

Is Wellness Recession-Proof?

How AI, Tech, and Changing Consumer Priorities are Reshaping Wellness

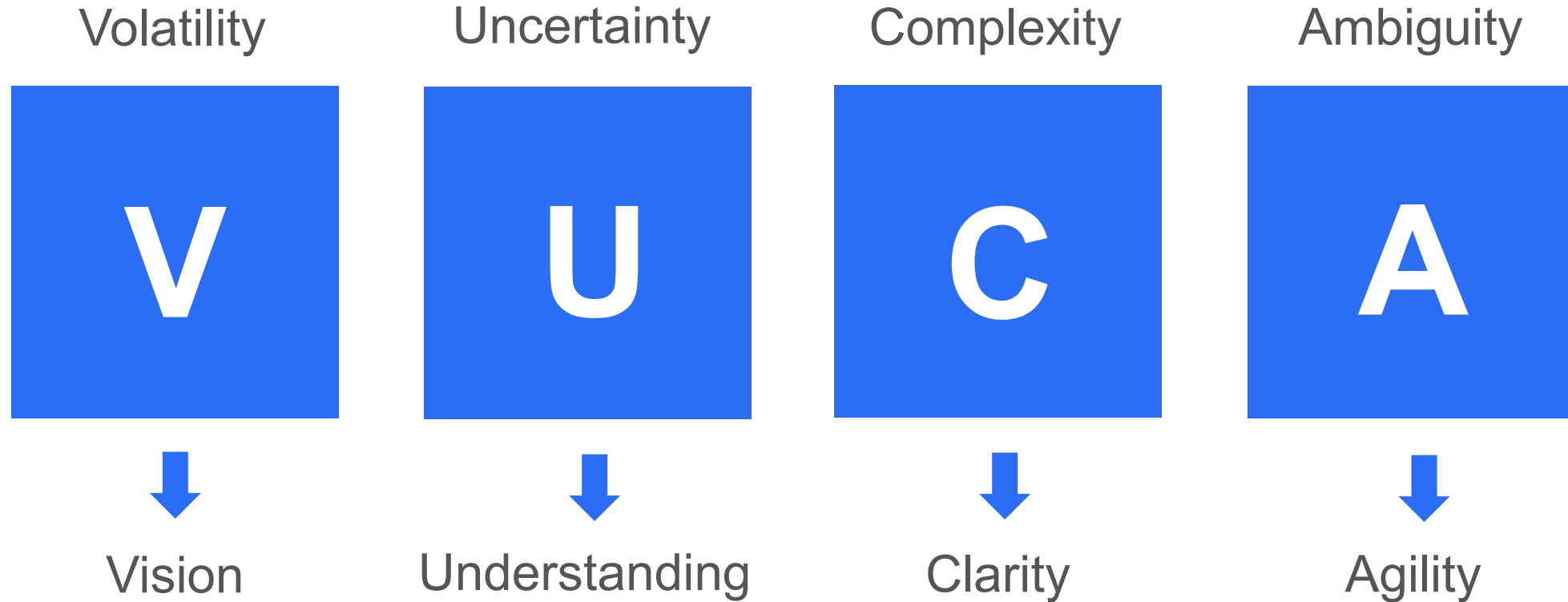
NIQ Canada
September 2026 (CHFA Toronto)

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

Cultural, Technological, Institutional, Financial, Political



Building business resiliency for the year ahead



Focus Areas

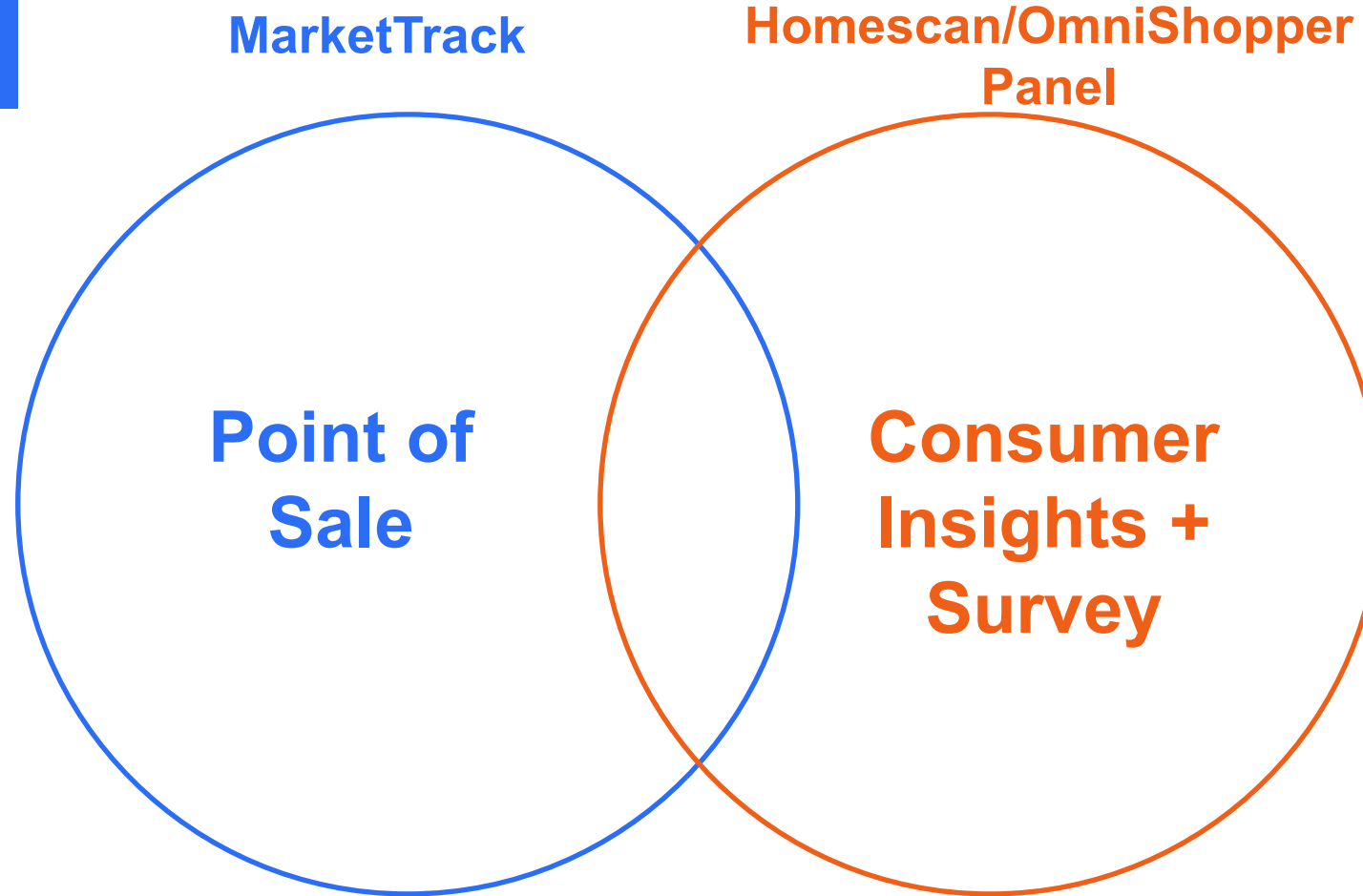


- Macro Economic Landscape in FMCG
- Strategic Perspective On Wellness
 - How various forms of technology are changing wellness
- Question & Answers

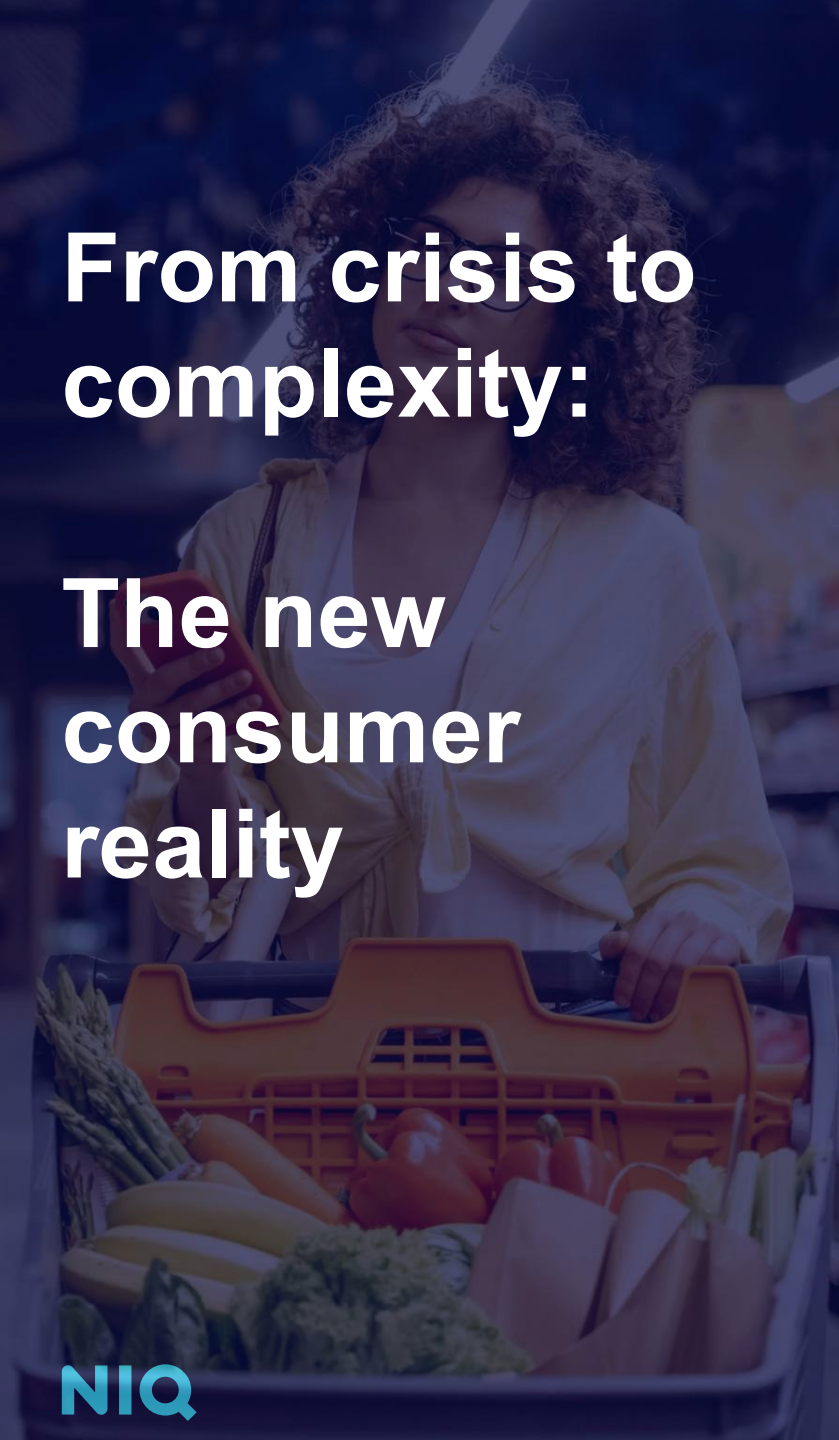
State of the FMCG Market

NIQ 101: Integrated research to get the full view of consumers & the market

Two Most Common
Data Sources



NIQ's capabilities go beyond the above (ex: pricing, innovation, assortment, etc), so just ask if you have any questions



From crisis to complexity:

The new consumer reality



Wallets are under pressure and spending has become intentional

- Rising living costs, economic uncertainty, and uneven confidence have permanently changed how Canadians allocate their dollars.



