trend #4: Conscious Buying

The global demand for ethical health and eco-friendly wellness products

60%

of Canadians believe it's important that the H&W products they buy are also eco-friendly and/or ethical

64%

of Canadians say personal wellness benefits are main motivations for conscious buying

55%

of Canadians would pay up 10% or more for H&W products that are also ethical or eco-friendly

Source: NIQ's 2025 Global Health & Wellness survey – Canadian figures

44%

of Canadians say they are conscious buying to support local businesses

38% Global

Source: NIQ's 2025 Global Health & Wellness survey – Canadian figures

Based on NIQ's latest survey, 49% of Canadian consumers consider themselves Health-Conscious Buyers

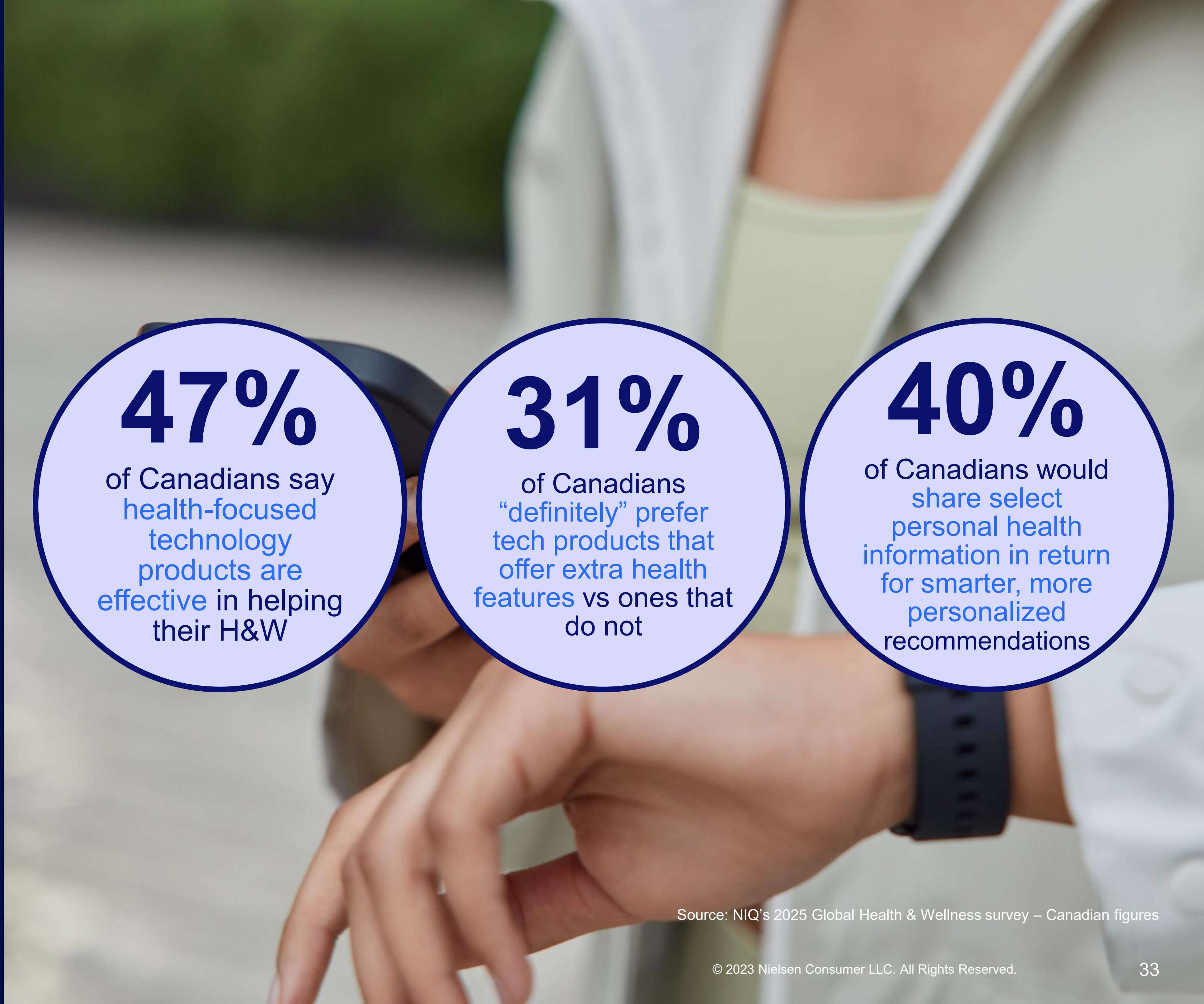
Segments – By attitude towards food packaging (%)
Canada

16%	35%	29%	7%	13%
Convenience Seekers: I like packaged foods because they are convenient and fit my busy lifestyle, regardless of their healthiness	**Casual Consumers:** I consume packaged foods occasionally and don't have strong preferences regarding healthiness or convenience.	**Health-Conscious:** I prioritize healthiness over convenience, so I carefully check labels and opt for packaged foods with minimal additives	**Wellness-Focused:** I prefer packaged foods that are specifically marketed as healthy options, such as those labeled as organic, natural.	**Eco-Health Advocates:** I actively avoid packaged foods due to concerns about their healthiness and environmental impact

Source: NielsenIQ PanelView | Food and beverage label content syndicated survey
Q3NEW0. How do you feel about packaged food products in terms of healthiness and convenience? | BASE: Total respondents, n=5295

Global trend #5: Health-related technology

Shaping the future



47%

of Canadians say health-focused technology products are effective in helping their H&W

31%

of Canadians “definitely” prefer tech products that offer extra health features vs ones that do not

40%

of Canadians would share select personal health information in return for smarter, more personalized recommendations

Source: NIQ’s 2025 Global Health & Wellness survey – Canadian figures

NIQ

61%

of global consumers using health wearables **trust the data from these devices** as much as that from their health practitioner/physical testing

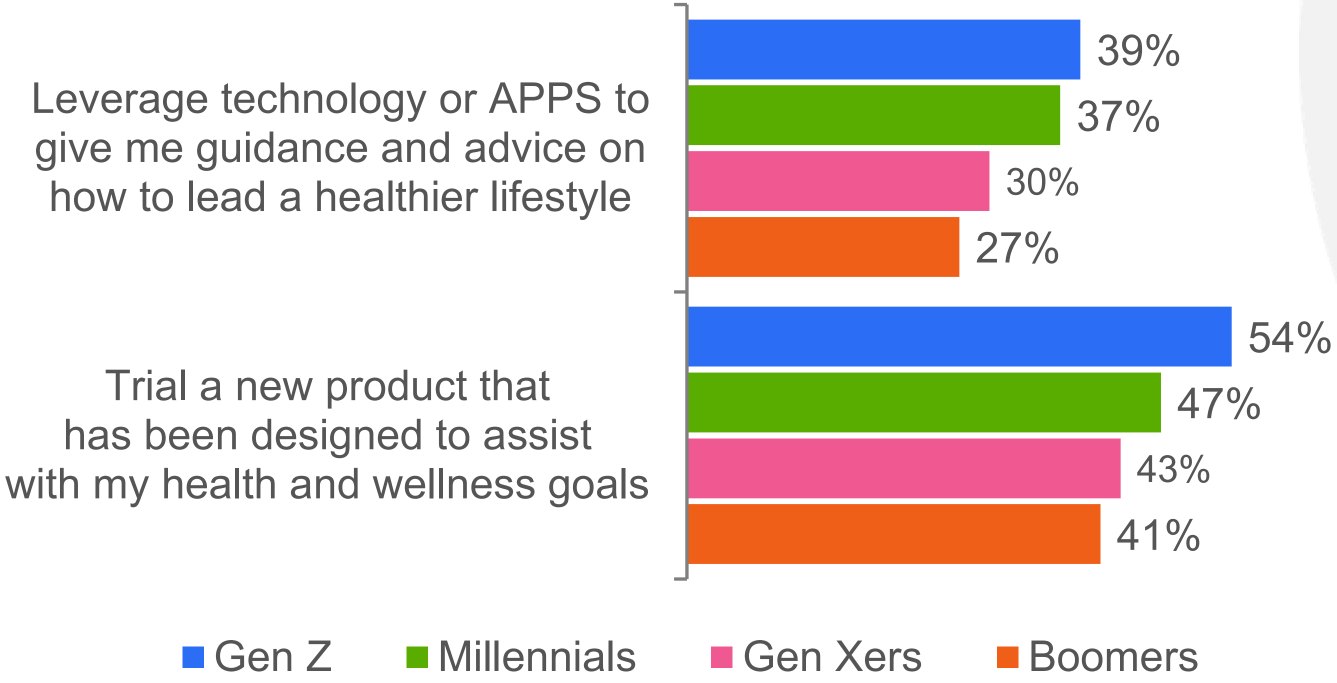
Source:Capgemini Connected products survey Nov 2023
Wired for Wellness : Tech & Durables Health categories – 2025- NF

NIQ

Gen Z is more prone to exploration

As digitally native consumers, Gen Z like to be highly informed when making purchase decisions surrounding their health

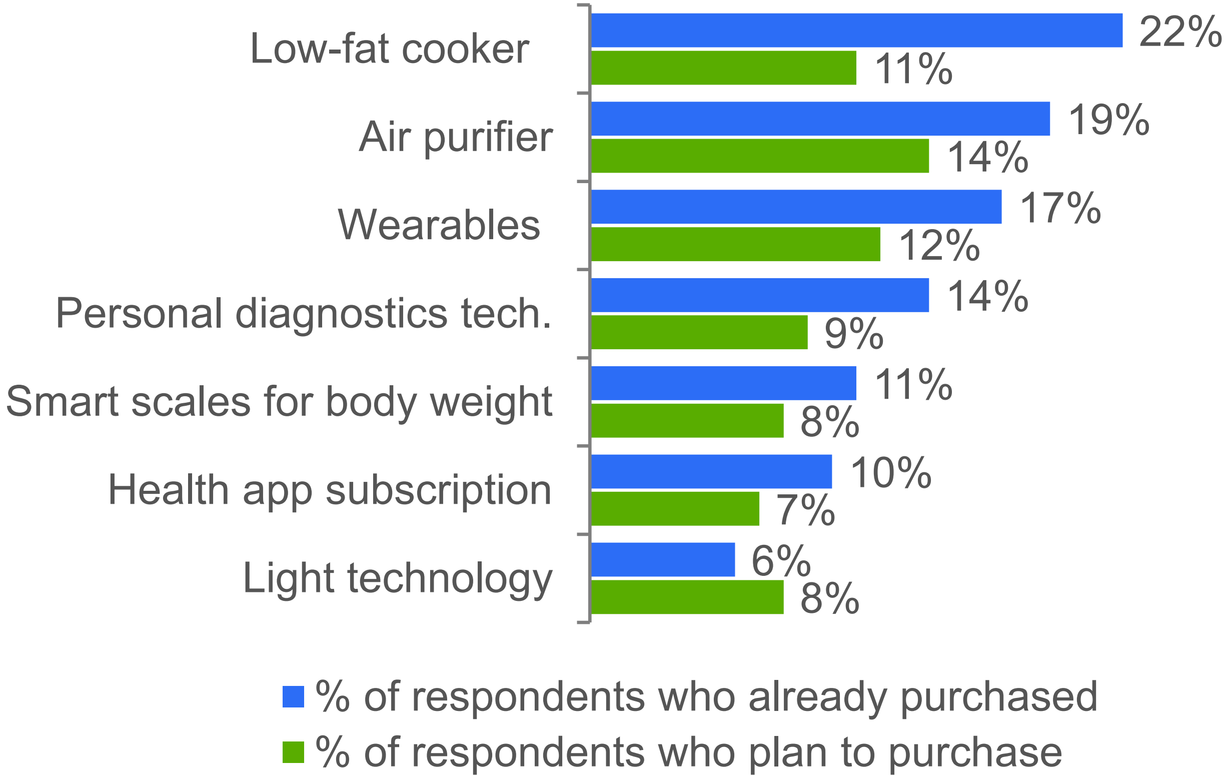
Opinion towards brand exploration
Canada



