

Wellness Reimagined Navigating Consumer Shifts in an Unpredictable Economy

Presented by Francis Parisien
SVP Sales SMB Canada & Strategic Initiatives

Sept. 19, 2025

NIQ



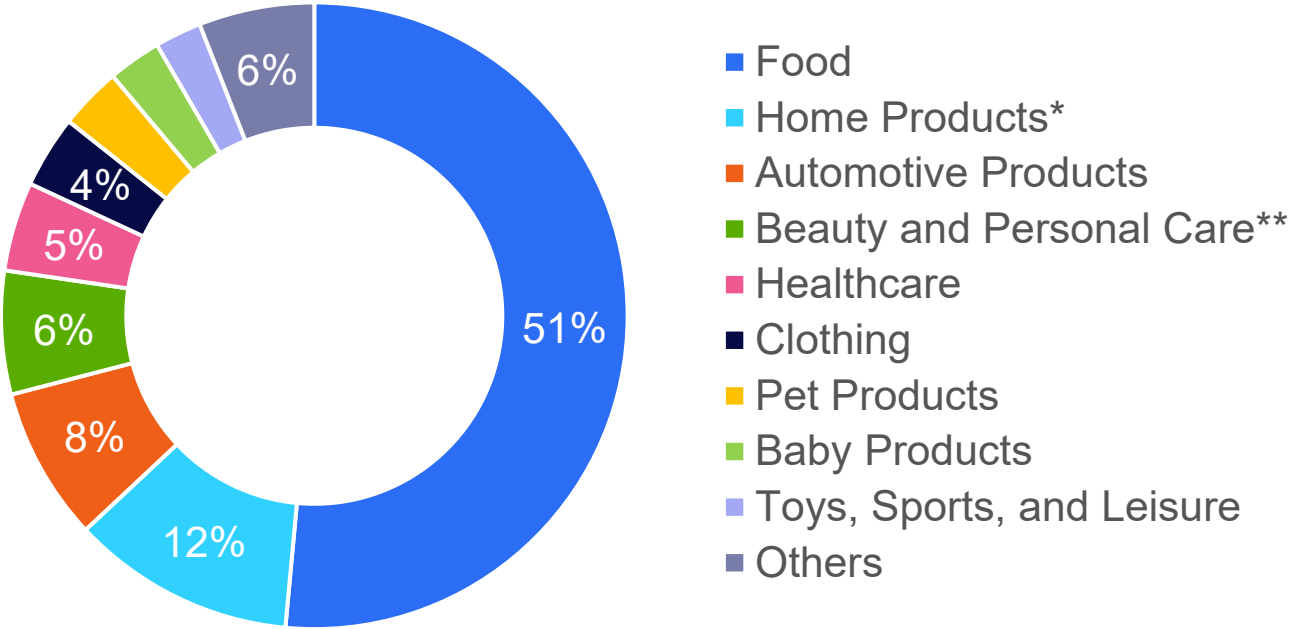
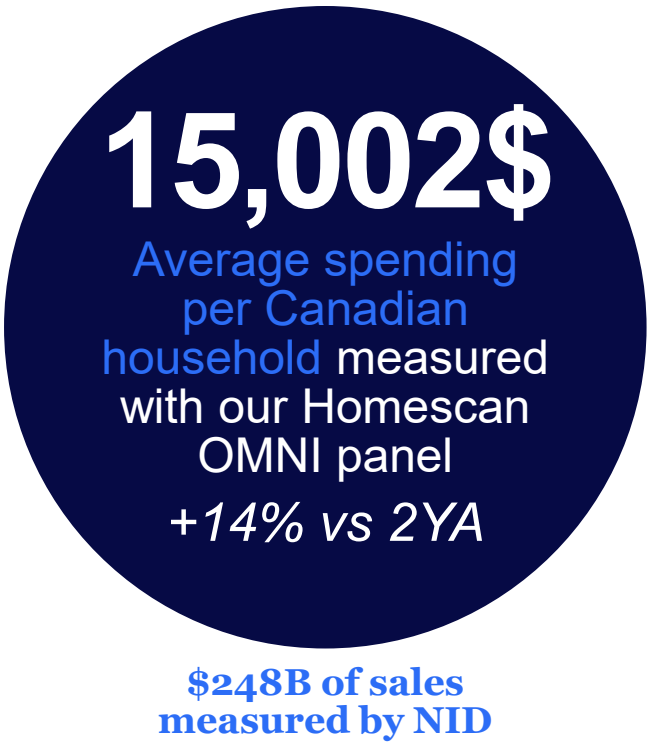
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NIQ



Food categories remain the largest expense item among the categories measured by NIQ Canada in its new OMNI panel

Expenditure measured by NIQ OMNI
52 weeks, Canada

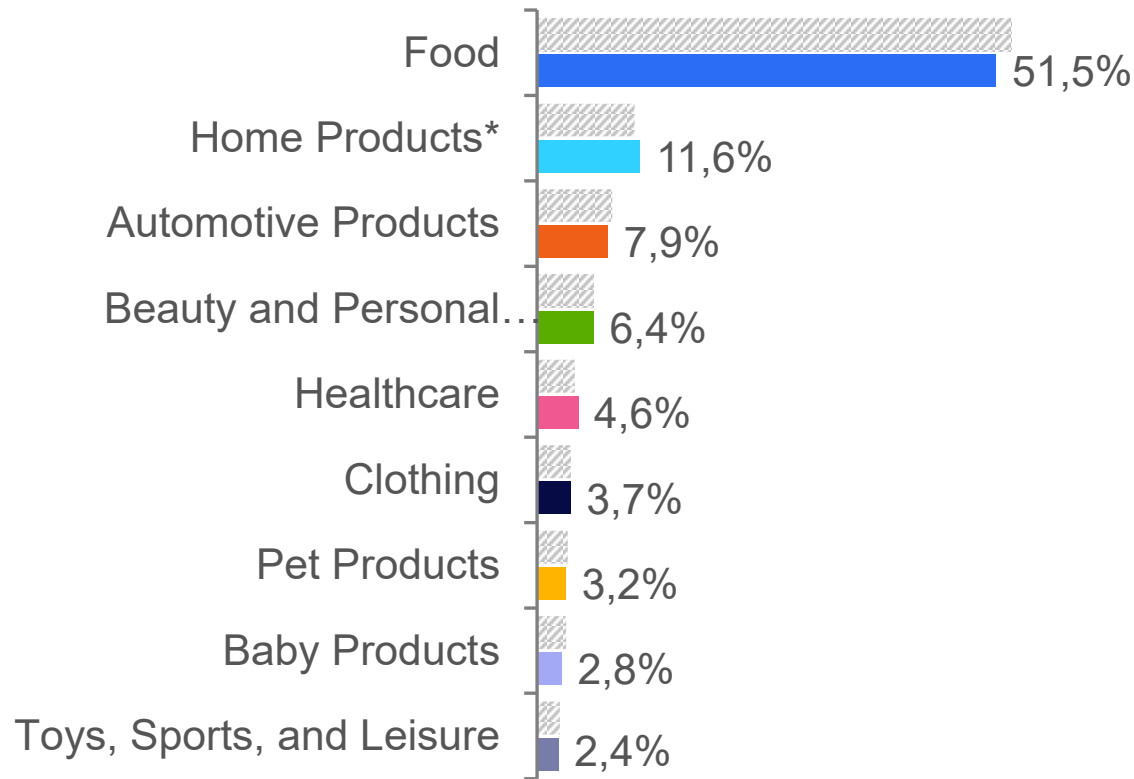


*Produits pour la maison incluant électroménagers / ** Beauté incl. petits appareils
Source: NIQ Canada, CPS OMNI, Tous réseaux Canada, Tous acheteurs, 52 weeks se terminant le 23 août 2025

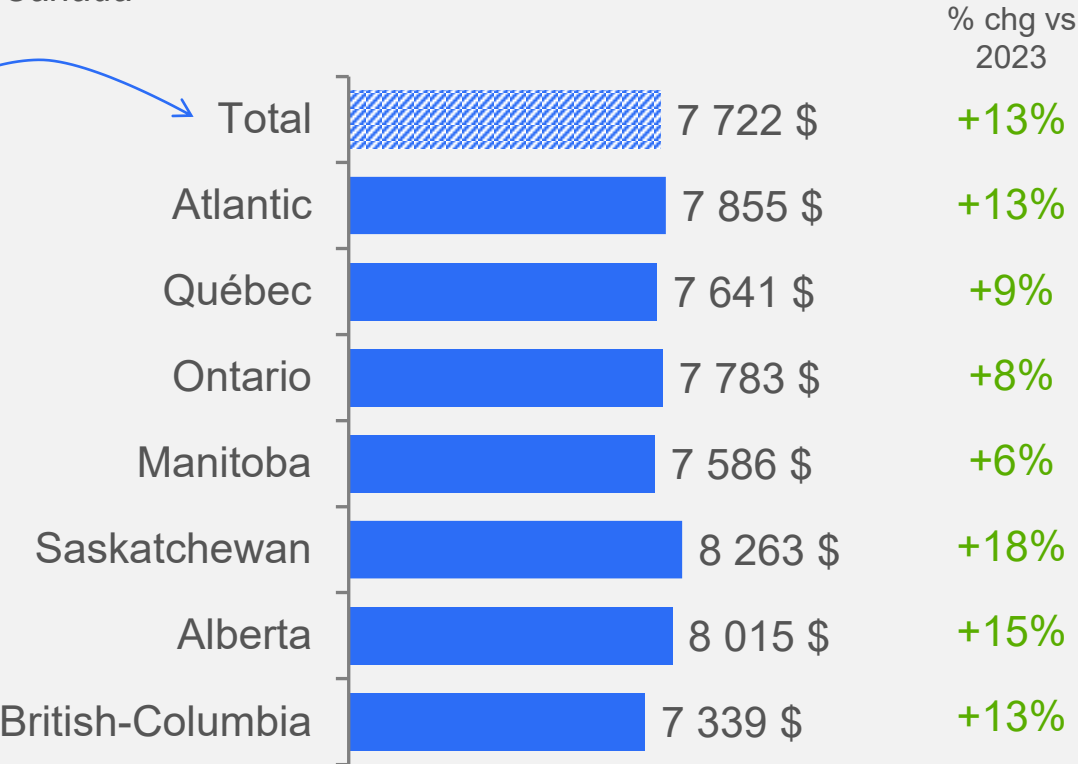
However, food has lost importance in total sales measured by NIQ OMNI

Food expenditure per household has increased by 13% over the past 2 years

Proportions of expenditure measured by NIQ OMNI
2025 vs 2023, Vol. \$, Canada



Food Expenditure Measured by NIQ OMNI
Canada



Source: NIQ Canada, CPS OMNI, Tous réseaux Canada, Tous acheteurs, 52 weeks se terminant le 23 août 2025

Actions Canadians are taking to save on their CPG bills

**Stock up
on promo**
65%

**Cook
more at
home**
57%

**Better
plan to
avoid
waste**
44%

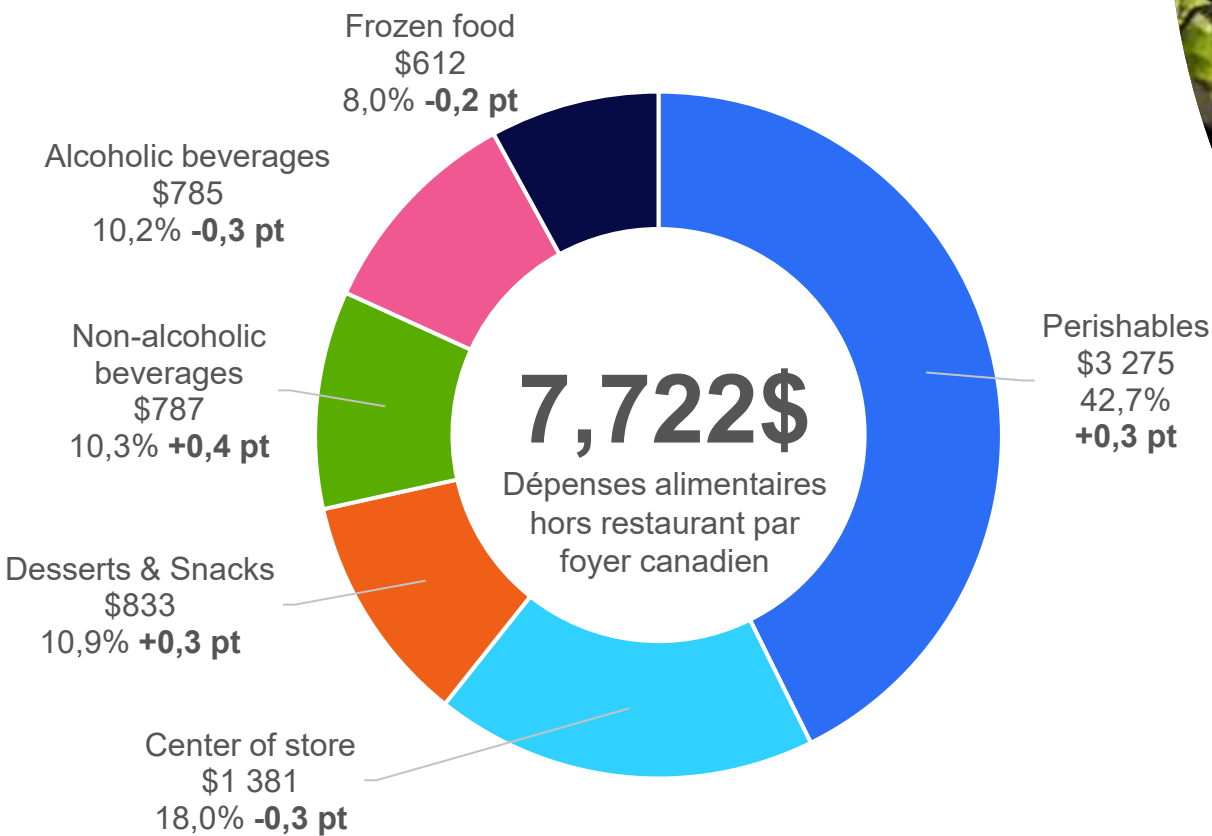
**Prepare
more
lunches**
27%

Eat less
17%

Source : NIQ Canada, Étude Substituts de repas à domicile, mai 2025

Perishables are gaining importance in the country's consumer basket

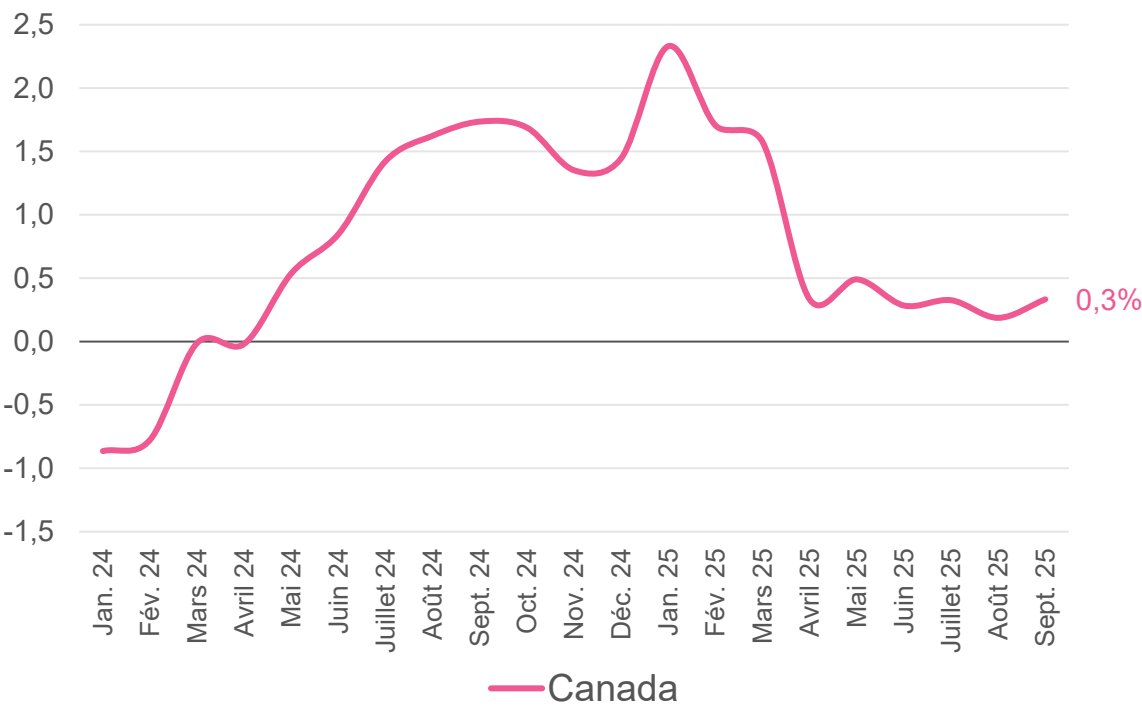
Food Expenditure Measured by NIQ OMNI
Canada



