

Made in Canada

The Retail Ripple of Patriotic Sentiment

NIQ Canada

May 2025

NielsenIQ



A woman with long dark hair, wearing a white t-shirt and black overalls, is walking down a grocery store aisle. She is looking to her right and has her hand near her face in a thoughtful pose. The aisle is filled with shelves of various products, including snacks and canned goods. The background is slightly blurred, showing other shoppers and store signage.

45%

of Canadian Consumers
say they will either boycott
American goods or only
buy Canadian products in
response to proposed US
Tariffs

Not all Canadian packaging claims meet the same standards

Place of Origin Attribute Definitions

Canadian Origin Stated

Inclusive of both **regulated** on-packaged claims like “Made in Canada” & “Product of Canada”

And **non-regulated** stated/on-package claims that show some or all of the product is Canadian such as “Proudly Canadian”, “Pure Canadian Maple Syrup” & “Finest Canadian Lobster”

Made in Canada Stated

Inclusive of **regulated on-package claims** like “Made in Canada”, “Produced in Canada” & “Harvested in Canada” signalling that the final substantial transformation occurred in Canada

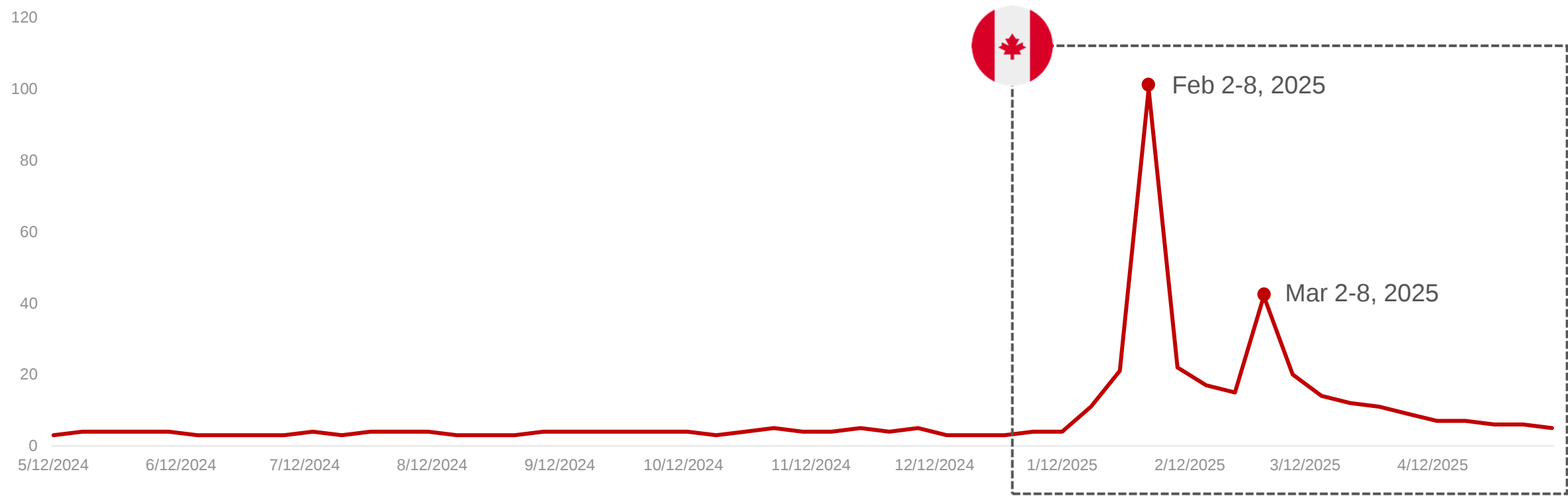
Allows for significant use of imported ingredients

Product of Canada Stated

Inclusive of **regulated** on-packaged “Product of Canada” claims signalling that all or virtually all ingredients, processing and labour used to make the product must be Canadian (**≥98% Canadian content**)

Google search for Canadian Products peaked beginning of February and again in March as Canada was threatened with 25% tariffs

