

Made in Canada

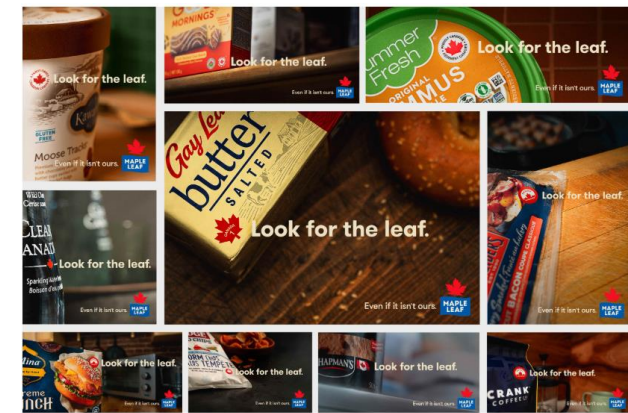
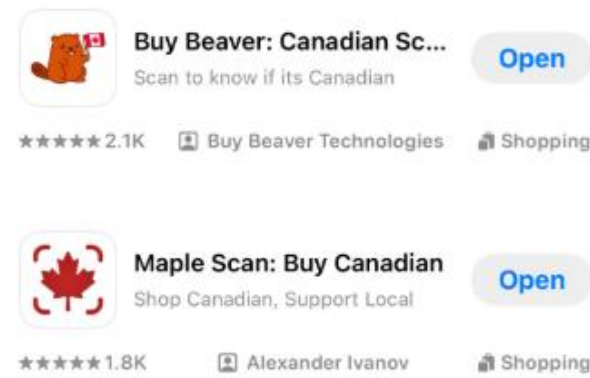
The *Buy Canadian* movement and its impact on the FMCG industry



NIQ Canada
April 2025

NielsenIQ

The 'Buy Canadian' movement: Gaining significant momentum in response to potential U.S. tariffs on Canadian goods



Made in Canada - Canadian Products

Public group · 1.3M members



Discussion Guides Featured People Events Media Files



Source: [Maple Leaf promotes Canadian unity by advertising others » Strategy, Oh Canada!](https://www.facebook.com/ChapmansIceCream/) Retailers show their pride - Grocery Business Magazine, <https://www.facebook.com/ChapmansIceCream/>, <https://www.instagram.com/sobeys/>

NIQ U.S. Tariff Impact Syndicated Survey

Custom Survey Buyer Groups Definitions:



Canadian Loyalists

I will only buy Canadian and go without if a Canadian option is not available

American Good Avoiders

I will boycott U.S. products and buy Canadian or from a non-U.S. country

Pragmatic Canadian Supporters

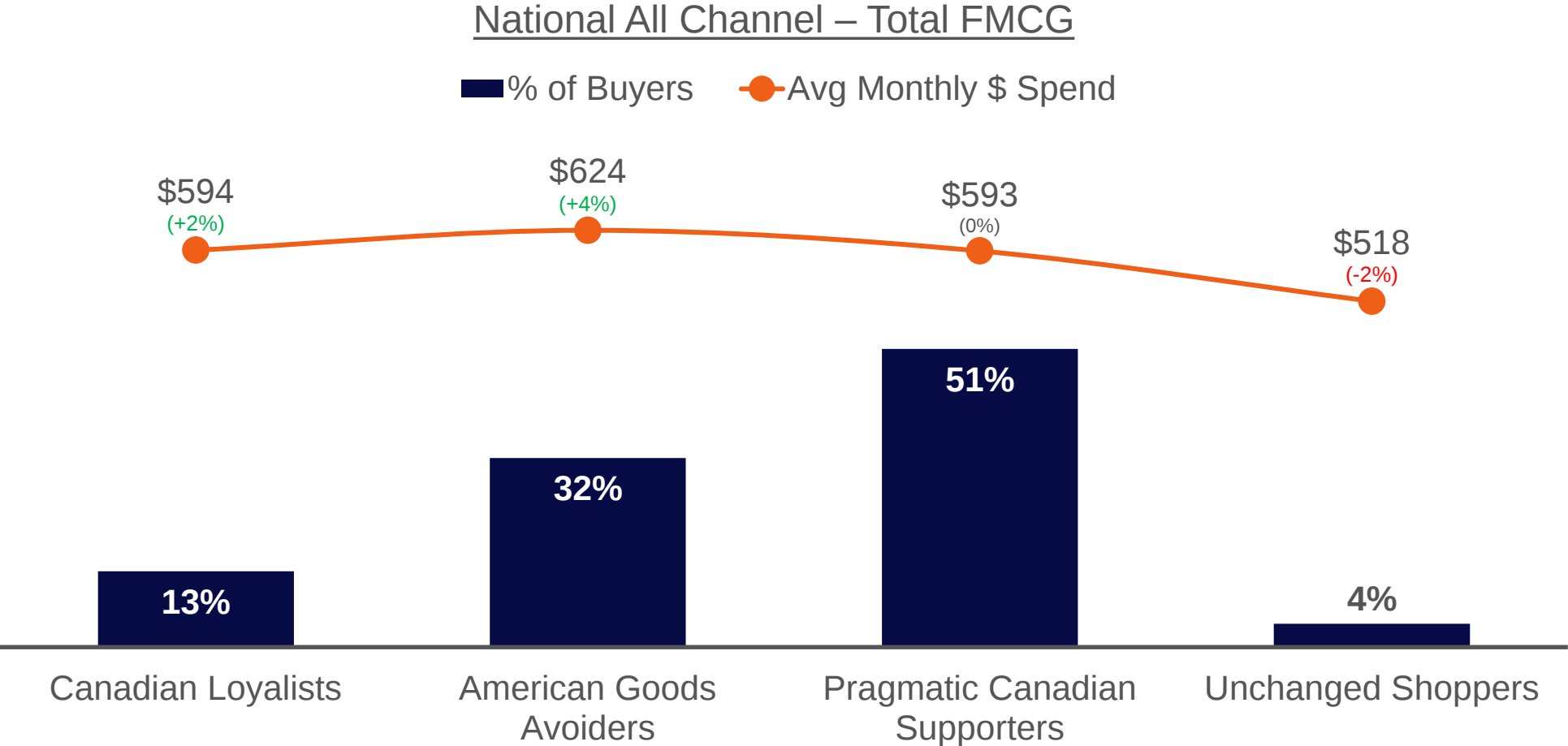
I will prefer Canadian products but will still buy U.S. if that is the best option

Unchanged Shoppers

I will continue buying U.S.-made products as usual, without making any changes.

Source: Survey NIQ Homescan Panel, Fieldwork: Feb 25 – Mar 9, 2025, Sample size: n=5,634

There is a strong risk to US products as 45% of consumers are either Canadian Loyalists or American Good Avoiders