Source: NIQ Canada, CPS OMNI, Tous réseaux Canada, Tous acheteurs, 52 weeks se terminant le 23 août 2025

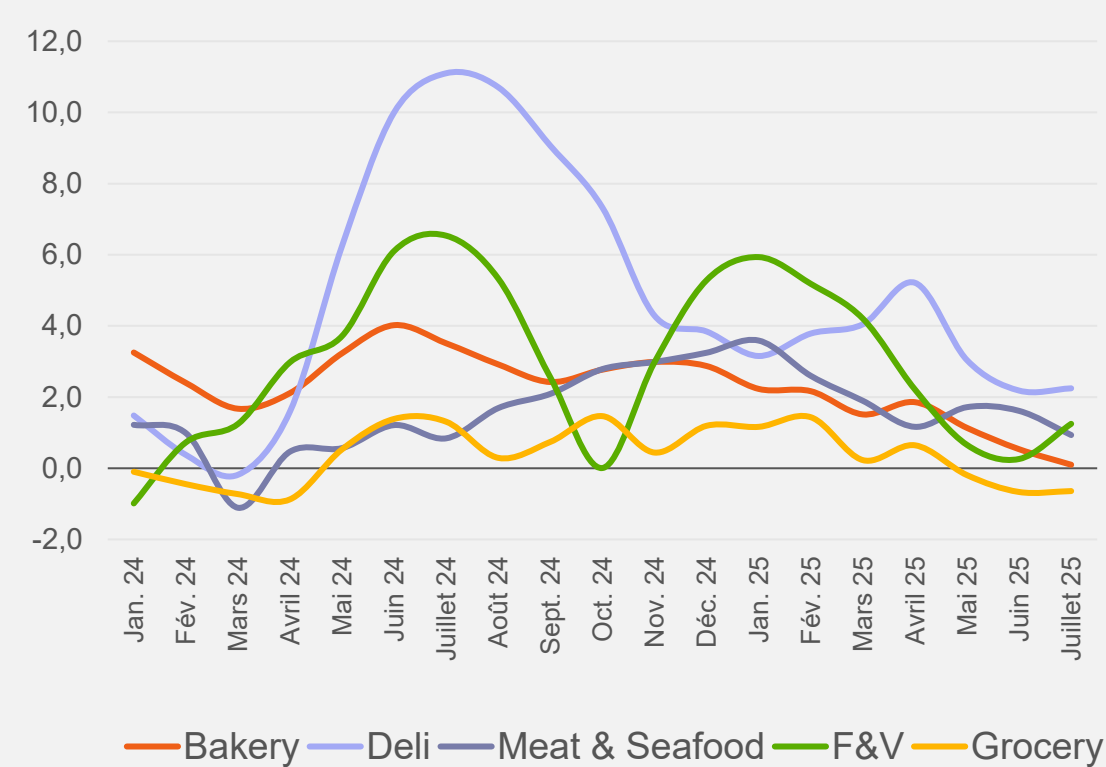
The industry as a whole is experiencing little growth in sales over the past 6 months

Unit sales growth– TOTAL CPG
Vol. units % chg, 12-weeks rolling



The centre-of-store categories saw their sales fall over the summer

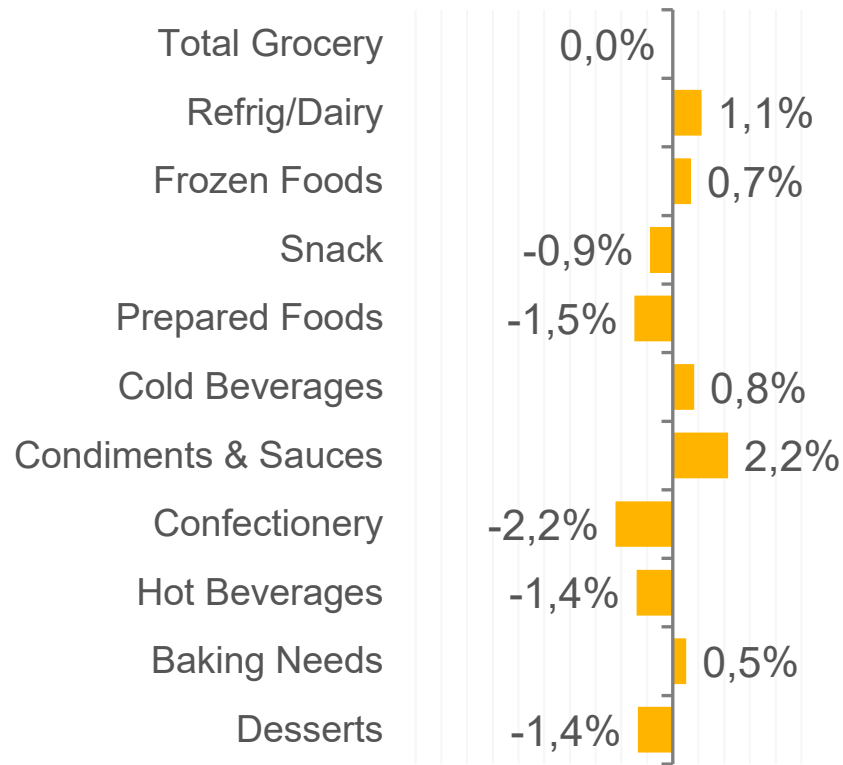
Unit Sales Growth – FOOD
Vol. units % chg, 12-weeks rolling (Canada)



Source: NIQ Canada MarketTrack, Tous réseaux, périodes roulantes de 12 semaines, dernière période = 6 sept. 2025

Consumers continue to spend time in their kitchens, which explains the performance of several categories of condiments and meal prep

Performance of GROCERY sub-departments
Vol units % chg, Latest 26 weeks (Canada)



Performance of selected Top 100 Grocery categories
Vol units % chg, Latest 26 weeks (Canada)

Top 10 Growing	Top 10 Declining
Cottage Cheese	Oriental Noodles & Instant
Lunch Kits	Light Lunches
Extreme Energy Drinks	Juices & Drinks - Refrigerated
Pure Maple Syrups	Side Dishes
Spices	Margarine
Seasonings & Salad Toppings	Fruit - C&B
Confections - Frozen	Snacking Fruits Nuts & Seeds
Butter & Dairy Spreads	Processed Cheese Slices
Whipping Cream	Soup
Honey	Potatoes - Frozen
	Breakfast - Frozen

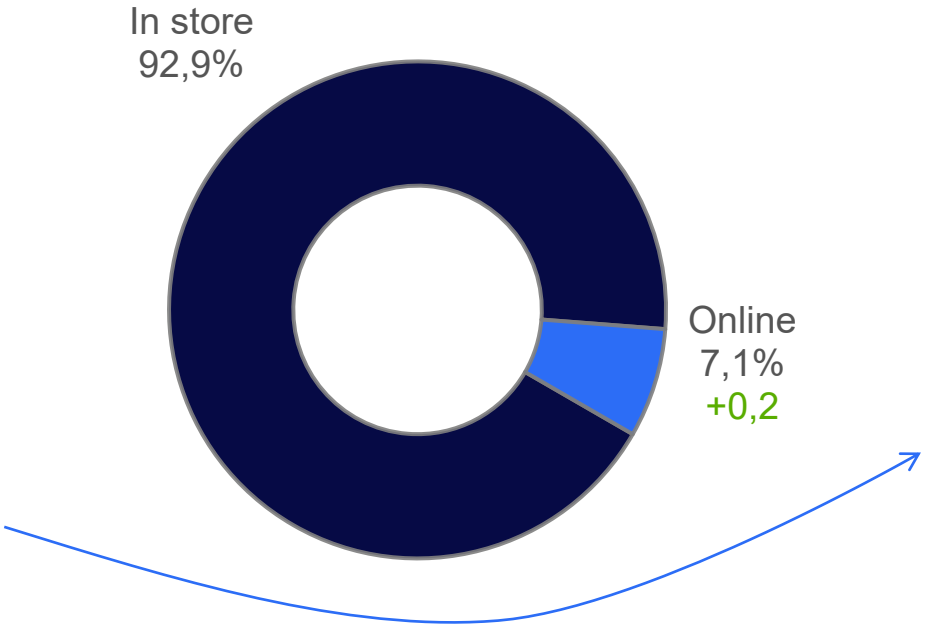
Source: NIQ Canada MarketTrack, All Channels National, 26 weeks ending Sept. 6, 2025

Conventional supermarkets are losing market share to warehouse clubs and discount grocery stores

Online sales account for 7.1% of sales, or \$9.12 billion in the country as a whole

Network Performance – Total Food Vol. \$, 552 weeks (Canada)

Channel	In store	Online
Supermarkets	55,7%	-0,9
<i>Conventional</i>	32,6%	-0,8
<i>Discount</i>	23,1%	+1,1
Warehouse Clubs	16,1%	+0,9
Mass Merch	13,0%	-0,05
Alcohol Stores	5,6%	-0,3
Dollar Stores	2,4%	+0,2
Delivery Services	2,0%	+0,1
Drug stores	1,7%	+0,1
C&G	0,7%	-0,1
Gen Merch Stores	0,2%	+0,1

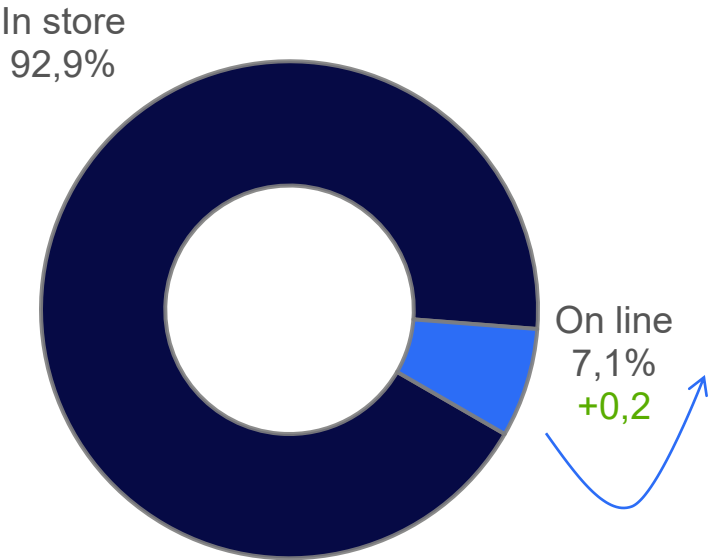


In store	Online
97,1%	2,9%
2,4%	2,4%
96,4%	3,6%
91,4%	8,6%
85,6%	14,4%
99,9%	0,1%
100%	
	100%
99,7%	0,3%
99,8%	0,2%
98,9%	1,1%

Source: NIQ Canada, CPS OMNI, Tous réseaux Canada, Tous acheteurs, 52 weeks se terminant le 23 août 2025

Still opportunities to develop online food sales in Quebec

Online Sales Performance – Total Food Vol. \$, 52 weeks (Canada)



Région	Import.	Pt chg
Canada	7,1%	+0,2
Maritimes	5,8%	+0,5
Québec	4,5%	-0,5
Ontario	7,4%	+0,3
Manitoba	8,9%	+0,6
Saskatchewan	8,0%	+0,7
Alberta	9,6%	+0,5
British-Columbia	8,9%	+0,3



Source: NIQ Canada, CPS OMNI, Tous réseaux Canada, Tous acheteurs, 52 weeks se terminant le 23 août 2025

Costco is the largest online retailer for food sales in Canada

Amazon is the most shopped by households in the country

Top 10 retailers – Online food sales
Vol. \$, Latest 52 weeks (Canada)

Online	Penetration
Costco	14,2%
Walmart	7,9%
Amazon	31,4%
RCSS	5,3%
Uber Eats	9,1%
Loblaws	3,4%
Door Dash	6,9%
Skip	7,0%
Save On Foods	2,0%
No Frills	2,6%

Source: NIQ Canada, CPS OMNI, Tous réseaux Canada, Tous acheteurs, 52 weeks se terminant le 23 août 2025





% of Canadians who bought food in-store...