Source: NIQ Consumer Outlook Gen Z 2024, Canada | Q: How likely or unlikely are you to do the following

39% of Canadians say they are buying tech to cook healthier

Bought any of the following health-focused technology products or planning to buy in the next 12 months
Canada



Source: NIQ's 2025 Global Health & Wellness survey – Canadian figures

40%

of Canadians consumers are likely to accept a recommendation from an AI assistant

47% Global

Source: NIQ 2025 Private Label & Branded Products report 2025 survey

Winning in this environment requires a relentless focus on the consumer

Major barriers from making healthier life choices

Cost vs 'standard' options	Lack of motivation	Lack of time	Difficulty of finding	Lack of trust
59%	28%	24%	23%	19%

Source: NIQ's 2025 Global Health & Wellness survey – Canadian figures

Brands have an opportunity to grow the size of prize with consumers

They must seize consumers’ openness to trying “whichever” brand fits their needs.

Needs-driven decisioning

57%

of Canadians consumers say brand or store brand is irrelevant → they just buy what they need

Broader consideration sets

48%

of Canadians say they’re buying more brands across more categories than ever before

Captive shopper audiences

57%

of Canadians say if they look hard enough, they can find a brand that fits their exact needs

Source: NIQ 2025 Private Label & Branded Products report 2025 survey

63%

of Canadians say they are more likely to buy from companies that have a strong H&W focus across their entire portfolio

80%

of Canadians want product labels need to be more transparent and easier to understand to make H&W choices

Source: NIQ's 2025 Global Health & Wellness survey – Canadian figures

Canadians seek to satisfy specific needs, leaving emotions aside.

We are getting into a world of needs-based decisions in stores across the country

Nutrition and gut health
Trust is everything

Consumers are looking for factors that build their level of trust; brands should focus on clear, easy-to-understand labeling + well supported claims

Wellness
Not just about products, it's about experiences

The future of wellness lies in synergy → providing consumers with complete, holistic experiences that address shifting consumer needs and generational preferences

Conscious buying
Connection between benefits to grow stronger

Brands can and must build stronger consumer trust and loyalty by investing in true, end-to-end conscious credentials; customers are making connections between personal and social benefits

Health-related tech
Price, functionality and personalization

Competition is fierce; brands must keep in mind that along with wearables, products that support healthier cooking, relaxation, and sleep quality are well-aligned with consumers' needs (and keep AI in mind!)

Thank you!

Next: Nick Gibson

A look ahead:

Wellness 2025

Why now?

Pivotal Moment as the CPG Ecosystem Absorbs Multiple Transformational and Foundational Shocks

Cultural, Technological, Institutional, Financial, Political

Financially polarized consumers

Shift to telehealth

Chronic disease

Tariffs

Pop culture

SNAP/WIC

Globalization and localization

Clean label

Social media

Return to work mandates

Aging population

Rx to OTC

Sustainability

GLP-1 impact

AI

Growth of retail media

Personalization

Cannabis legalization

Make America Healthy Again

Shifting demographics

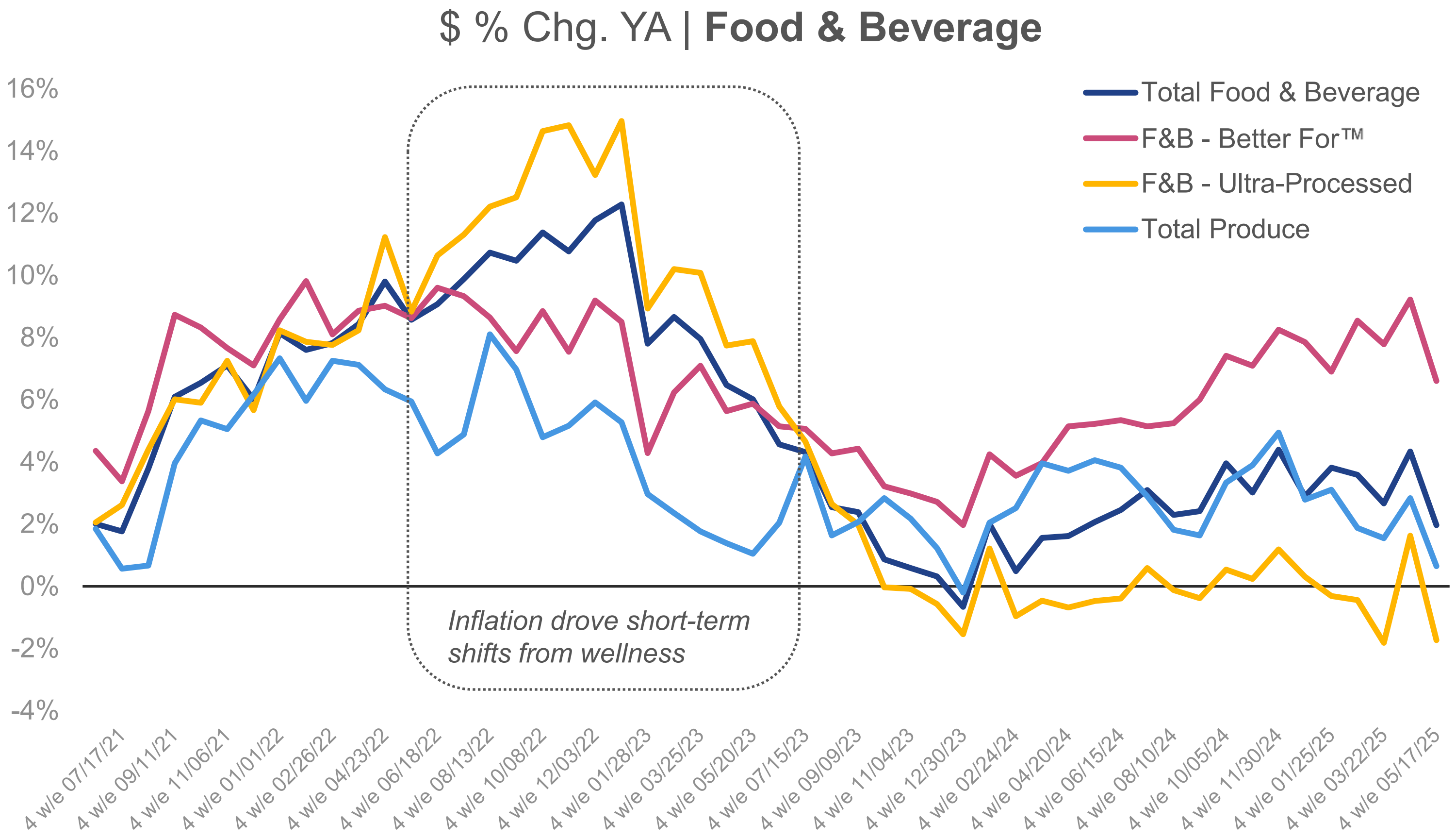
GenZ and GenAlpha

Better For™ mainstreaming

NIQ

NIQ *Better For™*...

Better For™ is a resilient trend and is here to stay



Source: NIQ, Retail Measurement Services – NIQ Product Insight; Total US xAOC; Total Food & Beverage vs Better For segment; $ % Change vs year ago; 4-week trended through week ending May 17, 2025; NIQ Ultra-processed

NIQ Product Insight (NPI)

Available NOW in Canada!

NielsenIQ

Product Insights

Harness the *power* of product attribution

Shoppers are sharing what they want—are you listening?

Claims	Certifications	Ingredients	Allergens	Nutrition Facts
Country of Origin	Diets & Lifestyle	Nutrition	Functional Ingredient	Natural & Organic

What is it?

NPI combines NielsenIQ's robust market measurement with Label Insight's deep product attribute data to bring together package claims and certifications with ingredient-based attributes for a more holistic view of how CPG products position themselves and how they are formulated.

How it works

NPI attribute packages such as Natural & Organic, Clean Label, Diets and Lifestyle, ESG Sustainability, and more are delivered directly into your NIQ databases, enabling you to make more informed business decisions, revealing key opportunities for investment, and furthering your understanding of the competitive market landscape.

Key benefits

- Truly understand the shopper by analyzing the market across detailed shopper need states and preferences
- Stay ahead of trends and understand what claims and certifications are resonating most with consumers
- Track competitors by diving deep into their brand positioning and formulation to inform your strategy
- Validate proven trends and identify emerging trends and white space opportunity to command shelf space and grow your market share
- Inform R&D efforts for new product launches and identify key future brand acquisition opportunities

The industry's *deepest* and *broadest* attribute solution

550+

characteristics across the Canadian market

*Returning **158% more** products with stated and **3,000% more** products with qualified than global competitors.*

SOURCE: The digital depth analysis, NIQ Brandbank, 2022

NPI reveals everything about every product with the industry's most granular attribution data

On Package Attribution

Standardizing attributes present on the label by analyzing marketing claims, warnings and third-party certifications.

- Canada Organic
- Non GMO
- Whole Grain
- Recyclable
- Kosher
- QAI Organic

"Our organic promise goes back to the family farm I was raised on. In 1985, my wife Ratana and I founded Nature's Path Organic Foods based on my dad's advice to 'Always leave the soil better than you found it,' by farming without chemical pesticides, fertilizers or GMOs. For over 30 years, our family has aspired to make delicious organic foods that you can love and trust."