Google trends - Interest over time* - Search: Canadian Products



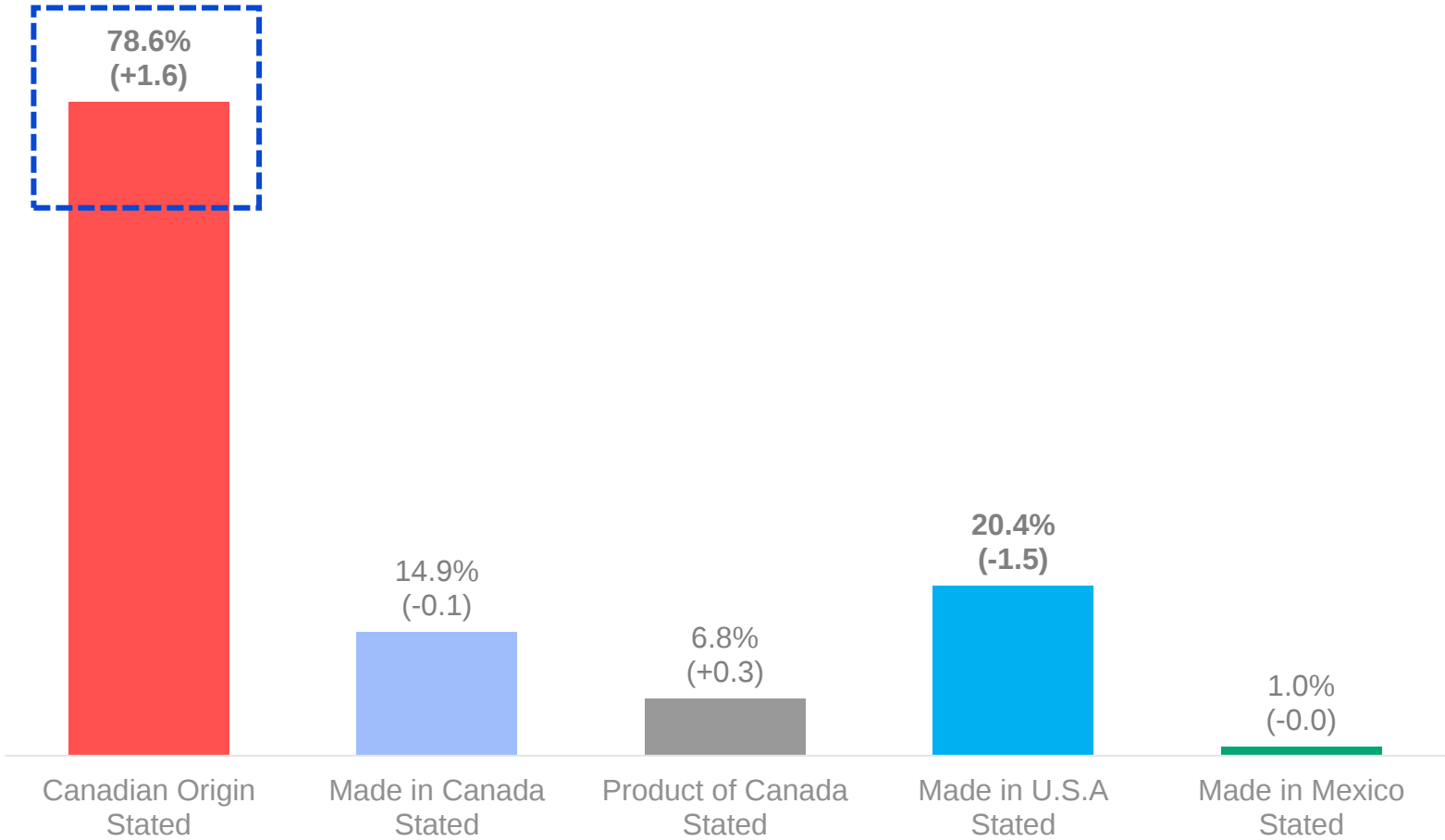
*Numbers represent search interest relative to the highest point on the chart for the given region and time. A value of 100 is the peak popularity for the term. A value of 50 means that the term is half as popular. A score of 0 means there was not enough data for this term.