Walmart
91%

Dollarama
91%

Costco
75%

SDM
68%

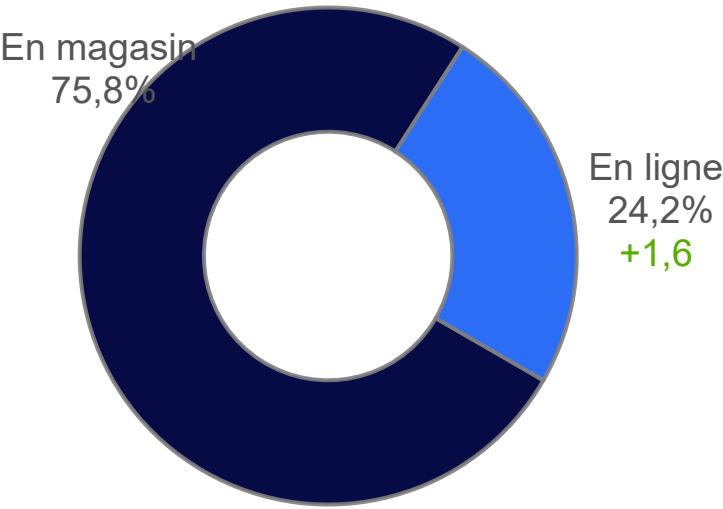
**Giant
Tiger**
48%

Source: NIQ Canada, CPS OMNI, Tous réseaux Canada, Tous acheteurs, 52 weeks se terminant le 23 août 2025

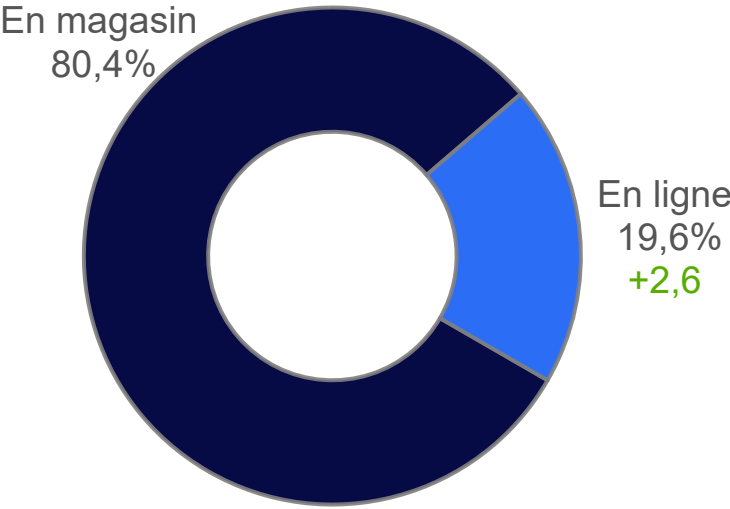
The development of online food sales is very low compared to the other departments measured by NIQ OMNI

Online Sales Performance
Vol. \$, 52 weeks (Canada)

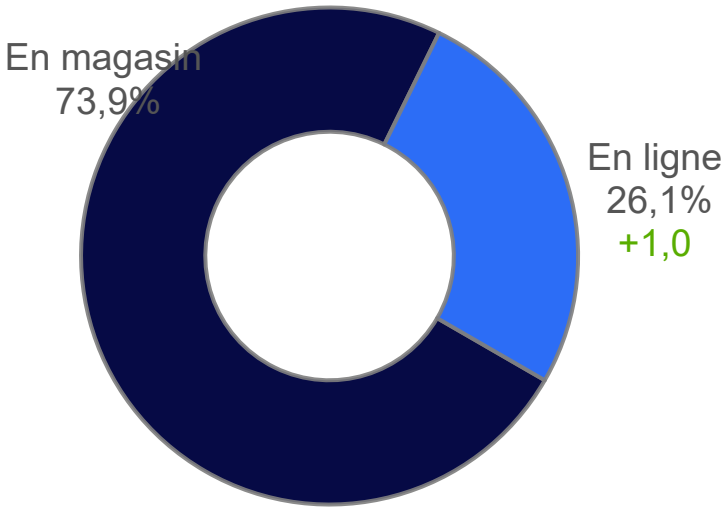
Beauty



OTC



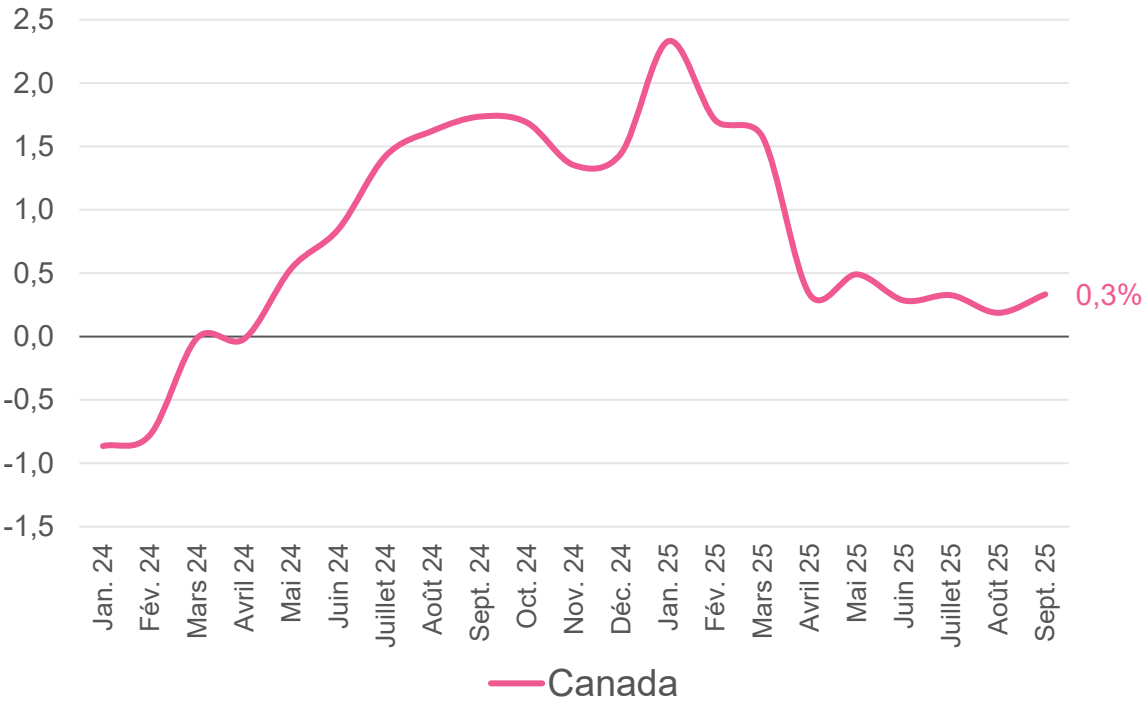
Pets



Source: NIQ Canada, CPS OMNI, Tous réseaux Canada, Tous acheteurs, 52 weeks se terminant le 23 août 2025

Non-food categories are not experiencing a lot of growth in networks measured by NIQ

Unit sales growth
Vol units % chg, Rolling 12 weeks (Canada)

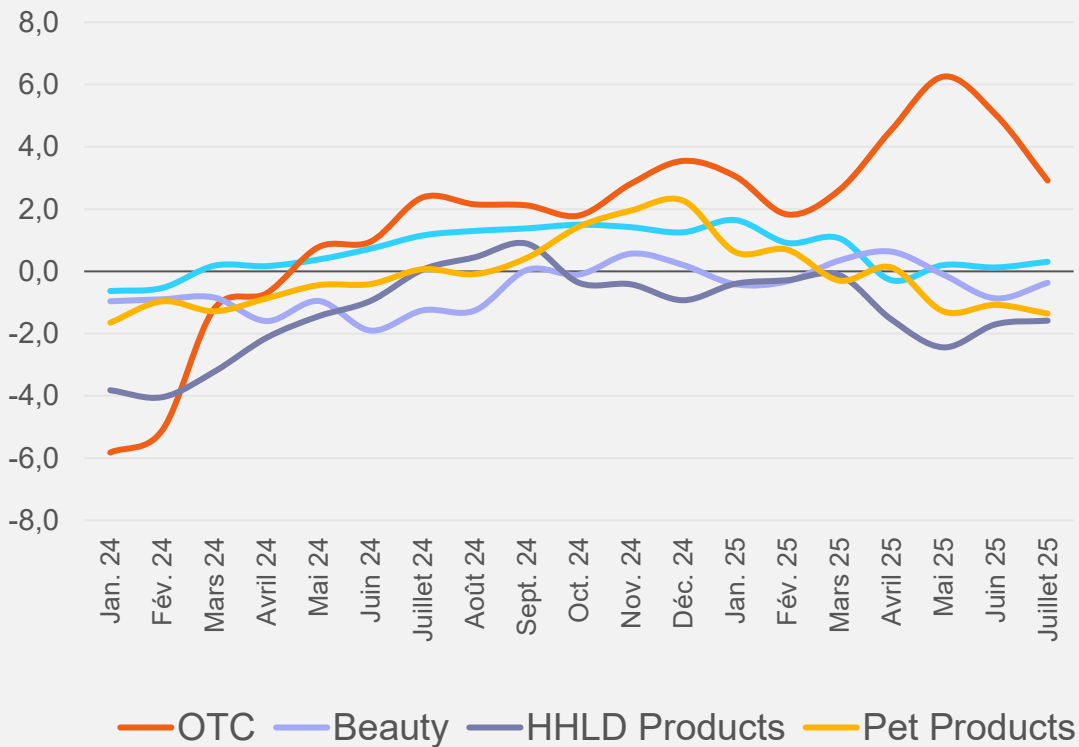


Source: NIQ Canada MarketTrack, All Channels National, rolling 12 weeks ending 6 sept. 2025



The situation is different for each category

Unit Sales Growth – FOOD
Vol units % chg, Rolling 12 weeks (Canada)



The good news is - consumers are taking care of their health and body

Performance of selected Top 50 NON-FOOD categories
Vol units % chg, Latest 26 weeks (Canada)

Top 10 Growing	Top 10 Declining
Calcium & Mineral Supplements	Cold Remedies
Womens Fragrances	Liquid Soap
Air Care	Throat Lozenges & Cough Drops
Energy & Nutrition Products	Disposable Pants
Cosmetics - Lip	Bar Soap
Hand & Body Moisturizers	Cat Litter
Cosmetics - Face	Analgesic & Decongestant Products - Topical
Herbal Remedies	Dishwashing Products
Natural Health Supplements	Surface Cleaning Systems
Vitamins	Upset Stomach Remedies

Source: NIQ Canada MarketTrack, All Channels National, 26 weeks ending Sept. 6, 2025





85%

of Canadians think
about their overall
health & wellness
regularly

81%

Global

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



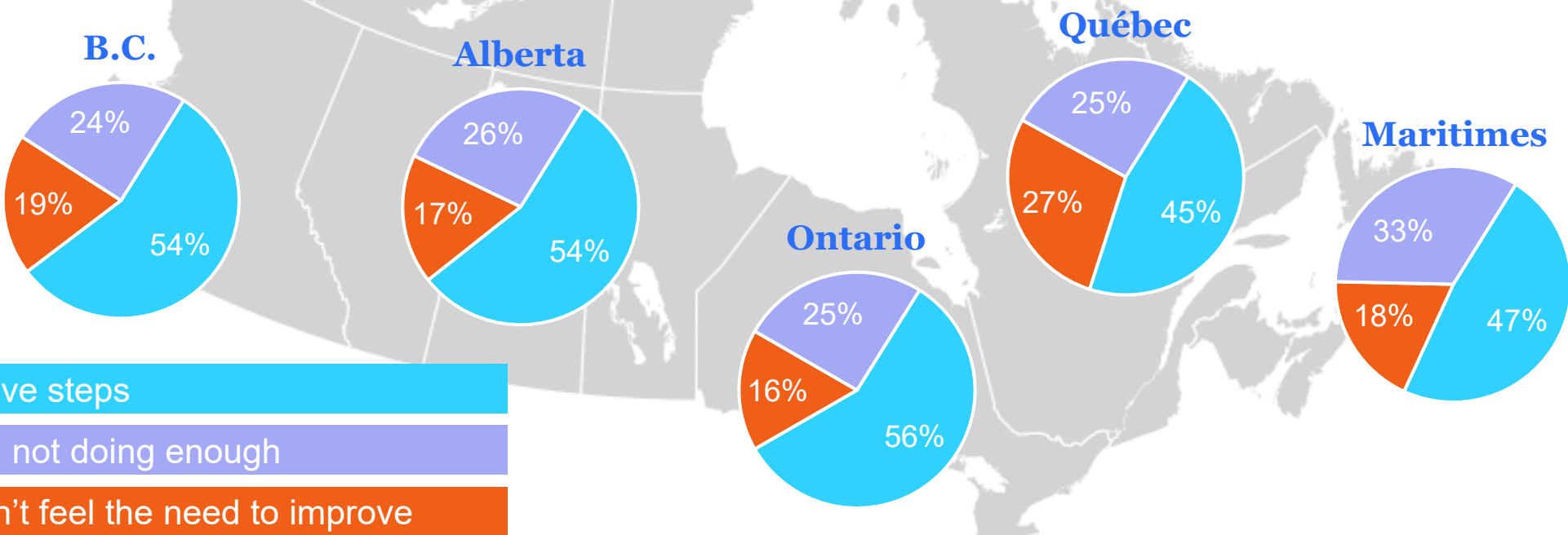
40%

of Canadians say
they are **taking active
steps** to improve their
Health & Wellness
(HW&)

Source: NielsenIQ Canada, 2024 Health & Wellness Survey

British Columbians are taking more active steps to stay healthy, while Quebecers are the most happy with their current situation and don't feel the need to improve anything

When thinking about your overall health and wellness, which best describes you?
Canada

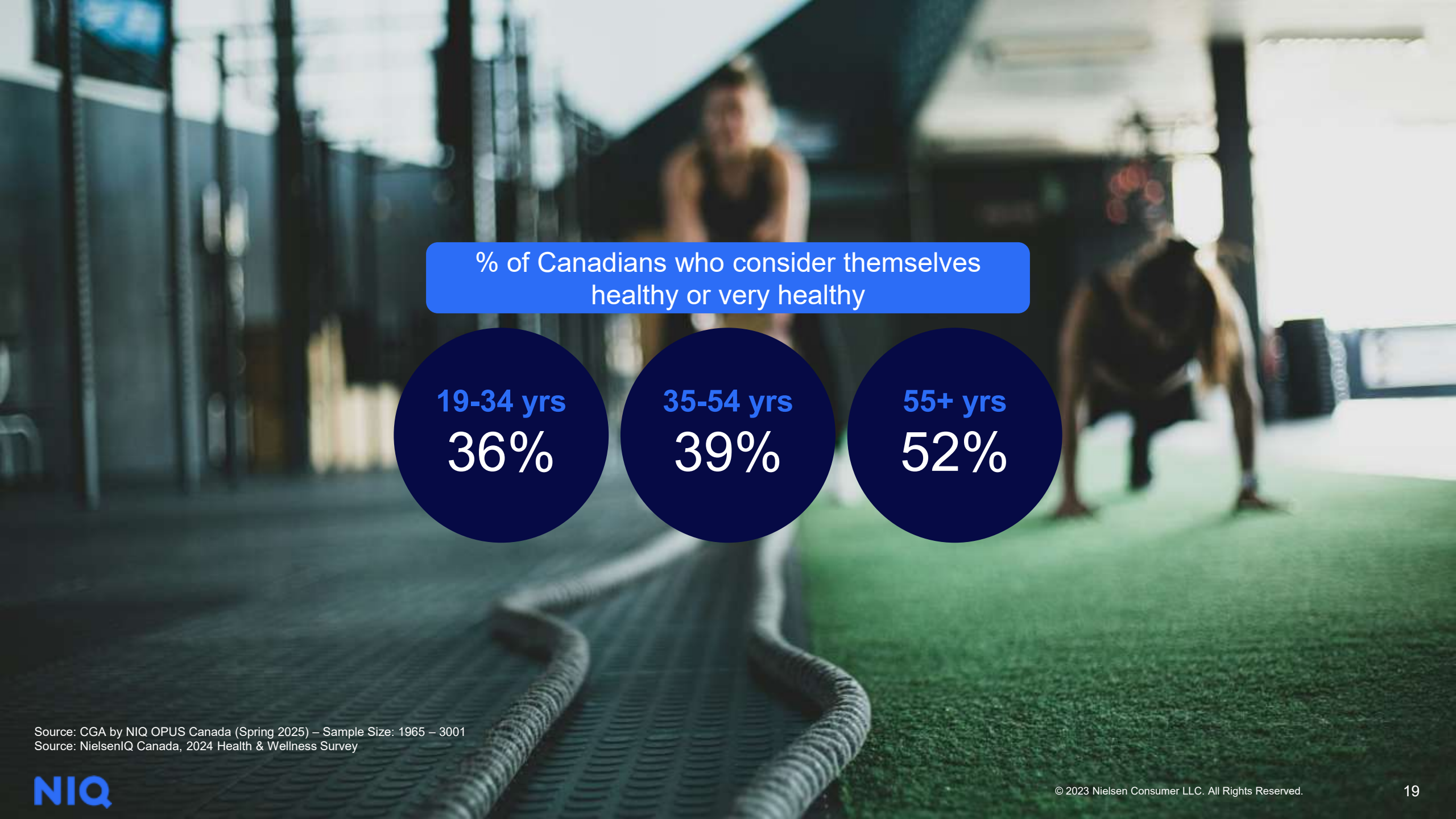


Taking active steps

Not happy, not doing enough

Happy, don't feel the need to improve

Source: NielsenIQ Canada, 2024 Health & Wellness Survey



% of Canadians who consider themselves
healthy or very healthy

19-34 yrs
36%

35-54 yrs
39%

55+ yrs
52%

Source: CGA by NIQ OPUS Canada (Spring 2025) – Sample Size: 1965 – 3001
Source: NielsenIQ Canada, 2024 Health & Wellness Survey



