

Exploring the Unique Opportunities of the *Quebec Market*

CHFA Vancouver - Brand School Session
April 2025

NielsenIQ





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The Full View

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NIQ



Québec is a quarter of Canada's CPG market

24%

of Canadian households
live in Québec

24%

of Total FMCG sales are
made in Québec

23%

of the CPG \$ growth is
sourcing from Québec

State of the population of Québec

1 out of 4
Canadian
households

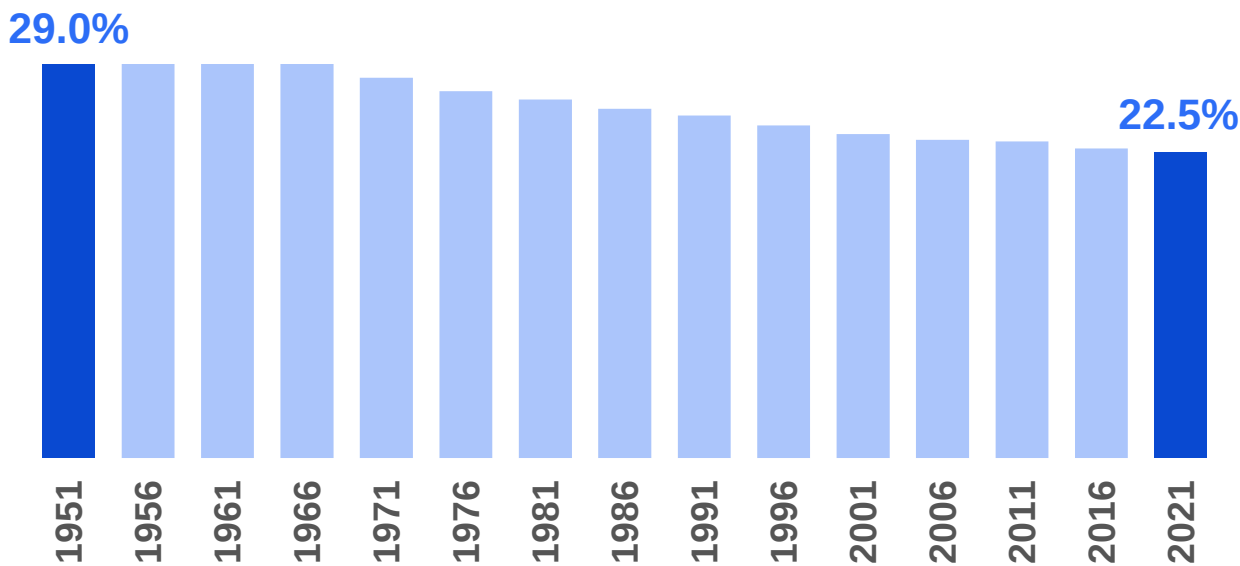
2nd largest
group of
consumers

Population
*growing
differently*

Québec's importance within Canada is diminishing

Québec's importance within Canada's population

Census Information



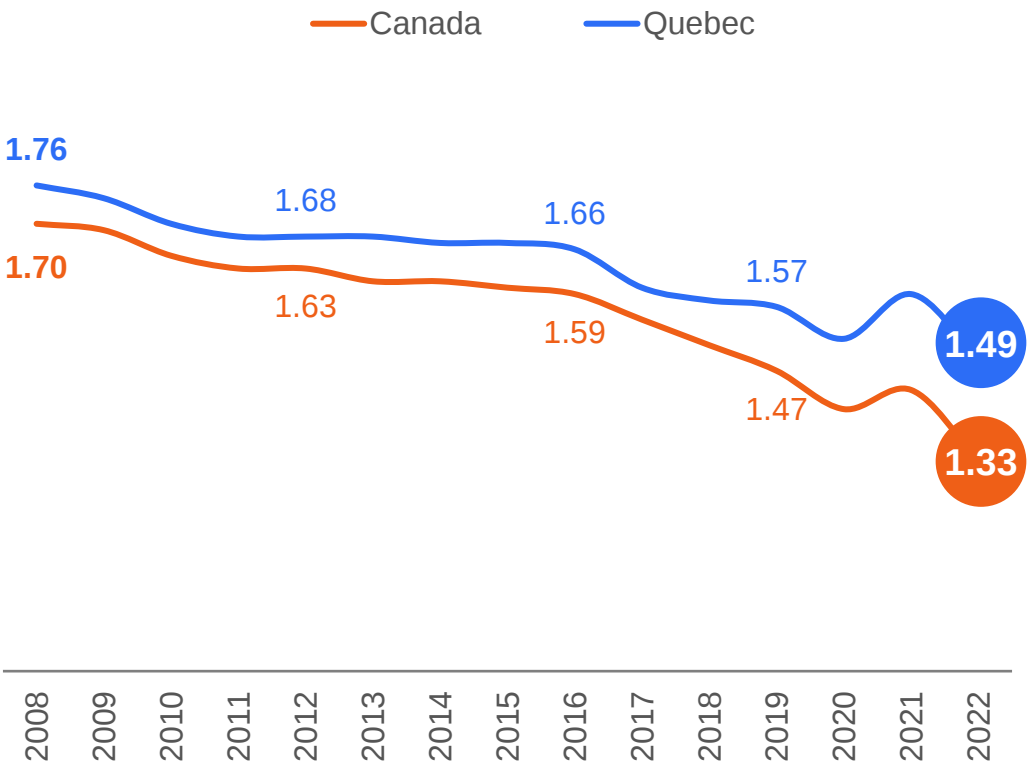
Source: Statistique Canada. Tableau 17-10-0009-01 Estimations de la population, trimestrielles



While declining, Québec's fertility rate remains higher than the national average

Total fertility rate in Canada

Number of children per woman, up to 2022 (Canada)



Source: [Retraite Québec - Amounts and payment \(gouv.qc.ca\)](#), Source: <https://www.statcan.gc.ca/en/start>

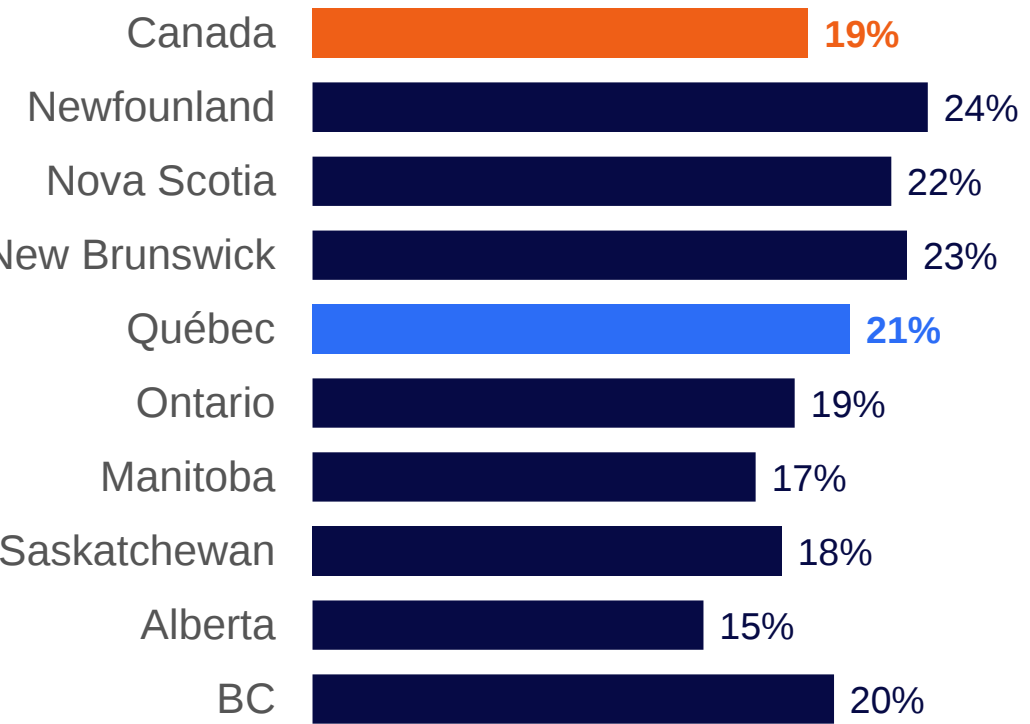
Contributing factors to *higher fertility*:

- 1- Subsidized *childcare service*
- 2- Provincial *family allowance*
- 3- Québec Parental *insurance plan*

Eastern provinces have an higher population over 65 y.o.

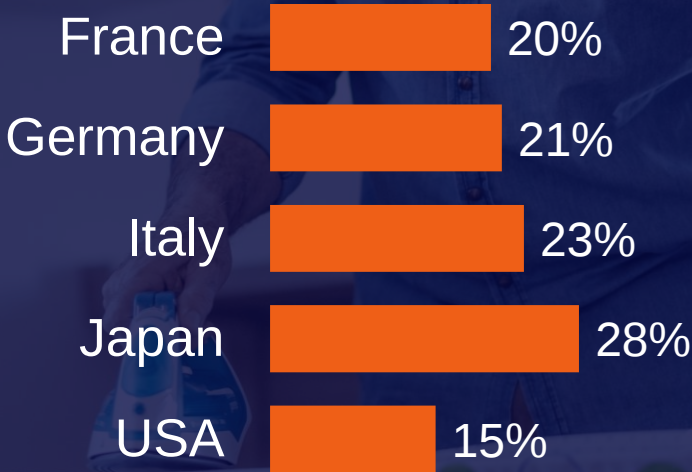
% of population over 65 y.o.

% of population over 65, Census 2021 (Canada), OCDE for G7 countries



Statistiques Canada, [Les populations des provinces de l'Atlantique vieillissent rapidement](#) / [Le vieillissement de la population s'accélère](#) | La Presse

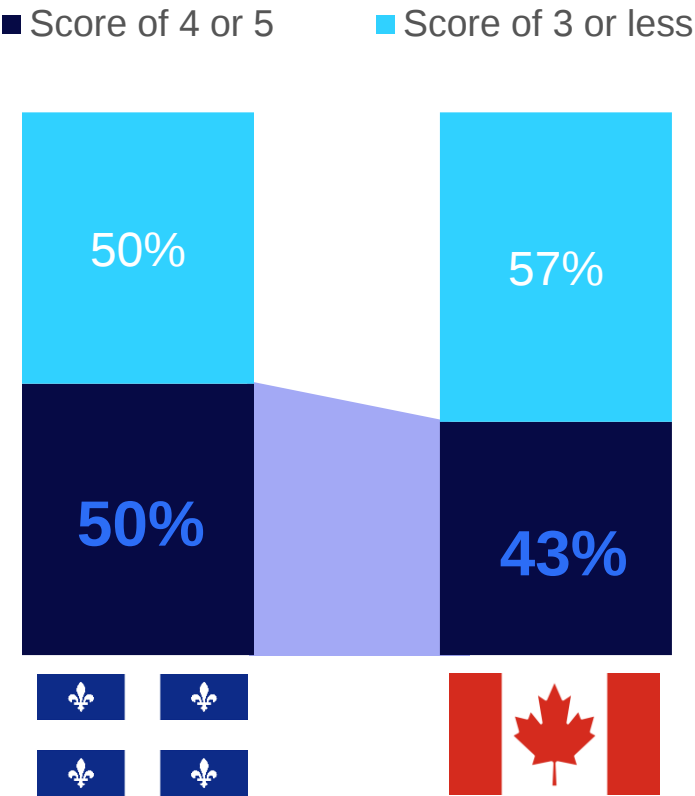
Other developed countries' population over 65 y.o.



Québécois, fitter and healthier than the rest of Canadians!