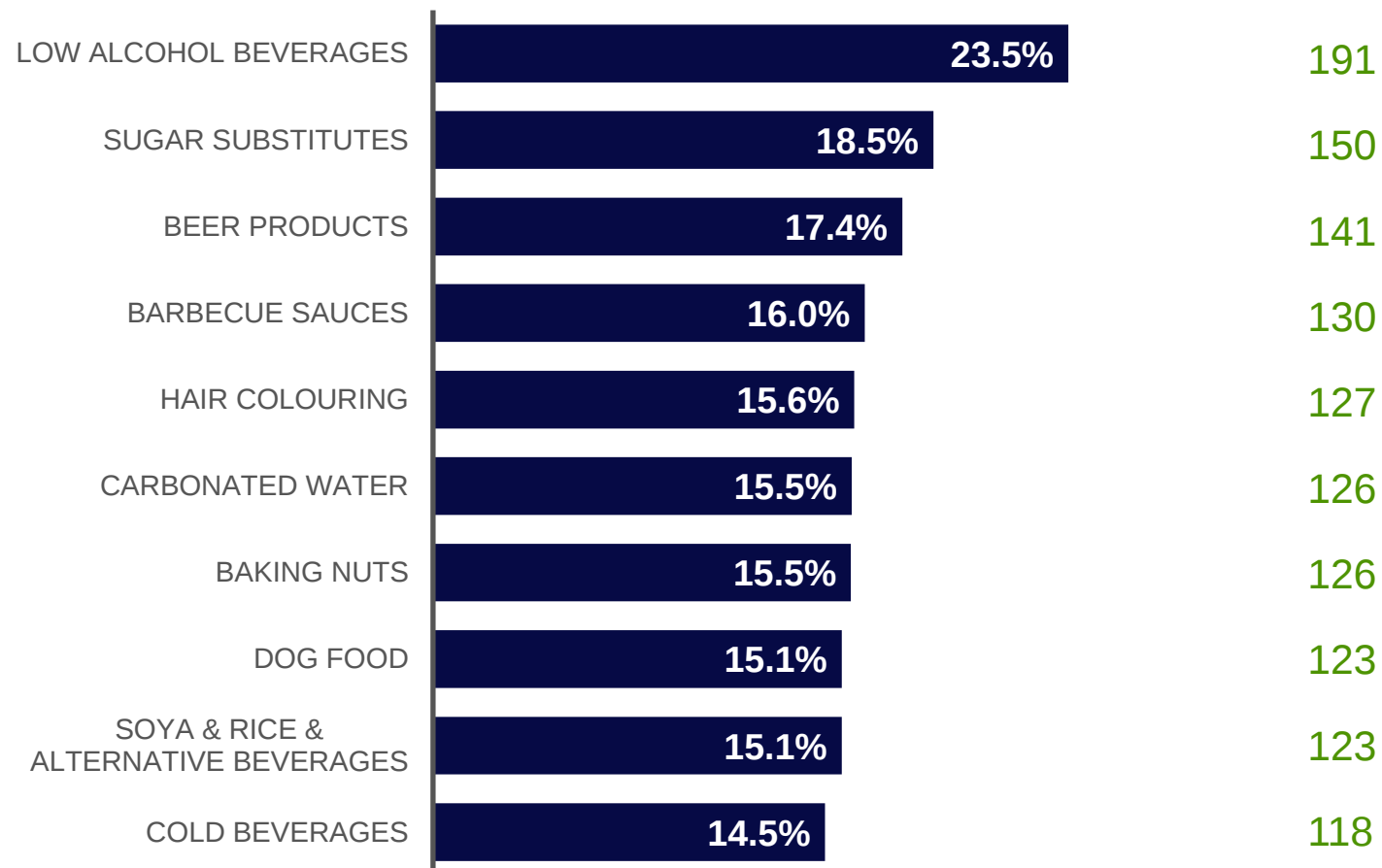
Source: Survey NIQ Homescan Panel, Fieldwork: Feb 25 – Mar 9, 2025, Sample size: n=5,634

There's an opportunity for Canadian products to win in categories that are *very important* to Canadian Loyalists