34%

of Canadians below
the age of 35 yrs old
say they engage in
weight or strength
training

Source: NielsenIQ Canada, 2024 Health & Wellness Survey

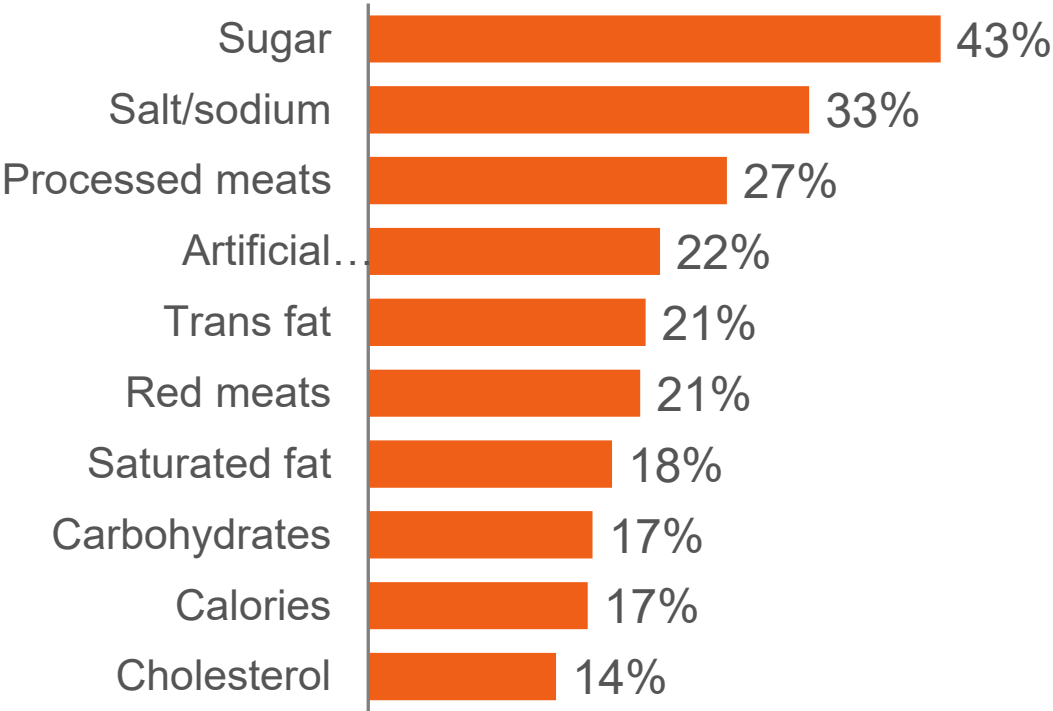


14%

Only 14% of Canadians
are NOT trying to reduce
anything in their diet
(ie. sugar, sodium,
calories, etc...)

Sugar remains at the top of Canadians' concerns – *and they are trying to quit!*

Items for which Canadians have been reducing the intake of during the past months
% of Canadians who said 'yes'



Source: NielsenIQ Canada, Health & Wellness 2024 Study



Measures taken to reduce potential health problems

**More fruits/
vegetables**
48%

**Follow a
more
balanced
diet**
30%

**More fiber
in diet**
29%

**More
vitamins**
25%

**More
natural
foods**
23%

Source: NielsenIQ Canada, 2024 Health & Wellness Survey

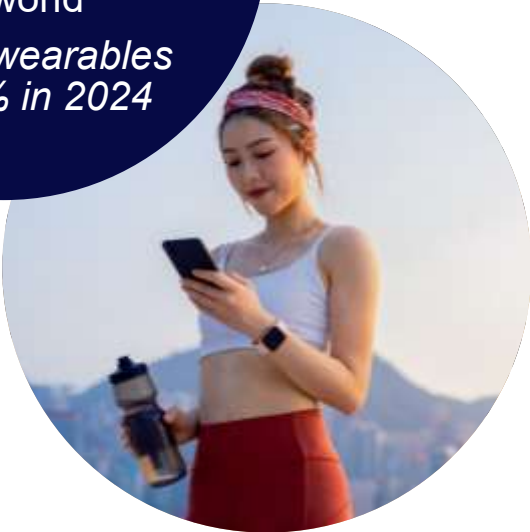
Why such a big focus on H&W? We're more aware and informed than ever

Surge in self-tracking/instant access to personal health

3.6B

downloads of H&W apps in 2024 around the world

Sales of wearables grew 4% in 2024



Increased coverage of H&W topics

1/5

of global consumers say influencers/ads on social media have a “significant influence” on H&W products they buy



Increasing regulation

117

countries now have taxes on sugary beverages

FOP will become law in Canada in Q1-2026



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



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
recomm.

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

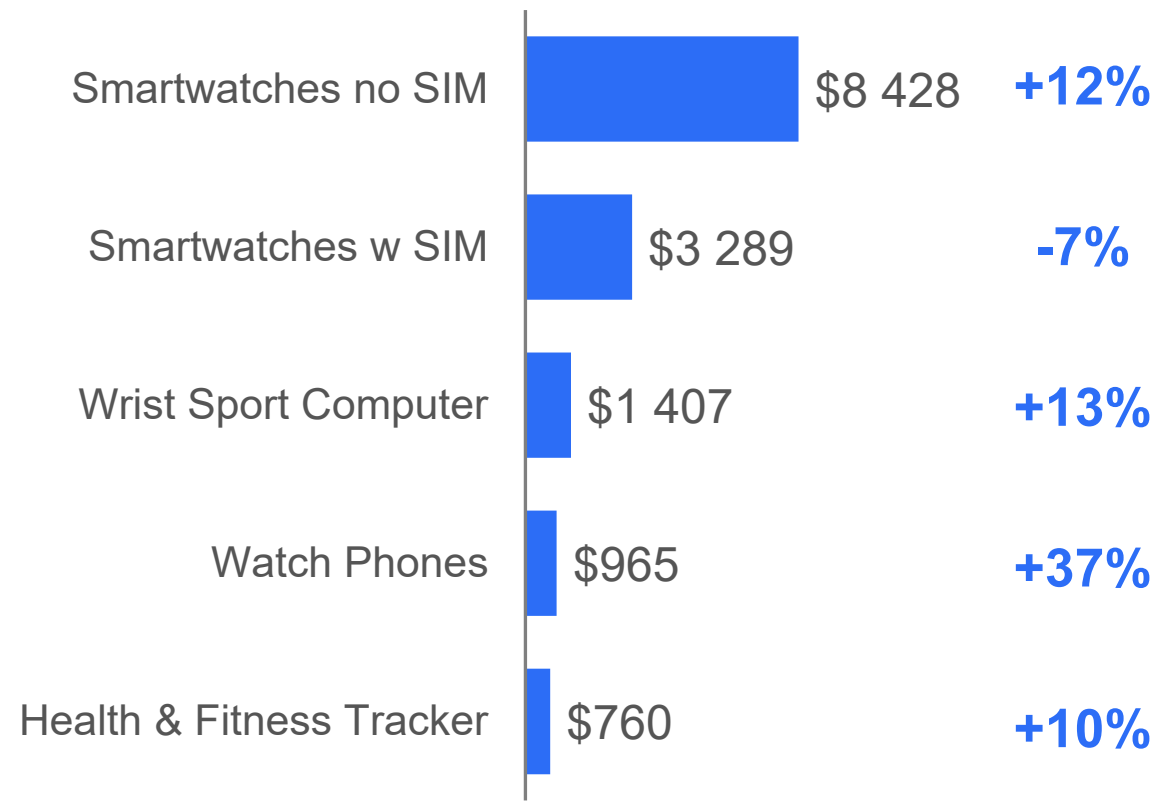
“The center of gravity of health data is shifting continuously – away from the clinic perimeter and towards the pocket, the wrist ... of the consumer.”

Gilbert S, Baca-Motes K et al, 2024

Using sensor-based data from wearables in health monitoring, Robert Koch Institute

Smart watch and other tech health segments are (still) growing around the world

Core wearables segments global sales
Value in Mio USD, value growth (Global)



Source: GfK Market Intelligence Sales Tracking Period : Apr 2024-Mar 2025 Categories: Core Wearables
Wired for Wellness : Tech & Durables Health categories – 2025- NF





61%

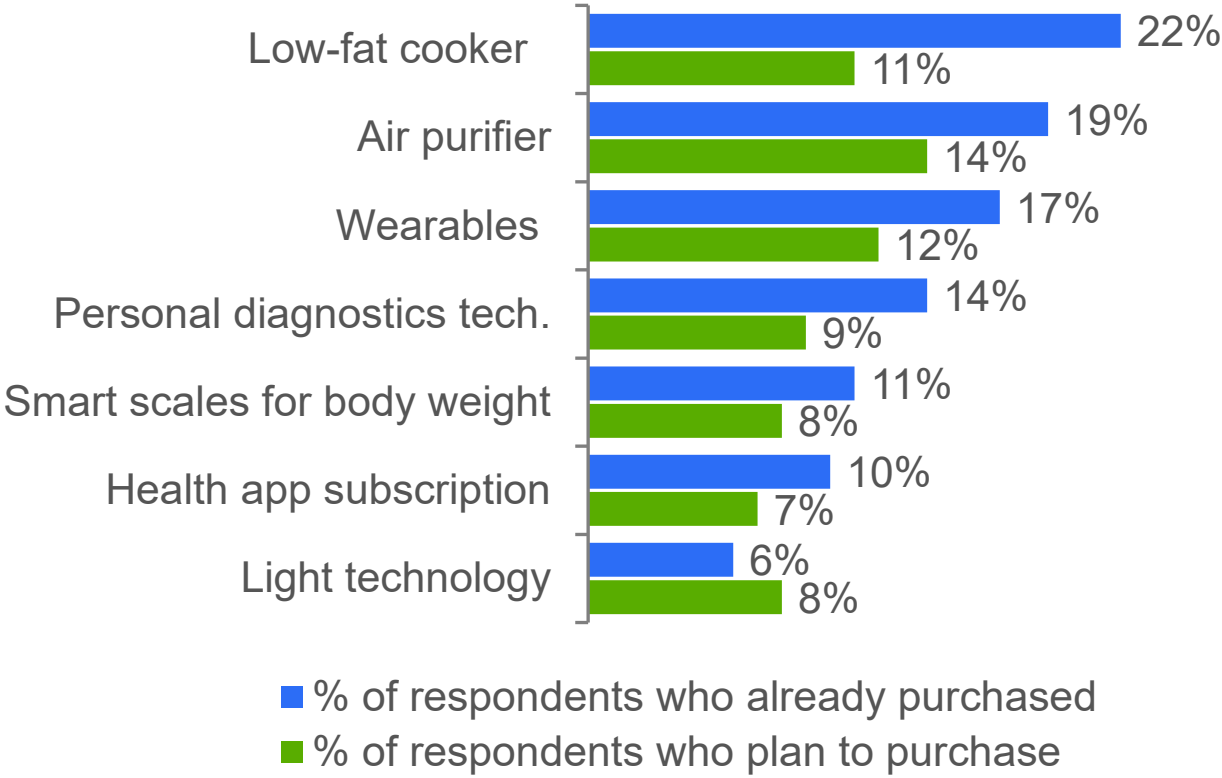
of global consumers
using health wearables
trust the data from these
devices as much as that
from their health
practitioner/physical
testing

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

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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