Do you consider yourself healthy? Scale of 1 to 5

2023 (Canada vs Québec)



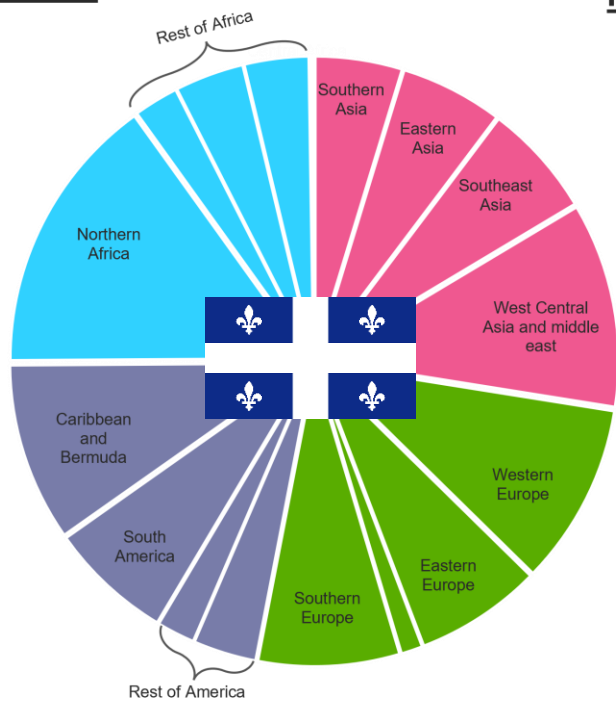
Source: NielsenIQ Canada, SS 2023 Health & Wellness Study

The face of multiculturalism is different in Québec, especially sourcing from across the Francophonie

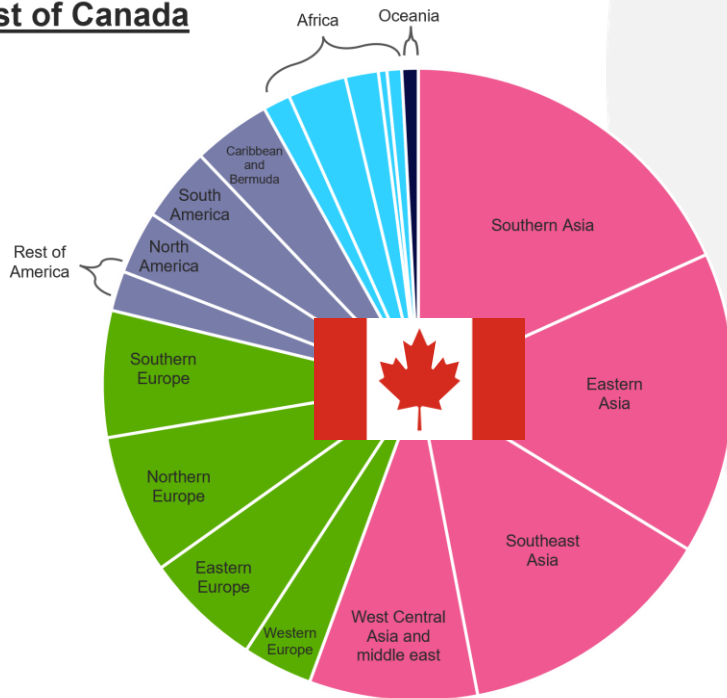
Immigrant population by selected places of birth

2021 Census

Québec



Rest of Canada

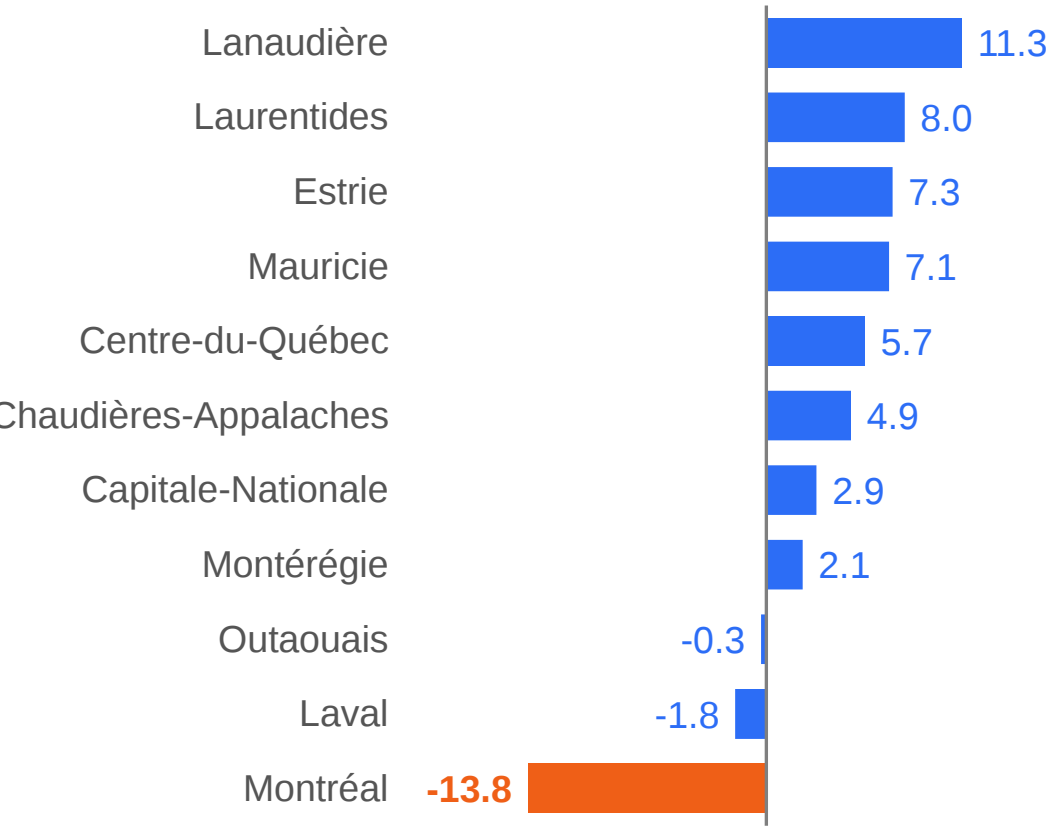


Source: NIQ Canada, 2024 Meal Choice Study, May 2024

More and more ‘settled’ households are moving out of Montréal ...

Net interregional migration rate

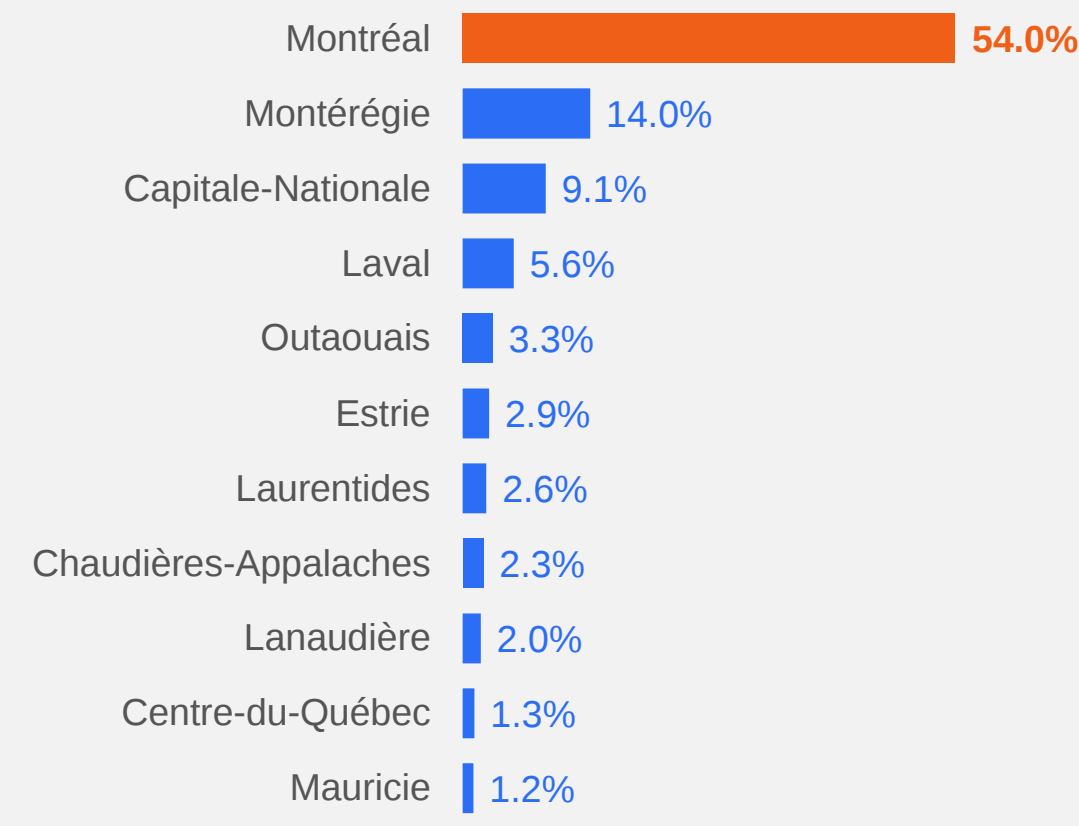
2022 vs 2023 (rate per 1000) (Québec)



... while it remains the main destination for recent immigration to the province

Distribution of immigrants admitted in 2022-2023

Québec



[Institut de la statistique du Québec Démographie – Comparaison entre les régions \(quebec.ca\)](https://www.quebec.ca/demographie)



43%

of Québec's
couples live in
**common-law
unions**

23%
ROC

Source: <https://www.ledevoir.com/societe/733353/societe-le-canada-a-le-plus-haut-taux-de-couples-non-maries-du-g7>



30%

of Québec's
households are
*1x member
households*

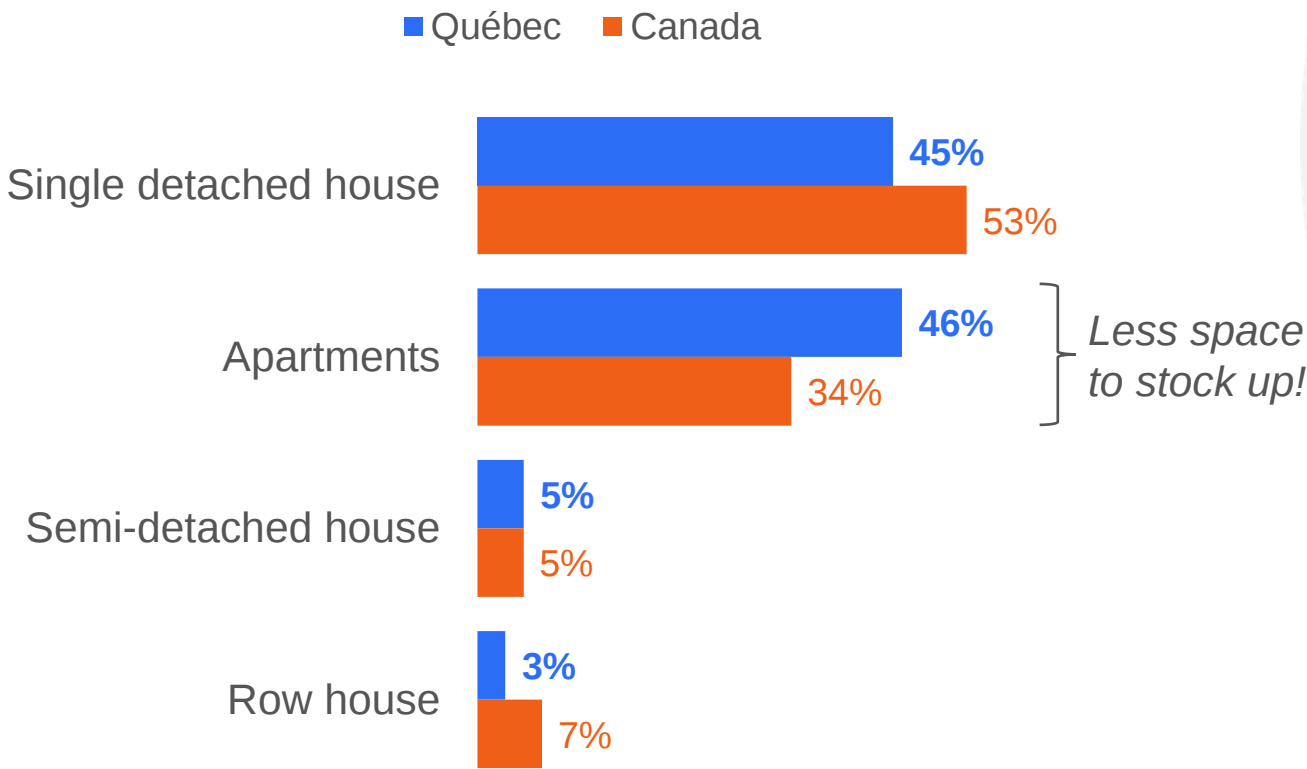
26%
ROC

Source: NIQ Omnishopper – National TL Outlet – FMCG – L52wks PE April 20 2024

46% of Quebecers live in apartments influencing their needs and choices

Types of housing

Canada 2021



<https://www150.statcan.gc.ca/t1/tbl1/en/cv.action?pid=9810024001>
[L'historique de l'architecture des appartements à Montréal | Association des Propriétaires du Québec \(APQ\)](#)



Implications for wellness brands

*Healthier
Aging
population*

Older consumers, focusing on
maintaining healthy habits

*Immigration
focused on
francophones*

Bigger african communities who
speak french

*Single member
households
with less space*

Consumers are less likely to stock
up. Single serve alternatives.