- Organic
- Pesticide Free
- Non GMO
- Fermented

Beyond the Label Attribution

Uncovering attributes not physically stated on the label by analyzing nutrients and ingredients against regulations.

Nutrition Facts
Valeur nutritive
Per 3/4 cup (55 g) / pour 3/4 tasse (55 g)
About 1/2 cup skim milk / environ 1/2 tasse de lait écrémé

Amount / Teneur	Cereal / Céréales	+ 1/2 cup skim milk / + 1/2 tasse de lait écrémé
Calories / Calories	250	290
	% Daily Value / % valeur quotidienne	
Fat / Lipides 9 g*	14 %	14 %
Saturated / saturés 1.5 g + Trans / trans 0 g	8 %	8 %
Polyunsaturated / polyinsaturés 4.5 g		
Omega-6 / oméga-6 4 g		
Omega-3 / oméga-3 0.9 g		
Monounsaturated / monoinsaturés 2.5 g		
Cholesterol / Cholestérol 0 mg		
Sodium / Sodium 80 mg	3 %	5 %
Carbohydrate / Glucides 36 g	12 %	14 %
Fibre / Fibres 5 g	20 %	20 %
Sugars / Sucres 10 g		
Protein / Protéines 6 g		
Vitamin A / Vitamine A	0 %	8 %
Vitamin C / Vitamine C	0 %	0 %
Calcium / Calcium	2 %	20 %
Iron / Fer	15 %	15 %

*Amount in dry mix / Teneur des céréales sèches
1/2 cup skim milk adds 40 Calories, 65 mg sodium, 6 g carbohydrate (6 g sugars) and 4 g protein.
1/2 tasse de lait écrémé ajoute 40 Calories, 65 mg de sodium, 6 g de glucides (6 g de sucres) et 4 g de protéines.

- Contains Omega-3
- Contains Omega-6
- Cholesterol Free
- Trans Fat Free
- Good Source of Iron
- Good Source of Fiber
- Not Keto Diet Friendly

INGREDIENTS: Whole grain rolled oats*, cane sugar*, soy oil*, brown rice flour*, flax seeds*, almonds*, oat syrup solids* (oat syrup solids*, tocopherols), natural vanilla flavour, sea salt, molasses*. ***Organic. Contains soy, almonds and oats. May contain peanuts, wheat or other tree nuts.**

- Artificial Color Free
- Contains Natural Preservatives
- Contains Natural Sweeteners
- Plant Based
- Contains Superfood Ingredients

NPI reveals everything about every product with the industry's most granular attribution data

Stated Attribution

Captures standardized attributes on the label across a set of products by analyzing claims, warnings & certifications

- Cruelty Free
- Sulfate Free
- Natural
- Paraben & Phthalates Free
- Vegan
- Recycled

92% of our formula is **naturally derived**, meaning it's unchanged from nature or keeps over 50% of it's original structure after some processing. This includes **water** and ingredients from **plants**, **mineral** and **fermentation sources**.

Naturally derived
Plant-based
Mineral
Fermented

Qualified Attribution

Uncovers attributes not physically stated on the label by analyzing nutrients & ingredients via regulations & requirements

- Ethically Sourced Extract
- Dye-Free
- Safe for Sensitive Skin
- With Coconut Oil
- Sustainably Sourced Extract
- No Guilt

INGREDIENTS: WATER (AQUA), COCAMIDOPROPYL BETAINE*, SODIUM METHYL LAUROYL TAURATE*, GLYCERIN*, SODIUM CHLORIDE, FRAGRANCE (PARFUM), COCAMIDE MEA*, SODIUM BENZOATE, CITRIC ACID, LAURIC ACID*, SODIUM METHYLTAURATE, STEARIC ACID*, COCOS NUCIFERA (COCONUT) OIL*, CITRULLUS LANATUS (WATERMELON) FRUIT EXTRACT*, HYDROLYZED HYALURONIC ACID, CETRIMONIUM CHLORIDE, ALPHA-ISOMETHYL IONONE, GERANIOL, LINALOOL.
*PLANT-BASED INGREDIENTS

Contains Fragrance
Contains Hyaluronic Acid
Contains Preservatives
Contains Botanical Ingredients

Traditional data addresses just 5% → NPI data addresses **more than 99%**

We are the gold standard in attribution

Trusted by the FDA and USDA for over a decade

Subset of NPI Canada Characteristics

Clean Label

All Natural
Antibiotics
Artificial Fragrance
Cruelty Free
Hand Made
Natural Preservatives
Non-GMO
Not Tested On Animals
MSG
Plant Based

Ingredients

Ancient Grains
Antioxidants
Caffeine
CBD
DHA
Hyaluronic Acid
Plant Protein
Sprouted Ingredients
Sugar Alcohols
THC

Sustainability

Biobased
Compostable
Cruelty Free
Eco Friendly
Fair Trade
Sustainable Farming
Tetrapak
Upcycled
Wild Caught
Women Owned

Place of Origin

Made in Alberta
Made in Canada
Made in Ontario
Made in Mexico
Made in Nova Scotia
Made in Ontario
Made in Quebec
Made in The Territories
Made in USA
Product of Canada

FDA

12 Yr. Partnership

Regulatory Monitoring

220 Active Users

USDA

8 Yr. Partnership

Globally Recognized as The Academic Gold Standard

#1 API on data.gov

Active discussion with Health Canada and other agencies

Trusted by Leading CA Retailers

Credentials & Certification

Licensed, registered dietitians, chemists, food technologists, and formulation experts

Experience & Skill

Diverse competency in regulatory, public health, government, and laboratory settings

Industry Expertise

Proficiency in industry trends and topics of interest to clients and partners' businesses

Data Mastery

Stewards of building and maintaining Label Insight data taxonomies and attribution

NPI Canada Launch Attribute Packages available in Discover – Food and Beverage

Canada packages showcase top attributes and unlock future expansion opportunities

The industry's *deepest* and *broadest* attribute solution

350+ Food and Beverage characteristics across the Canada market

Allergens and Intolerances
Dairy
Egg
Fish
Gluten
Lactose
Milk
Mustard
Peanut
Sesame
Shellfish
And more...

Clean Label
All Natural Ingredients
All Natural
Antibiotics
GMO Presence
High Fructose Corn Syrup
Hormones
MSG
Natural Colours
Natural Flavours
Natural Positioning
And more...

Diets & Lifestyle
Halal
Keto
Kosher
Low Glycemic
Mediterranean
Paleo
Pescatarian
Plant Based
Raw
Source of Plant Protein
And more...

Health & Need States
Allergy Relief
Anxiety Support
Appetite Control
Arthritis Support
Bone Health
Brain Health
Cardiovascular Health
Cellular Function Support
Digestive Health
Estrogen Support
And more...

Ingredients
Algae
All Nootropic Ingredients
Allulose
Almond Protein
Aloe Extracts
Ancient Grains
Antioxidants
Apple
Avocado Oil
Berry
And more...

Natural & Organic
Artificial Colours
Artificial Flavours
Artificial Ingredients
Artificial Sweeteners
Canada Organic
GMO Presence
Natural Positioning
Naturally Derived
Organic Positioning
Organic
And more...

Nutrition
100 Calories Or Less
Added Sugar Presence
Calorie Presence
Calories Per Serving Ranges
Carbohydrate Per Serving Ranges
Fat Presence
Fibre Per Serving Ranges
Fibre Presence

Place of Origin
Made In Alberta
Made In British Columbia
Made In Canada
Made In Manitoba
Made In Mexico
Made In New Brunswick
Made In Newfoundland
Made In Nova Scotia
Made In Ontario
Made In Prince Edward Island
And more...

ESG – Animal Welfare
Animal Welfare Approved
Best Aquaculture Practices
Cage Free
Humane Raised and Handled
Crate Free
Cruelty Free
Dolphin Safe
Farm Raised
Free Range
Global Animal Partnership
And more...

ESG – Environmental Sustainability
Anti-Pollution
Bamboo
Biobased
Biodiversity
Carbon Footprint
Carbon Zero
Compostable
Deforestation
Eco Friendly
Energy Efficiency
And more...

ESG – Farming Insights
Biodynamic
EU Organic Farming
Family Farmed
Farm Raised
Farmed Seafood
Greenhouse Grown
Regenerative Agriculture
Soil Association
Sustainable Farming

ESG – Social Responsibility
B Corporation
Bipoc Owned
Black Owned
Cradle To Cradle
Ethical
Fair Trade
Fair Wages
LGBTQ+ Owned
Minority Owned
Responsibly Sourced
And more...

ESG – Sustainable Packaging
Biodegradable
BPA
Curbside Recycle
Drop Off Recycle
Eco Friendly Packaging
Less Packaging
Plastic Free
Recyclable
Refillable
Reusable Packaging
And more...

NPI Canada Launch Attribute Packages available in Discover – Beauty & Personal Care

Canada packages showcase top attributes and unlock future expansion opportunities

The industry's *deepest* and *broadest* attribute solution

350+
Beauty and Personal Care characteristics across the Canada market

Allergens and Intolerances
Dairy
Egg
Fish
Gluten
Lactose
Milk
Mustard
Peanut
Sesame
Shellfish
And more…

Beauty Benefits
Advanced Formula
Antibacterial Agents
Breathable
Clinically Tested
Concentrated Formula
Daily Use
Dark Spots
Dermatologist Tested
Detoxifying
Evening
And more…

Beauty Ingredients
Adaptogens
Aloe Extracts
Alpha Hydroxy Acid AHA
Aluminum
Amino Acids
Antioxidants
Apple
Arnica
Avocado Oil
Ayurvedic
And more…

Clean Beauty
Alcohol Content
Ammonia
Artificial Fragrance
BHA
BHT
Cruelty Free
Diethanolamine
Formaldehyde
Gluten
Hand Made
And more…

Clean Label
All Natural Ingredients
All Natural
Antibiotics
GMO Presence
High Fructose Corn Syrup
Hormones
MSG
Natural Colours
Natural Flavours
Natural Positioning
And more…

Health & Need States
Allergy Relief
Anxiety Support
Appetite Control
Arthritis Support
Bone Health
Brain Health
Cardiovascular Health
Cellular Function Support
Digestive Health
Estrogen Support
And more…

Natural & Organic
Artificial Colours
Artificial Flavours
Artificial Ingredients
Artificial Sweeteners
Canada Organic
GMO Presence
Natural Positioning
Naturally Derived
Organic Positioning
Organic
And more…

Place of Origin
Made In Alberta
Made In British Columbia
Made In Canada
Made In Manitoba
Made In Mexico
Made In New Brunswick
Made In Newfoundland
Made In Nova Scotia
Made In Ontario
Made In Prince Edward Island
And more…

ESG – Animal Welfare
Animal Welfare Approved
Best Aquaculture Practices
Cage Free
Humane Raised and Handled
Crate Free
Cruelty Free
Dolphin Safe
Farm Raised
Free Range
Global Animal Partnership
And more…

ESG – Environmental Sustainability
Anti-Pollution
Bamboo
Biobased
Biodiversity
Carbon Footprint
Carbon Zero
Compostable
Deforestation
Eco Friendly
Energy Efficiency
And more…

ESG – Farming Insights
Biodynamic
EU Organic Farming
Family Farmed
Farm Raised
Farmed Seafood
Greenhouse Grown
Regenerative Agriculture
Soil Association
Sustainable Farming

ESG – Social Responsibility
B Corporation
Bipoc Owned
Black Owned
Cradle To Cradle
Ethical
Fair Trade
Fair Wages
LGBTQ+ Owned
Minority Owned
Responsibly Sourced
And more…

ESG – Sustainable Packaging
Biodegradable
BPA
Curbside Recycle
Drop Off Recycle
Eco Friendly Packaging
Less Packaging
Plastic Free
Recyclable
Refillable
Reusable Packaging
And more…

What’s the opportunity?