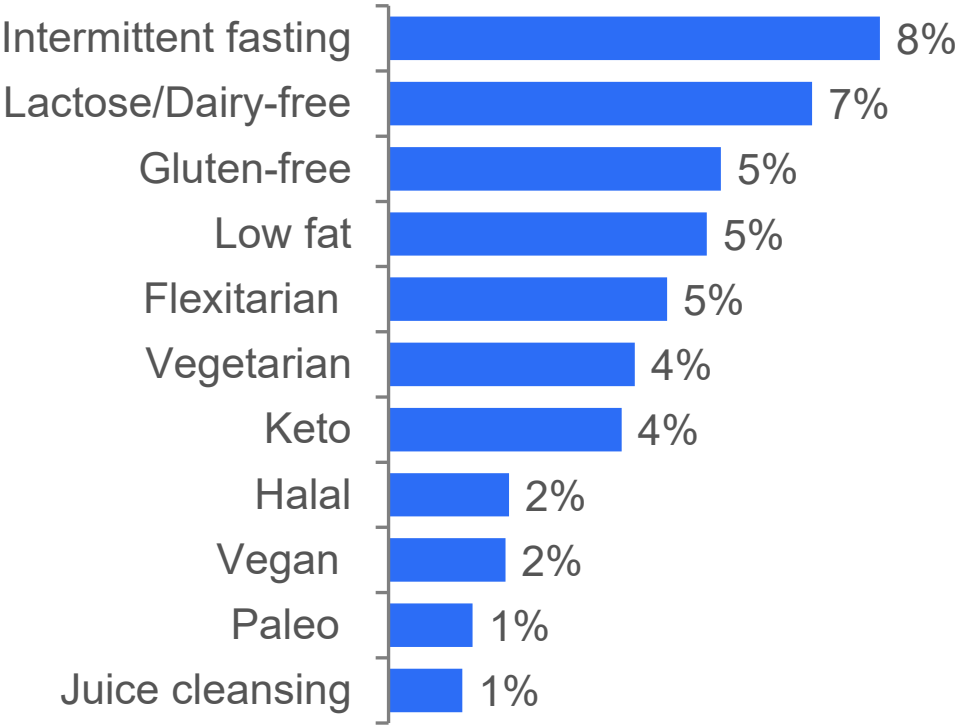


53%

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

Canadians are adopting new diets

% of Canadians who follow (these) diets
Canada



Source: NielsenIQ Canada, Health & Wellness 2024 Study





Of Canadians following these diets, % that are
doing so for less than 1 year

**Juice
cleansing**
43%

**Intermit.
fasting**
41%

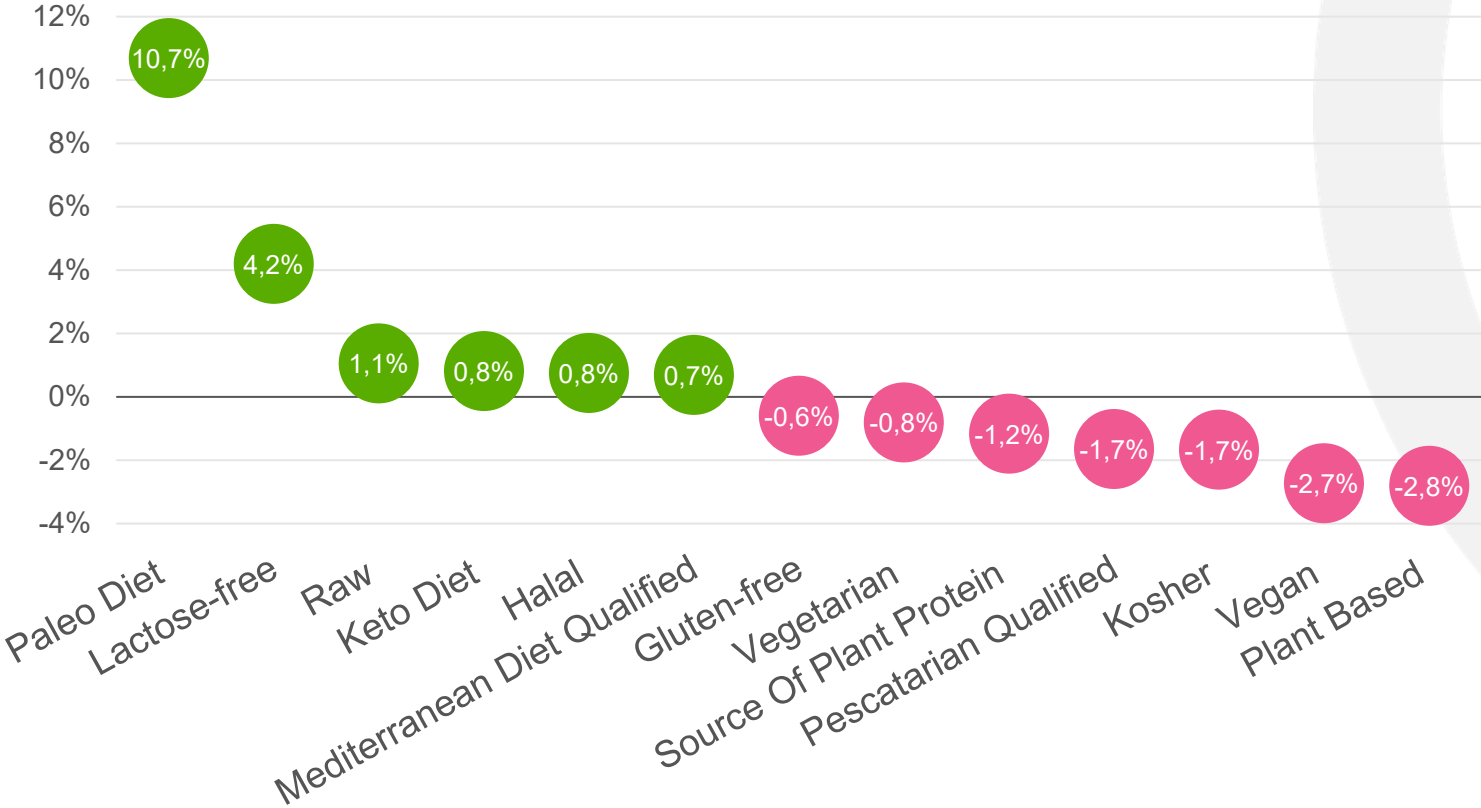
Paleo
47%

Keto
50%

Source: NielsenIQ Canada, Health & Wellness 2024 Study

This is having an impact on category sales

Performance of DIET attributes – NPI (Stated)
Vol. units % chg (Canada)



Source: NIQ NPI (NIQ MarketTrack), National All Channels, 52 weeks ending Aug. 9, 2025

Meat free

Of Canadians following these diets, % that are doing so for more than 5 years

Vegetarian
64%

Lactose-free
55%

Gluten-free
46%

Vegan
50%

Source: NielsenIQ Canada, Health & Wellness 2024 Study



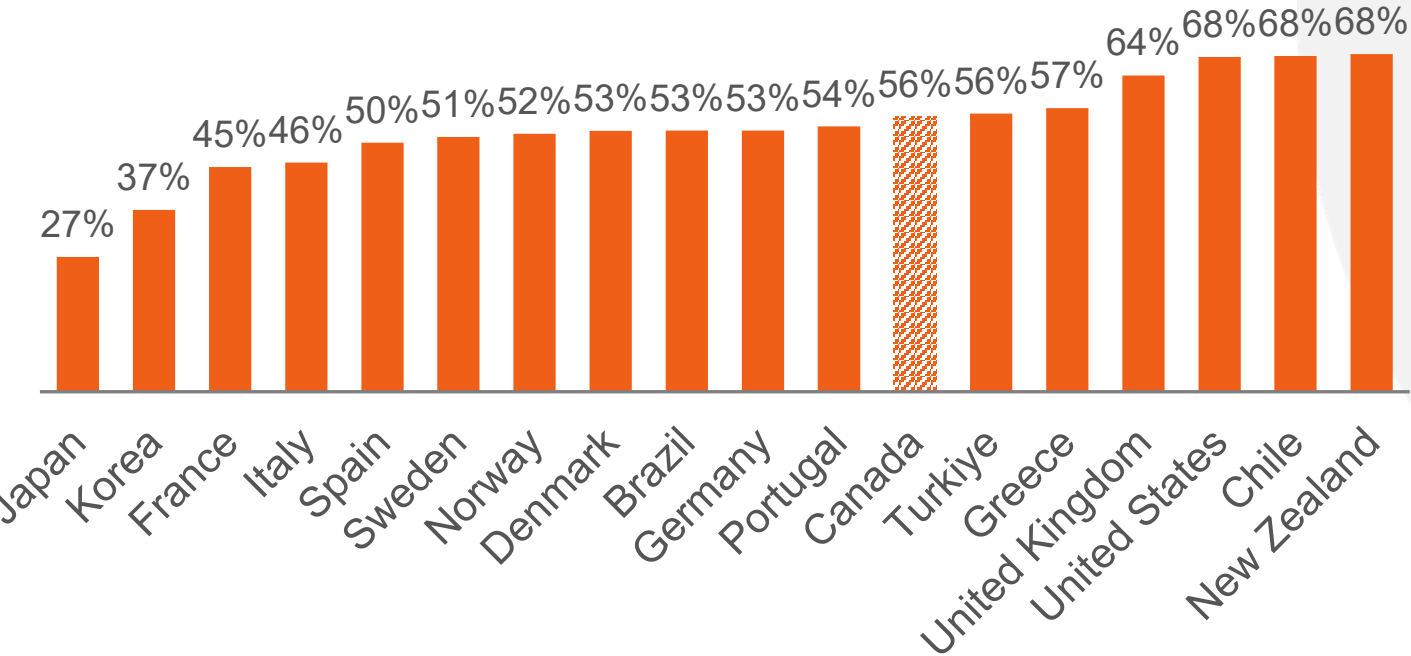
31%

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

Developed nations lead in overweight populations, spotlighting urgent health risks.

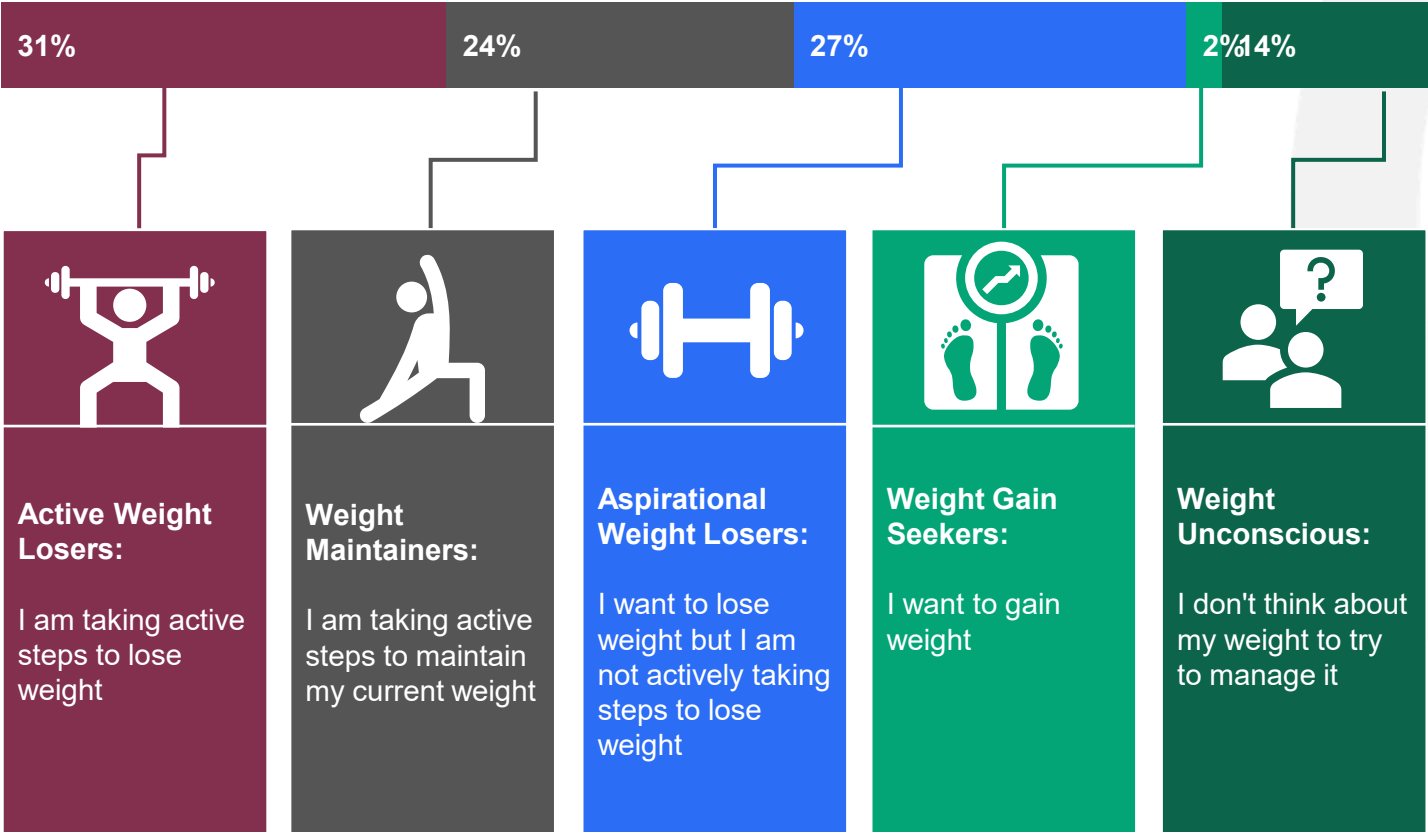
% of population 15+ who are overweight and obese population (2022)



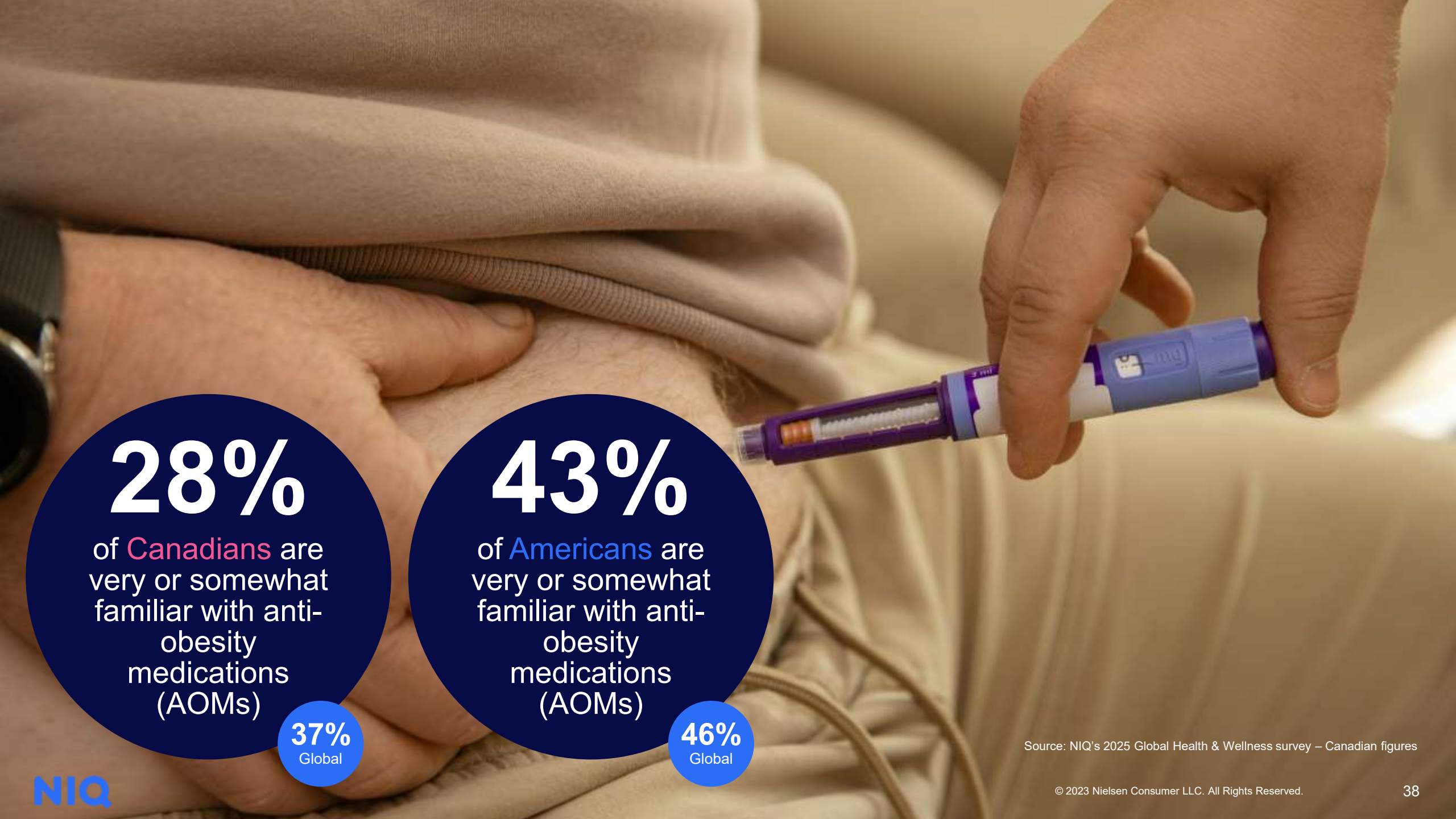
Source: <https://data.oecd.org/healthrisk/overweight-or-obese-population.htm> Based on the WHO classification, adults with a BMI from 25 to 30 are defined as overweight, and those with a BMI of 30 or over as obese. This indicator is presented both for "self-reported" data (estimates of height and weight from population-based health interview surveys) and "measured" data (precise estimates of height and weight from health examinations) and is measured as a percentage of the population aged 15 years and older. For more refer notes