Québec's population buying power

Income
is on par with
country's
average

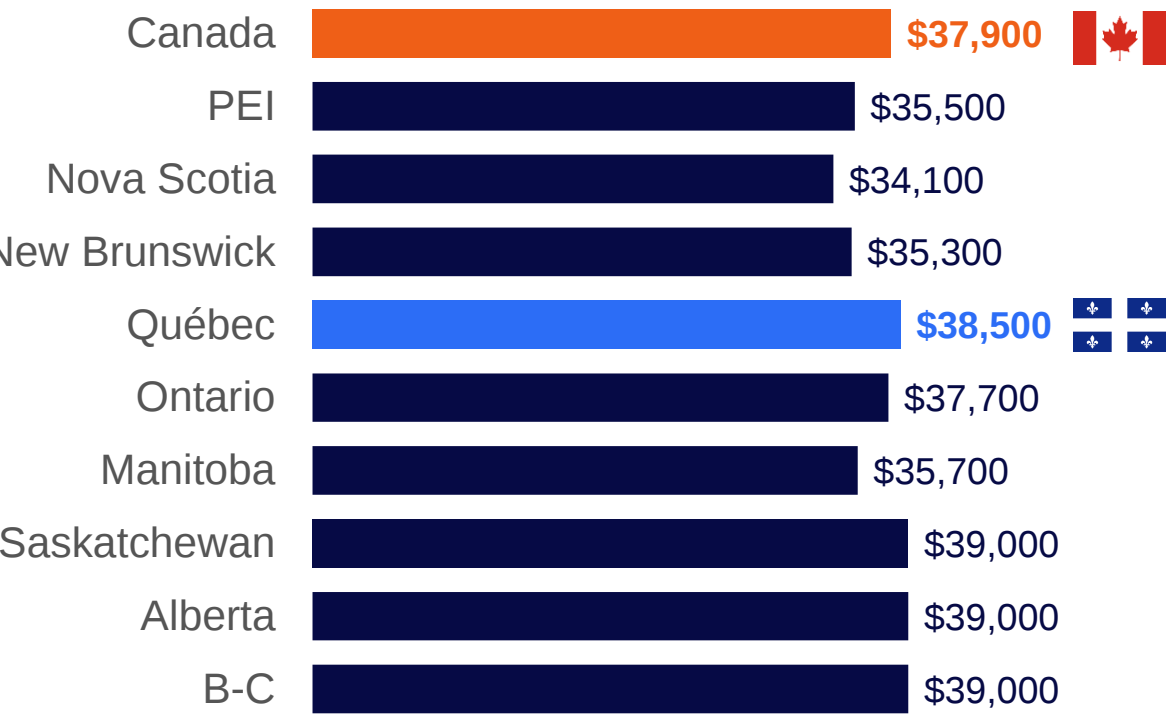
Women are
bigger part
of the
workforce

CPG
consumption
is *stagnant*

Spending power for Québécois slightly above Canadian average

Median after-tax income by province

2022, released in 2024 (Canada)

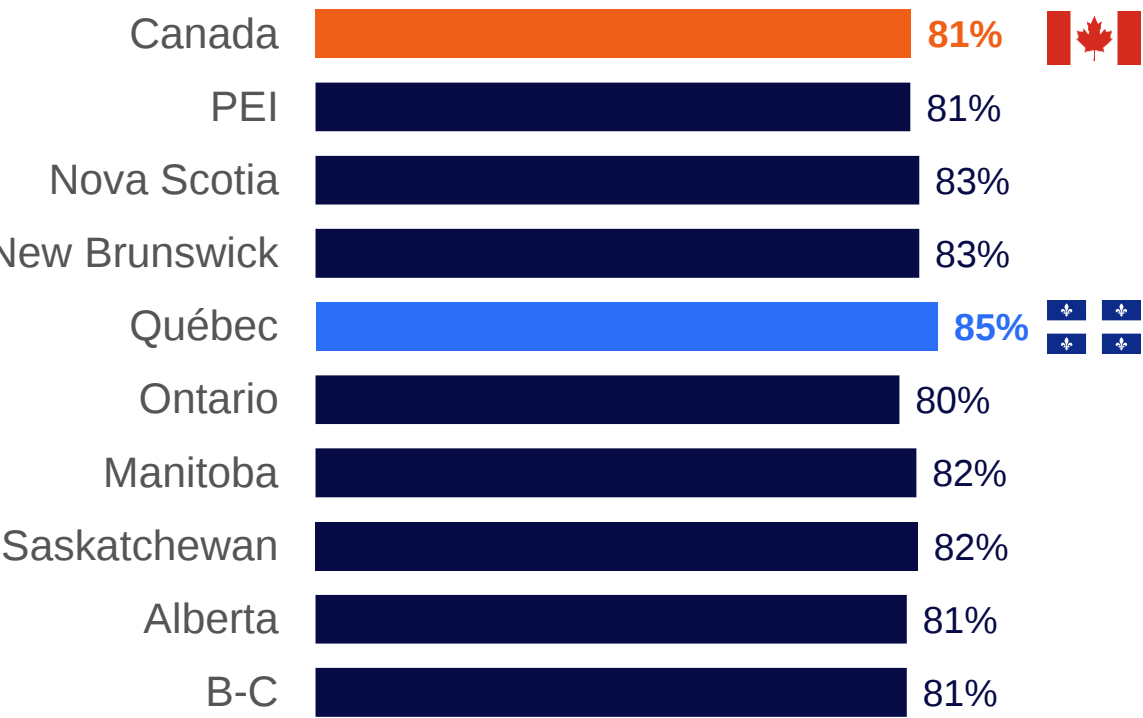


Source; Statistiques Canada, [Revenu du marché, total et après impôt moyen et médian des particuliers selon certaines caractéristiques démographiques](#)

The 1st reason why median revenue is now higher is that more women work in Québec

Employment rate for women

February 2024



Source: Labour Force Survey (3701), table 14-10-0287-01 [Employment rate highest among core-aged women in Quebec in February 2024 \(statcan.gc.ca\)](#)

Impacts of *women at work* :

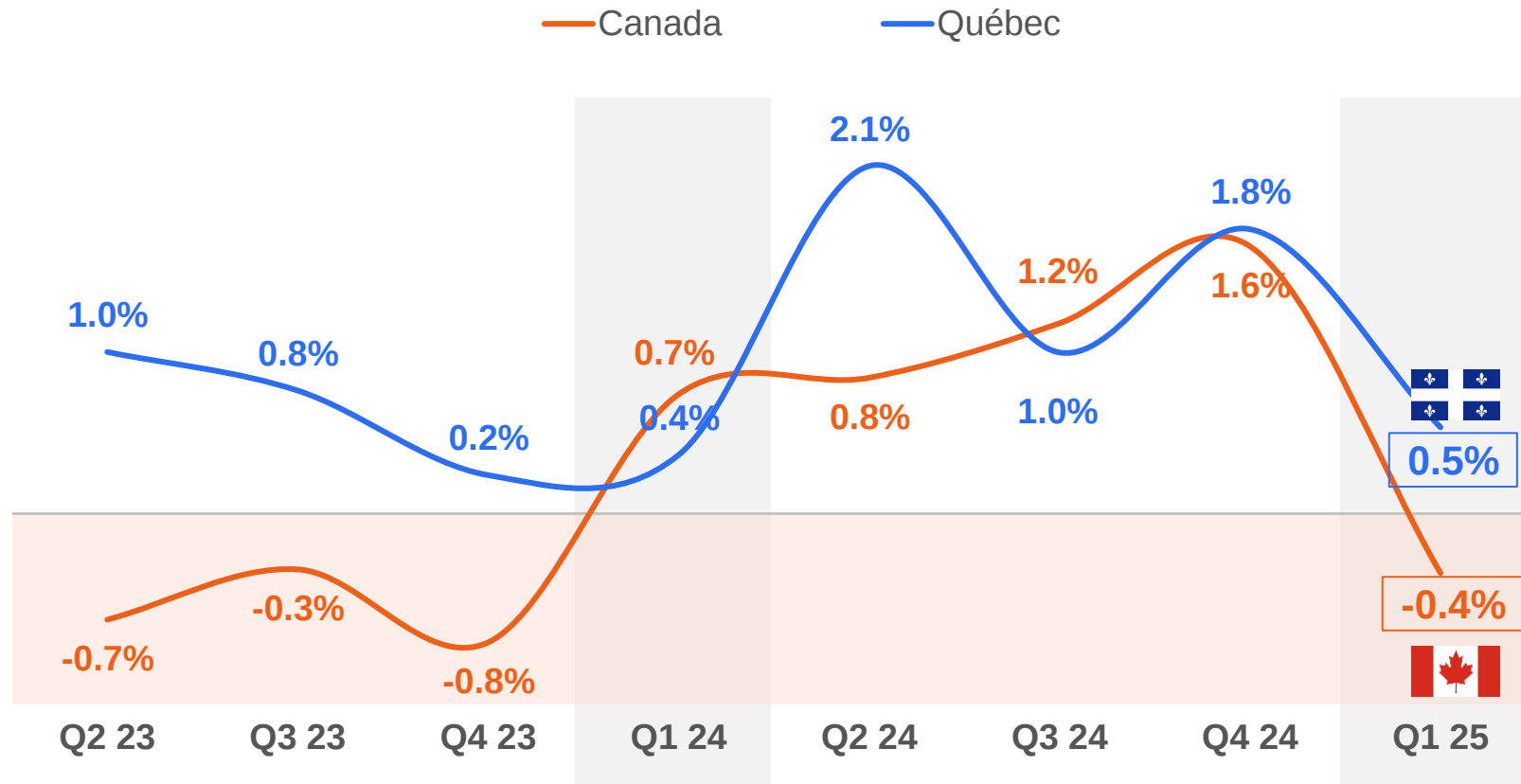
- 1- Higher household spending power
- 2- Different needs (cloths, commute, lunch,etc.)
- 3- Less discretionary time
- 4- Importance of daycare

Unit growth is *stagnant*

As inflation went up, the units growth rate has flattened implying a slow down in CPG consumption.