Consumer purchases & digital discovery is not brand centric, but rather attribute + need state centric

75%

of CPG shoppers use digital channels to become inspired, browse, research, or select a brand.

78%[1]

of grocery searches on Amazon are unbranded

84%[2]

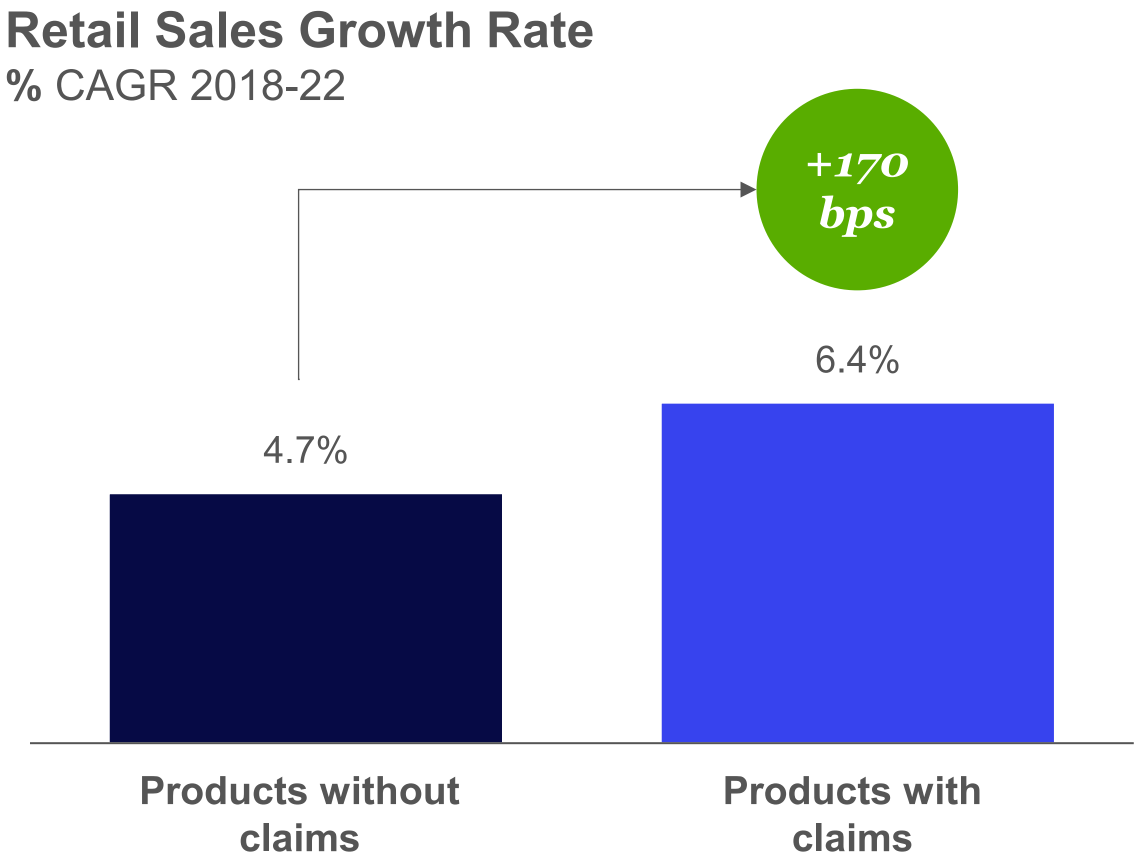
of brands fail to claim 1 of their top 3 attributes

87%[3]

of products qualify for an attribute but are not returned in the retailer's search results

1. Motley Fool, 2021
2. Activating Attributes Report, Label Insight, May 2020.
3. The digital depth analysis: The e-commerce experience audit, NIQ. July 2022.
4. IBM and NRF Research Study, 2020.

So, are claims driving growth?

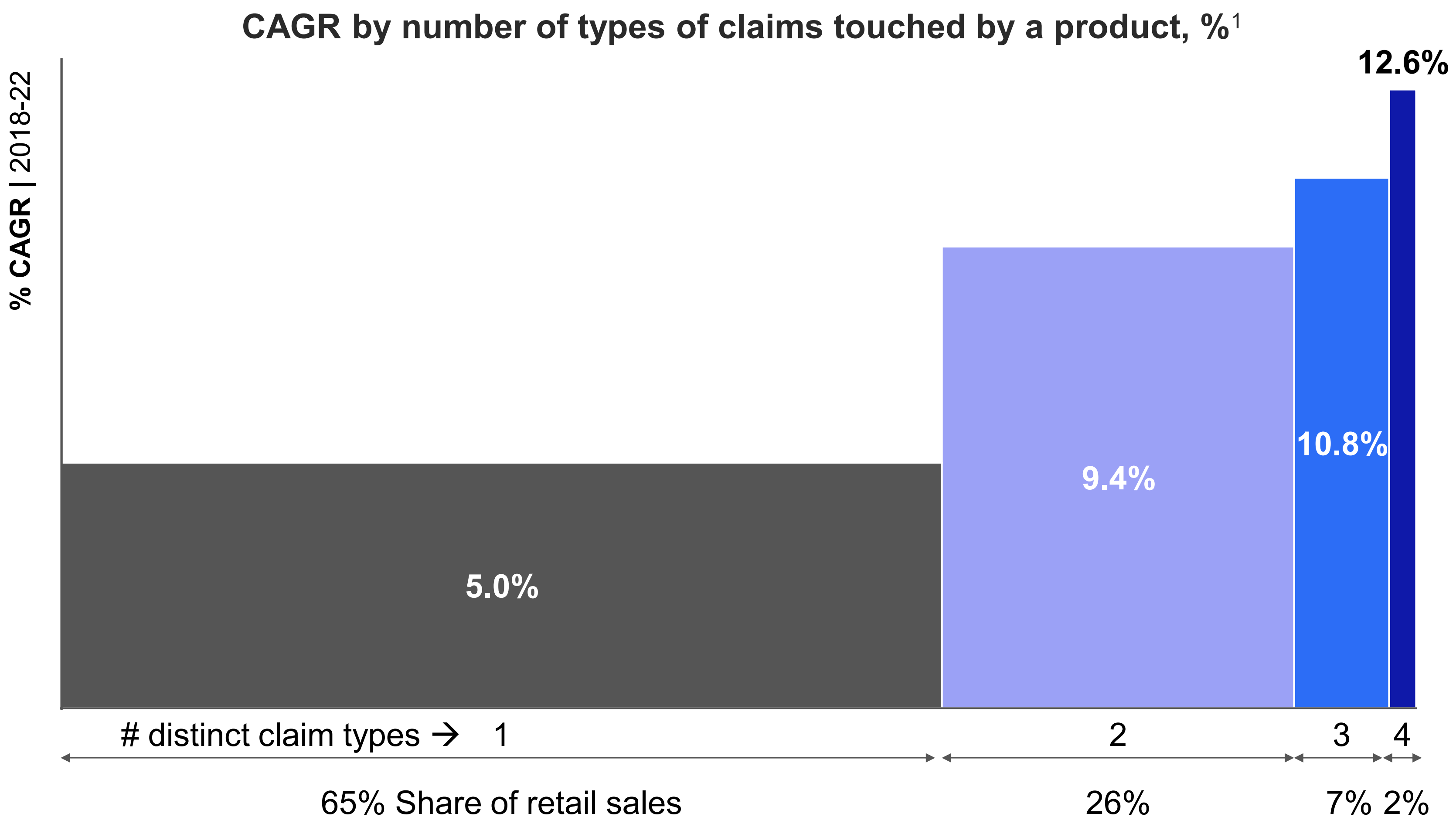


Across ***32 categories analyzed***, products with claims have experienced ***170 bps p.a.*** (8.1% cumulative) ***more growth in the past five years*** than products without them