\$ Shr - Canadian Loyalists - National All Channel – L52wks

Top 10 FMCG Categories for Canadian Loyalists by dollar share

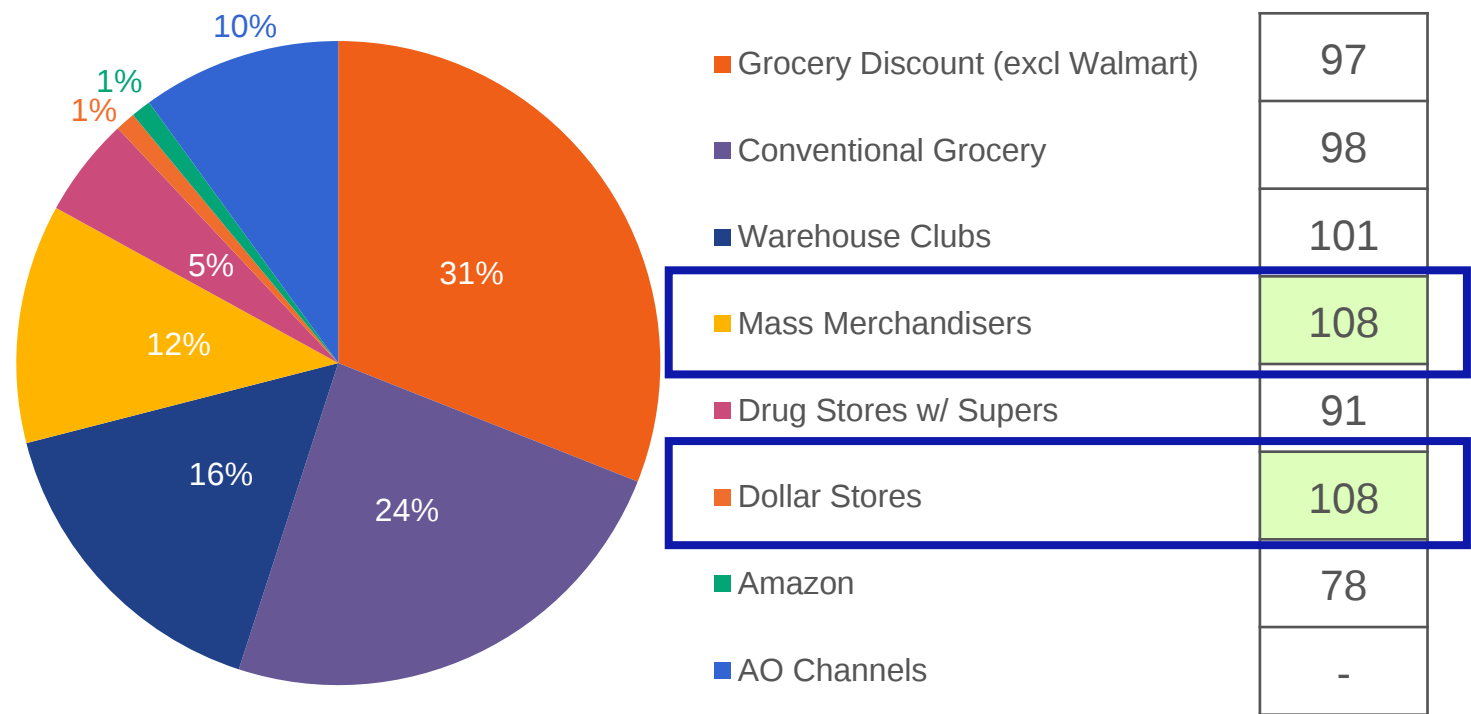
**\$Share
Index**



Source: Survey NIQ Homescan Panel, Fieldwork: Feb 25 – Mar 9, 2025, Shared to: Canadian Loyalists survey buyer group (n=803)

Canadian Loyalists only slightly shop more than the average household at Dollar Stores and Mass Merchandisers

Canadian Loyalists - Total FMCG Channel \$Shr – L12wks



Source: Survey NIQ Homescan Panel, Fieldwork: Feb 25 – Mar 9, 2025, Canadian Loyalists: n=803, Shared to: Total Outlets

Canadian Loyalists
are more likely to be
lower income, have
a middle-aged head
of household and
live in Manitoba/
Saskatchewan



Head of
Household
Age

<35	88 Index
35/44	78 Index
45/54	115 Index
55/64	107 Index
65+	109 Index



Region

135 index
Man/Sask



Ethnicity

113 index
TL South Asian

51 index
TL Chinese



Income

123 index
\$20-\$29K

138 index
\$30-39K

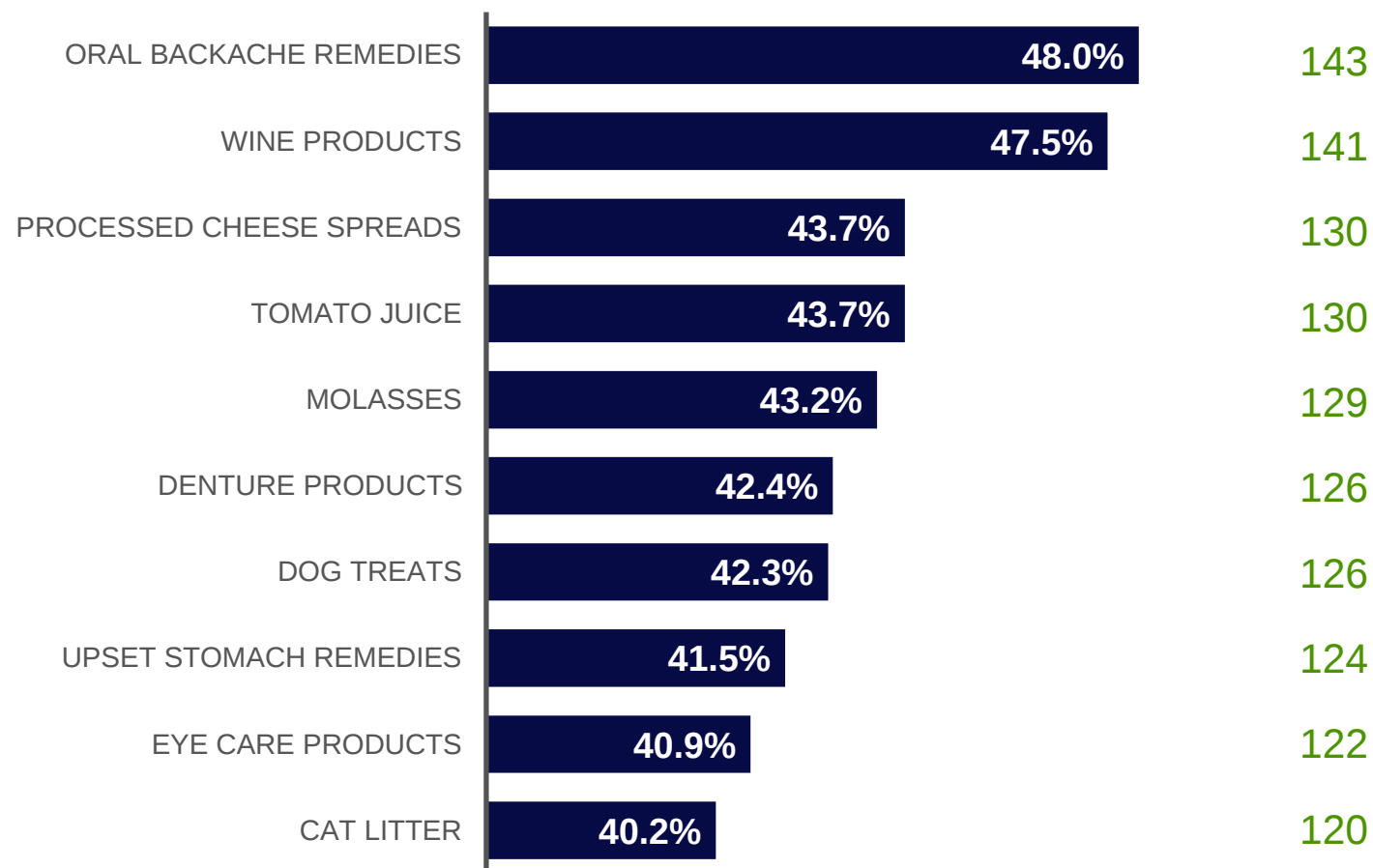
Source: Survey NIQ Homescan Panel, Fieldwork: Feb 25 – Mar 9, 2025. Canadian Loyalists: n=803