Consumers aren't pulling back, they're recalibrating

- Today's shopper is disciplined and resourceful: prioritizing essentials, scrutinizing every purchase, trading down, switching channels, and redefining what "value" truly means.



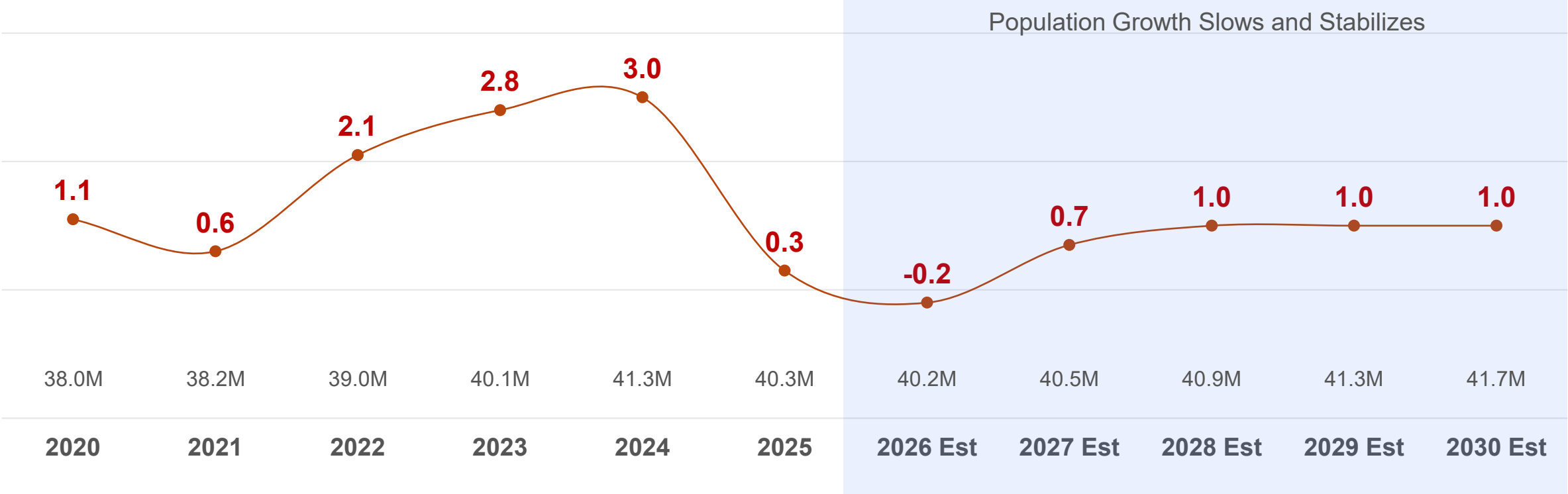
This is a pivotal moment for FMCG growth

- Price alone won't win. Growth will come from earning the trip through relevance, affordability, and innovative solutions that meet consumers where they are right now.

Canada's population growth continues to slow over next 2 years, before stabilizing through to 2030