~1/3 of Canadian households are taking active steps to lose weight

Weight Management Segments (%)



Source: 2024 Total Health Syndicated Survey on NIQ Homescan Panel
Q2A2. Which ONE of the following best describes your current relationship with your weights? (Select one)



28%

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

37%
Global

43%

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

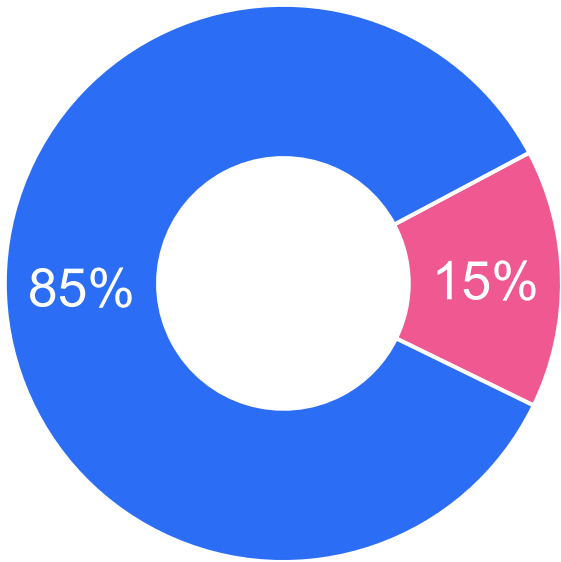
46%
Global

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

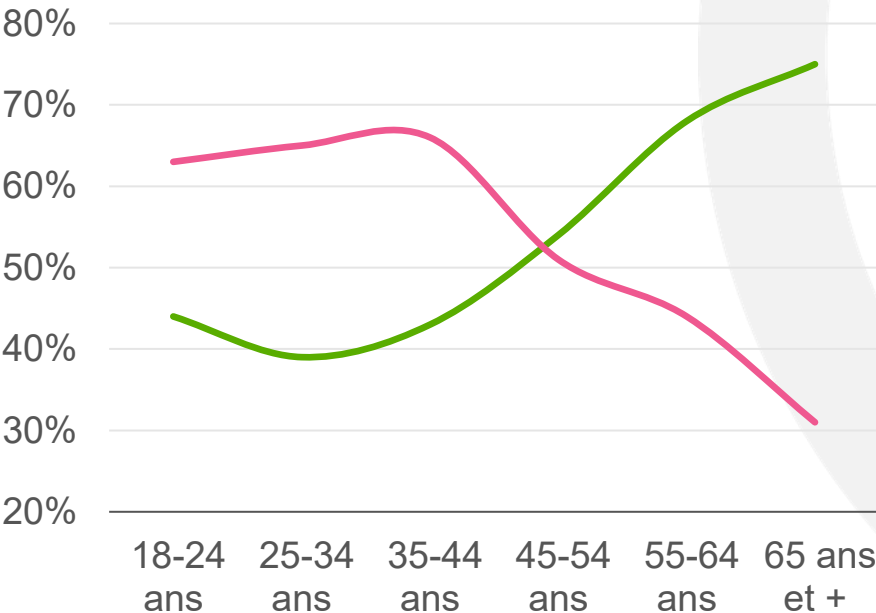
15% of Canadian households use GLP-1 medications

They do it as much to lose weight as they do to manage diabetes

% AOM/GLP-1 user in Canada
Canada



■ User ■ Non-user

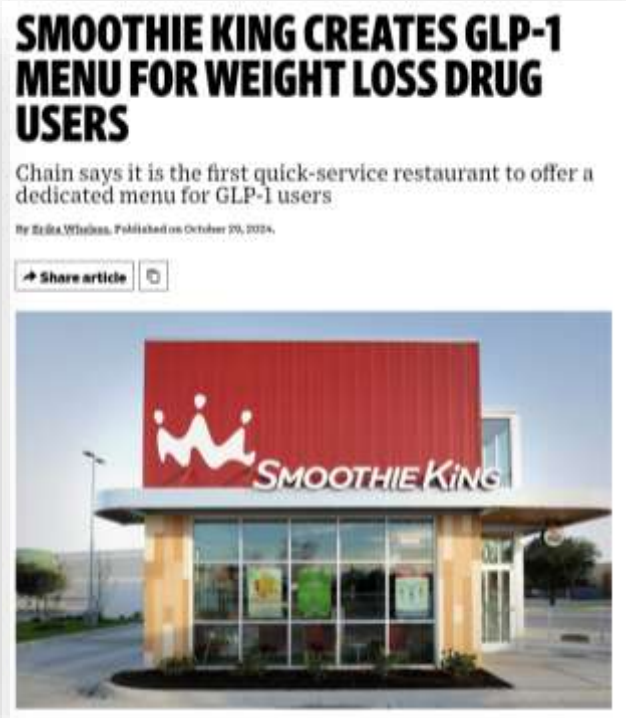
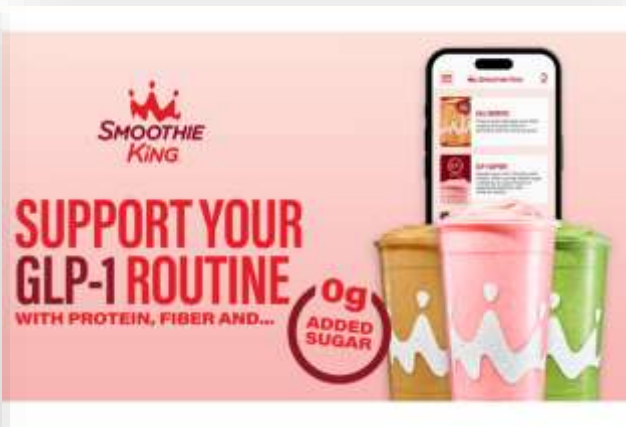


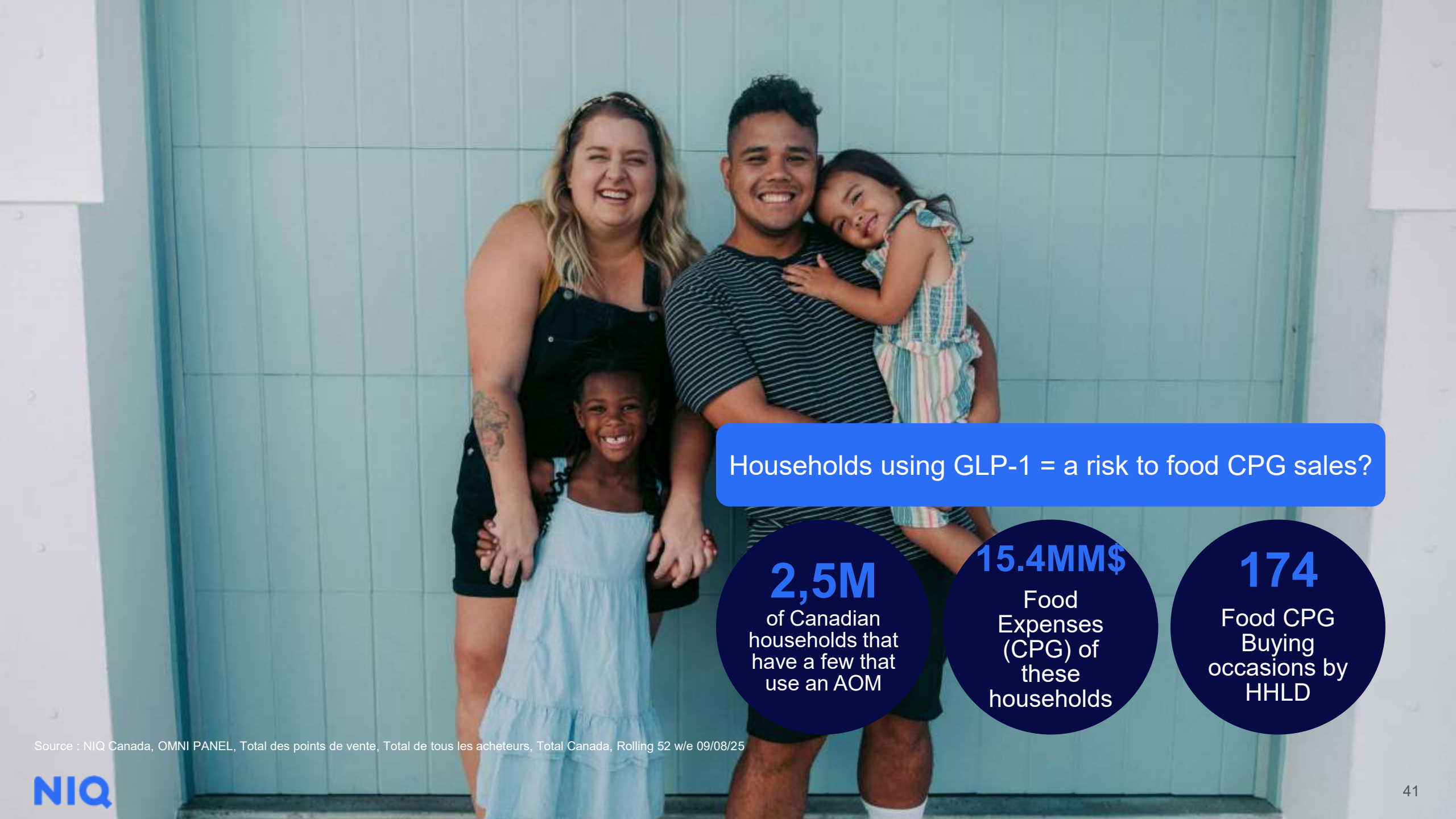
— Gestion du diabète — Perte de poids



Source : Sondage sous licence de NielsenIQ sur le GLP-1 – Avril 2025
Q : Pour quelle raison est-ce que vous ou d'autres membres de votre ménage utilisez-vous un médicament injectable sous ordonnance?
* Les pourcentages pour Gestion du diabète, Perte de poids et Autre ne sont pas mutuellement exclusifs

In the USA, AOM/GLP-1 support being called out on products across food, beverages, and supplements





Households using GLP-1 = a risk to food CPG sales?

2,5M

of Canadian households that have a few that use an AOM

15.4MM\$

Food Expenses (CPG) of these households

174

Food CPG Buying occasions by HHLD

Source : NIQ Canada, OMNI PANEL, Total des points de vente, Total de tous les acheteurs, Total Canada, Rolling 52 w/e 09/08/25



+2,4%

increase in \$ sales of food
GICs among households
using a GLP-1

-VS-

+5,4%

in households that
do not use it

Source : NielsenIQ Omnishopper | Sondage sous licence de NielsenIQ sur le GLP-1 – Avril 2025

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70%

of Canadians say that
possible side effects
could be a barrier to
using AOMs

44% → cost, 15% →
availability

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

A man is sleeping peacefully in a bed with white linens and a grey blanket. The room is bright and airy, with large windows in the background. A potted plant sits on a windowsill, and a white shelving unit with various items is visible to the right. The overall atmosphere is calm and comfortable.

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

Getting
good
sleep
60%

Following
self-care
routine
45%

Looking
my best
33%

Source: NielsenIQ Canada, 2023 Health & Wellness Syndicated Survey

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Canadians are more ‘stressed’ about the quality of their sleep

Surge in self-tracking/instant access to personal health

22%

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



Increased coverage of H&W topics

63%

of Canadians say they are very/somewhat concerned about stress



Increasing regulation

60%

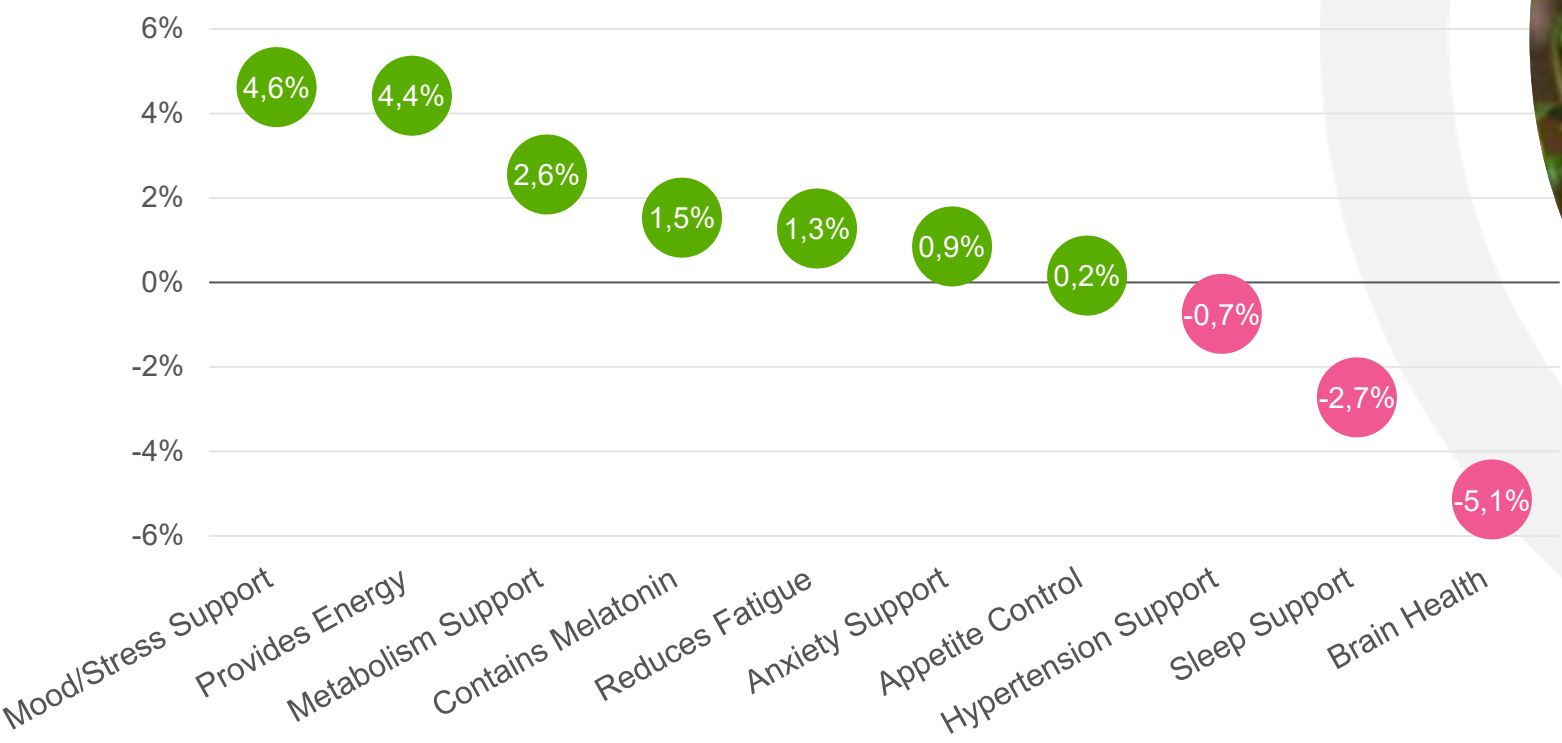
of Canadians have purchased NHS in the past 6M; 19% have purchased sleeping aids



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

Canadians are looking for help around sleep, anxiety, mood control – the opportunities are limitless!