Unit growth rate per quarters

Total Sales, Quebec vs Canada



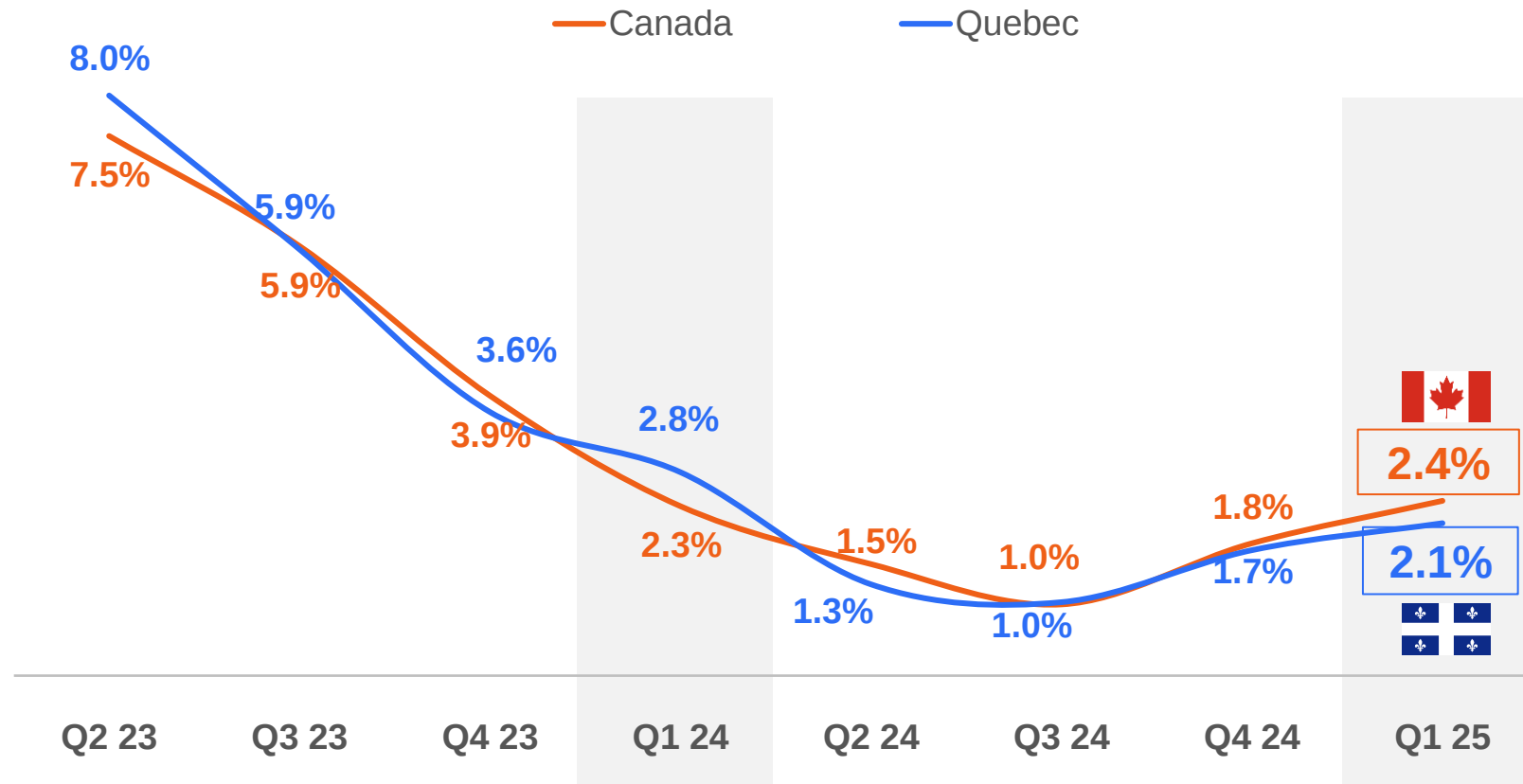
Source: NIQ Market Track Total Tracked Sales, National GB+DR+MM, L52w ending Mar 8th 2025.

Inflation is *on the rise*

After stabilizing in 2024, inflation has picked up in Q1 2025 as it is expected to increase over the next few months.

Inflation rate per quarters

Total Sales, Quebec vs. Canada



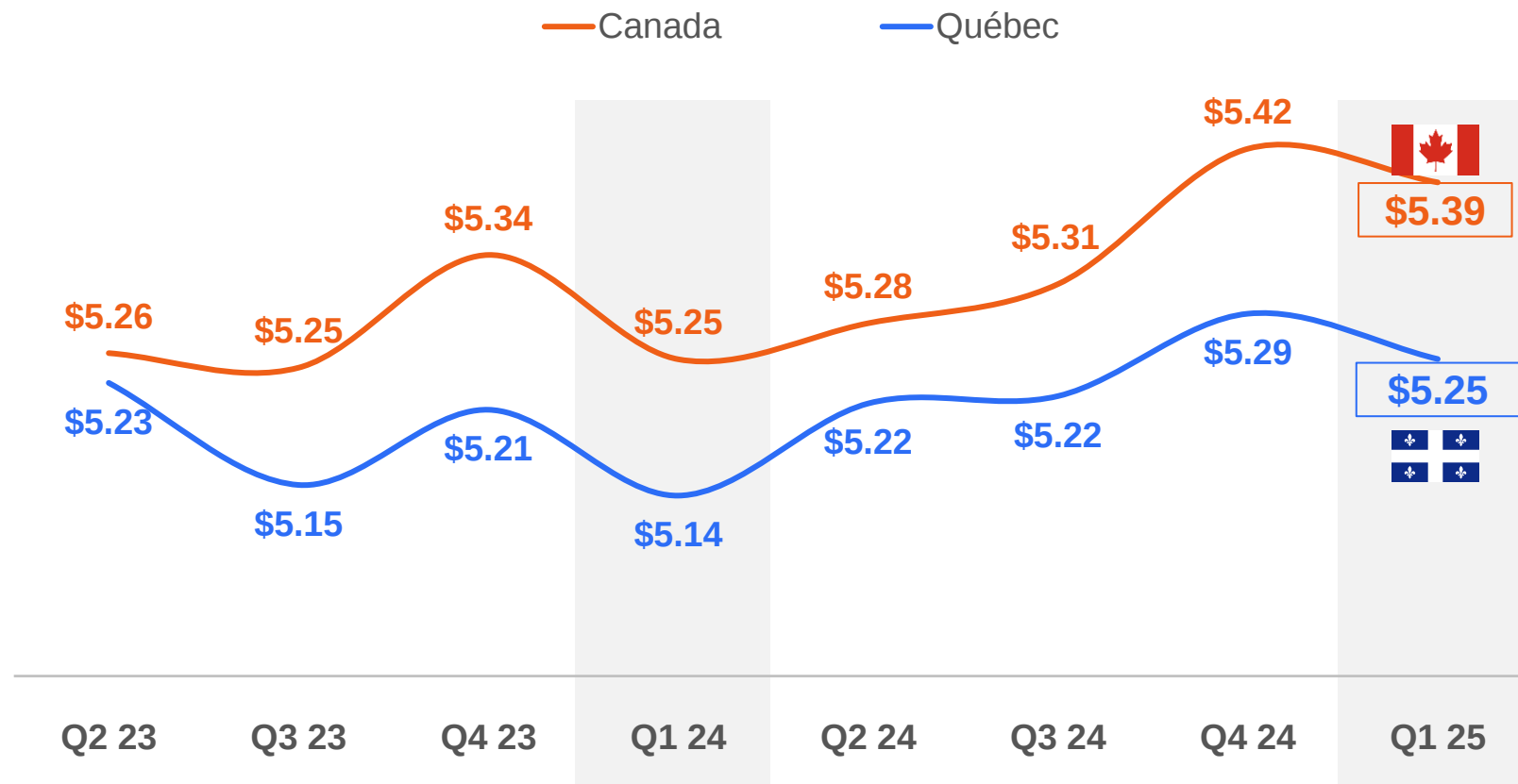
Source: NIQ Market Track Total Tracked Sales, National GB+DR+MM, L52w ending Mar 8th 2025.

Average prices are *lower in Quebec*

Average CPG unit prices are lower than the national average

Average CPG unit price per quarter

Total Sales, Quebec vs Canada



Source: NIQ Market Track Total Tracked Sales, National GB+DR+MM, L52w ending Mar 8th 2025.

Implications for wellness brands

Higher median income

Quebecers have a greater spending power, especially knowing that average CPG prices are typically lower

Women at work

Working women looking for convenience as they have less discretionary time.

Stagnant unit growth

Although unit growth has been stagnant because of the inflation, it remains positive and greater than ROC.

Québec market particularities

They have
different
*buying
habits*

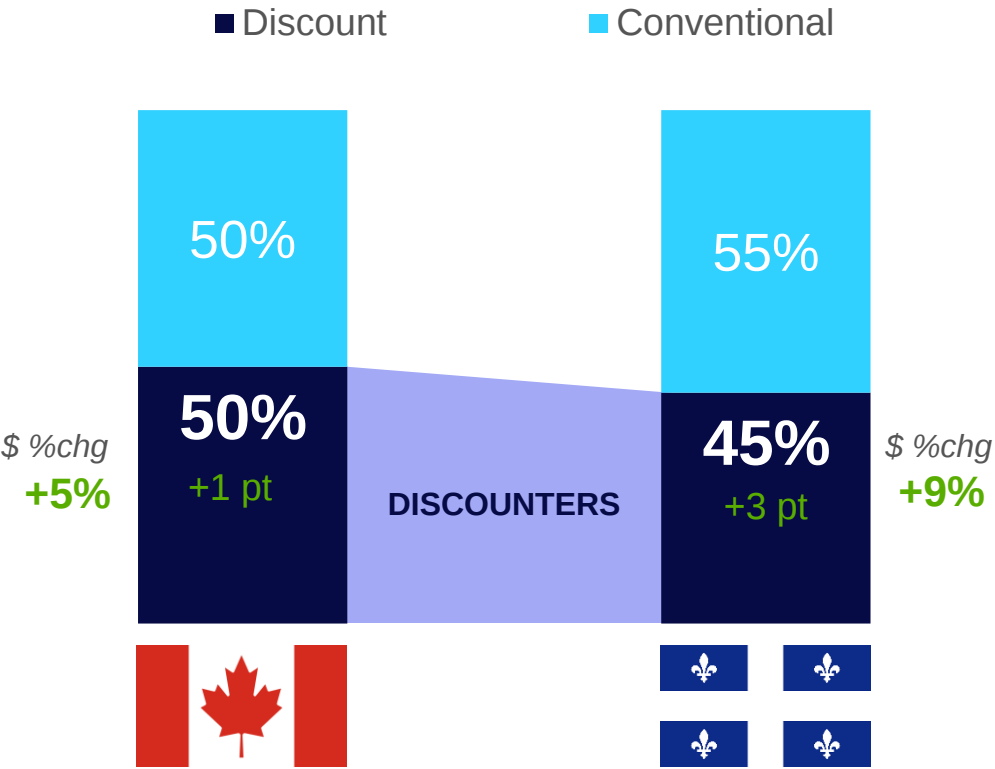
Quebec
consumers
*are not as
out going*
as you think

There are
still *more*
units sold
in Quebec

Discount retailers are lagging behind in Québec

Discount retailers market share

Total CPG \$ Sales, 52 weeks, GB+DR+MM



Source: NielsenIQ RMS | Total Tracked Sales | Quebec Discount vs. Conventional| Latest 52 Wks PE Mar 8th 2025.