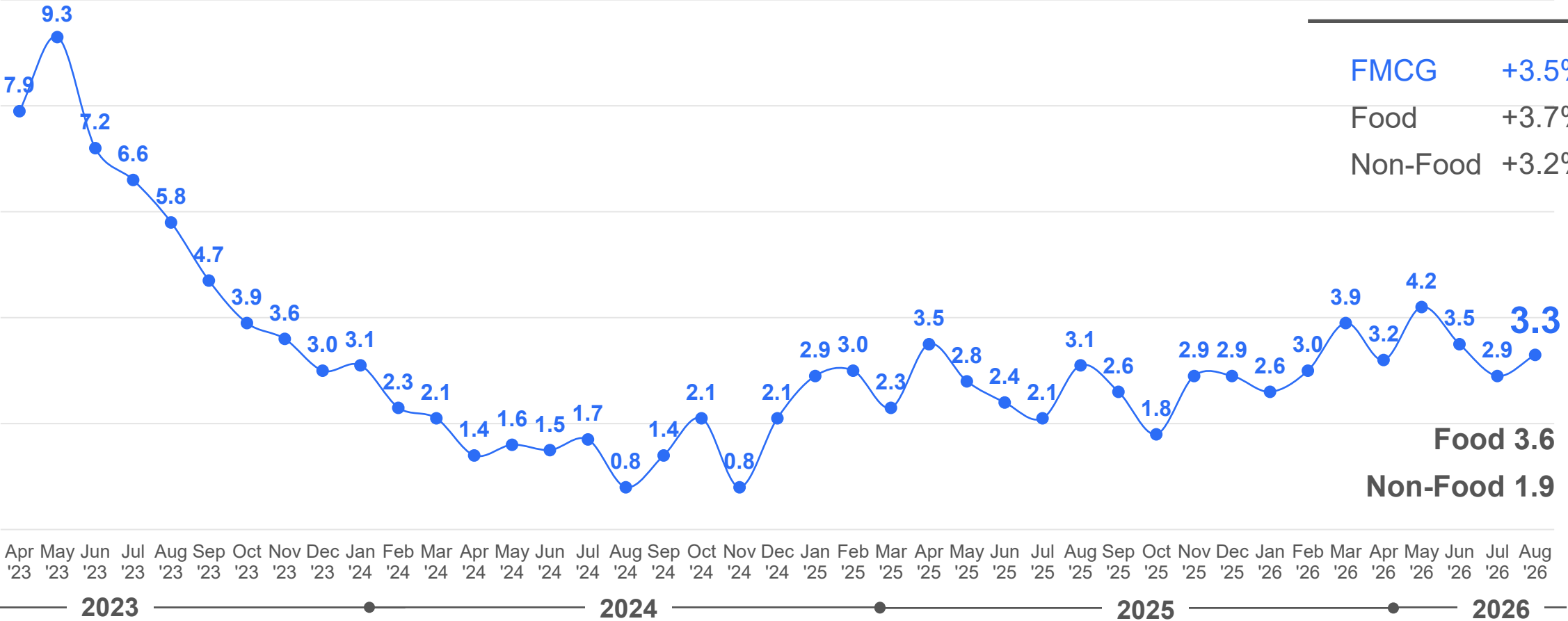
Canada's Population Growth % Chg



FMCG inflation in August accelerates fueled by Food departments



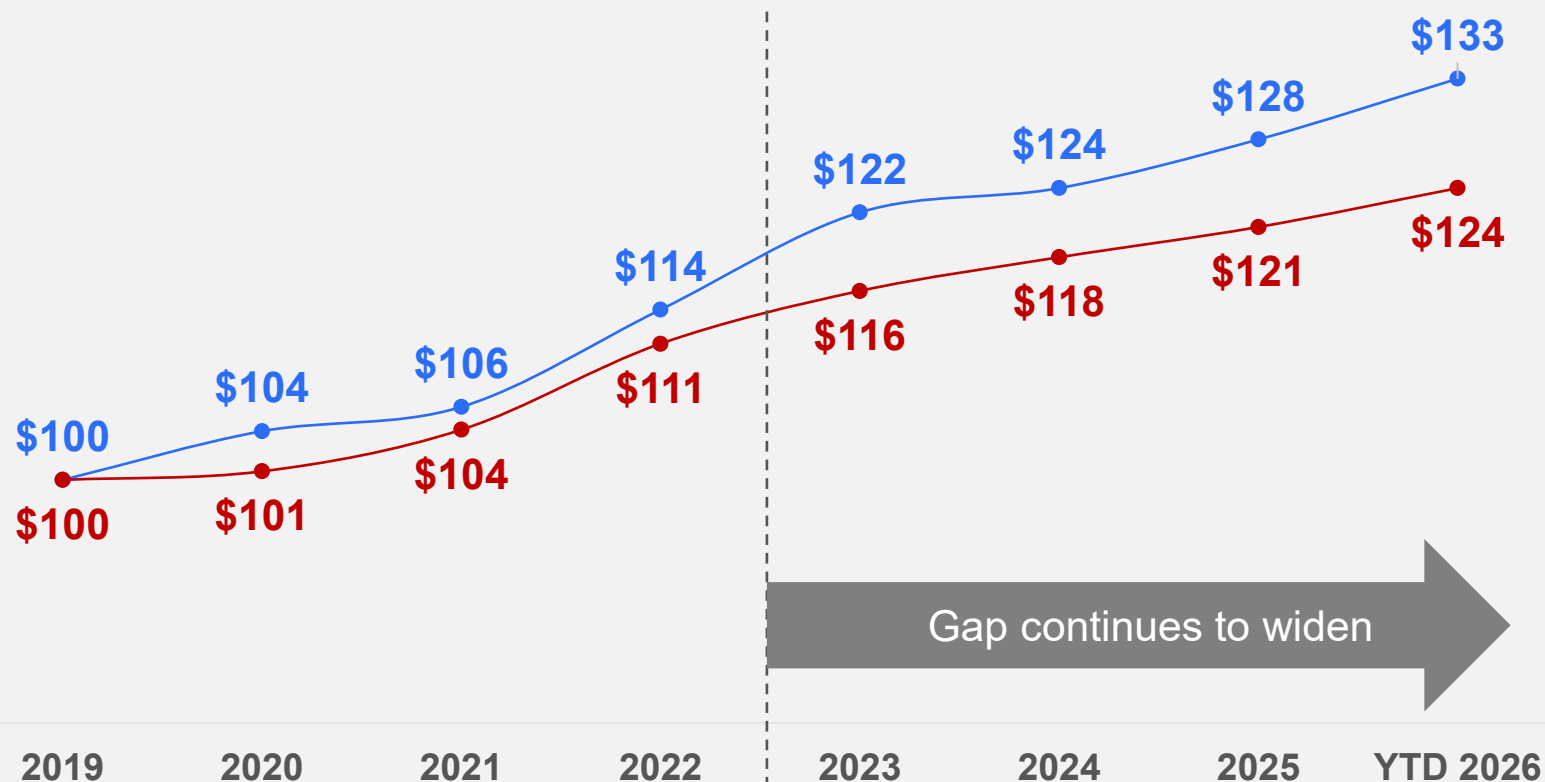
Canada FMCG Inflation: The 3 Year trend



FMCG inflation has increased at a faster rate than overall CPI



Compounding Inflation: **Canadian CPI[^]** vs. **Canada FMCG**



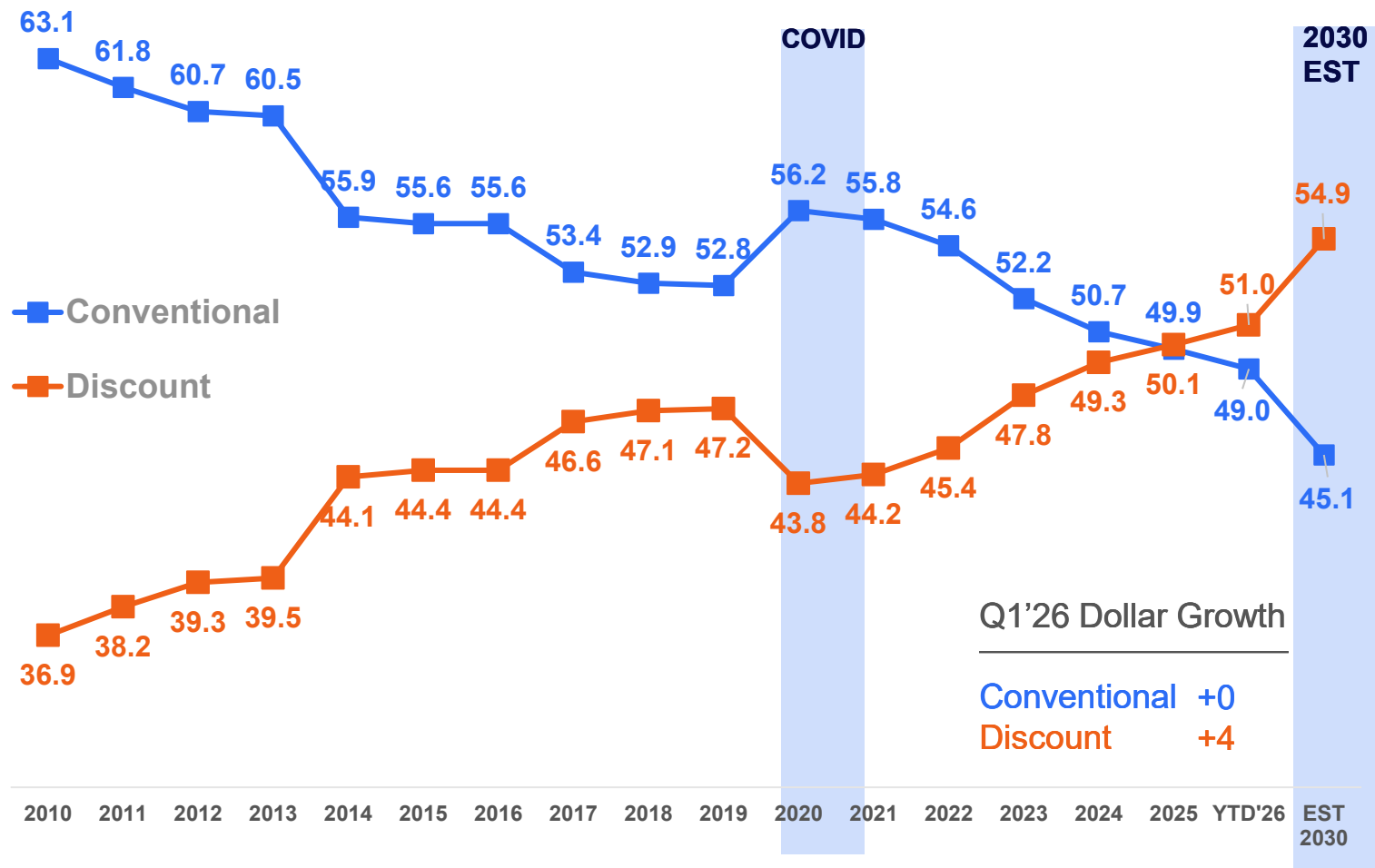
Consumers are spending **+33% more** for FMCG products than pre-pandemic

Compare that to **overall living costs** that increased **+24%**

Canadians have shifted spend to Discount retailers – with more to come!



Discount vs Conventional Grocery + Drug + Mass – \$ Market Share



Other Ways To Save (Top 5)

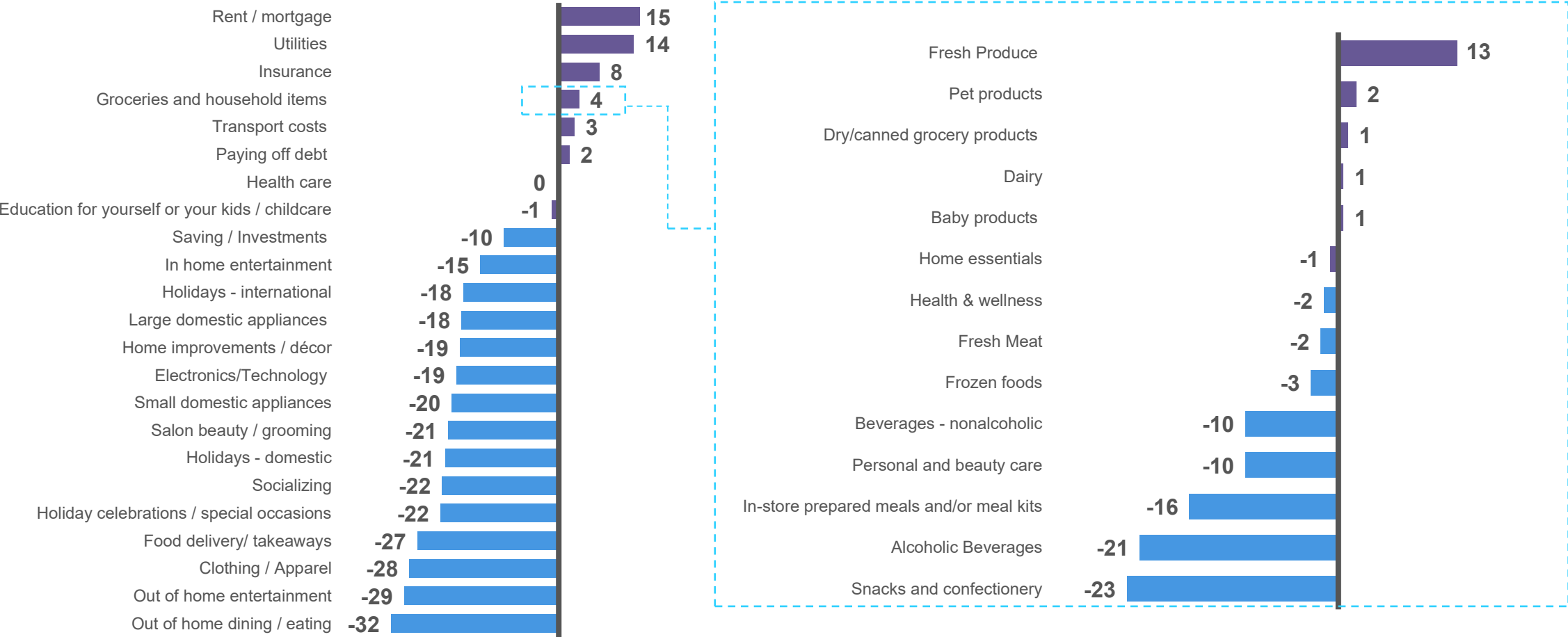
- 65% Stock up when on promotion
- 57% Cook at home more often
- 53% Reduce dining out
- 44% Choose cheaper brands
- 44% Plan meals to avoid waste



In 2026, consumers plan to continue prioritizing “non-negotiable” essential expenses

These essentials include Rent/Mortgage, Utilities, Insurance and Groceries - particularly Fresh Produce

Change in Spending Intentions: % of respondents intending to spend more net of % of respondents intending to spend less





6 Barriers hindering healthier life choices

76%
of Canadians are
concerned about
future health
problems

- | | | | |
|---|---------------------|------------|--|
| 1 | Cost | 59% | Say healthier alternatives are too expensive |
| 2 | Motivation | 28% | Don't feel driven to make healthier choices |
| 3 | Time | 24% | Don't have time to make healthier choices |
| 4 | Availability | 23% | Have difficulty finding healthier alternatives |
| 5 | Trust | 19% | Don't trust that the product will be effective |
| 6 | Guidance | 16% | Product labeling is confusing/too complex |

NIQ Data Methodology on Wellness

NIQ Product Insights (NPI): Our solution to get to granular attribute data

STATED ATTRIBUTES

captures standardized attributes stated on the label across a set of products by analyzing marketing claims, warnings and third-party certifications



- USDA Organic
- WBE Canada
- Vegan
- CGLCC Certified LGBT+ Business



- Unsalted
- Organic
- Dairy-Free
- Cashew Product
- Non-GMO

QUALIFIED ATTRIBUTES

uncovers attributes not physically stated on the label by analyzing nutrients and ingredients against regulations and standards

INGREDIENTS: COCONUT OIL*, CASHEWS*, SUNFLOWER OIL*, QUINOA REJUVELAC (WATER, QUINOA*), WATER, SUNFLOWER LECITHIN*, NUTRITIONAL YEAST, CITRIC ACID, FERMENTED OREGANO EXTRACT (WATER, OREGANO*, RAW CANE SUGAR*, ACTIVE CULTURES). *ORGANIC
CONTAINS: CASHEW, COCONUT

- Artificial Colour Free
- Salt Free
- Contains Natural Flavor
- Contains Sweeteners
- Plant Based

Amount/serving		% Daily Value*	Amount/serving		% Daily Value*
Nutrition Facts					
About 16 servings per container					
Serving size 1 tbsp (14g)					
Calories per serving		110			
Total Fat 12g		15%	Total Carbohydrate <1g		0%
Saturated Fat 9g		45%	Dietary Fiber 0g		0%
Trans Fat 0g			Total Sugars 0g		
Cholesterol 0mg		0%	Includes 0g Added Sugars		0%
Sodium 0mg		0%	Protein 0g		
Vitamin D 0mcg 0% • Calcium 0mg 0% • Iron 0.1mg 0% • Potassium 20mg 0%					

* The % Daily Value (DV) tells you how much a nutrient in a serving of food contributes to a daily diet. 2,000 calories a day is used for general nutrition advice.