Source: Google trends, May 2025

Opportunity for Canadian Food products to continue to win

Consumers spent more on Canadian products at the expense of Made in the USA

\$ Shr – Food and Beverage (selected categories) - National All Channel - YTD 2025



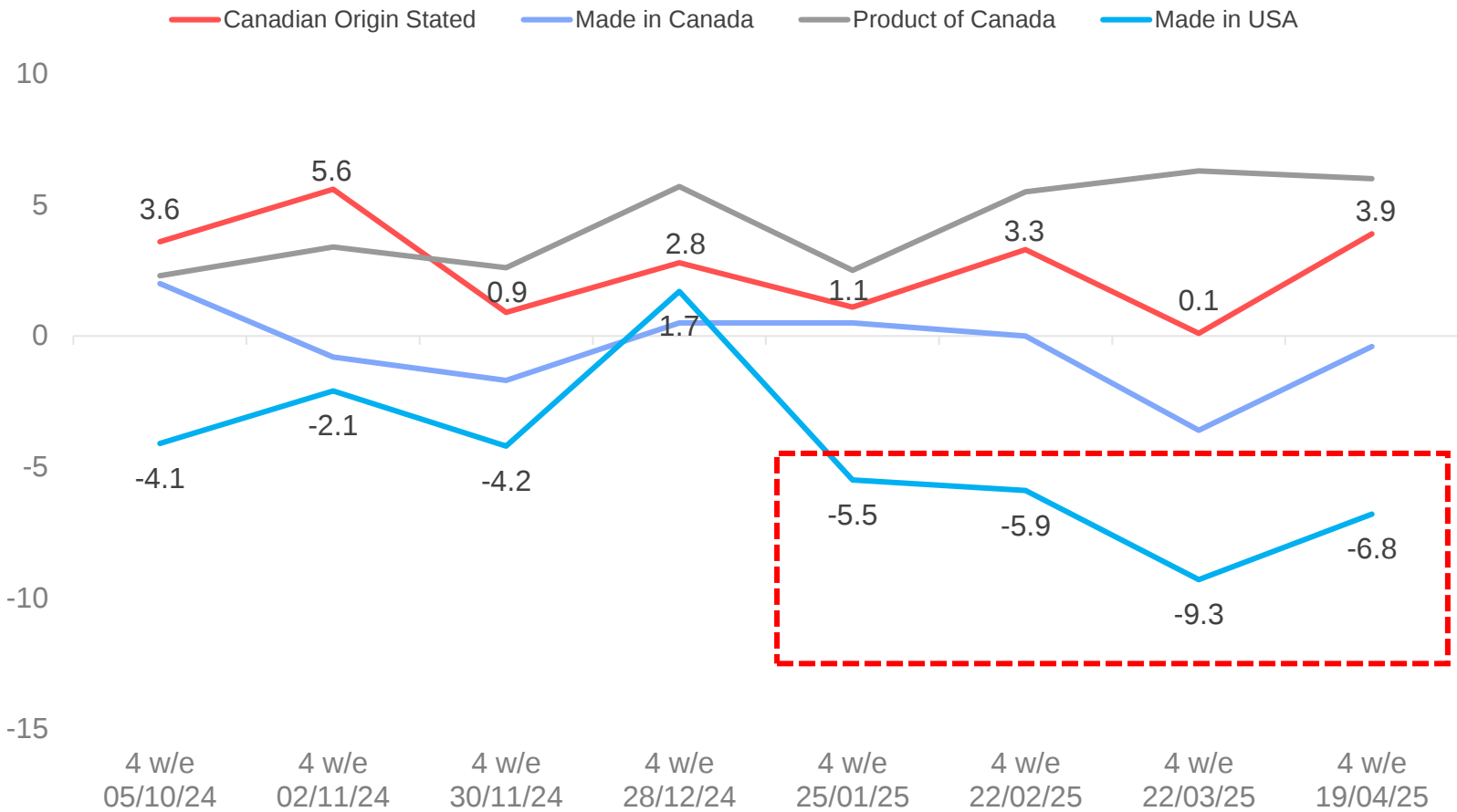
Source: NielsenIQ Retail Measurement Services, NielsenIQ Product Insight, National EX NLFD All Channels, L16W PE April 19, 2025,
*Canadian Origin includes Made in Canada and Product of Canada