Data through June 2022

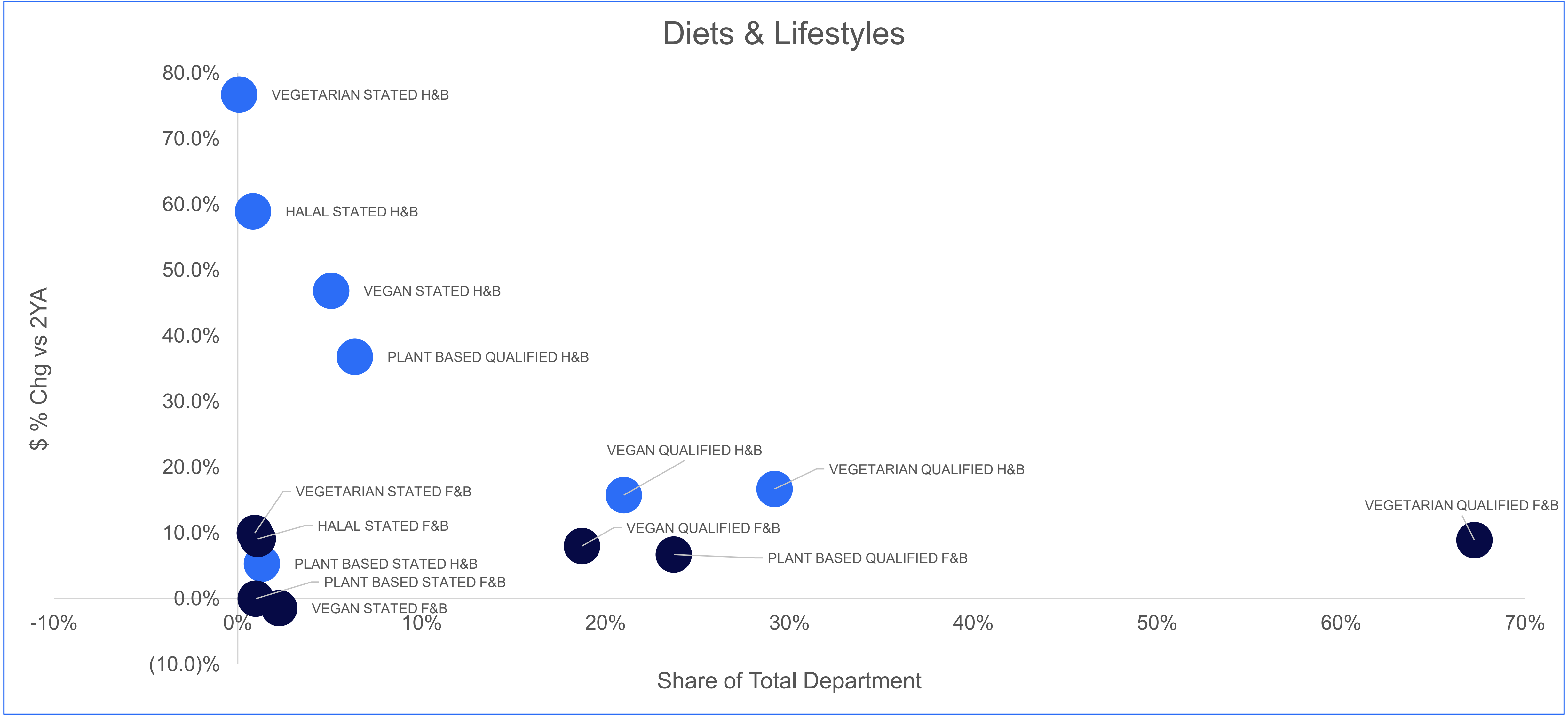
Products with more types of claims grow ~2x faster than those with only one type of claim

Few products move beyond one claim

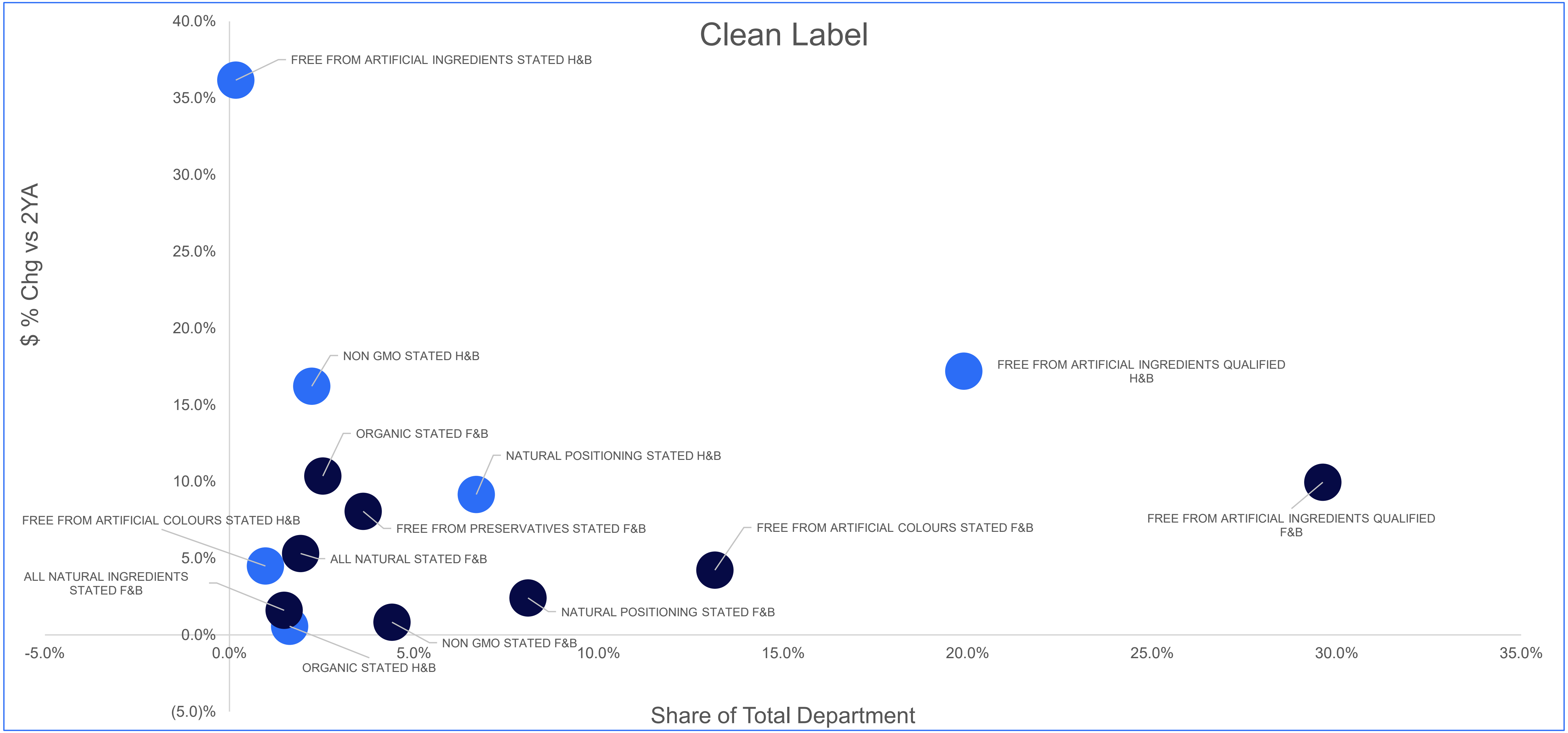


1. 6 types of claims exist - 4, 5, and 6 type scenarios not included due to low sample size

Trends are not always the same across departments : H&B categories are seing much more growth than F&B among diets & lifestyles



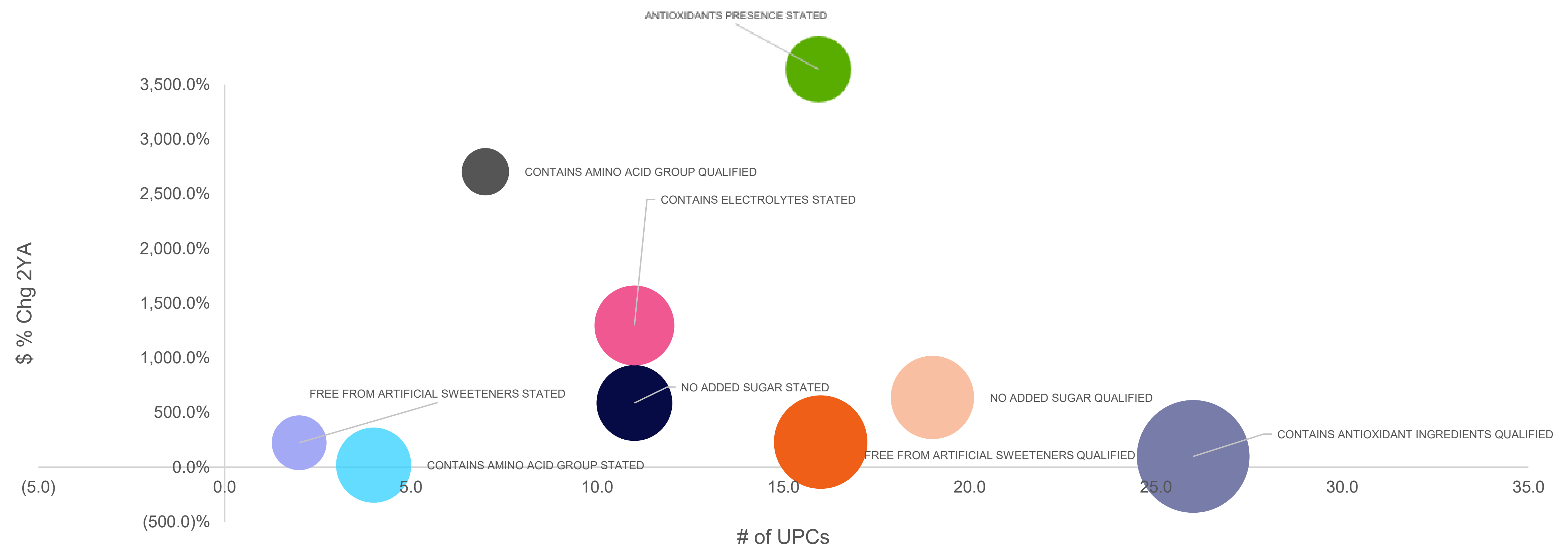
Free from artificial ingredients attributes represent a decent chunk of both departments and is still growing fast while natural positioning attributes don't resonate as well



Source: NielsenIQ Product Insight, National incl. NFLD GB+DR+MM, L52W PE June 7th 2025

Sport drinks has been one of the fastest growing category in the last 2 years and attributions are key