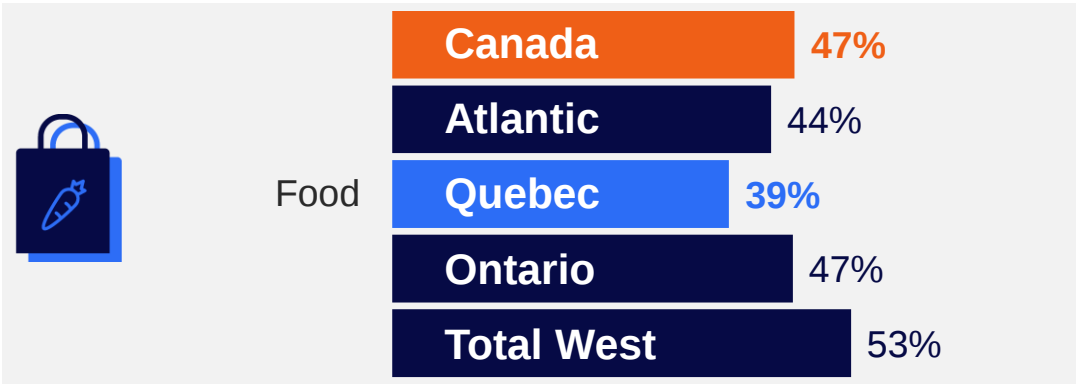
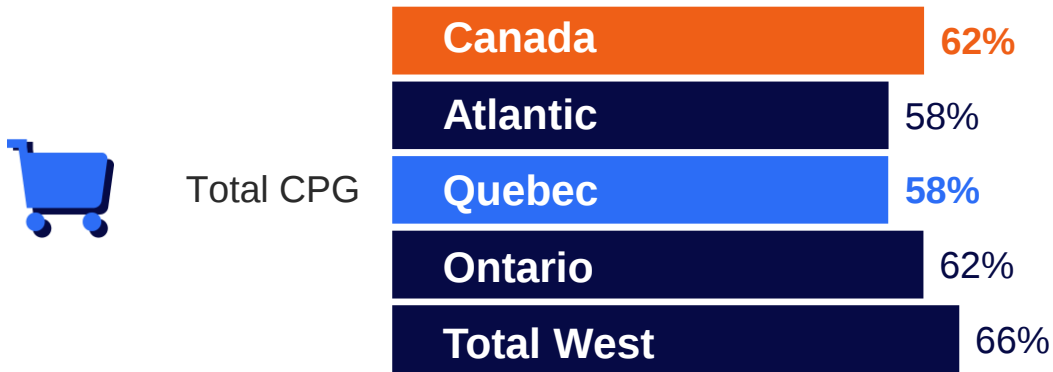
41%

units gain for
discounters is
due to Quebecers
*shifting from
conventional*

Buying food online? Québec lagging the rest of Canada for FMCG categories in general

Online Penetration

2024 Total CPG



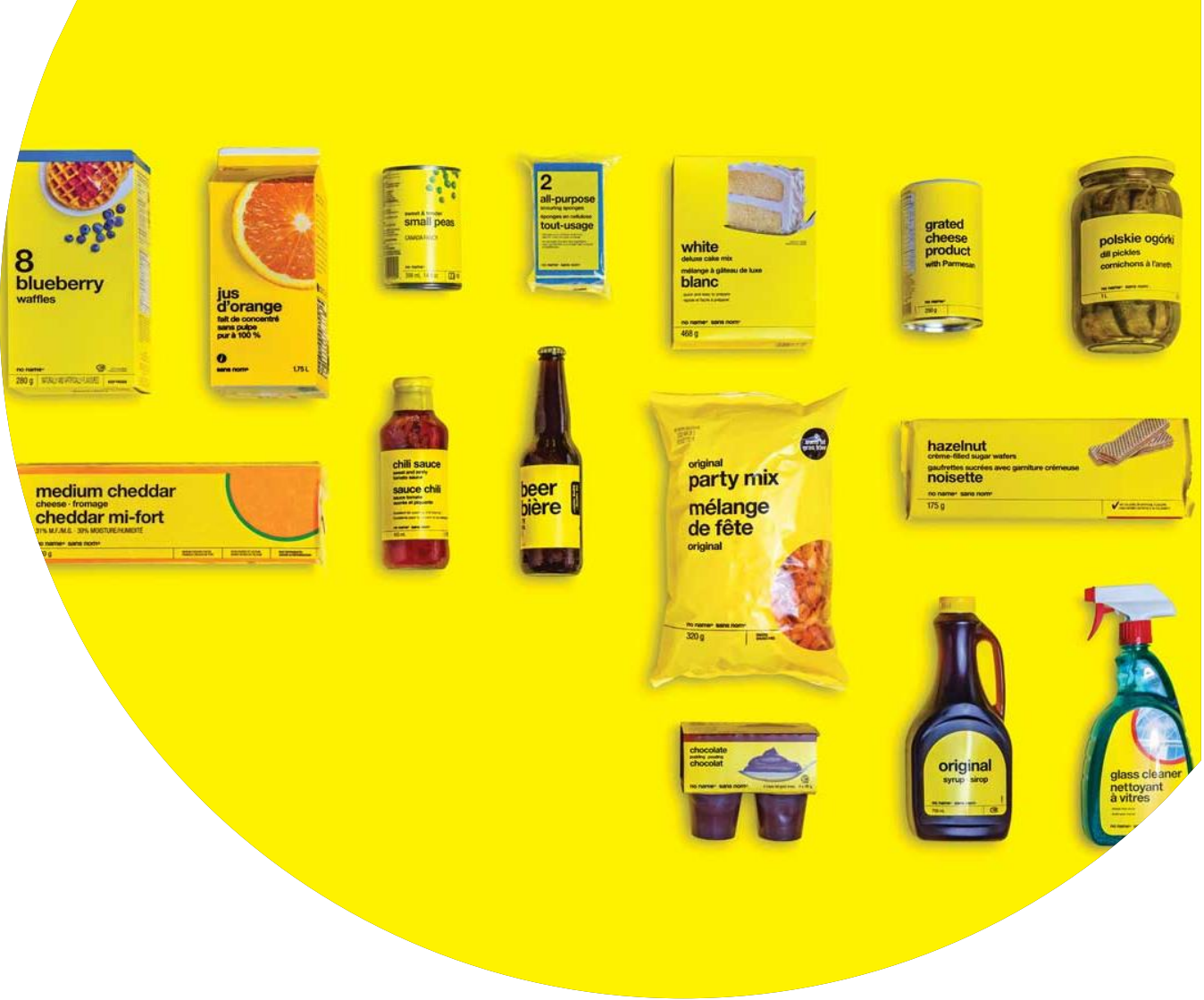
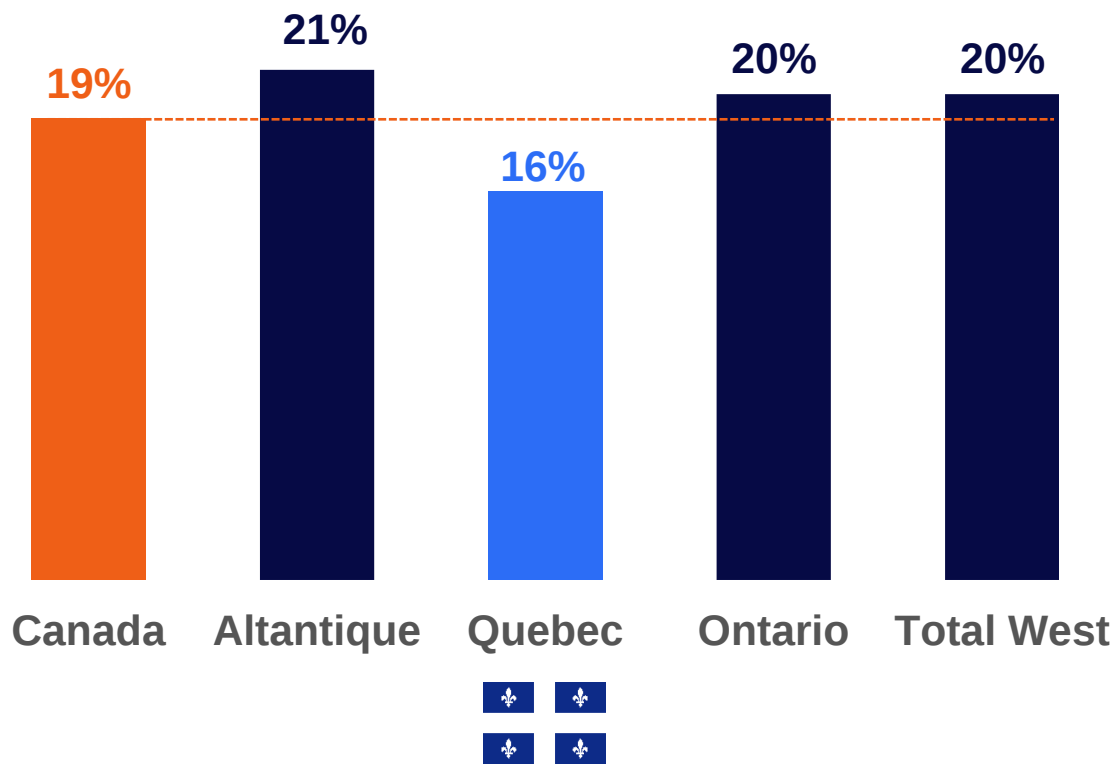
Source: NIQ CPS – National TL Outlet – FMCG – L52wks PE August 26 2024



Private Label are less a successful in Quebec

Private Label market share of total CPG \$sales

Total CPG \$ Sales, 52 weeks, GB+DR+MM



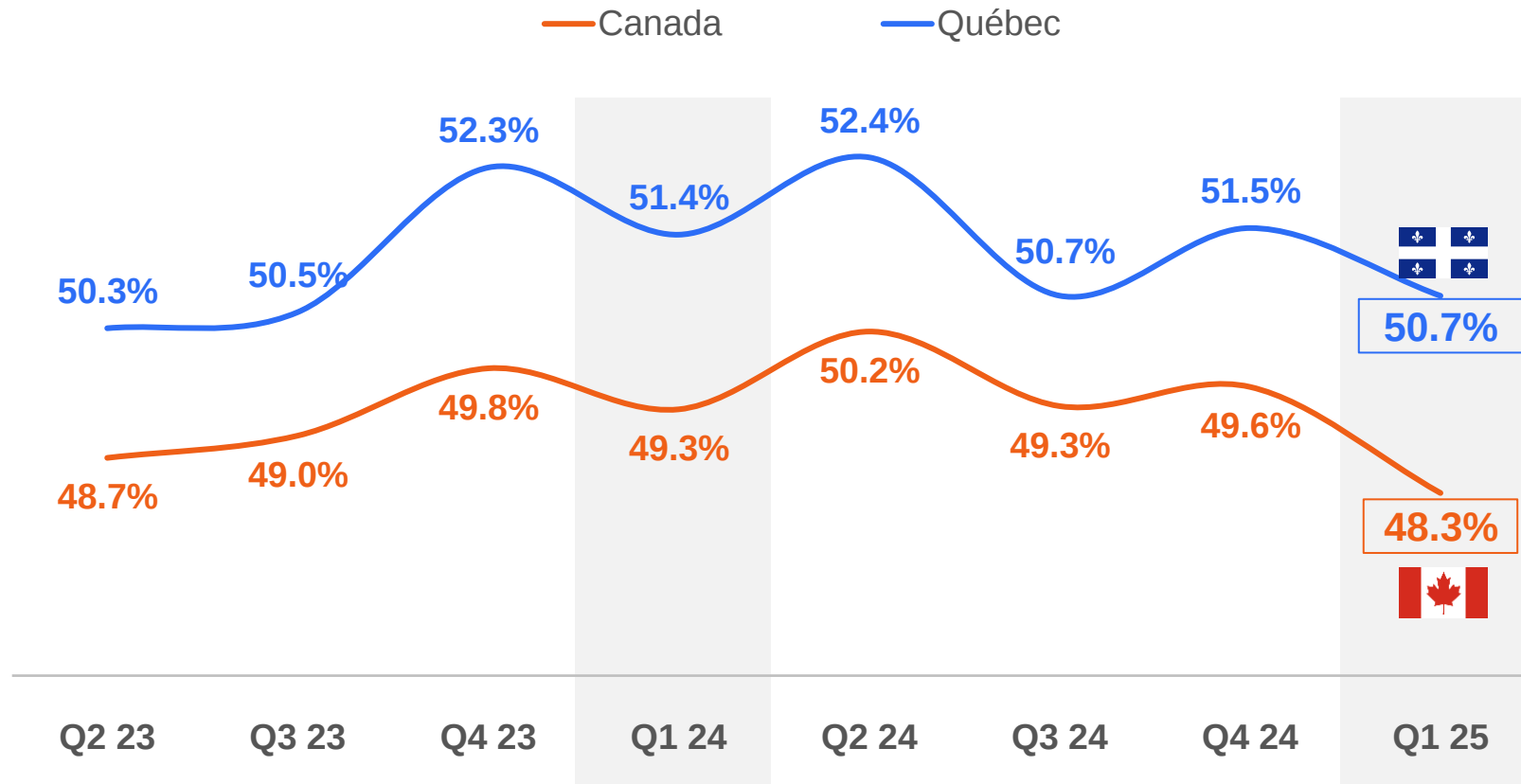
Source: NielsenIQ Retail Measurement, Total Private Label FMCG, National All Channels, PE 11/02/2024