- Low Carbohydrate
- No Fiber
- Pescatarian Diet Friendly
- Free From Added Trans Fats
- Mediterranean Diet Friendly

NPI Canada Launch Attribute Package Examples – Food and Beverage

Canada packages showcase top attributes and unlock future expansion opportunities

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





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...

Understanding Growth Drivers in FMCG Wellness

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



16%

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

53%

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

29%

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

Wellness Shifting Dimensions

REMOVAL

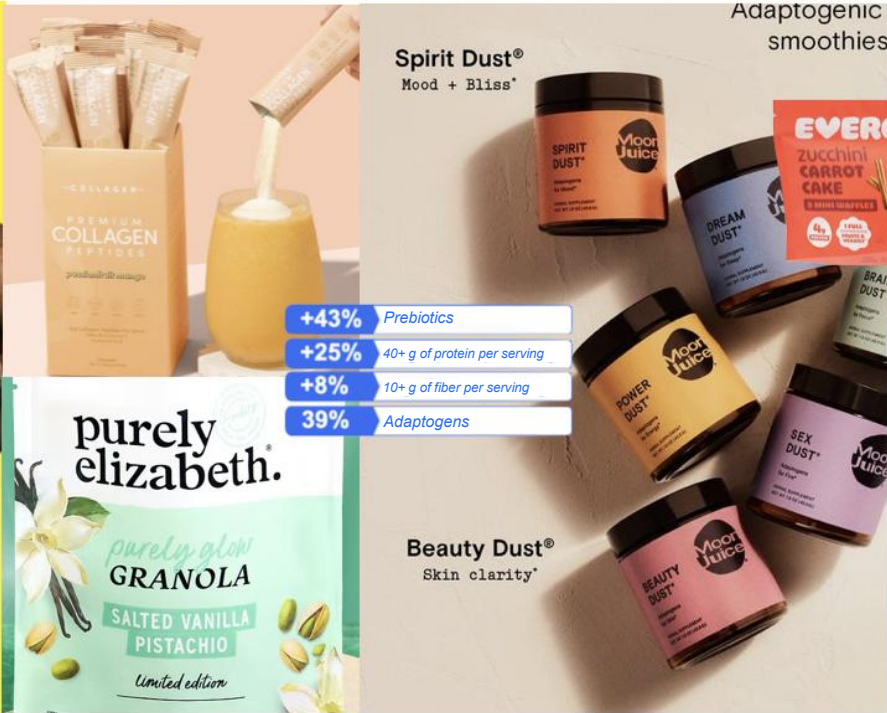
How wellness *borrowed* the codes



Wellness used to mean taking away, the era of low-cal, fat free, no parabens

ADDITION

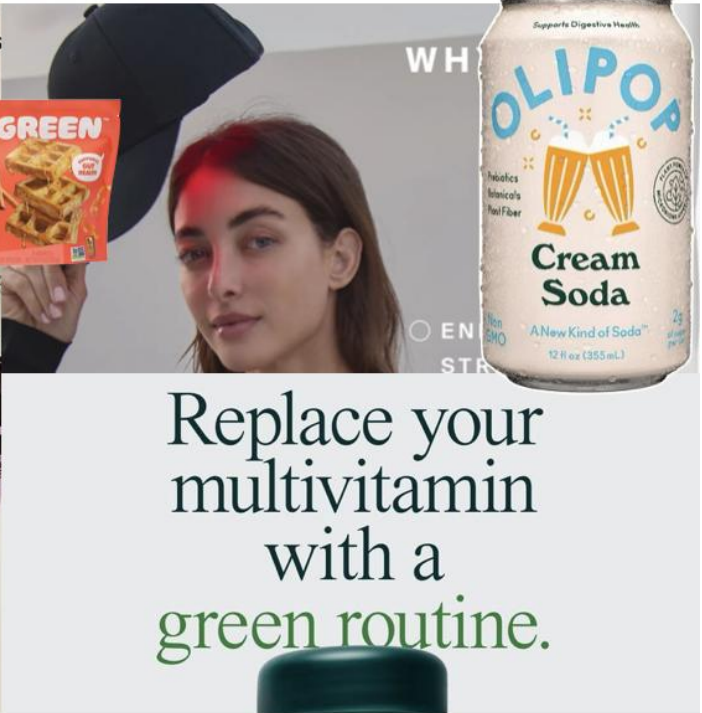
How wellness *blurred* the codes



Shift toward *adding* value + protein, + fibre, + adaptogens and blurring of food, beauty, supplements

OPTIMIZATION

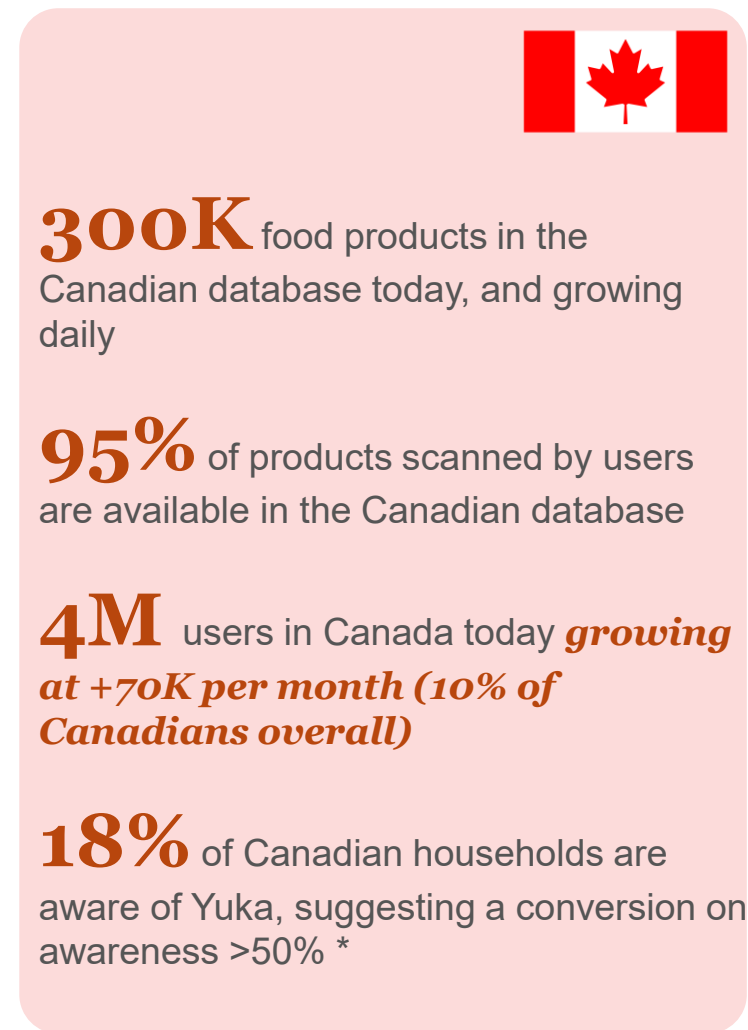
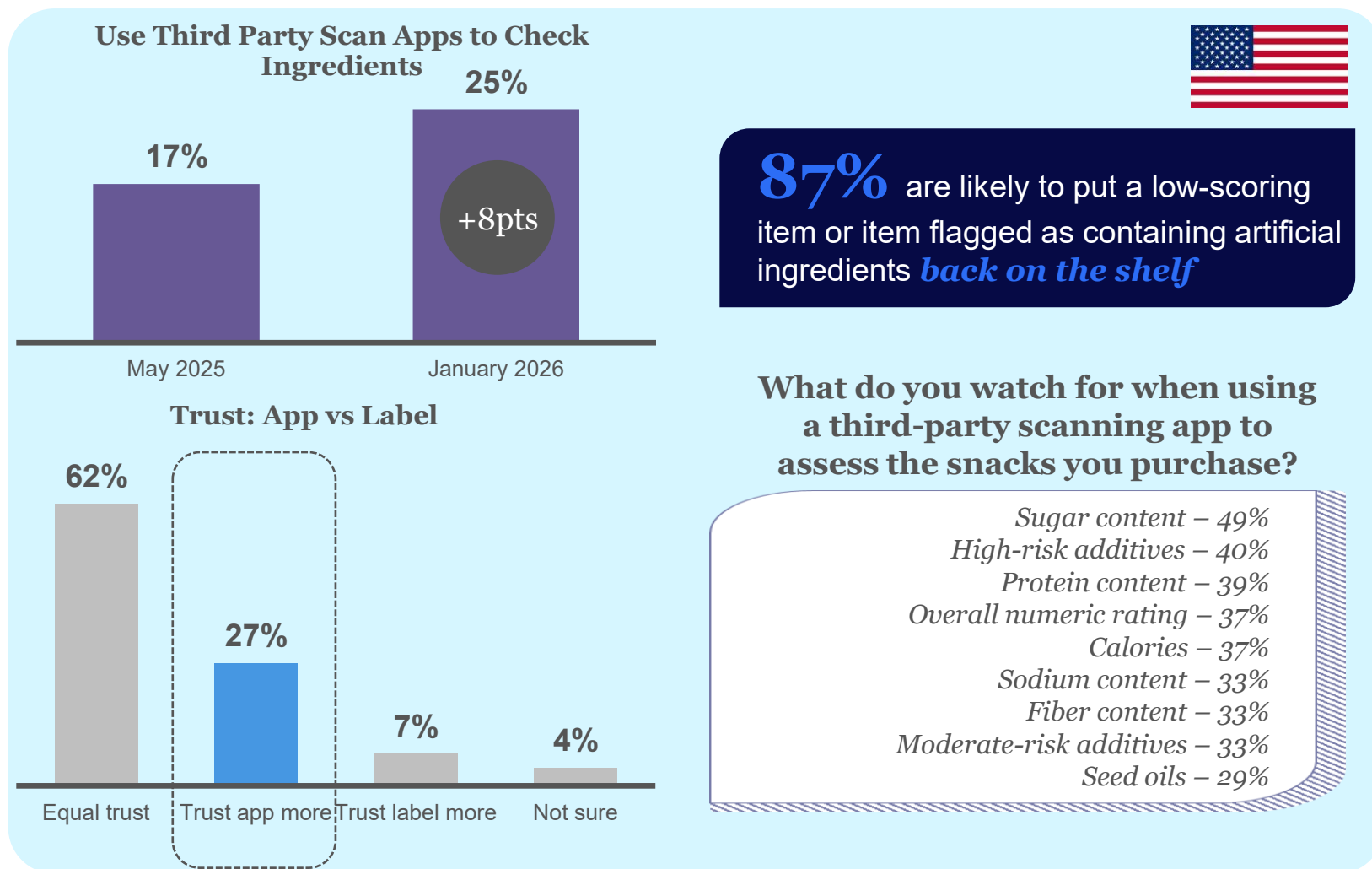
How wellness is *integrating* the codes