Performance of HEALTH & NEEDS attributes – NPI (Stated)
Vol. units % chg (Canada)



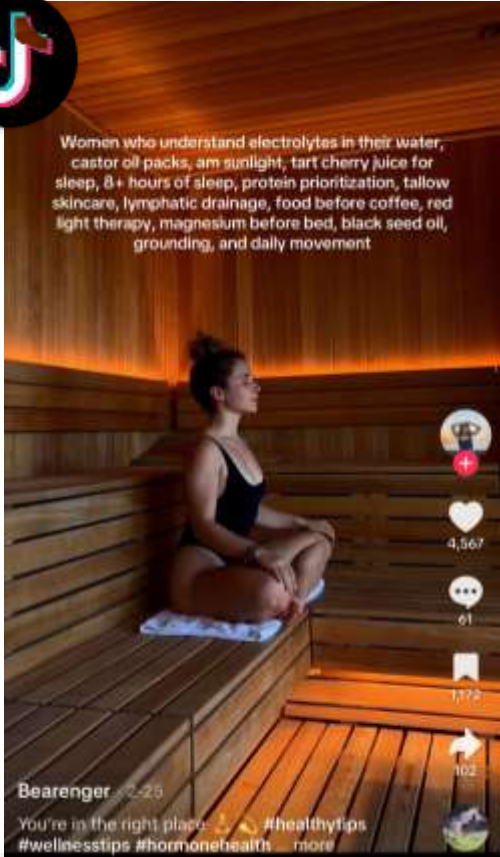
Source: NIQ NPI (NIQ MarketTrack), National All Channels, 52 weeks ending Aug. 9, 2025



Social Media continues to fuel Wellness trends



Women who understand electrolytes in their water, castor oil packs, am sunlight, tart cherry juice for sleep, 8+ hours of sleep, protein prioritization, tallow skincare, lymphatic drainage, food before coffee, red light therapy, magnesium before bed, black seed oil, grounding, and daily movement



Bearenger · 2-25

You're in the right place 🍋💧 #healthytips #wellnesstips #hormonehealth more

#Wellness
4.9M Posts



GRAB N GO HIGH PROTEIN SNACKS



they're 20 grams and 8 grams of fiber

Claire Edwards · 1-23

High protein snacks that aren't protein powder and greek yogurt 🍌🥛💪

#Protein
2.2M Posts



my daily supplements for healthy skin + gut + hair



I take my internal health very,

Tatyana · 2024-4-10

Part 4 | My daily supplements for glass skin, a happy gut and long healthy hair 🍌💧

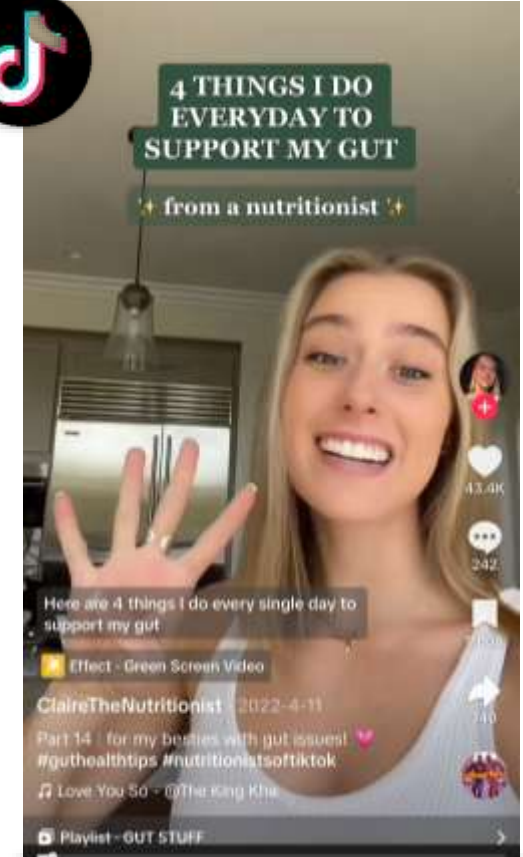
Playlist · wellness

#Supplements
1.7M Posts



4 THINGS I DO EVERYDAY TO SUPPORT MY GUT

from a nutritionist 🌟



Here are 4 things I do every single day to support my gut

Effect - Green Screen Video

ClaireTheNutritionist · 2022-4-11

Part 14 | for my besties with gut issues! 💕

#guthealthtips #nutritionistsoftiktok

Love You So - @The King Khe

Playlist · GUT STUFF

#GutHealth
1.3M Posts

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

What's the fastest growing category (in units) in Canada?

for the 3rd year in a row...

+27%

Vol. units
% chg

Social media ...where influencers and viral marketing campaigns wield power over decision making



Pickle Sandwiches

What will be the next 'cottage cheese'?



Freeze Dried Candy



Crookie



Baked Feta



Whipped Coffee



Stuffed Dates



Loaded Cereal



35%

of consumers
sought out a new
product in-store or
online because of
something seen on
social media

22%

of consumers
changed brands
based on the
recommendation of
a social influencer

Source: NIQ 2024 Consumer Outlook, U.S

A photograph of two women in a gym setting. They are both wearing green athletic tops. The woman on the right is holding a smartphone and looking at it, while the woman on the left looks on. The background is a bright, out-of-focus gym interior.

31%

of consumers are
using social media
as their primary
source to learn
about new products
and services

28%

of consumers
search social media
for product
information before
using a traditional
search engine

Source: NIQ 2024 Consumer Outlook, U.S

NHS is growing double-digit in Canada

Performance of Natural Health Supplements (NHS) segments
Vol. units % chg (Canada)

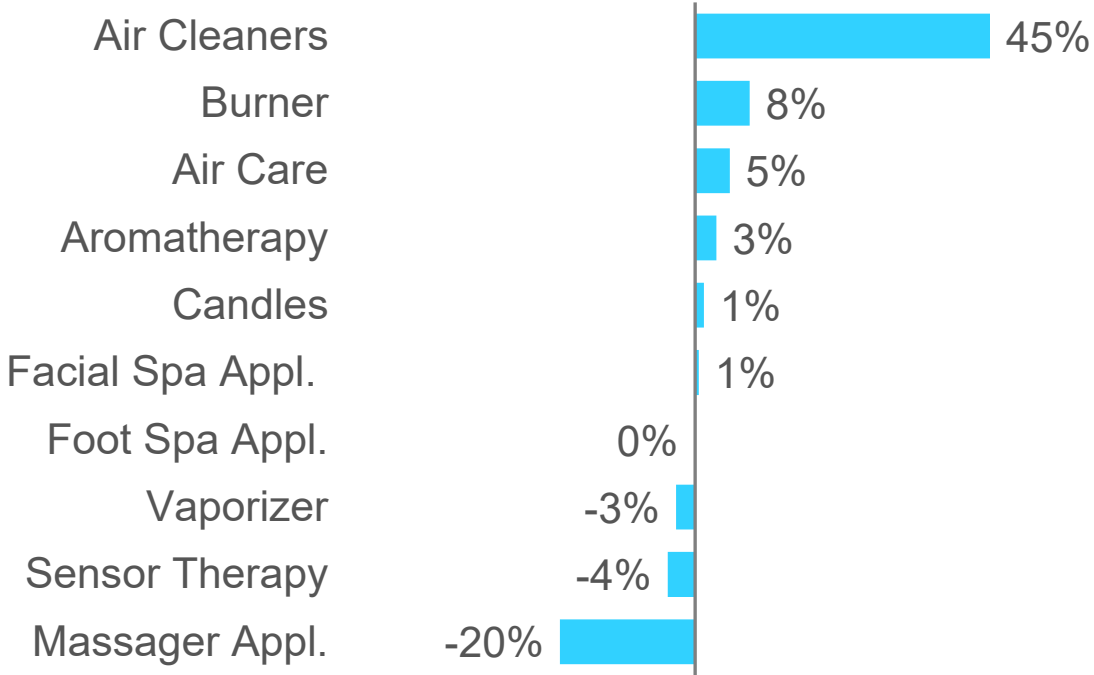
Top 15 growing	Top 10 declining
Berberine	Immune
Propolis	Anti-Oxidants
Protein	Cla
Sexual Enhancement	Bee Propolis
Lutein	Florabile
Lactation	Arthritis
Salmon Oil	Stress
Skin Care	Cleanse Kit
Ashwagandha	Quercetin
Vitamin C	Eye
Liver Aid	
Hair And Nails	
Magnesium	
Cinnamon Bark	
Creatine	

Source: NIQ MarketTrack, National All Channels, 52 weeks ending Aug. 9, 2025



Canadians are looking for ways to relax and find serenity at home

Performance of selected categories
Vol. units % chg (Canada)



Source: NIQ MarketTrack, National All Channels, 52 weeks ending Aug. 9, 2025



58%

of Canadians say they worry that environmental issues (e.g., *pollution and climate change*) are having an adverse impact on their current and future health and wellness

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

A helicopter is shown in flight over a landscape that appears to be a volcanic area. Large, intense fires are burning on the ground, with thick plumes of white and grey smoke rising into the sky. The background features a blue body of water and distant, hazy mountains under a cloudy sky. The helicopter is a red and white model, flying from left to right.

Top 3 global risk most likely to
present a material crisis on a
global scale in 2025

State-based
armed
conflict
23%

Extreme
weather
effects
14%

Geo-
economic
conflicts
8%

Source: Global Risks Report 2025, Wired for Wellness : Tech & Durables Health categories – 2025- NF