Quebecers have always liked *a good deal*

*Historically, more sales
volume has been generated
under promotion in Québec*

Importance of the \$ vol sold on any promotion

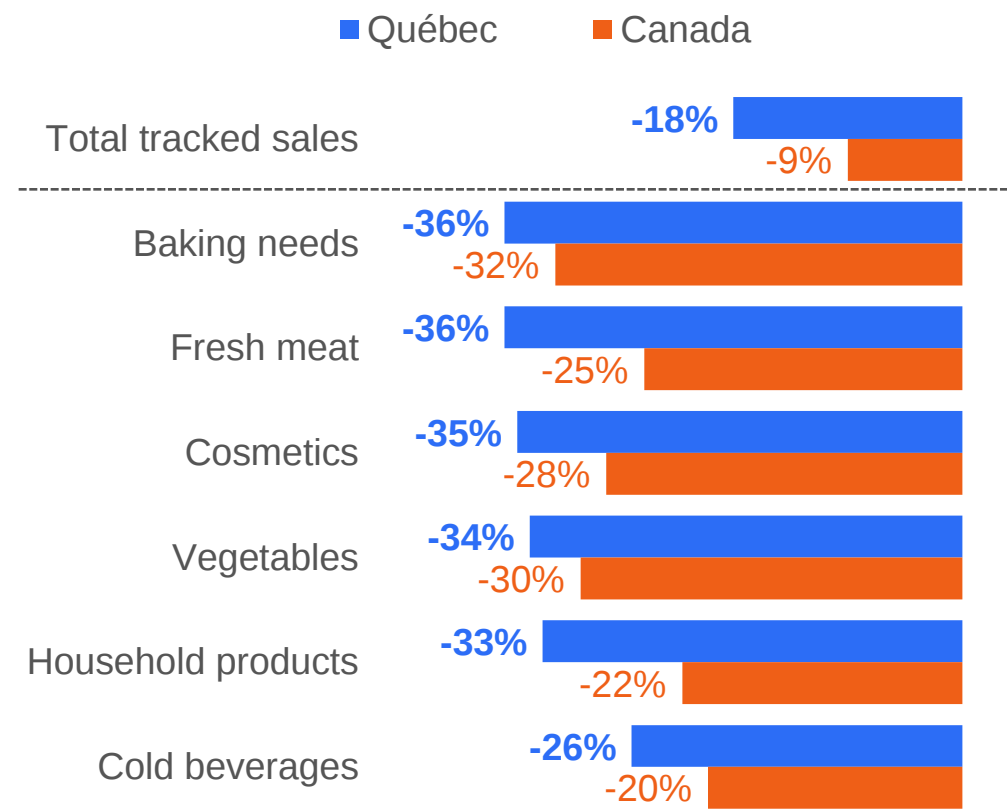
Total Sales, Quebec vs Canada



Source: NIQ Market Track Total Tracked Sales, National GB+DR+MM, L52w ending Mar 8th 2025.

Depth of discount is more important in Québec stores tracked by NIQ

Average depth of discount, selected major groups (Canada)



Source: NIQ RMS – National All Channel – TL FMCG – L52wks ending August 10 2024



#1

*1st in term of
production*

50% of Canadian
cheese production
is from Québec

#1

*1st in term of
consumption*

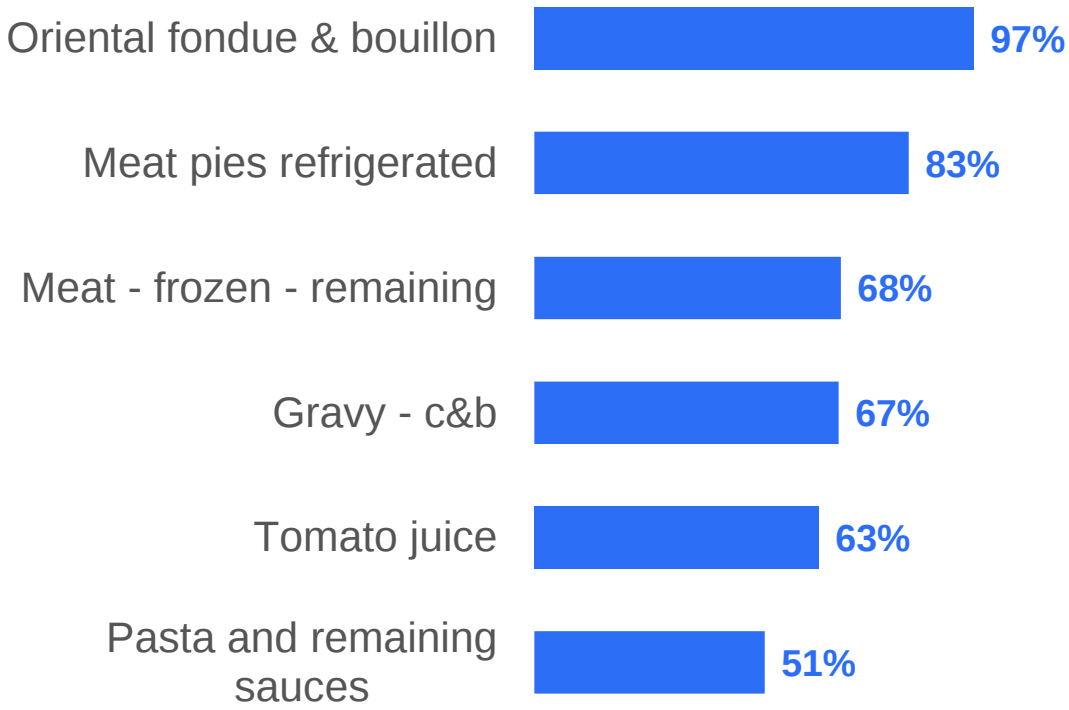
Québécois eat on
avg 8.5 kg, 1.5 kg
more vs ROC

Source: [La consommation des aliments chez les Québécois selon les recommandations du Guide alimentaire canadien](#)

Quebecers consume differently than the rest of the country

Overdeveloped categories in Québec

Importance of Québec to category's \$ volume, 52 weeks



Source: NIQ RMS – Québec GB+DR+MM – TL FMCG – 52wks ending March 24 2025



33%

of Québécois say
*they've reduced
their sugar
intake* in the past
3 months

41%

ROC

Overdeveloped 'sweet' categories in Québec

Ind.

Sweet spreads

176

Fozen baked desserts

145

Muffin mixes

139

Molasses

138

Pure maple syrups

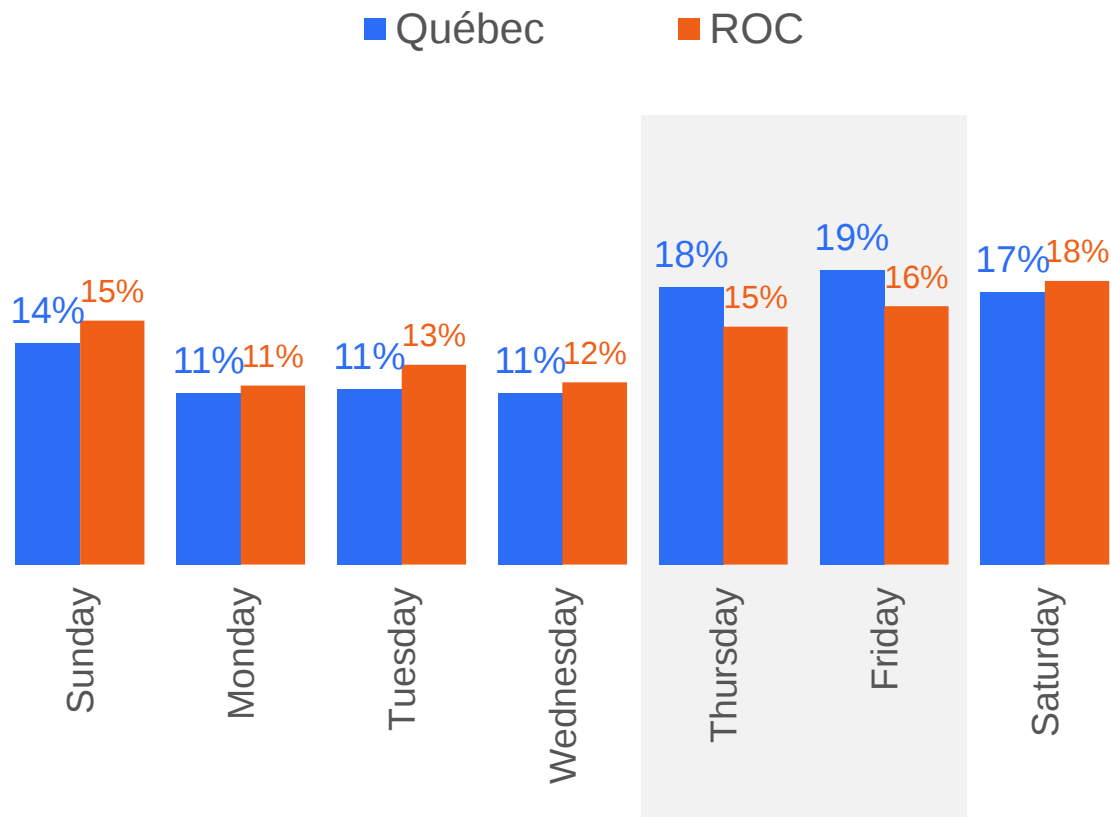
132

Source: NIQ Health & Wellness survey – Q. Which of the following food items, if any, have you or anyone in your household, been reducing the intake of during the past 3 months (SUGAR)?
NIQ RMS – Quebec All Channel vs National – Total tracked slaes – 52wks ending May 18 2024

Quebecers shop fresher deals, right before the weekend

% sales by day of the week

Canada



Source: NIQ CPS – National All channel – TL FMCG – 52wks end 18 May 2024



Implications for wellness brands

Discount Retailers

Discount retailers source most of the growth. Thursday and Friday are the biggest shopping days.

Reliance on promotions

Price strategy on the Quebec market has to be different from ROC. Private Label plays a lesser role

Eating habits

Quebecers have different eating habits than ROC, which may open-up doors to your brand.