Every bite, sip, application, counts toward cognitive health and quality of life

Apps & Wearables

The Yuka App is changing the way people shop



Sources



Left: NIQ, BASES Quick Question Omnibus Survey (US), n=1,000, May 2025 Vs. n=2,006, January 2026, Source: NIQ, BASES Quick Question Omnibus Survey (US), n=2,006, January 2026

Right: [The Yuka Effect: How App-Savvy Shoppers Are Changing Whole Health - Grocery Business Magazine](#) | *NielsenIQ Canada Omnishopper Survey, Q2 2026

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\$20.1B

on all CPG/FMCG
Products
(+5.3%, exceeding Total
Households)

+10.4%

on "No Sugar Added"
Food/Bev products
(*7pts higher than Total
Households)

+12.5%

on "Protein Stated"
Food/Bev products
(*7pts higher than Total
Households)

Wearables *impact nutrition choices almost 2x more* than wearers intend



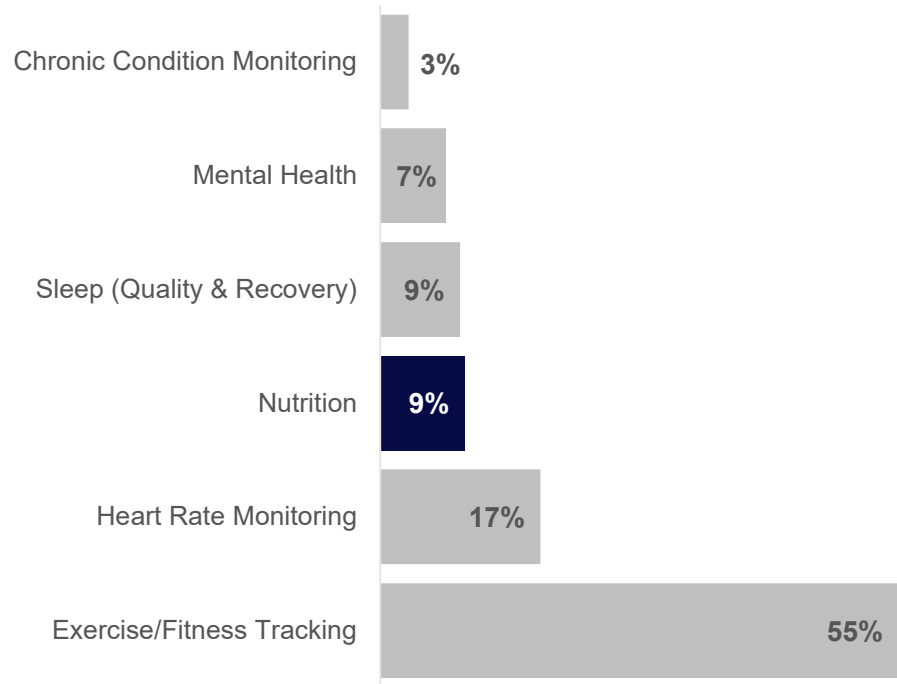
36%
of U.S. adults use a health wearable

62%
of wearable users have worn their device for >1 year

1.6x
higher wearable adoption among GLP-1 households vs. general population

Nutrition is a low stated motivation for wearable use...

Top motivations for wearing a wearable

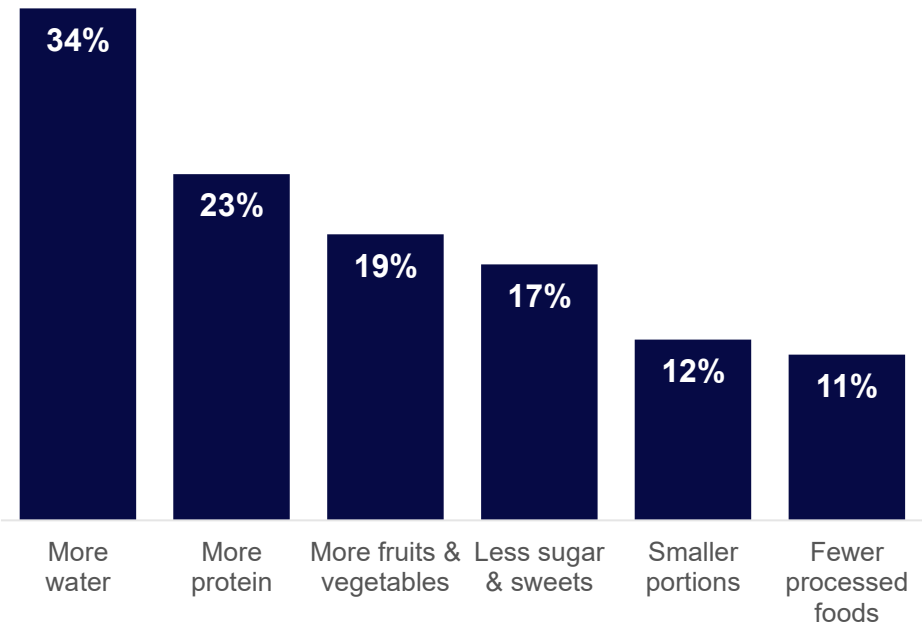


New wearable buyers cut alcohol, result of personalized feedback on sleep and recovery?

Oura Ring, Whoop, Lumen, Tile, FitBit, or Garmin BevAI and sales of alcohol in subsequent quarters post wearable purchase

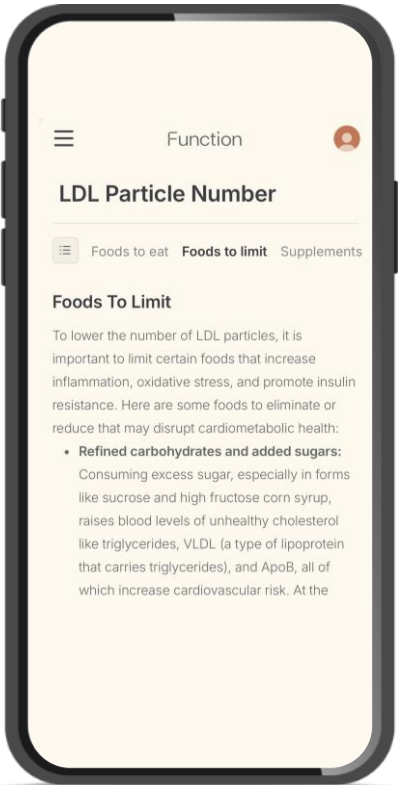
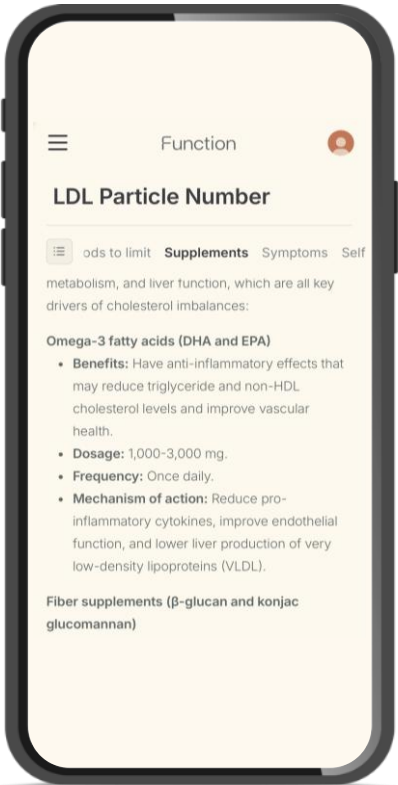
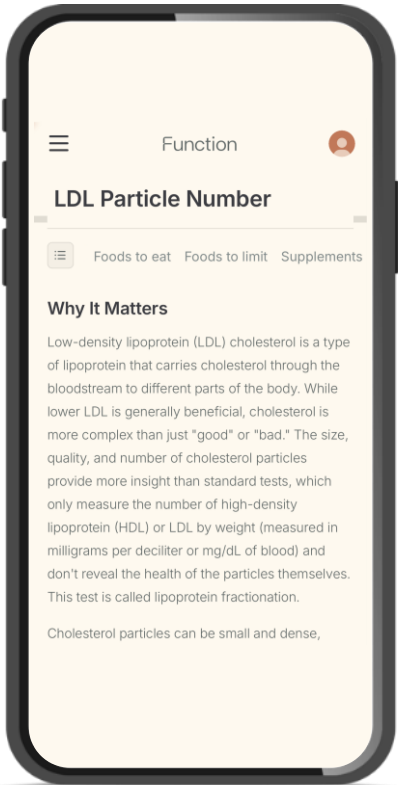
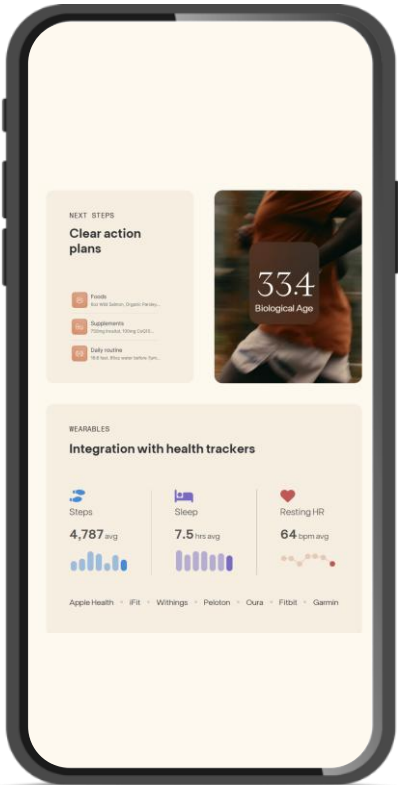
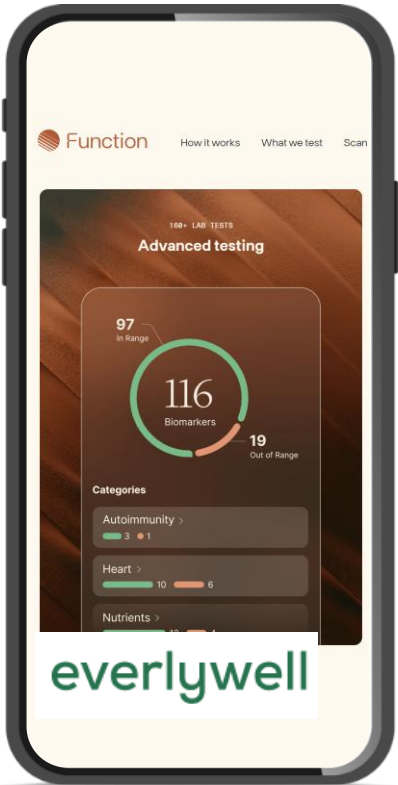
Despite low intent, wearable use drives meaningful nutrition behavior change

