

Made in Canada: How are Canadians responding to U.S. Tariffs?

Excerpts from NIQ Canada latest syndicated studies

March 2025

NIQ

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97%

of Canadians are
aware of the
potential tariffs that
may be imposed
by the U.S.
government

92%

of Canadians
believe tariffs will
have a negative
impact on
Canadian daily life
(51% very
negative)

Source: NIQ Canada, Syndicated Study - How Canadian Grocery Shoppers Will Respond to U.S. Tariffs, March 2025



52%

of Canadians say they
will prefer Canadian-
made products
whenever possible
but will still buy U.S.
products if they remain
their best option

Source: NIQ Canada, Syndicated Study - How Canadian Grocery Shoppers Will Respond to U.S. Tariffs, March 2025

32% of Canadians say they will boycott U.S.-made products and refuse to purchase them, regardless of availability or price

That sentiment is stronger in Québec, where consumers can find products identified by the Aliments du Québec easily

Opinion by province
March 2025

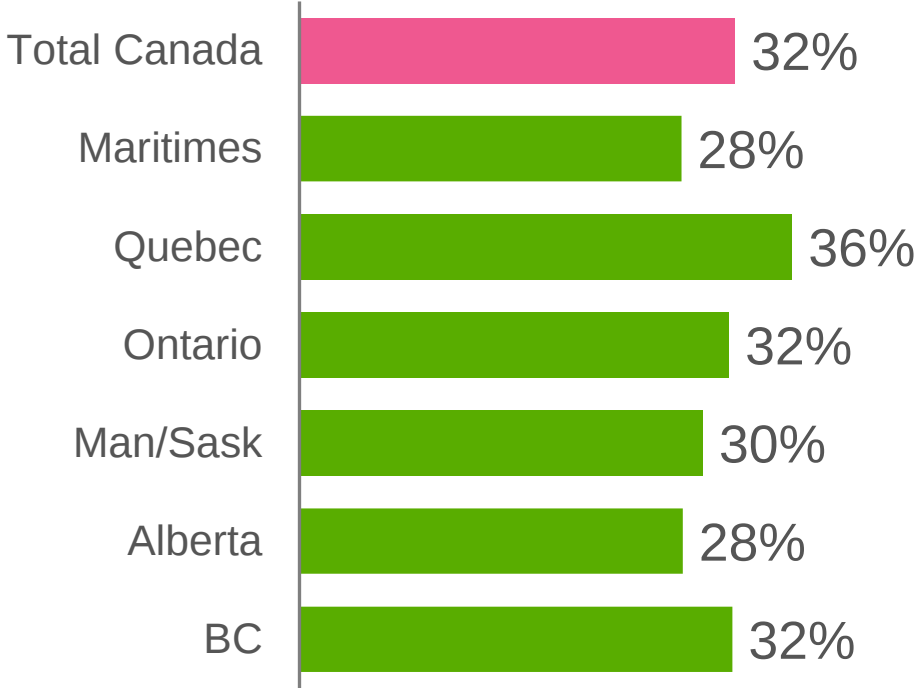


Photo: [Aliments du Québec](#)
Source: NIQ Canada, Syndicated Study : [How Canadian Grocery Shoppers Will Respond to U.S. Tariffs](#), March 2025





How will you adjust your grocery shopping habits if the price increased due to the U.S. increasing tariffs?
(Select all that apply)

**Stock up
sales
products
more**

**Shop more
at discount
stores to
reduce
spending**

**Buy
essential
only**

**Buy more
private
label
products**

Source: NIQ 2024 Enhancement Demographic Study, Dec. 2024



55%

of Canadians say
they find it easy
to identify "Made
in Canada"
products

Source: NIQ Canada, Syndicated Study - How Canadian Grocery Shoppers Will Respond to U.S. Tariffs, March 2025

However, there's a clear opportunity for retailers to do better at identifying **Made in Canada** products

59%

of Canadians say retailers don't **highlight** 'Made in Canada' products enough

54%

of Canadians say retailers don't **promote** 'Made in Canada' products enough

34%

of Canadians say **imported products** dominate the shelves

Source: NIQ Canada, Syndicated Study - How Canadian Grocery Shoppers Will Respond to U.S. Tariffs, March 2025



30%

of Canadians say they
would be more likely
to switch grocery
stores if a store made
it easier to find
Canadian products

Source: NIQ Canada, Syndicated Study - How Canadian Grocery Shoppers Will Respond to U.S. Tariffs, March 2025

**NIQ Canada can help you
understand how Canadians
are reacting to tariffs**

3 ways NIQ Canada can help you dig further in own Canadians react to tariffs

We are in this industry day-in, day-out – talk to us to get a better understanding of what’s going on!

Get a copy of our Syndicated Study

- Hear what Canadians have to say about:
 - Awareness of potential tariffs
 - Perception of the impact of tariffs on daily life
 - Approach to purchasing U.S.-made CPG products in response to tariffs
 - Adjustments Canadians plan to make if price increased due to U.S. tariffs
 - Ease to identify "Made in Canada" products
 - Feeling re: difficulty to find such products
 - Strategies stores can adopt to help consumers by Canadian products and likeness to switch stores if it's easier to find such products
 - Opinion towards boycotting U.S.-owned stores
- Get a split of our National view by:
 - Age of household + presence of kids in the HHLD
 - National + regions views
 - HHLD revenue + number of members in the HHLD
 - Ethnicity
 - Lifestage & Generational breaks
 - 4 groups specified for this study: Non-US made & Global Shopper, Canada-Only Shopper, Canada-made First Buyer, Unchanged Shopper
 - + 4 more buyer groups

Get a custom view of your category and your brands

- Using the buyer groups from the Syndicated Study, run a custom Market Summary analysis to understand:
 - How do your brand index among households that claim they will boycott US products?
 - How does this compare to your competitors?
 - How would the possible boycott impact your overall business? Understand your vulnerability or opportunity to mitigate or take advantage of.
 - How can you message to help ensure you maximize your sales potential
 - What has been the trend recently vs pre-tariff for your brands among households that are boycotting? Is their behavior changing?

Watch out for the upcoming launch of NielsenIQ Product Insights (NPI)

- Launching in April 2025, NPI combines NIQ’s robust measurement data with Label Insight's deep product attribution.
- Available on both Food and Health and Beauty products, NPI includes Place of Origin attributes which can help clients better analyze growth of *Made in Canada* vs *Made in USA* vs *Made in Mexico* products.
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How Canadian Shoppers Will Respond to US Tariffs

Understand Canadian sentiment around US tariffs

Measure the impact on your categories and products!

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

- Full report: \$7,500
- Optional Market Summary on buyer groups available at an additional customized cost, dependent on scope and frequency.

What you get

This research combines panel survey responses with market insights. (Homescan+Omni Panel)

Respondents: Canadian shoppers
Sample size: ~15,000 in total from both panels
Fieldwork: Feb 2025

Tie to purchasing behaviour across 4 different attitudinal groups

- American Good Avoiders
- Canadian Loyalists
- Pragmatic Canadian Supporters
- Unchanged

Key benefits

- Understand Shopper Sentiment: Gain insight into how consumers feel about the U.S. tariff and its impact on grocery shopping
- 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 and who actually does!
- Competitive Landscape Analysis: Identify which grocery chains are perceived as Canadian vs. U.S.-owned and understand the implications to their Share of Trade.



- Ability to link how Canadians feel about US tariffs to their changes in purchasing of your categories & brands.

Coming *into view*