Achieving full East-West distribution

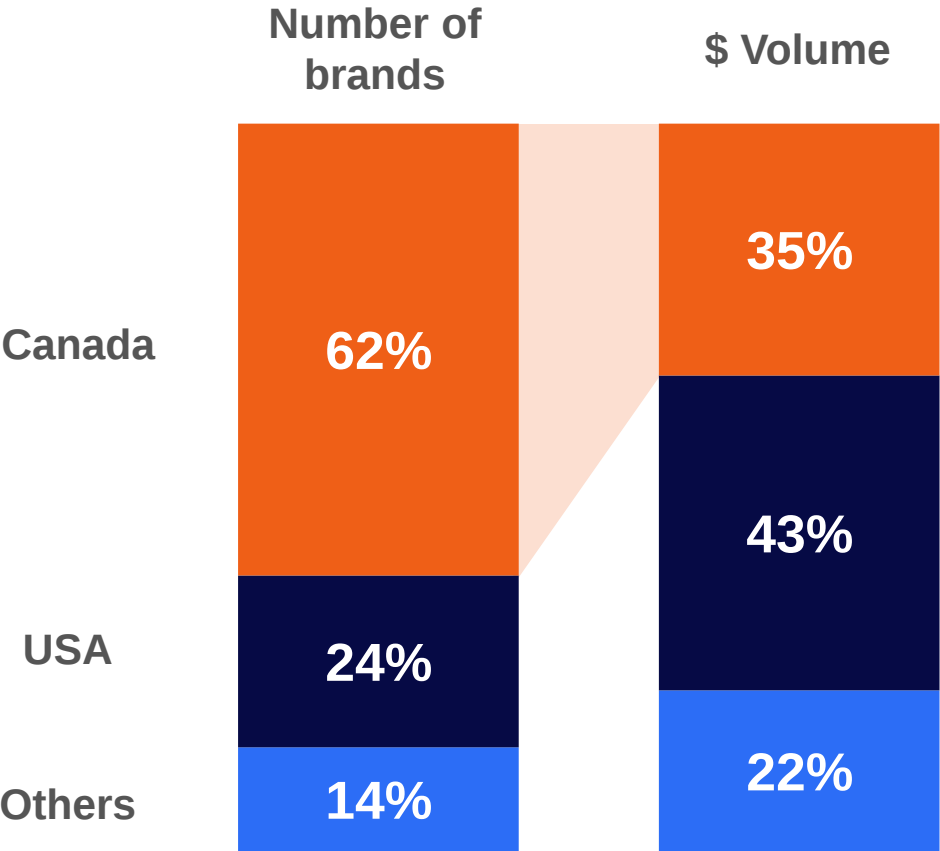
Quebec is a stronghold for *local brands*

Canadian brands have *room to penetrate* the Quebec market

Quebecers and ROC *react the same way to tariffs*

Canadian brands Importance (%)

Canada, Year 2024, GB+DR+MM

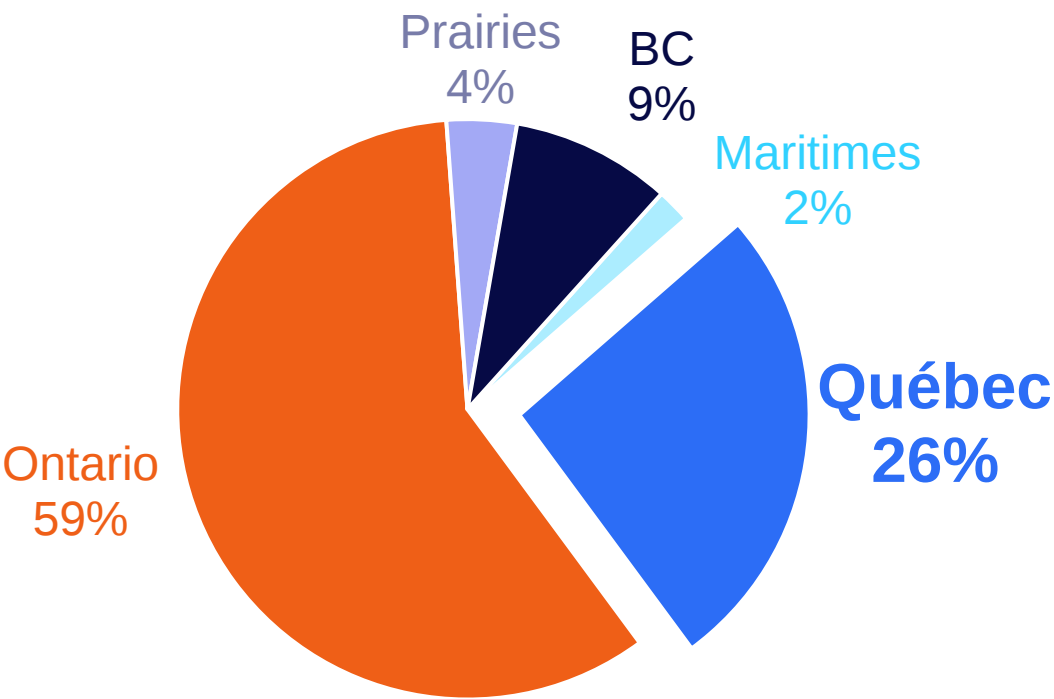


Source: Nielsen MarketTrack, National All Channels –52 weeks Ending December 28, 2024.
Closed Group: 4,004 defined FMCG Manufacturers >\$500K annual sales

Will US tariffs have a positive impact on *Canadian Brands* sales volume in Canada?

Contribution to \$ sales by Head Offices province of origine

Canada, Total CPG \$ Vol, 52 weeks
~2500 Canadian brands(>500K\$ de ventes)



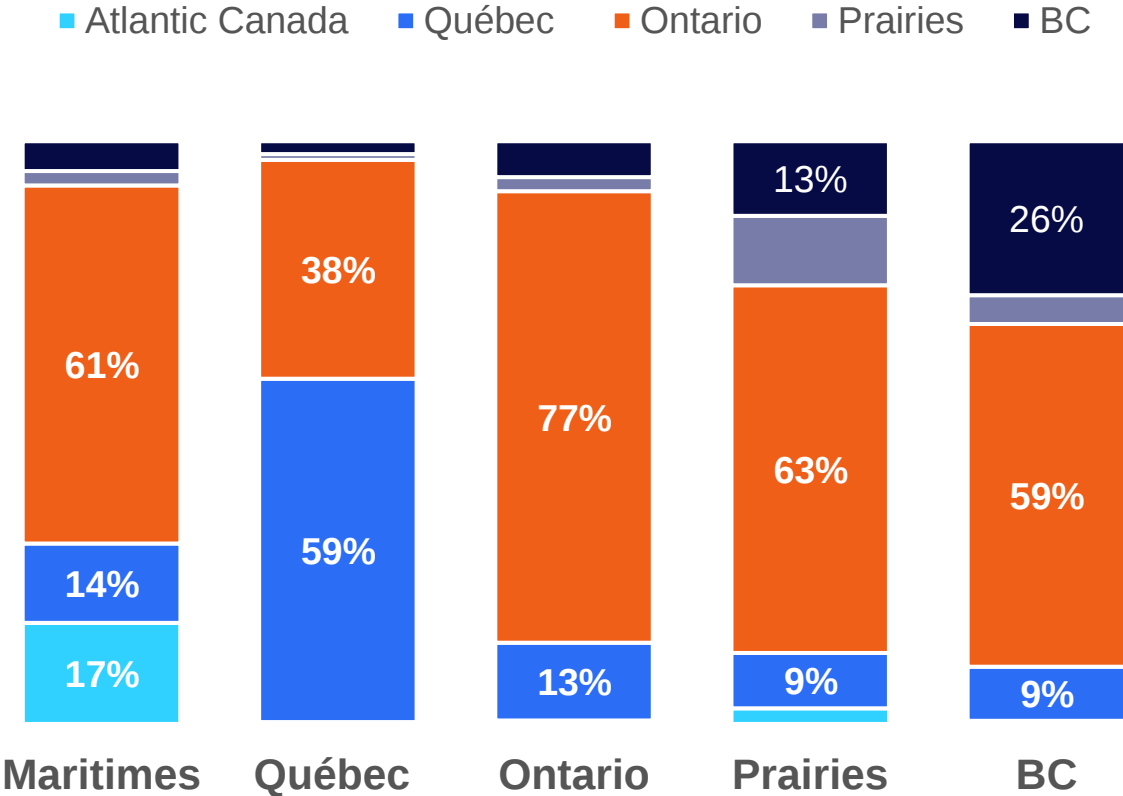
Source: Nielsen MarketTrack, National All Channels –52 weeks Ending December 28, 2024.
Closed Group: 4,004 defined FMCG Manufacturers >\$500K annual sales

Brands originating from *Quebec* account for 26% of all Canadian Brands revenues

Brands originating from other provinces have an opportunity to *increase their penetration* in Quebec

Contribution to \$ sales by Head Offices province of origin

Canada, Total CPG \$ Vol, 52 weeks
~2500 Canadian brands(>500K\$ de ventes)

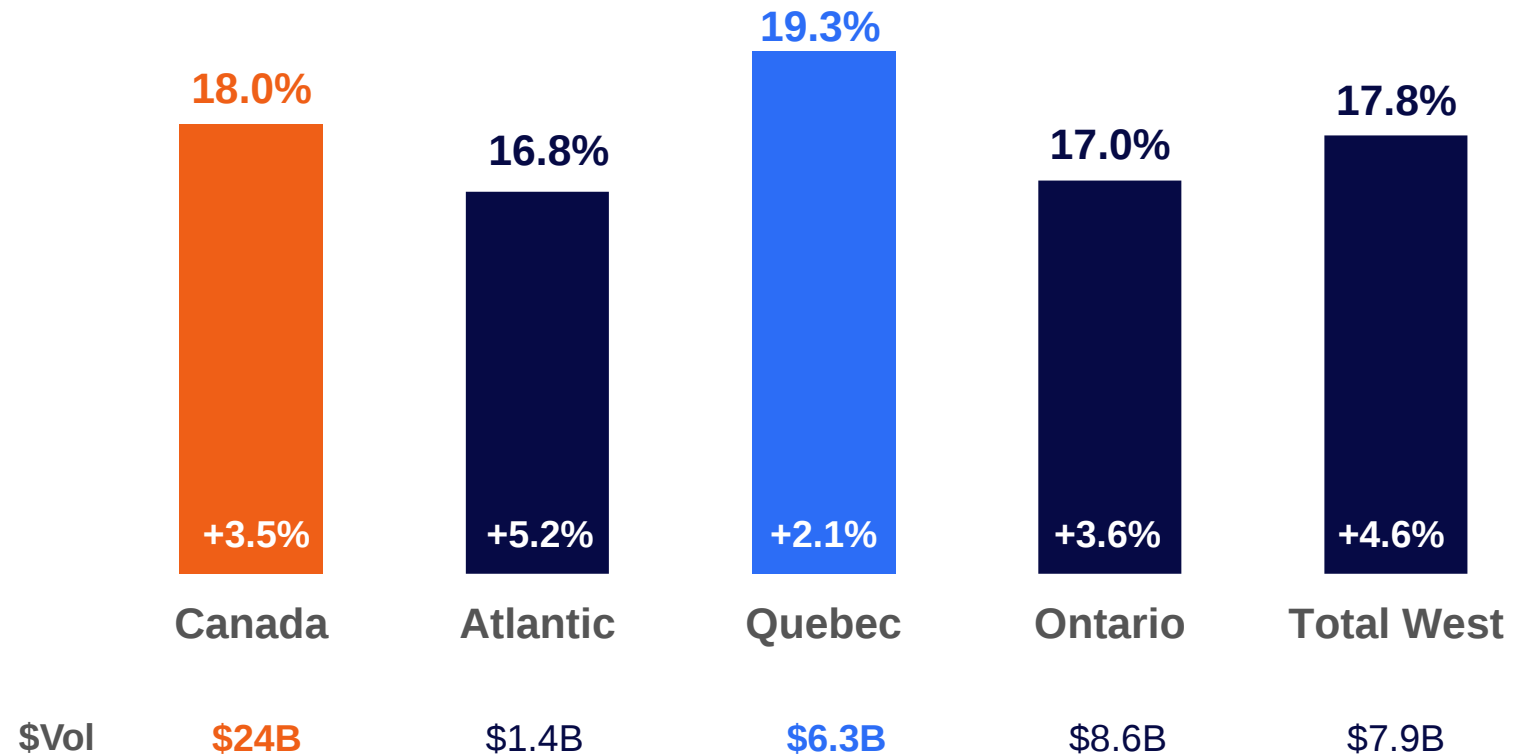


Source: Nielsen MarketTrack, National All Channels –52 weeks Ending December 28, 2024.
Closed Group: 4,004 defined FMCG Manufacturers >\$500K annual sales