USA Food products continue to show soft performance indicating consumers may have solidified new shopping habits

\$ % Chg YA - Food and Beverage (selected categories) - National All Channel

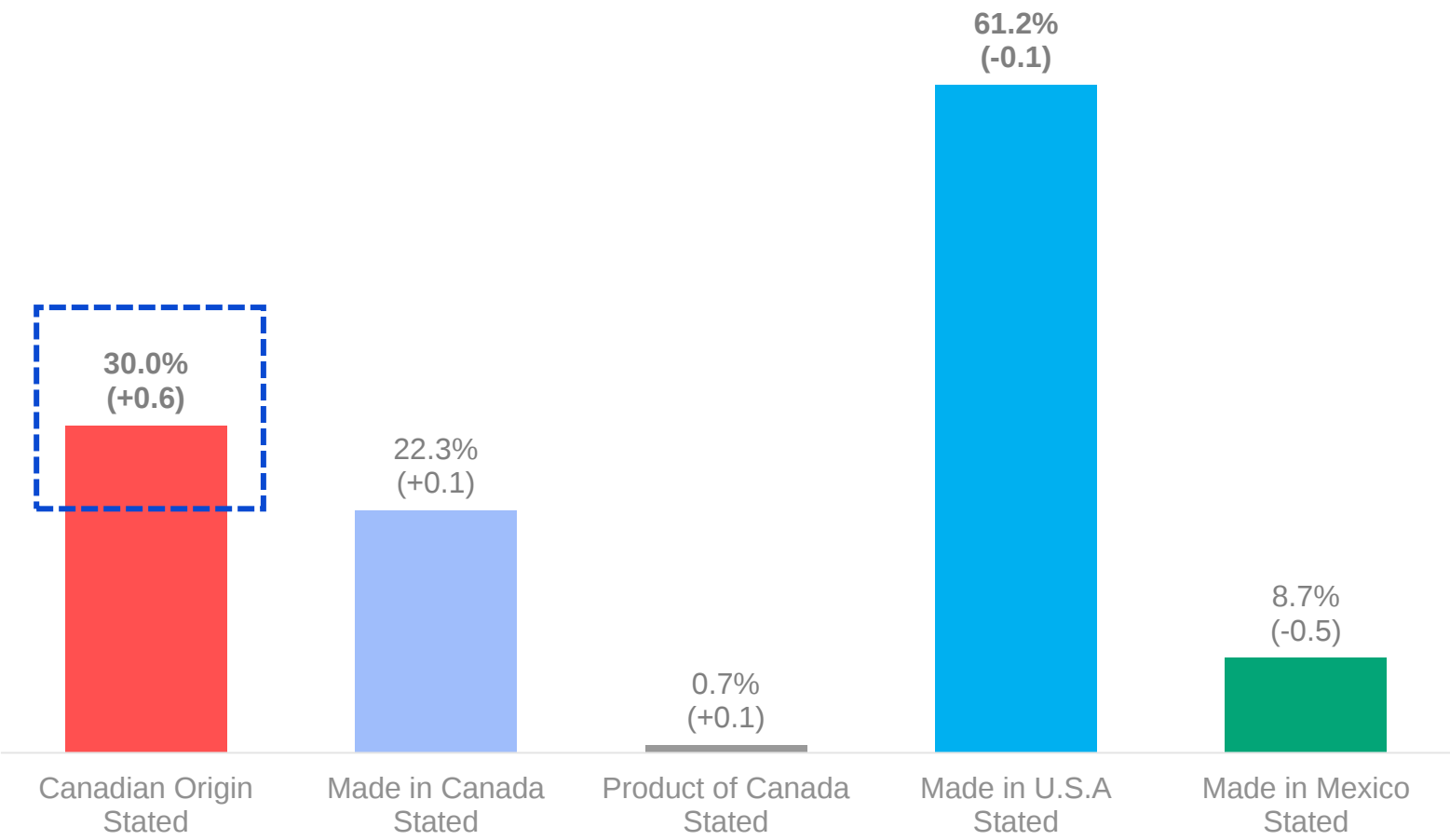


Source: NielsenIQ Retail Measurement Services, NielsenIQ Product Insight, National EX NLFD All Channels, L16W PE April 19, 2025