Sport Nutrition Drinks Attributes



Bubble size = $ Vol
Sport Nutrition Drinks = +115% vs 2YA

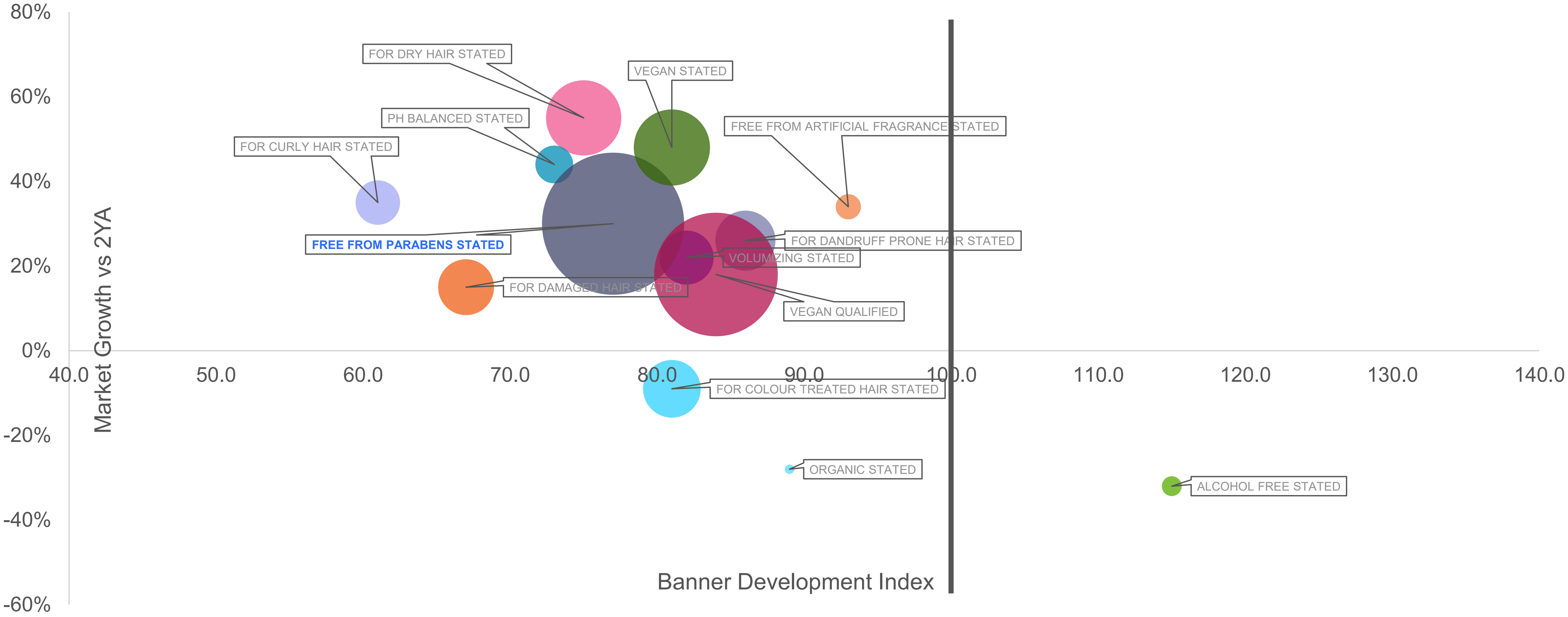
Digging deeper at the category level is the next logical step after high level mapping : Stated attributes on pack are important in this category and seeing 4X more growth

		Proven Trends		Growing Trends	Developing Trends	
		62% of Personal Deodorants	83% of Personal Deodorants	24% of Personal Deodorants	14% of Personal Deodorants	6% of Personal Deodorants
Total Personal Deodorants		**Vegan Qualified**	**Free from Parabens Qualified**	**Free from Aluminum Stated**	**Free from Parabens Stated**	**Vegan Stated**
Dollar growth vs YA	**+5.2%**	**+6%**	**+8%**	**+17%**	**+20%**	**+25%**

Source: NielsenIQ Product Insight, National incl. NFLD GB+DR+MM, L52W PE May 3rd 2025

Case Study for Retail Discussion: Quebec Drug Retailer is under-developed in a lot of fast growing segments within Hair Care

Hair Care – X Drug Retailer vs Total Quebec Drug

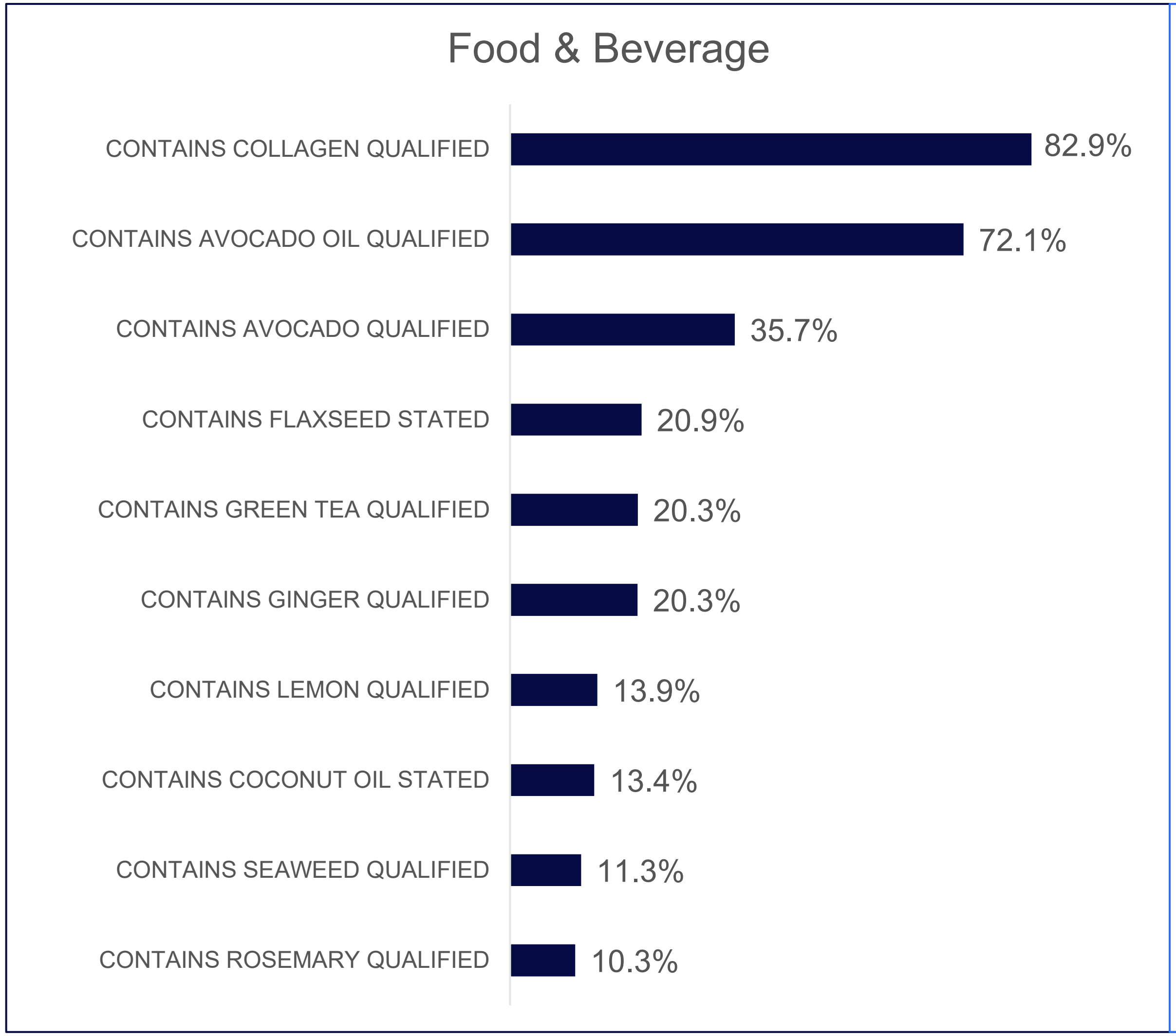


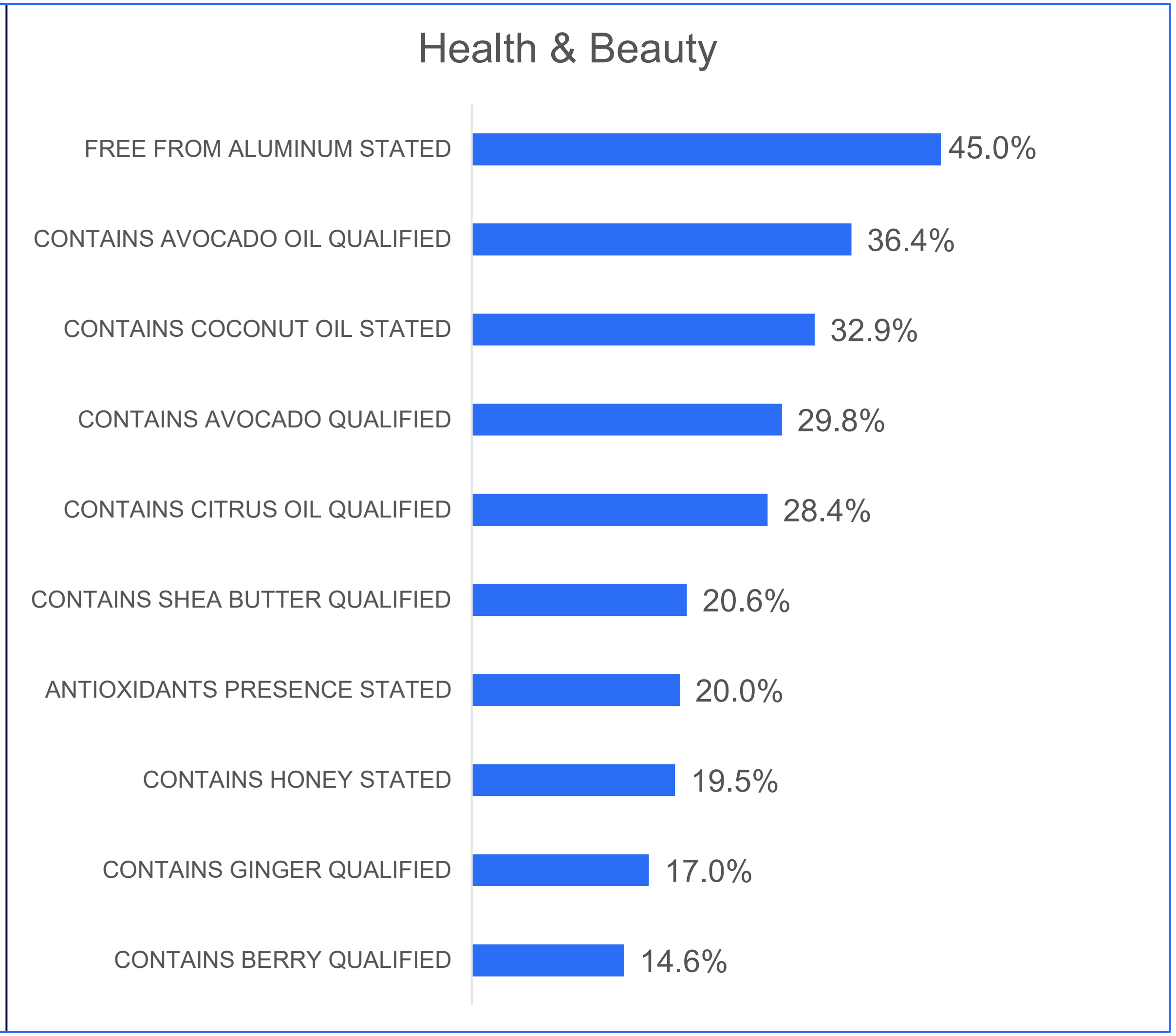
Source: NielsenIQ Retail Measurement Services (leveraging NIQ Product Insights), Quebec Drug Retailer* vs Total Quebec Drug, Hair Care Category, L52W ending 06/07/25

NIQ

For the first time, NIQ can help manufacturers understand niche growth pockets through ingredient trends tracking

Growing Ingredients - % Chg vs 2YA





Source: NielsenIQ Product Insight, National incl. NFLD GB+DR+MM, L52W PE June 7th 2025

Connecting To Deeper Data Insights

Leveraging Attributes With Our Strategic Analytics & Insights Solutions

Driving brand growth around key practice areas

Consumer Behavior and Insights

+30%

Anchor your strategy around people, their needs, and their preferences and gain a **30% increase in marketing efficiency**.