There's a risk to
U.S. products in
categories that are
important to
American Good
Avoiders

\$ Shr - American Goods Avoiders - National All Channel – L52wks

Top 10 FMCG Categories for American Goods Avoiders by dollar share

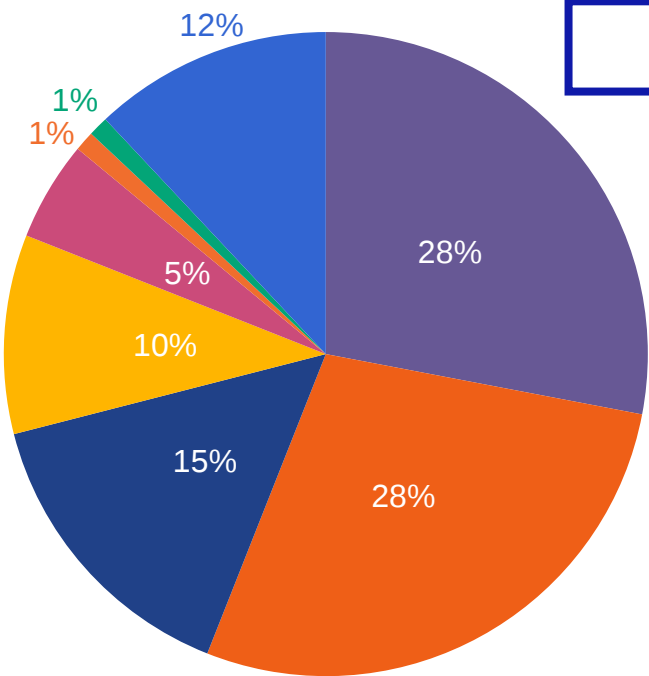
\$Share
Index



Source: Survey NIQ Homescan Panel, Fieldwork: Feb 25 – Mar 9, 2025, Shared to: American Good Avoiders (n=1,894)

U.S. products have *greater risk* to sales in Conventional Grocery from American Goods Avoiders

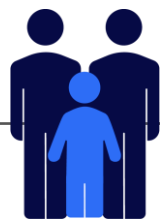
U.S. Goods Avoiders - Total FMCG Channel \$Shr – L12wks



	\$ Share Index
Conventional Grocery	113
Grocery Discount (excl Walmart)	90
Warehouse Clubs	97
Mass Merchandisers	88
Drug Stores w/ Supers	106
Dollar Stores	94
Amazon	102
AO Channels	-