60%

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

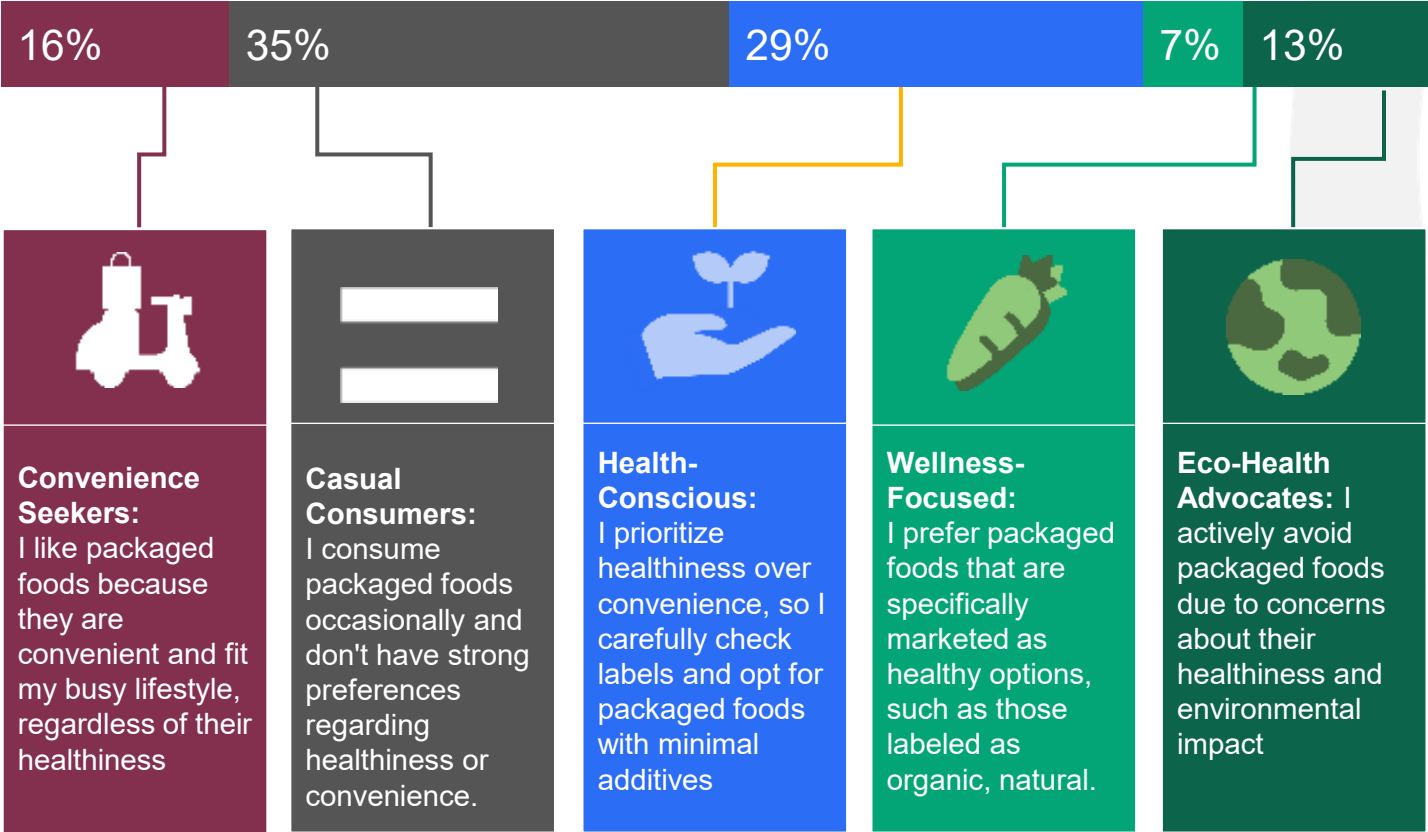
64%

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

Source: NIQ Consumer Life 2024; NIQ 2025 Global Health & Wellness survey

49% of Canadian consumers consider themselves Health-Conscious Buyers

Segments – By attitude towards food packaging (%)
Canada



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



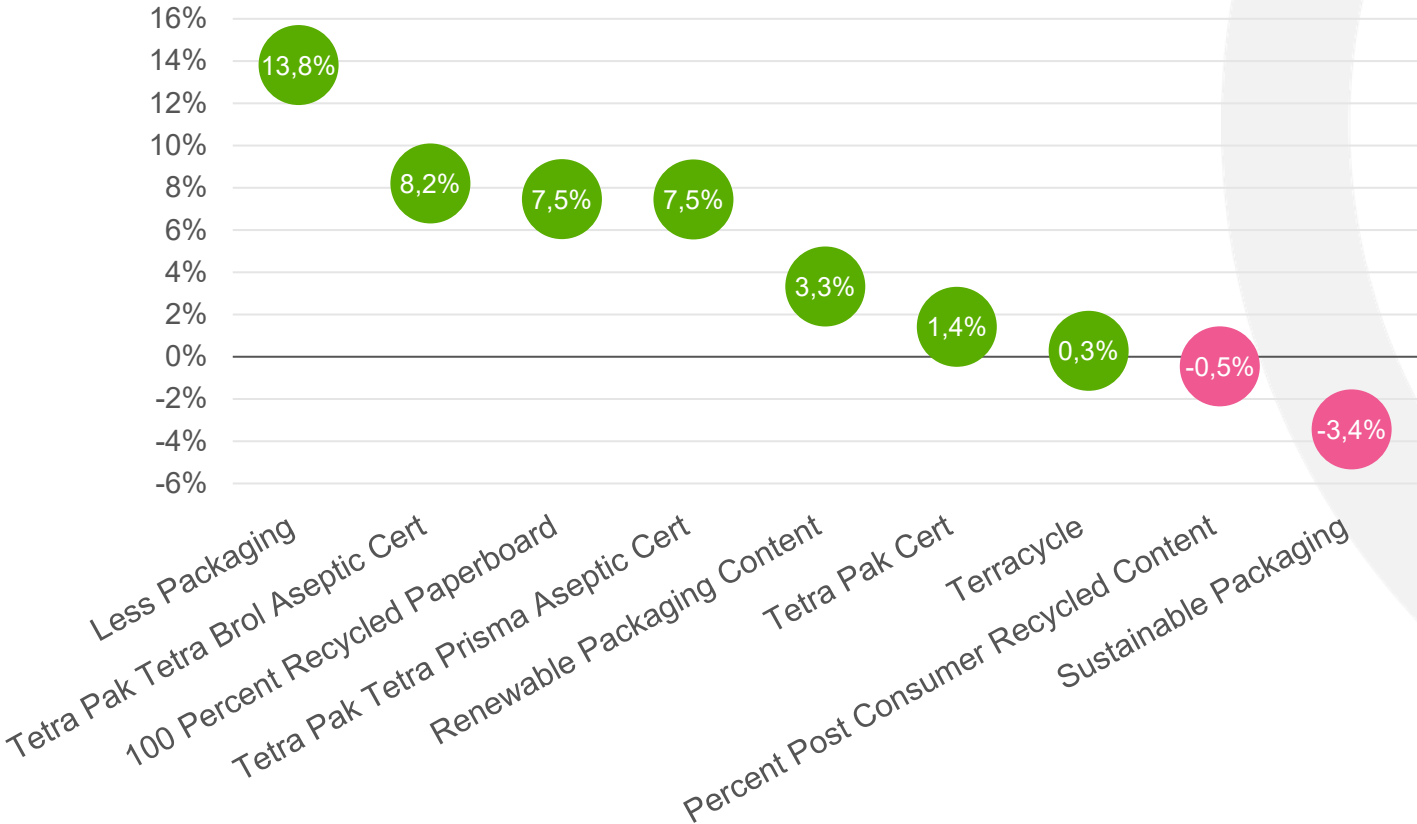


33%

of Canadian
consumers are
concerned about the
impact of a product's
packaging on the
environment
(32% moderate)

Canadians are buying products that offer greener packaging options

Performance of PACKAGING attributes – NPI (Stated)
Vol. units % chg (Canada)



Source: NIQ NPI (NIQ MarketTrack), National All Channels, 52 weeks ending Aug. 9, 2025



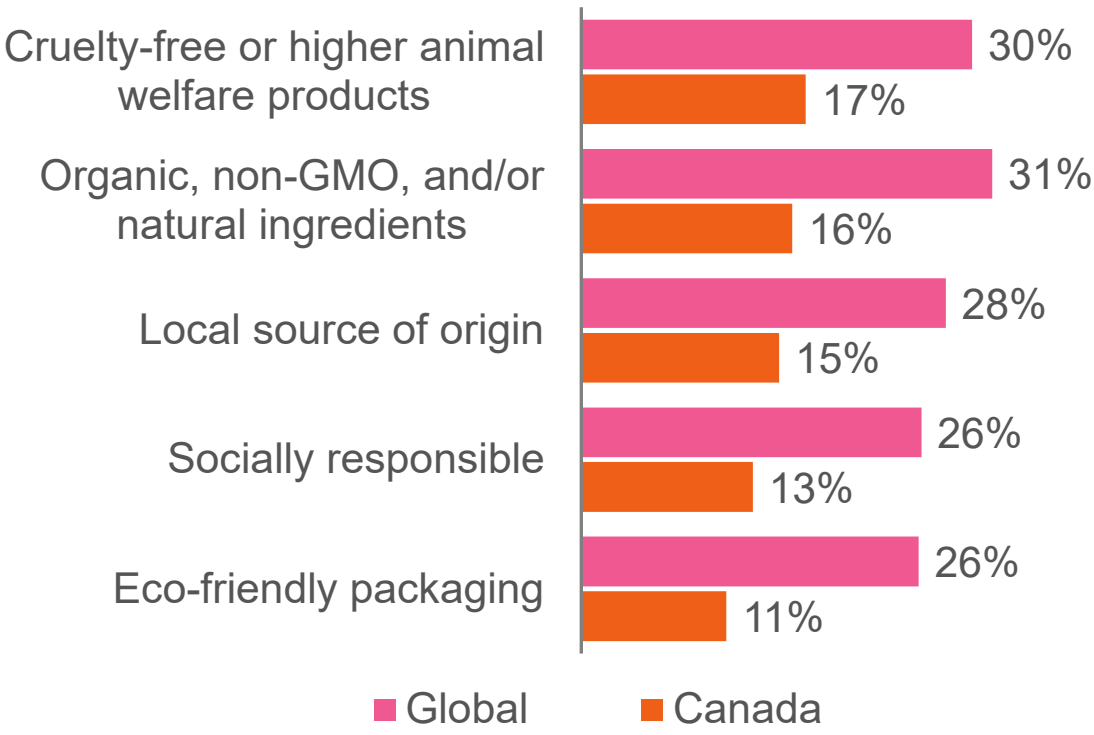
16%

of Canadians say the
complexity of
packaging and
certifications
prevents them from
buying more healthy
items

Source: NIQ Global Health & Wellness Study, June 2025

That being said, Canadians have not willing to pay more for ‘conscious buying’

Willingness to pay 10% more for products with the following attributes/features
Canada vs Global



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





Major barriers from making healthier life choices

**Cost vs
'standard'
options**
59%

**Lack of
motivation**
28%

**Lack of
time**
24%

**Difficulty
of finding**
23%

**Lack of
trust**
19%

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

**Winning in this environment
requires a relentless focus on
the consumer**



40%

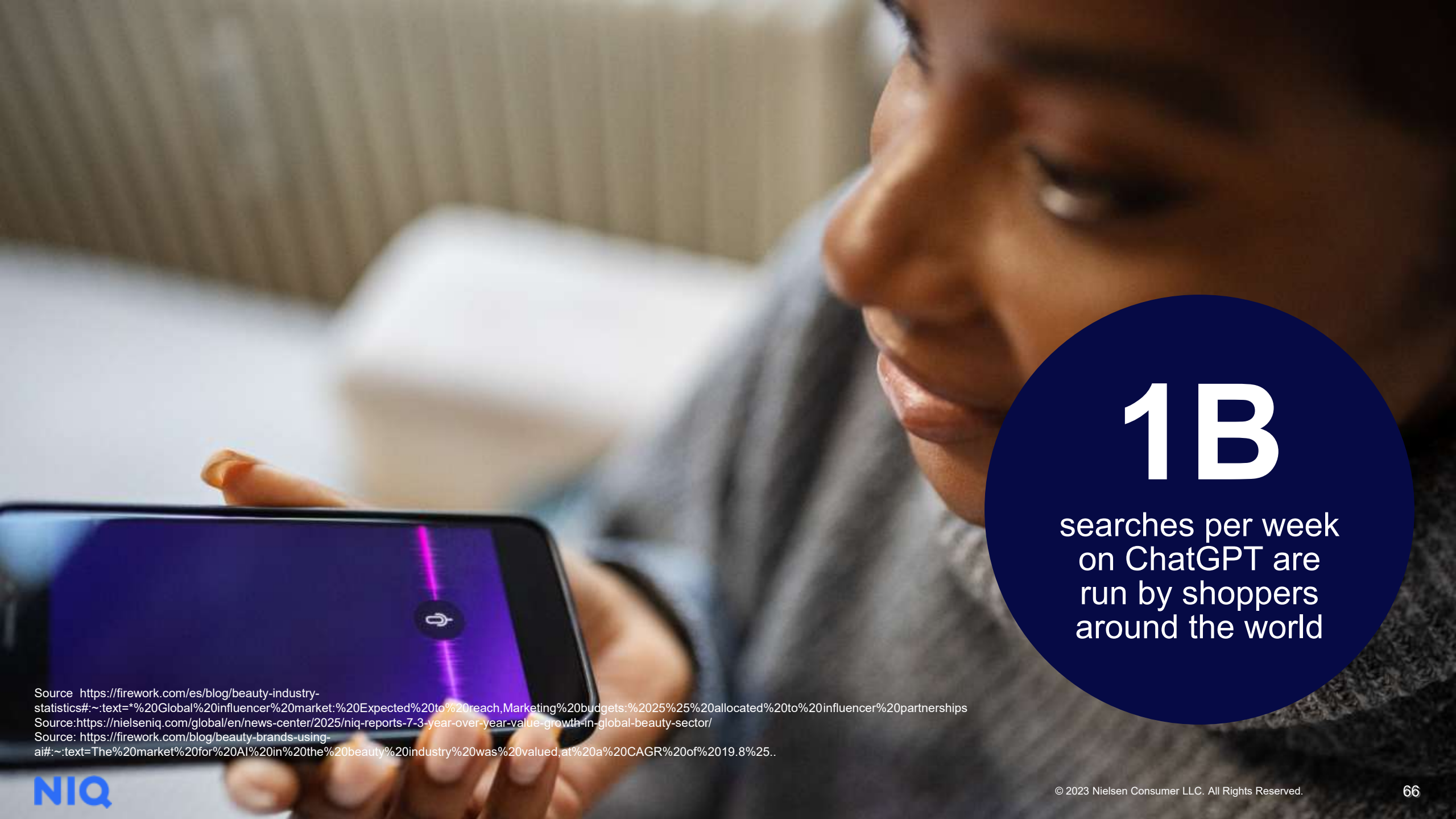
of Canadians
consumers are
likely to **accept a
recommendation
from an AI
assistant**

47%
Global



AI

in Beauty was
valued at around
\$3.27B in 2023,
projected to reach
\$8.1B by 2028



1B

searches per week
on ChatGPT are
run by shoppers
around the world

Source <https://firework.com/es/blog/beauty-industry-statistics#:~:text=%20Global%20influencer%20market:%20Expected%20to%20reach,Marketing%20budgets:%2025%25%20allocated%20to%20influencer%20partnerships>
Source:<https://nielseniq.com/global/en/news-center/2025/niq-reports-7-3-year-over-year-value-growth-in-global-beauty-sector/>
Source: <https://firework.com/blog/beauty-brands-using-ai#:~:text=The%20market%20for%20AI%20in%20the%20beauty%20industry%20was%20valued,at%20a%20CAGR%20of%2019.8%25..>

The use of ChatGPT as a search engine varies fundamentally across generations

Boomers+



Baby Boomers typically ask ChatGPT simple questions and use it in the same way they would use Google.

Millenniaux



Millennials, on the other hand, tend to use ChatGPT in a more personal way, treating it more like a digital guide by asking for advice on everyday issues or important life choices.

Gen Z



Younger generations, especially university students, are using ChatGPT as an all-in-one assistant. They connect it to documents, prepare complex prompts, and use it regularly for schoolwork, creative ideas, or even to make decisions about their personal lives.

Source: <https://www.bitdegree.org/crypto/news/gen-z-to-boomers-altman-breaks-down-how-different-generations-use-chatgpt>

Anecdotal example – but is your brand well 'positioned' in the results?



According to ChatGPT :

An affordable option that doesn't compromise on performance, this mascara offers dramatic volume and length, making it a favorite among beauty enthusiasts.

What is the
best mascara
sold in
pharmacies in
Canada?



ChatGPT can set a beauty routine for you

To make the recommendations even more personalized, it is possible to tailor them to specific skin types or particular concerns.

 **Morning Skincare Routine**

1. Cleanser

- Use a gentle, hydrating cleanser to remove sweat and excess oil.
- *Example:* CeraVe Hydrating Cleanser or La Roche-Posay Toleriane

2. Toner (optional)

- Helps balance skin pH and prep for serums.
- *Example:* Thayers Witch Hazel (alcohol-free), Paula's Choice Enriched Calming Toner

3. Serum

- Choose based on your needs:
 - Vitamin C (for brightening and antioxidant protection)
 - Niacinamide (for oil control and pore appearance)
- *Example:* The Ordinary Vitamin C Suspension, La Roche-Posay Pure Vitamin C

4. Moisturizer

- Hydrates and locks in previous layers.
- *Example:* Neutrogena Hydro Boost, Vanicream Daily Facial Moisturizer

5. Sunscreen (SPF 30 or higher)

- Most important morning step!
- *Example:* EltaMD UV Clear, La Roche-Posay Anthelios, Black Girl Sunscreen

 **Evening Skincare Routine**

1. Cleanser

- Double cleanse if you wear makeup or SPF:
 - Oil-based cleanser (e.g., Banila Co Clean It Zero)
 - Then a water-based cleanser

2. Toner (optional)

3. Treatment / Serums

- Retinol (anti-aging, acne)
- Salicylic Acid (for acne-prone skin)
- AHA/BHA (for exfoliation, 1–3x/week)
- *Examples:* The Ordinary Retinol, Paula's Choice BHA Liquid Exfoliant

4. Moisturizer

- Slightly thicker than morning, if your skin tolerates it.

5. Spot Treatment (if needed)

- For acne: Benzoyl Peroxide or Salicylic Acid
- *Example:* Mario Badescu Drying Lotion, Clean & Clear Persa-Gel

Would you like a version for your specific skin type or concerns (like acne, redness, dryness, etc.)? I can personalize it for best results.



shopify

Source: ChatGPT



90%

of CPG searches
on Amazon are
unbranded

Source: NIQ 2025 Private Label & Branded Products report 2025 survey, NIQ 2024 Enhancement Demographic Study, Dec. 2024

SMB 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

Brand loyalty is under threat as 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 + supporting claims with professional endorsements and detailed information

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 focus on these 3 pillars, and 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!)



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