Behavior change as a result of using a wearable



NIQ Bases Quick Question Omnibus, December 2025, , NielsenIQ Digital Purchases, October 2025

Depth of testing is now in consumer hands with specific recommendations



Consumers have choice

superpower

Quest

Mito

everlywell

EREWON

Function



PROTEIN GOAL



82 g
of 120 g

68%

12g remaining
to reach your goal

PROTEIN INTAKE

Today

82 g

12 AM 12 PM 12 AM

TOP PROTEIN SOURCES



Chicken

32 g



Greek Yogurt

18 g



Protein Shake

16 g



Eggs

8 g



Other

8 g

SHOPPING LIST

Reach your protein goal with these picks.



Greek Yogurt

High in protein & probiotics

Qty: 1



Chicken Breast

Lean & versatile

Qty: 1



Eggs

Complete protein

Qty: 1 dozen



Protein Powder

Quick & convenient

Qty: 1



Cottage Cheese

High protein & low fat

Qty: 1



PRODUCT RECOMMENDATIONS



Whey Protein Powder

★★★★★ 4.6 (2,431)

24g protein / serving

\$34.99

Add



Plain Greek Yogurt (2%)

★★★★★ 4.7 (3,982)

17g protein / serving

\$4.49

Add



Chicken Breast (Fresh)

★★★★★ 4.5 (1,876)

26g protein / 100g

\$6.49 / lb

Add



EST. PROTEIN BOOST

+56–70 g

Add these items to easily
meet and exceed your goal.

TOTAL EST.

\$45.46

Based on
recommended qty.

ACTIVITY



7,532
steps



Goal: 10,000

RECOVERY



Your body is well
recovered and ready.

SLEEP



7h 45m
Sleep duration



Sleep quality
Good

HEART RATE



72 bpm
Resting

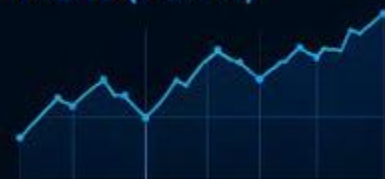


AI RECOMMENDATION

Consider a 20g protein snack
this afternoon to hit your goal
and support muscle recovery.



TREND (7 DAYS)



You're consistent!
Protein intake
up **14%**
vs last 7 days



PRO TIP

Spread your protein intake across 3–4 meals per day for
better absorption and muscle protein synthesis.

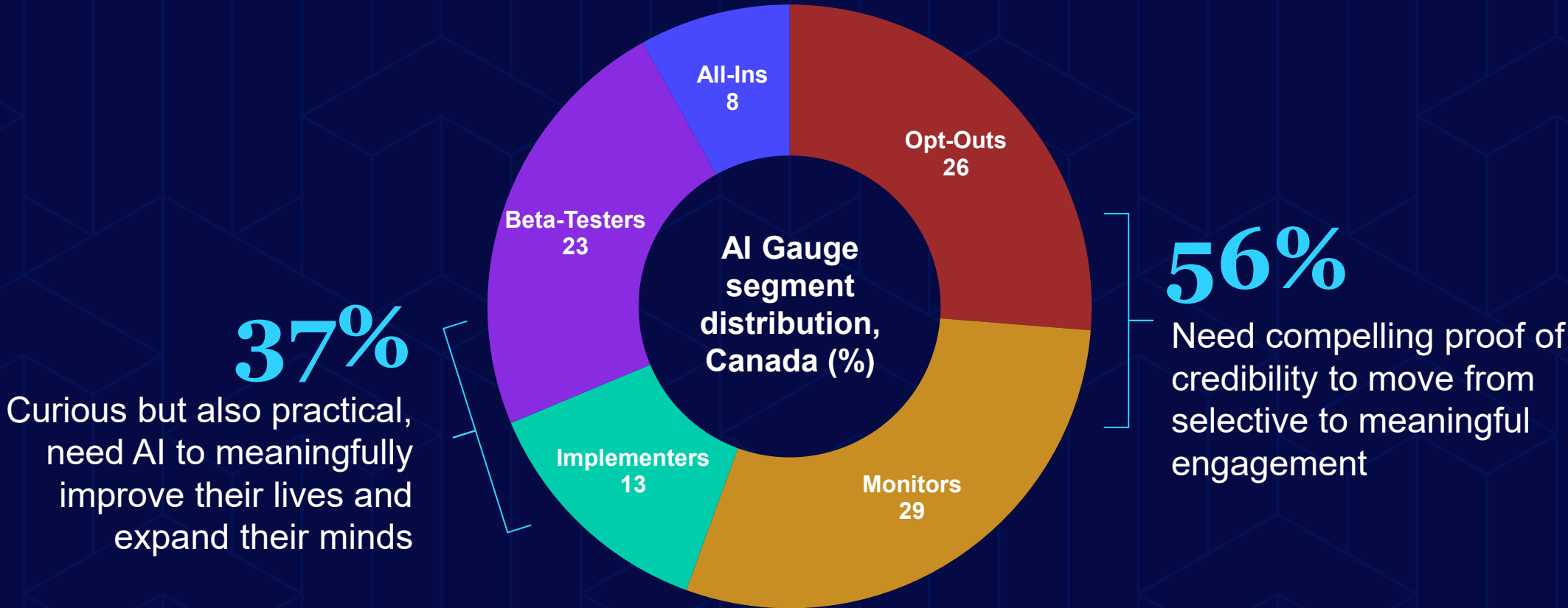
Learn more →

Impacts from AI

Canada's largest AI segment is one of the least engaged



 **34%** of Canadians used AI apps or tools in the past 30 days, **+13 pts** from 2024

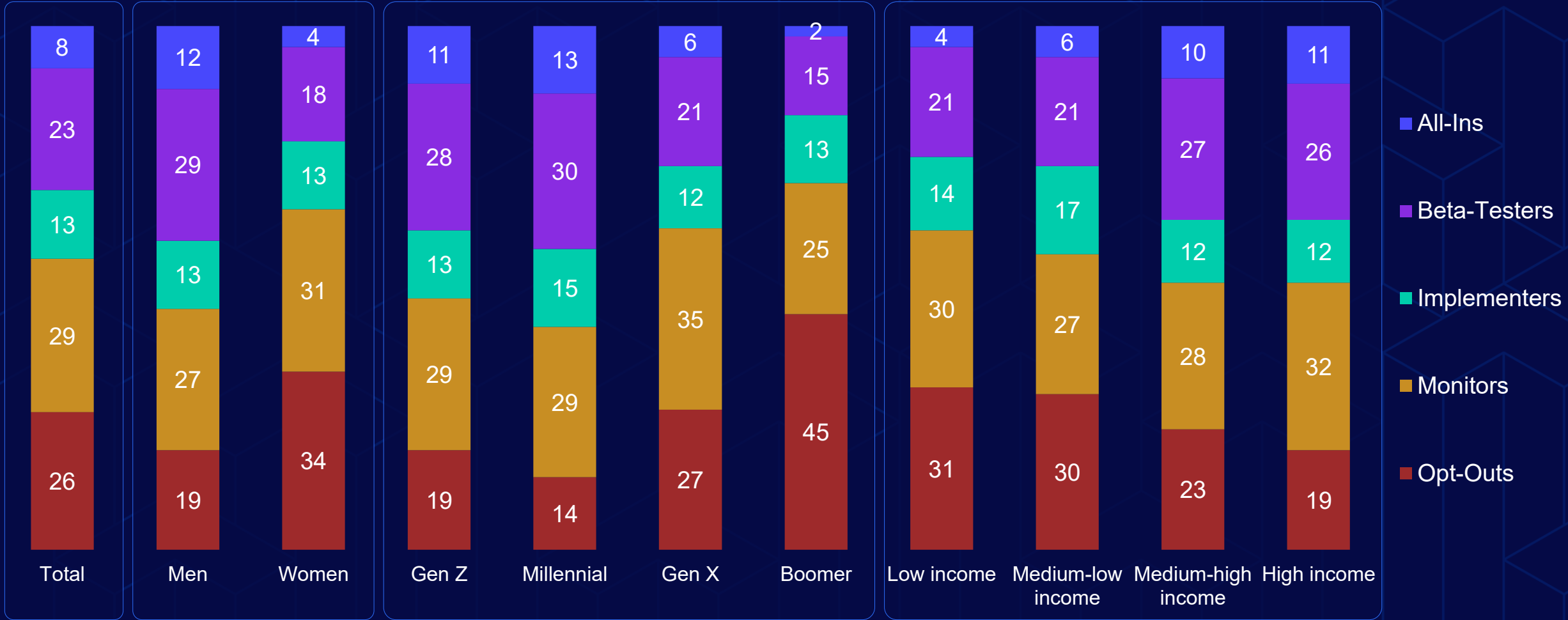


Men, Gen Z, Millennials, and high earners represent the clearest opportunities for AI adoption



These are traditionally the most bullish audiences

AI Gauge segment distribution in Canada (%)



Saving money is still the primary motivation for shoppers who engage in agentic commerce