Source: Survey NIQ Homescan Panel, Fieldwork: Feb 25 – Mar 9, 2025, American Good Avoiders: n=1,894, Shared to: Total Outlets

American Goods Avoiders are *more likely* to have a head of household 55+ and in Quebec



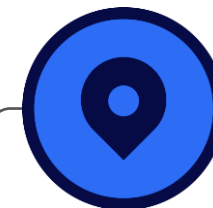
Head of
Household
Age

120 index

Age 55-64

138 index

Age 65+



Region

111 index

Quebec



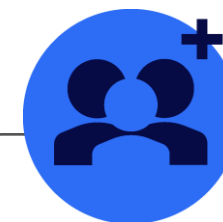
Ethnicity

101 index

TL South Asian

69 index

TL Chinese



Household
Size

116 index

1 member

112 index

2 members

Executive Summary



'Buy Canadian' consumer

- Strong risk to US brands as **45%** of consumers are either Canadian Loyalists or American Good Avoiders
- Canadian Loyalists are more likely to be **middle aged, lower income** and live in **Manitoba/Saskatchewan**
- American Goods Avoiders are more likely to have a head of household **55+** and live in **Quebec** region



Categories purchased

- Opportunity for Canadian products to win in categories important to Canadian Loyalists (**Low Alc Beverages, Sugar Substitutes, Beer, BBQ Sauce**)
- Risk to U.S. products in categories that are important to American Goods Avoiders (**Back Ache, Wine, Processed Cheese Spreads, Tomato Juice**)



Channels Shopped

- Some opportunity for **Dollar Stores** and **Mass Merchandisers** with Canadian Loyalists who slightly over index in those channels
- Risk to U.S. products high in **Conventional Grocery** which is more important to American Goods Avoiders than the average household

2025 Syndicated U.S. Tariff Impact

NIQ

2025 Panel Syndicated Report

What is it

NIQ U.S. Tariff Impact Syndicated Report explores how Canadians perceive and respond to the U.S. tariff increase on consumer packaged goods. It delves into shifts in grocery shopping habits, brand preferences, and the ease of identifying Canadian-made products. The insights help retailers and manufacturers navigate consumer sentiment and adjust strategies accordingly.

Investment

National report: \$10K Survey Insight Report. The Market Summary on buyer groups (*American Goods Avoiders*, *Canadian Loyalists*, *Pragmatic Canadian Supporters*, and *Unchanged Shoppers*) is available at an additional customized cost, depending on the scope and frequency.

Full report is available in March 2025
For more information, contact your NielsenIQ representative.

How it works

This research combines Panel (Homescan+Omni Panel) survey responses with market insights.
Respondents: Canadian grocery shoppers
Sample size: ~15,000 in total from both panels
Fieldwork: Feb 2025

Key benefits

- **Understand Shopper Sentiment:** Gain insight into how consumers feel about the U.S. tariff and its impact on grocery shopping decisions.
- **Adapt Retail Strategies:** Learn how shoppers identify Canadian products and what retailers can do to help them buy more local goods.
- **Gauge Store Loyalty:** Determine whether consumers are willing to switch stores based on product sourcing and pricing changes.
- **Competitive Landscape Analysis:** Identify which grocery chains are perceived as Canadian vs. U.S.-owned and understand the implications.

How Will the U.S. Tariff Impact Canadian Grocery Shopping?



Give us a *shout-out* if you like our work!



New format but still easy

*Won't take you more than **1 minute!***

NIQ

Your voice is important in shaping our initiatives focused on enhancing your NIQ experience. We kindly ask that you take 1-2 minutes to share your feedback.

Based on your recent experience relating to **NIQ Gifting Review - Retailers**, how likely are you to recommend NielsenIQ insights to a colleague? *

0 = Not likely at all 10 = Extremely likely

0	1	2	3	4	5	6	7	8	9	10
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How satisfied are you with the **actionability** of the insights and recommendations?

0 = Not satisfied at all 10 = Extremely satisfied

0	1	2	3	4	5	6	7	8	9	10
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How satisfied are you with NielsenIQ's **knowledge of your industry and business** based on the content shared?

0 = Not satisfied at all 10 = Extremely satisfied

0	1	2	3	4	5	6	7	8	9	10
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Or click the [Survey Link](#)

P.S. How the score is calculated:

0 1 2 3 4 5 6	7 8	9 10
Not Satisfied	Neutral	Satisfied



Easy tip:

If you like it, give us a 9 or 10!