SMB plays a *more significant* role in Québec, but is seeing slower growth

SMB regional growth

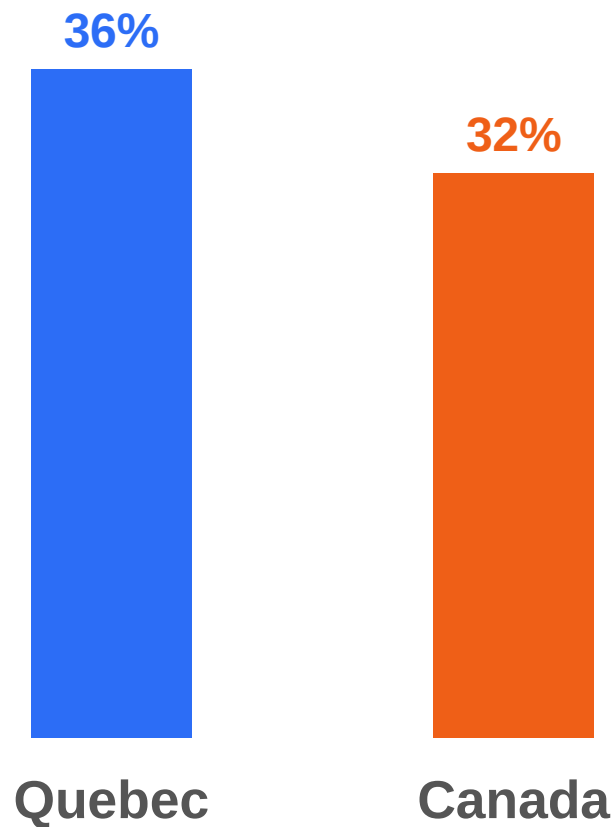
SMB closed group total \$ sales importance



Source : NIQ RMS – Regional All Channel – TL SMB closed group – L52wks PE 29 June 2024

Will you boycott U.S.-made products and refuse to purchase them?

% of respondents

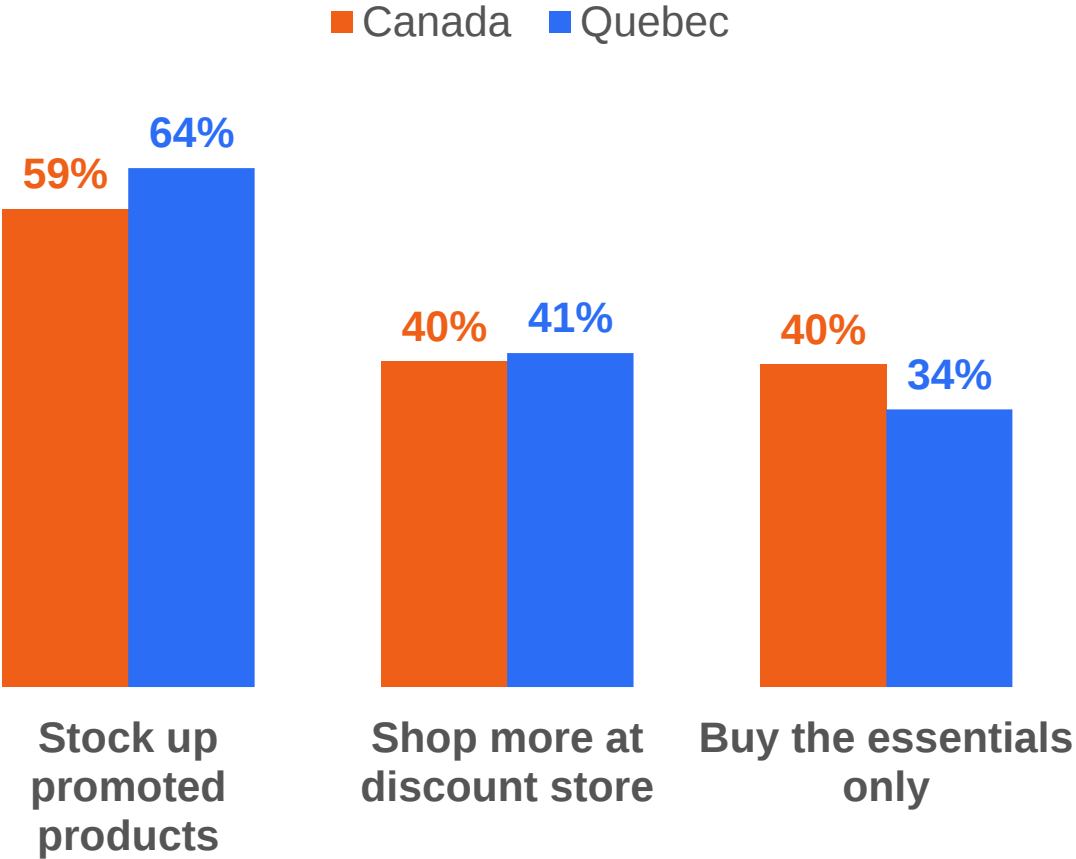


Source: NielsenIQ PanelView | 2025 Tariffs Impact Survey

US-Made brands
will have a harder
time in the Quebec
market

How will you adjust your grocery shopping habits if the price increased due to the U.S. increasing tariffs?

% of respondents – TOP 3 Answers



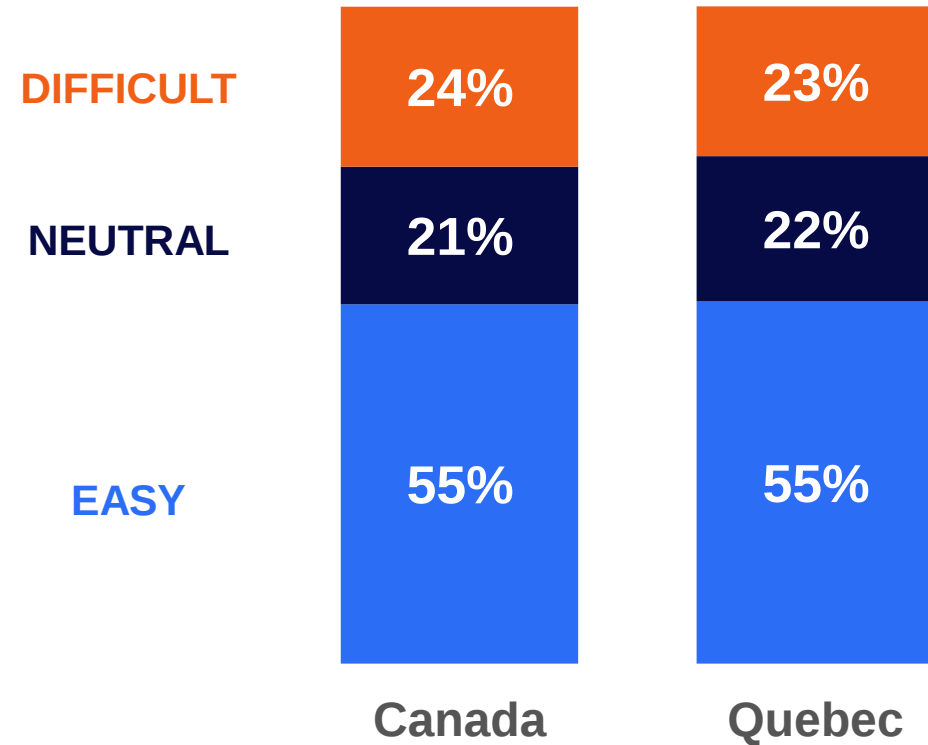
Most Quebecers will *stock up products* when on sale to mitigate the impact of tariffs

Source: NielsenIQ PanelView | 2025 Tariffs Impact Survey

Most consumers
find it easy to
identify « *Made in
Canada* »
products

How easy it for you to identify products "Made in Canada"?

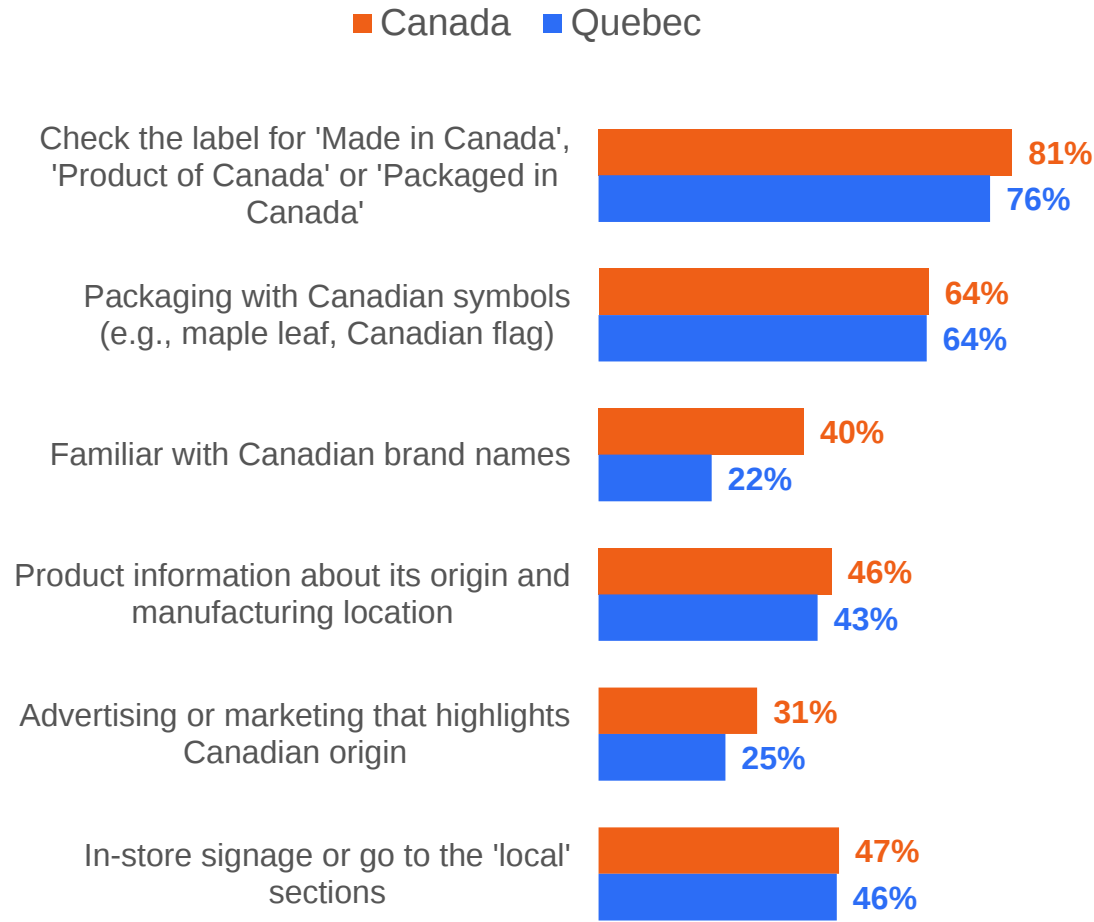
% of respondents



Source: NielsenIQ PanelView | 2025 Tariffs Impact Survey

How do you usually identify Canadian products?

% of respondents



Quebecers are *less familiar* with Canadian brand names

Source: NielsenIQ PanelView | 2025 Tariffs Impact Survey

THE TIME IS NOW!

Population

Quebec's diverse population may be very considerate of your brand if it suits their evolving needs

Market Particularities

Having a great distribution at Maxi, Super C, Walmart will accelerate your brands 'growth... Especially if you play in a preferred category.

Local SMB Stronghold

The Quebec market has been very prolific for Quebec brands. However, consumers have the eagerness to buy more Canadian brands.

COME AND MEET THE TEAM!

There are many ways NielsenIQ can help your brand succeed!

NielsenIQ



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Merci!