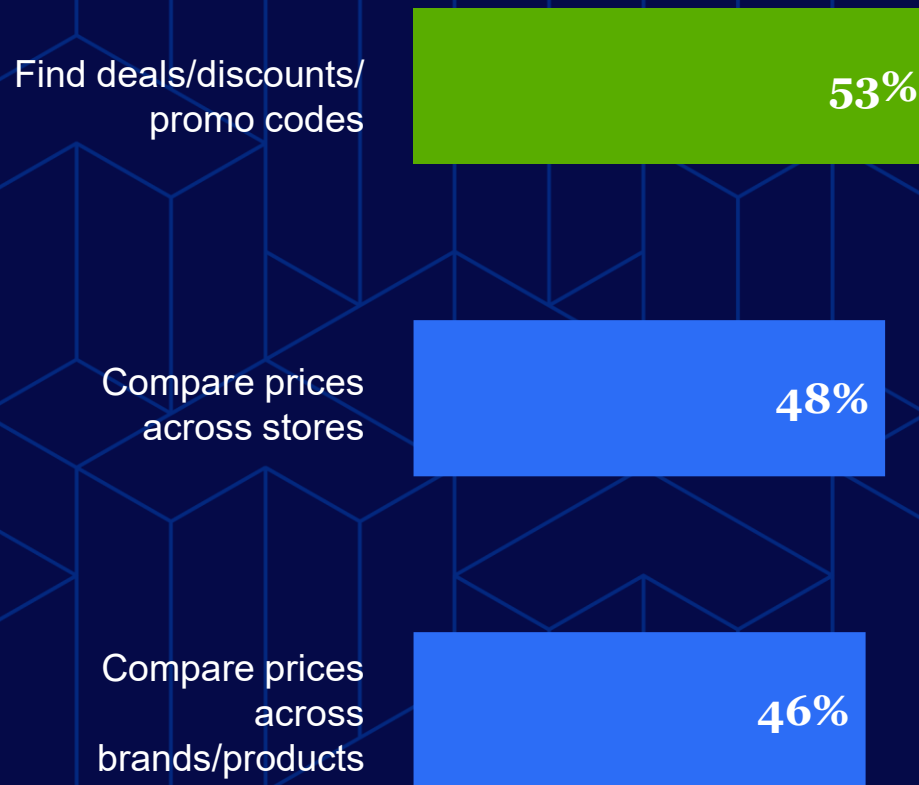
Top 3 motivations



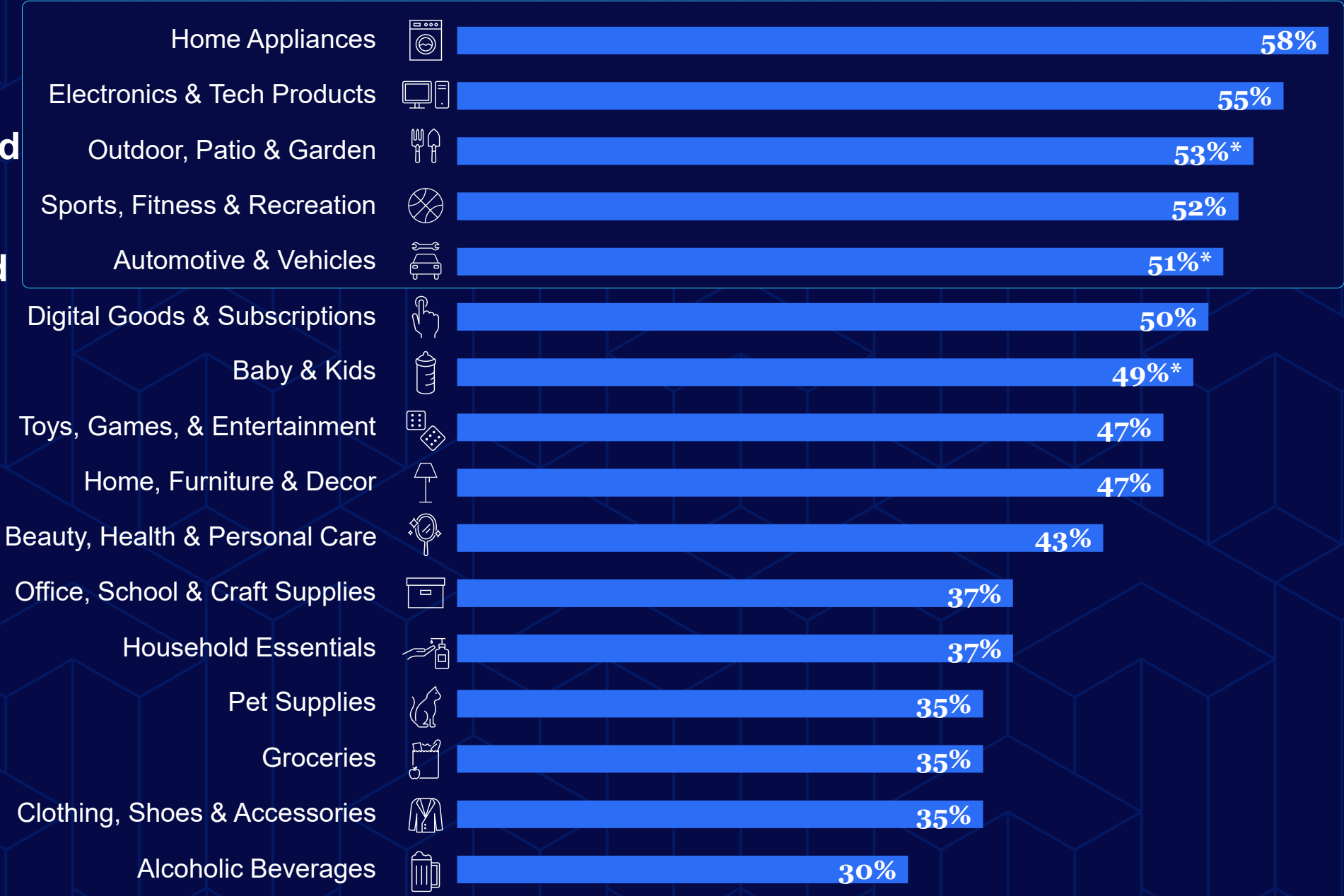
AI shopping tools are most often *used for price-related tasks*, continuing the trend since last wave



Top 3 tasks



AI tools are most often used to shop for Home Appliances and Electronics & Tech products, while adoption is relatively uncommon for Alcoholic Beverages



Among those “very familiar” with AI



\$28.9B

on all CPG/FMCG
Products

+7.5%

on dollars for all
CPG/FMCG Products
(vs +3.6% for Total
Households)

+10.5%

on dollars for all “Protein
Stated” Food/Bev
products (*5pts higher
than Total Households)

The Impacts of GLP-1's

Peptides moving quickly from clinic to consumer

- **30G needles**
(peptide self-injection protocols) **+793%**
- **31G needles** (GLP-1 pens, dose slitting, needle replacement) **+242%**
- Growth in GHK-Cu, Matrixyl, Argireline, BPC-157

Metabolic, weight & energy regulation	Cognitive, mood & aesthetic health	Longevity, growth hormone & performance	Tissue repair & bone/joint health
Focus: weight & glucose control, energy balance	Focus: brain & mental health, skin health	Focus: avoiding chronic disease, energy balance	
Peptides & primary use case: • GLP-1 & 2: metabolic health, weight reduction, insulin balance • MOTS-c, SS-31 & NAD+: mitochondrial health and energy	Peptides & primary use case: • Semax & Selank: mental performance & anxiety • Oxytocin: mood regulation, social stimulant • GHK-CU: skin regeneration, hair growth, anti-aging • Melanotan I&II: tanning and skincare	Peptides & primary use case: • GLP-1 & 2: diabetes, heart disease, dementia • Tesamorelin, Ipamorelin, Sermorelin: growth hormone stimulation • PNC-27: anti-cancer	Peptides & primary use case: • BPC-157: tendon & ligament repair • TB-500: muscle & soft tissue repair • Collagen: structural support



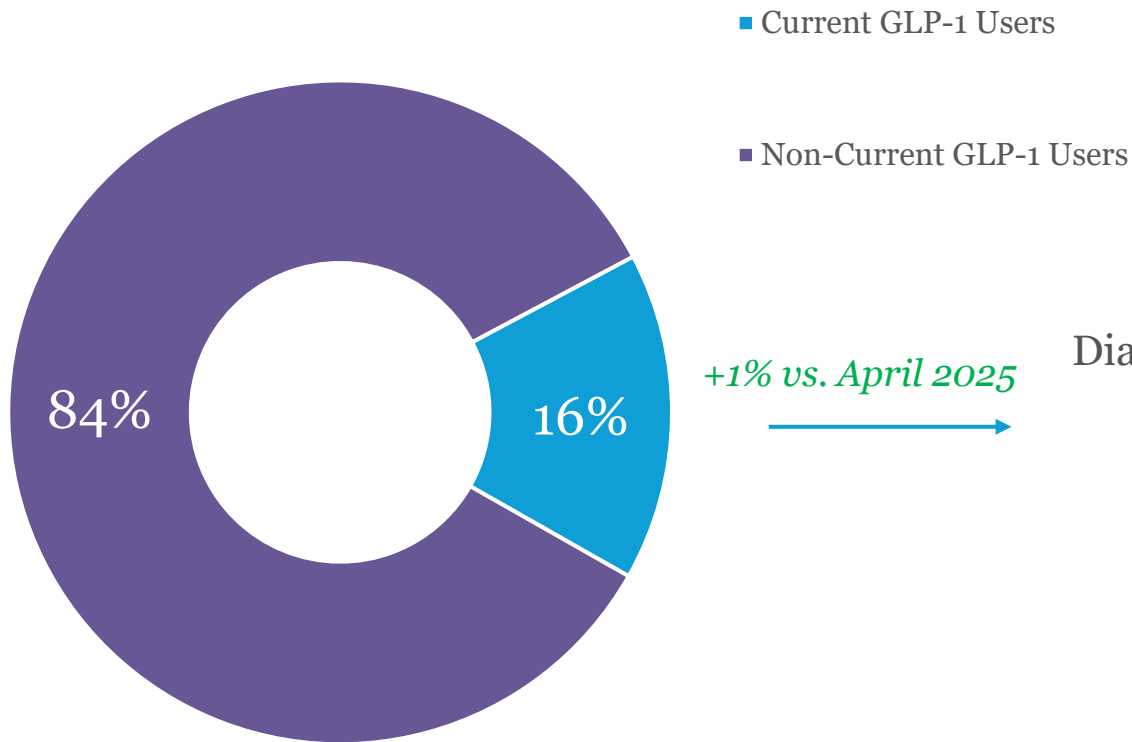
Why watch?