Share of USA products not impacted as severely in Personal Care

Despite lower share, consumers are shifting purchases to Canadian Origin products

\$ Shr - Personal Care (selected categories) - National All Channel - YTD 2025



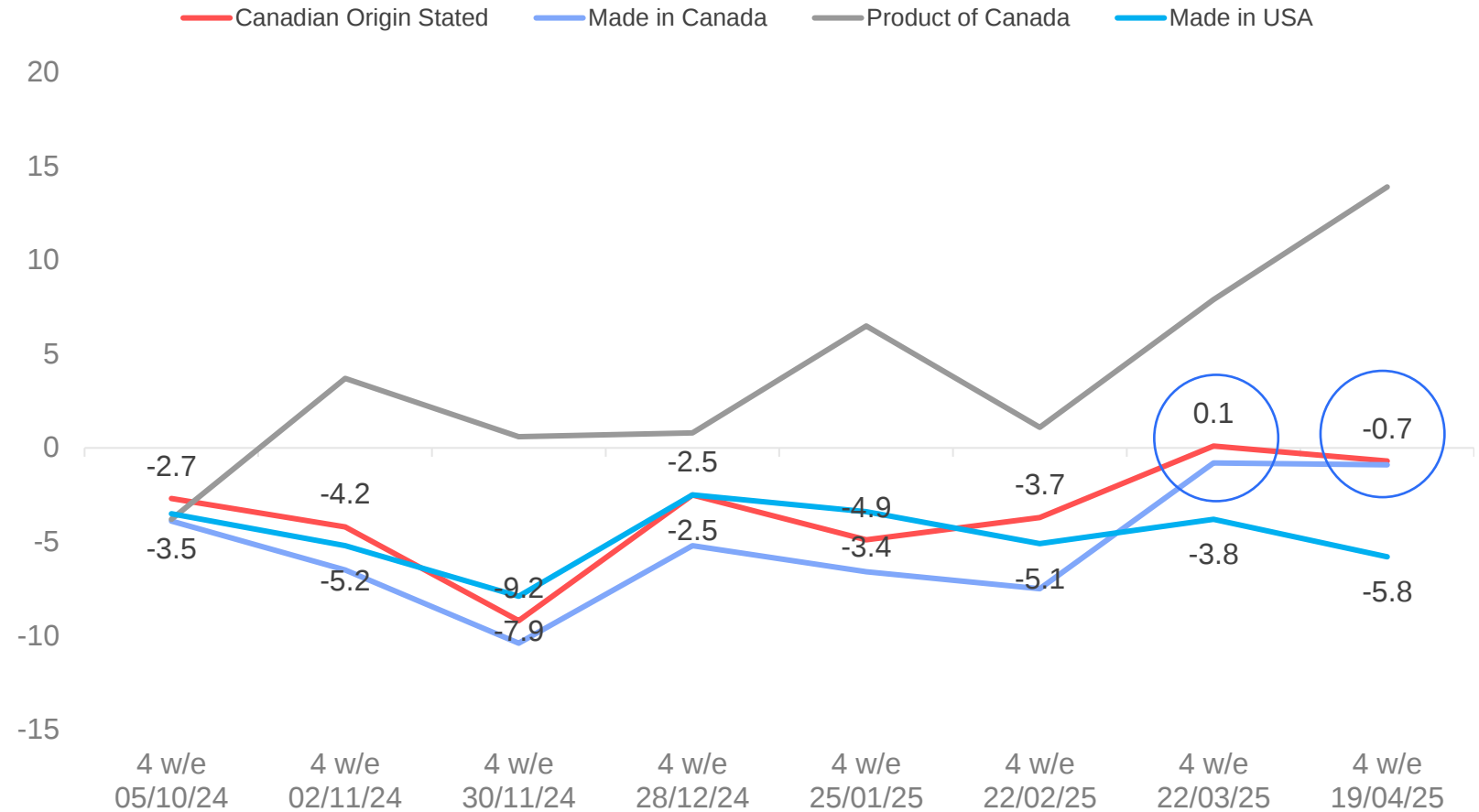
Source: NielsenIQ Retail Measurement Services, NielsenIQ Product Insight, National EX NLFD All Channels, L16W PE April 19, 2025
*Canadian Origin includes Made in Canada and Product of Canada.