Innovation powered by BASES

+55%

Innovate and renovate to achieve excellence and **boost sales by +55% above the category average**.

Brand & Media

+20%

Create and bring to life an irresistible brand that enhances people's lives while enjoying a **20% increase in ad-driven sales.**

Analytics & Activation

+6%

Maximize your RGM strategy and **improve your trade spend efficiency by 6%** when working with NIQ

NIQ & GFK Consult

Bringing together these and other NIQ assets to unlock our customer's most strategic business questions creating brand growth roadmaps

NielsenIQ – Analytics & Activation

The **right items** in the **right stores** at the **right prices** with the **right promotions**

Pricing & Promotion
Consumer sensitivity to price changes and promotional lifts

Forecasting and Demand Planning
Predicting future demand with precision

Assortment
The right products to meet consumer demand

Market Structure
Connecting shopper behaviour to growth

Business Drivers
Drivers and drains of growth and volume decomposition

Precision Areas
Tactical activation at a granular level

Event Effectiveness
Impact testing of in-store execution and marketing campaigns

On Shelf Availability
On shelf and out of stock positioning scorecard and tracking

NIQ

Despite economic pressures, top wellness attributes are overperforming

What is driving this change?

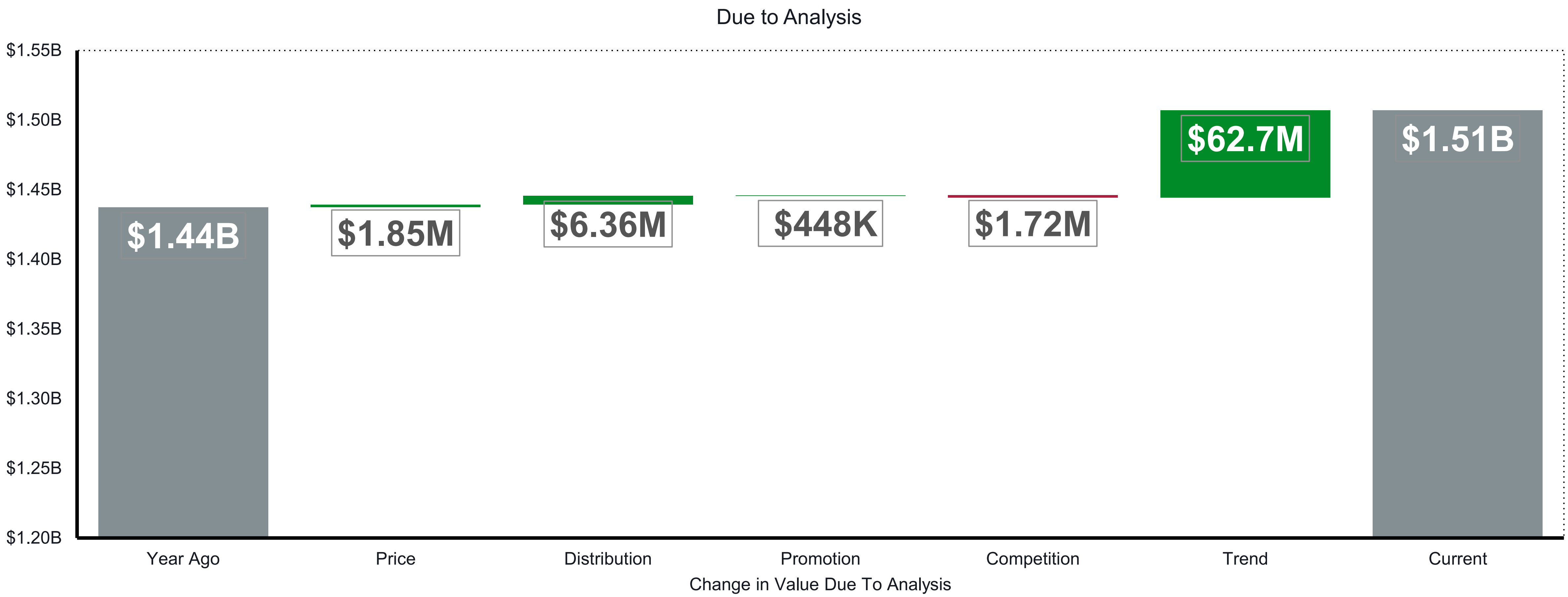
	Total GB+DR+MM		
	$ (M)	$ % Chg YA	$ % Chg 2YA
TOTAL TRACKED SALES	123,867	3.0%	6.4%
TOTAL GROCERY	56,222	3.5%	8.2%
ORGANIC POSITIONING STATED (GROCERY)*	1,517	4.9%	9.4%
HEALTH AND BEAUTY AIDS	16,868	3.0%	5.8%
FREE FROM PARABENS STATED (HABA)*	1,535	3.8%	23.2%
CONTAINS PARABENS QUALIFIED (HABA)*	434	(4.8)%	(8.1)%

Source: NielsenIQ Retail Measurement Services (leveraging NIQ Product Insights), National GB+DR+MM, L52W ending 06/07/25
*Based on product claims over a closed group of categories (food/beverage, or personal care)

NIQ

Organic-Positioned Products winning on the strength of consumer resonance

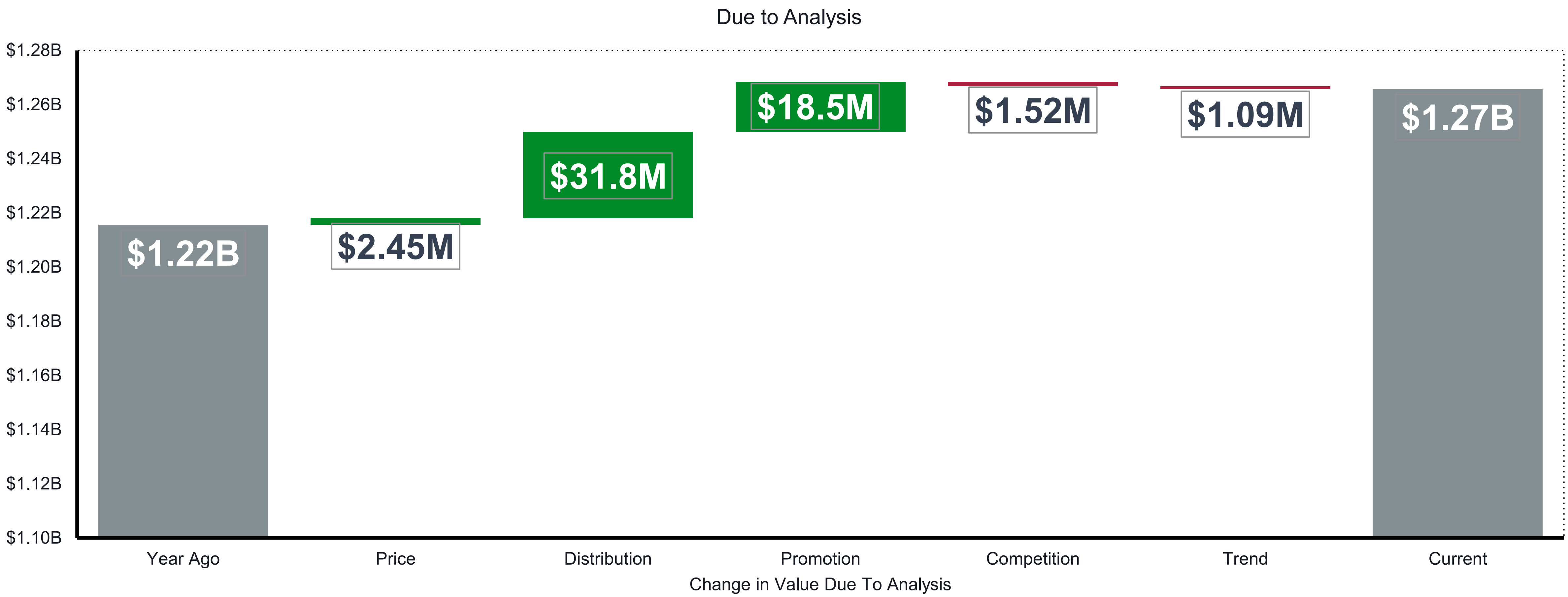
NIQ Business Drivers outlines the multiple drivers of growth, particularly “Trend” indicating strong consumer resonance of these items



Dataset: NielsenIQ Retail Measurement | CA - NDH MULTIPURPOSE - CROSS CATEGORY - Business Drivers | NDH MULTIPURPOSE BD

Paraben-Free Products growing on the strength of distribution and promotions

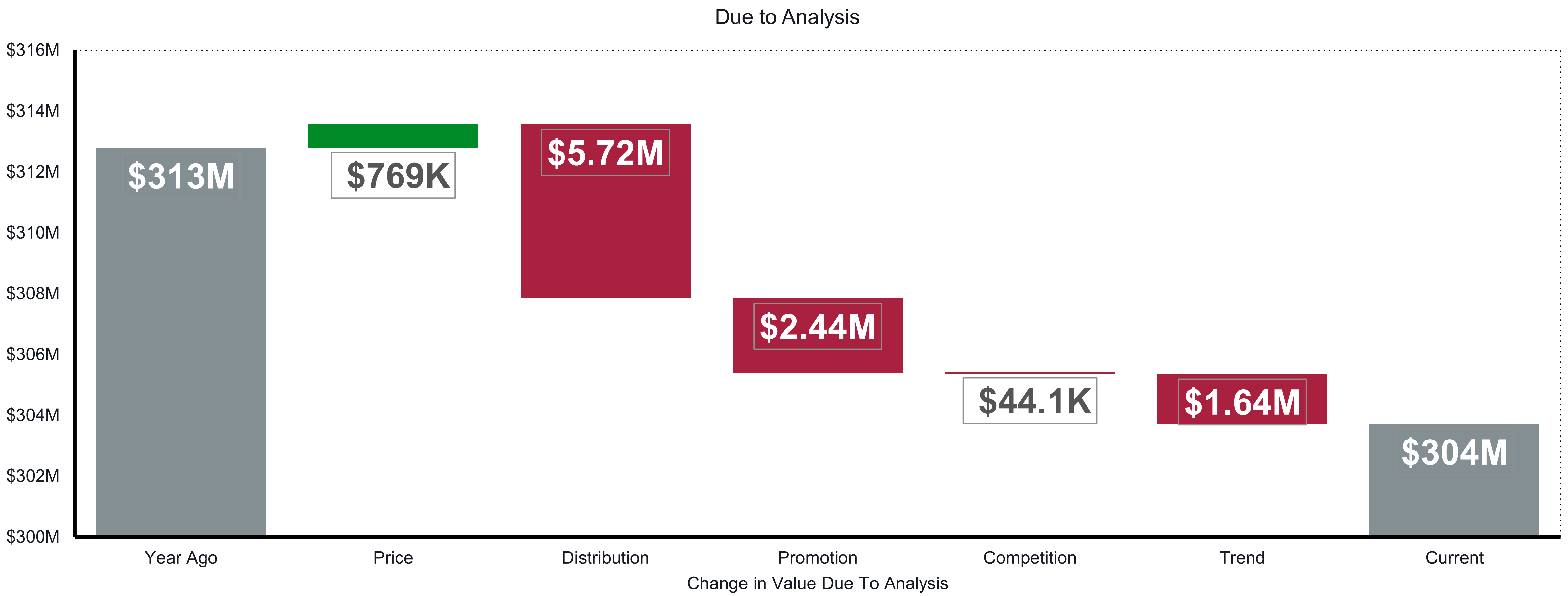
Other factors are effectively flat suggesting that this may have become a “minimum entry point” in personal care