This will start to impact their CPG purchases. It's an early signal of next-generation ingredient demand and proof of unmet need across core categories and an expansion beyond weight loss into a full ecosystem

Several thousand peptides are currently being studied for therapeutic use – with 100 - 200 estimated to be approved or in late-stage research

Source: FDA, desk research, NIQ US E-Receipt Panel; gray market activity captured across five domains; Amazon needle purchases tracked by gauge (30G/31G/32G).

16% of Canadian households use GLP-1 medications, while GLP-1 penetration is growing, usage is increasingly shifting from diabetes management to weight loss



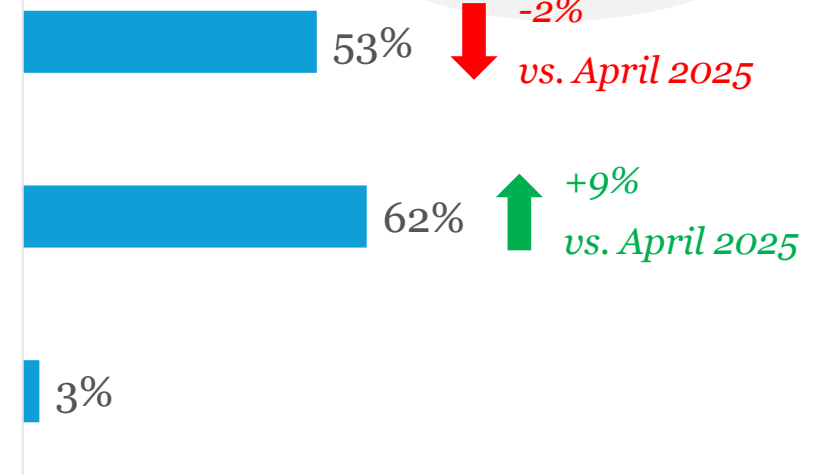
+1% vs. April 2025



Diabetes management

Weight loss

Other

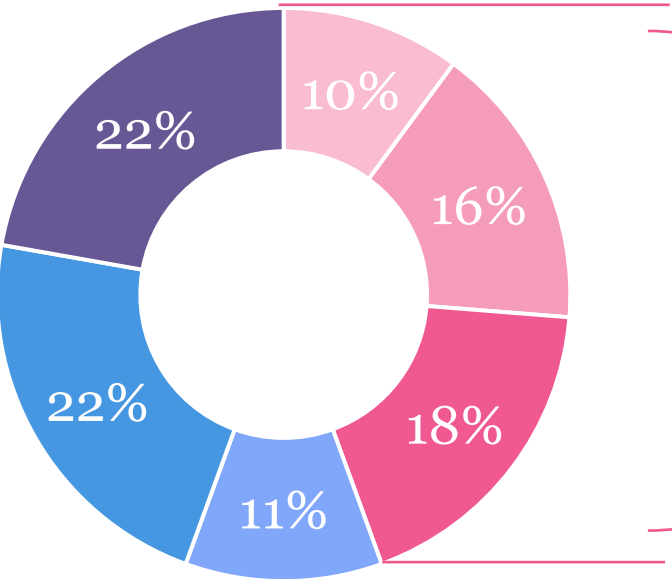


Canada is experiencing a GLP-1 expansion, with 44% of users starting within the last six months



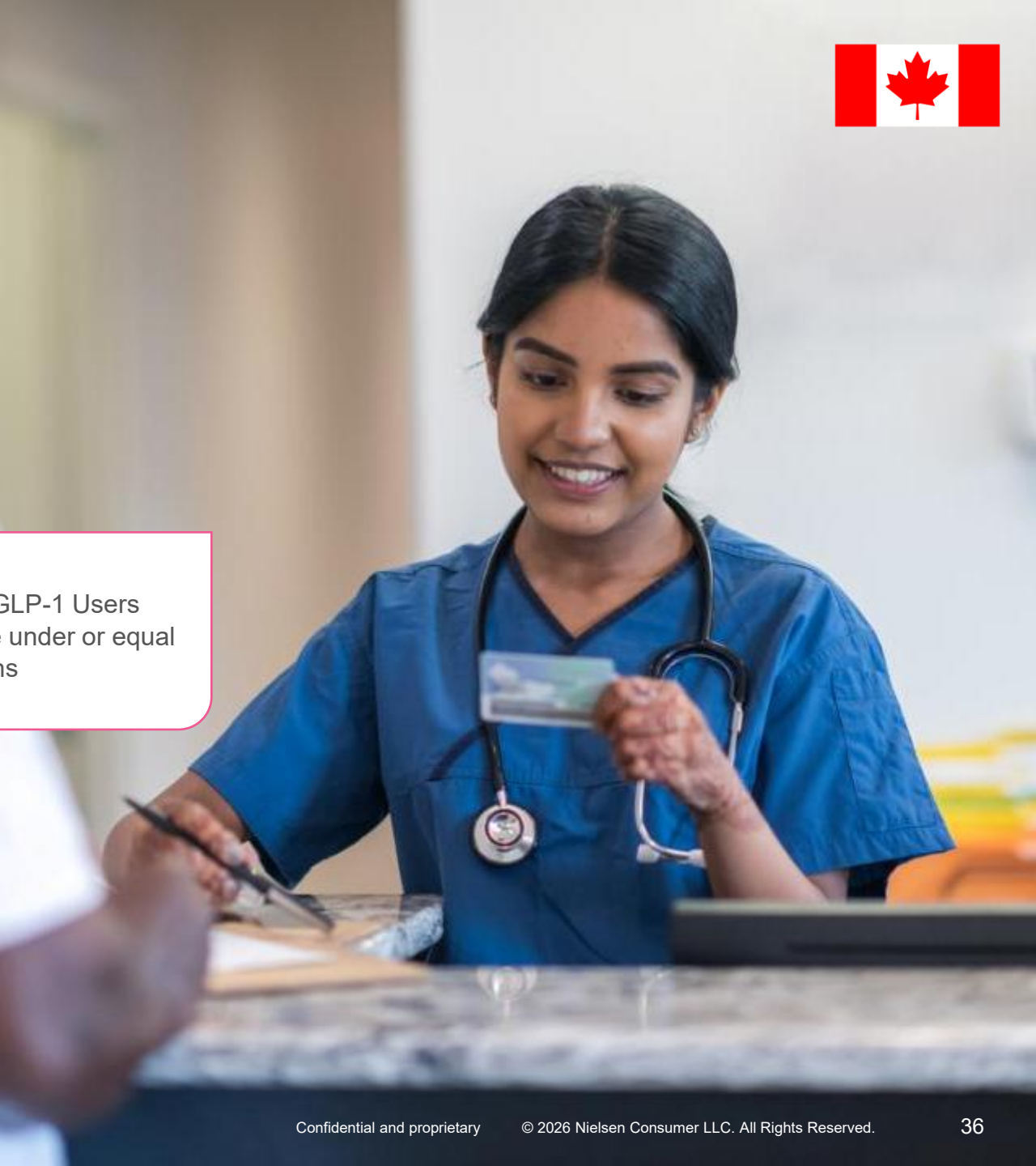
Length of GLP-1 Usage

- In the past month
- 2-3 months ago
- 4-6 months ago
- 7-11 months ago
- 1-2 years ago
- More than 2 years ago



44% of GLP-1 Users Usage are under or equal to 6 months

Source: NielsenIQ Panel On Demand Omnishopper | CA - OMNI POD during Rolling 52 w/e 23/05/26



Among current GLP-1 using households



\$20.6B

on all Packaged Food/Bev Products
(+0.1% on dollars, -3% on units, behind vs Total Households)

Down

on trips, and units/trip

+0.9%

on dollars for all “No Sugar Added Stated”
(exceeds overall growth, but behind Total Households)

How GLP-1 Dynamics Are Changing

- More users
- “Cycling” of use
 - People going on/off for specific situations
- “Micro-dosing”
- New forms: pills, and more
- Better pricing through access to generics
- Side effect concerns growing
- GLP-1 Alternatives
 - Natural supplements and otherwise

Moving Forward

What other trends are we keeping our eyes on?

Canada & Beyond

- ***Continue to Watch...***

- GLP-1's, Yuka/App users, AI users
- Front of Pack Labeled Products – topline, by category, and by nutrient
- Digestive Health & Fibre

- ***Starting to Watch...***

- Interactions between these trends: GLP-1's & App users, AI & GLP-1's, etc
- Rapid changes to how GLP-1's are used, consumed, and the outcomes for grocery retail
- Peptides – how will this emerge in the market in general, and in Canada specifically?
- Digging into “Super Wellness” consumers: their values, purchases, and other behaviours
- What ingredients are starting to emerge or getting disproportionately hit?
- Nuances on the Front of Pack Labeled Product story, including segmentations like...
 - Other health attributes and claims (protein, digestive health, artificial flavours/ingredients/colours).
 - Are the “healthier” FOP products separating themselves from the others?
 - How are those “highly aware” of FOP or “planning to consumer less” purchasing vs others?
 - Is there any difference between FOP products with lower amounts of the nutrient vs higher amounts (ex/only 15% DV of sugar vs 55%)?

Get Ahead While You Still Can

Brands not adjusting to these trends will be left behind

Consumers are finding innovative ways to optimize their health amid economic pressure



This economic pressure is not stopping consumers from using technology of various kinds to understand & optimize their wellness

Technology use is generally leading to more healthy purchase habits



While the “say/do” gap is not fully closed, real change is being driven by consumer health desires & tech use, including increasing of products perceived to be health and decreasing of products perceived to be unhealthy

Support consumers in making the decisions they want to make



Many consumers have identified their wellness priorities, and many are taking actions to fulfill it. But many barriers persist, and many nuances exist. Be the brand destination that makes it easier. Be aware of the ways consumers are informing themselves, and use data to unlock your best path

What is available today to go deeper?

- Understand the implications for your category(s) for what consumers say AND do
 - NIQ has insights on the trends we saw today for your categories specifically
 - *Come to our **Booth 1509** for more topline data on these trends (GLP-1, Yuka, AI), or discuss afterwards with us*
- Available Consumer Studies :
 - GLP-1 Trends:
 - More on GLP-1 usage: demographics, deeper purchase trends, usage behaviours, etc
 - What wellness trends are GLP-1 users actually growing on? Which categories/wellness trends are at the highest risk?
 - Future Study:
 - The Super Wellness Consumer:
 - How highly engaged consumers are purchasing wellness in FMCG
 - Includes insights on AI, wearables, apps, and other technology use
- Other things to consider:
 - Access to Retailer-Specific Data (example: Whole Foods, Longos, Loblaws, etc)
 - Innovation Research & Testing
 - Custom Consumer Surveys

Discussion & Questions



The Full View™