Dataset: NielsenIQ Retail Measurement | CA - NDH MULTIPURPOSE - CROSS CATEGORY - Business Drivers | NDH MULTIPURPOSE BD

Paraben-Containing Products in Personal Care losing space, promotions, and consumer resonance

There is clearly a shift away from paraben-containing products, and lower consumer resonance suggests it may shift further



Dataset: NielsenIQ Retail Measurement | CA - NDH MULTIPURPOSE - CROSS CATEGORY - Business Drivers | NDH MULTIPURPOSE BD

Creating actionable growth roadmaps **for your brands**

Identify **Opportunities**

Key Questions:

- What emerging needs or white spaces offer new opportunities?
- What segment or channel should I target?
- How do people interact with my category and brand?

Leverage NIQ to:

Target consumers

Optimize positioning

Drive loyalty

Maximize **Potential**

Key Questions:

- Are my new propositions meeting consumer needs?
- Am I maximizing the potential of all RGM levers?
- How do I win at point of sale?

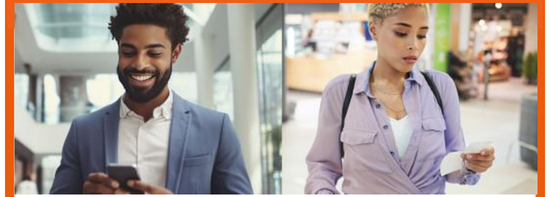
Leverage NIQ to:

Forecast innovation

Promote ideation

Drive concept testing

Refine **Strategies**



Key Questions:

- Does my mix (i.e. pack, ad, product, price, etc..) meet my desired objectives?
- Which stores and where in store should we deploy?

Leverage NIQ to:

Optimize marketing mix

Focus advertising

Level-up merchandising

Optimize **Performance**

Key Questions:

- How well is my in-market mix, brand and customer experience delivering against my strategy?
- What levers are driving changes in performance?

Leverage NIQ to:

Refine assortment

Forecast demand

Inform pricing


A look ahead:
What is next for NPI?

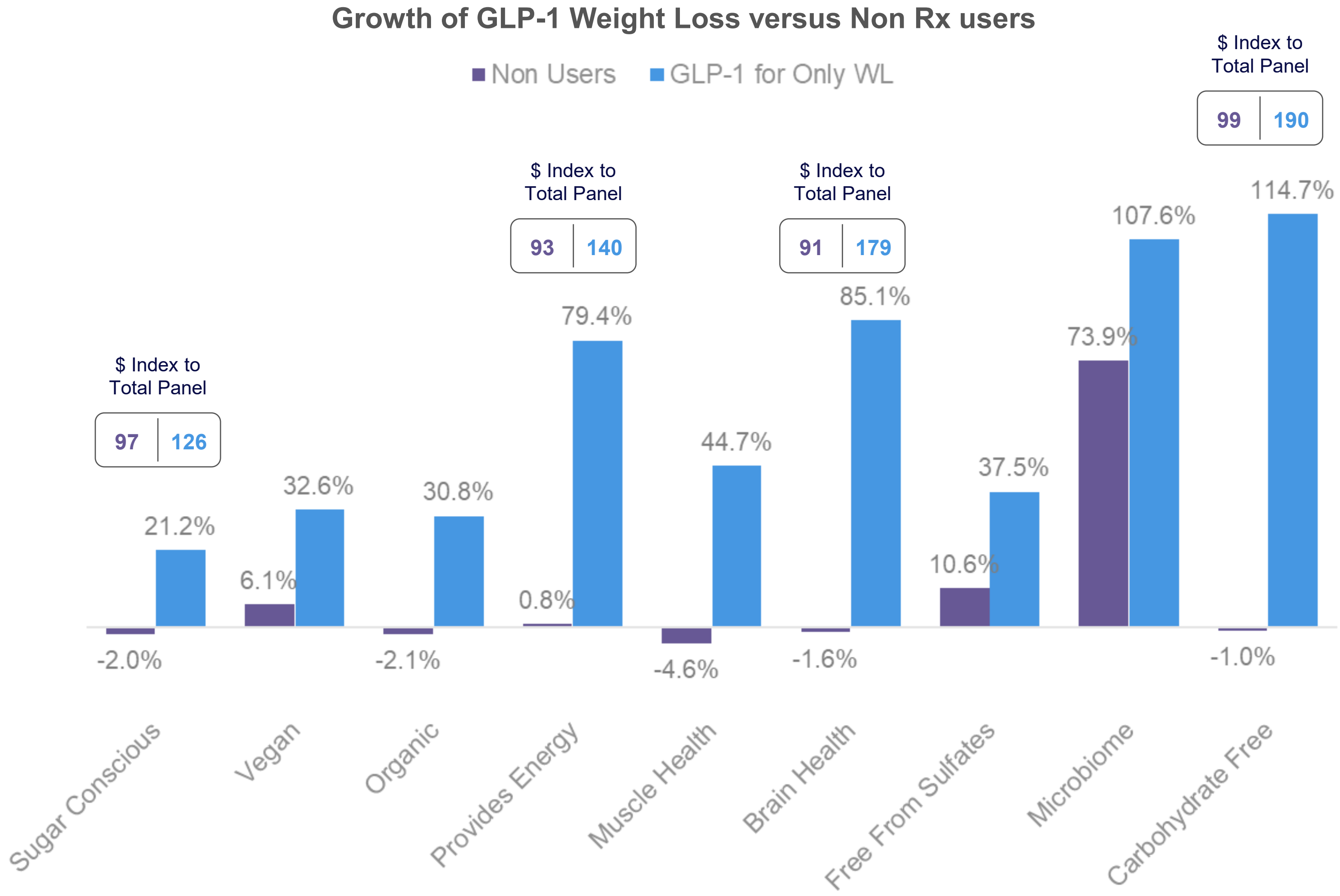
NPI insights will expand in Canada & Beyond

- What is coming in the future?
  - **More consumer insights**
    - Adding to both our Homescan & Omnishopper panels
  - **More characteristics**
    - We already have 550+ characteristics in Food & Bev, but we will continue to have more added
      - Any recommendations you have are encouraged!
  - **More categories**
    - Beyond Food/Bev/Personal Care, we will soon be adding pet, supplements/OTC, and more
  - **More countries**
    - In addition to Canada and the US, UK/Western Europe is launching very soon!
    - We can access NPI insights from the US and elsewhere through our Global Snapshots team

NIQ

US Consumer Insights Example: GLP-1 weight loss shoppers are increasingly intentional

Health needs states, nutrition, clean label all showing strong growth



Some attributes GLP-1 weight loss users showing stronger growth

- *Immune health*
- *Joint health*
- *Muscle health*
- *Osteoporosis*
- *Bone Health*
- *Digestive Health*
- *Hair, Skin Nail support*
- *Clinically tested*
- *Free from aluminum*
- *Free from antibiotics, hormones*
- *Free from high fructose corn syrup*
- *Free from artificial colors, flavors, fragrances, ingredients*
- *Free from parabens and phthalates*
- *Free from sulfates*
- *Natural, natural flavors*
- *Calorie conscious, fat conscious*
- *Sodium conscious (especially very low sodium)*
- *Contains added sugar*
- *Nutrient dense*
- *Antioxidants stated*
- *Paleo*
- *Non-GMO*
- *Plant-based*
- *Free from gluten*
- *Excellent and good source of protein*

Source: NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024); Total US; Total Outlets; Total Food & Beverage; Product Insight stated claims on package; Unit % Change, 52 weeks ending September 28, 2024

Summary & Next Steps

Wellness is resilient – how will you capitalize?

What is happening & where do we focus next

1. Attitudes remain resilient amid other industry & consumer pressures

Pressure on consumers and industry is real, but our insights demonstrate that these wellness trends remain generally resilient amid these challenges

2. Topline performance doesn't tell the whole story

Understanding topline performance of particular health & wellness trends is critical, but going further to understand the "why" of the growth/declines is critical to understand what action to take. Precise data helps tease out the noise.

3. Find the trends that matter & focus on consumers who care

The comprehensive nature of our attribute insights allows retailers & brands the ability to look at critical trends within and across categories. Further, the ability to segment consumers by how much they care about these issues, then look at their actual purchases, is the next unlock for companies looking to drive growth into the future.

NPI Strategic Insights Reports

Discounts available!

NielsenIQ

Product Insights

Harness the *power* of product attribution

Are you keeping track of the major trends crossing categories?

Claims	Certifications	Ingredients	Allergens	Nutrition Facts
Country of Origin	Diets & Lifestyle	Nutrition	Functional Ingredient	Natural & Organic

Where can I start?

Our consistent recommendation is to add NPI to your Discover database(s) to maximize the utility of these insights.

However, we do have ad hoc options both for your category(s) and cross category

How it works

We have multiple **"Strategic Insights Reports"** which can provide critical insights as to how these key trends are performing across Food & Bev, or Personal Care.

These insights can stay at the higher level (Total Food & Bev, or Total Personal Care), or down to the category level

Today's Offer

We are offering **up to 50% off** all Strategic Insights Reports for the **until September**

Not only can these reports provide you with critical strategic insights, you can also put this investment towards your Discover subscription (within 60 days)

For more, talk to your NPI or Account Lead today!

Start your NPI journey with strategic insights…

50% Off

Strategic Insights Reports in by September 2025

Q&A

Coming *into view*