Canadian Personal Care brands have opportunity to further capitalize on Buy Canadian movement

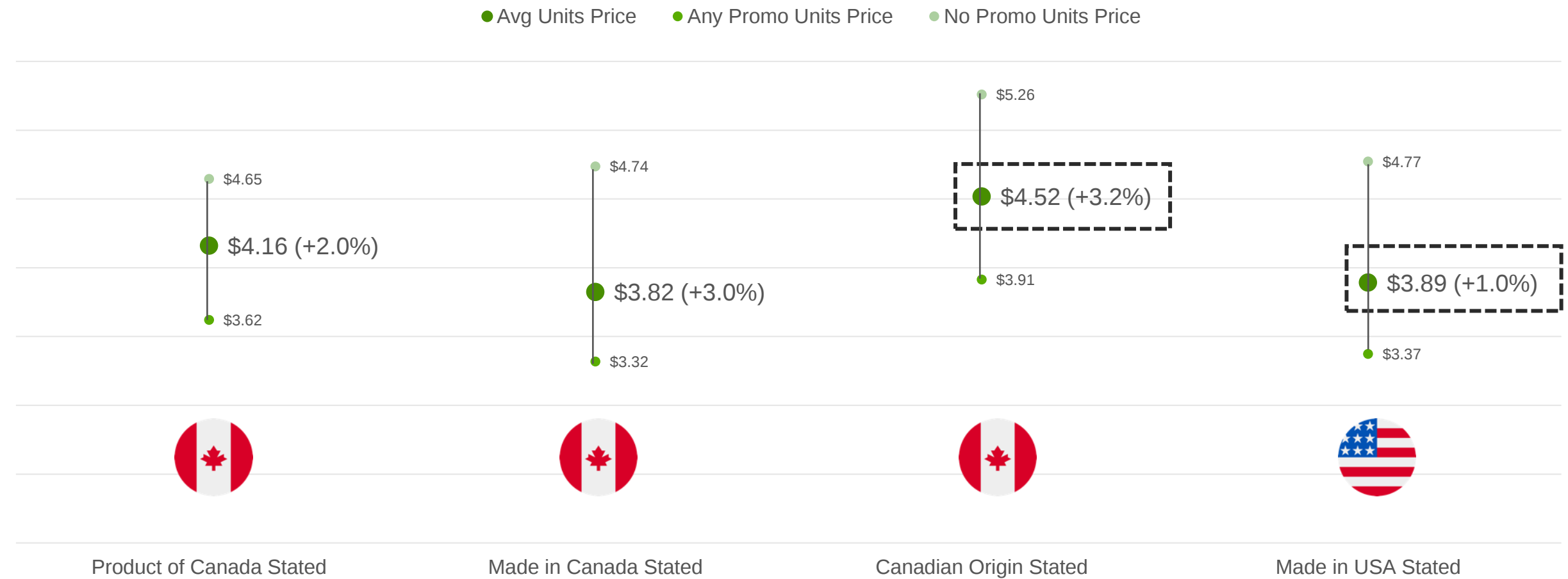
\$ % Chg YA - Personal Care (selected categories) - National All Channel



Source: NielsenIQ Retail Measurement Services, NielsenIQ Product Insight, National EX NLFD All Channels, L16W PE April 19, 2025

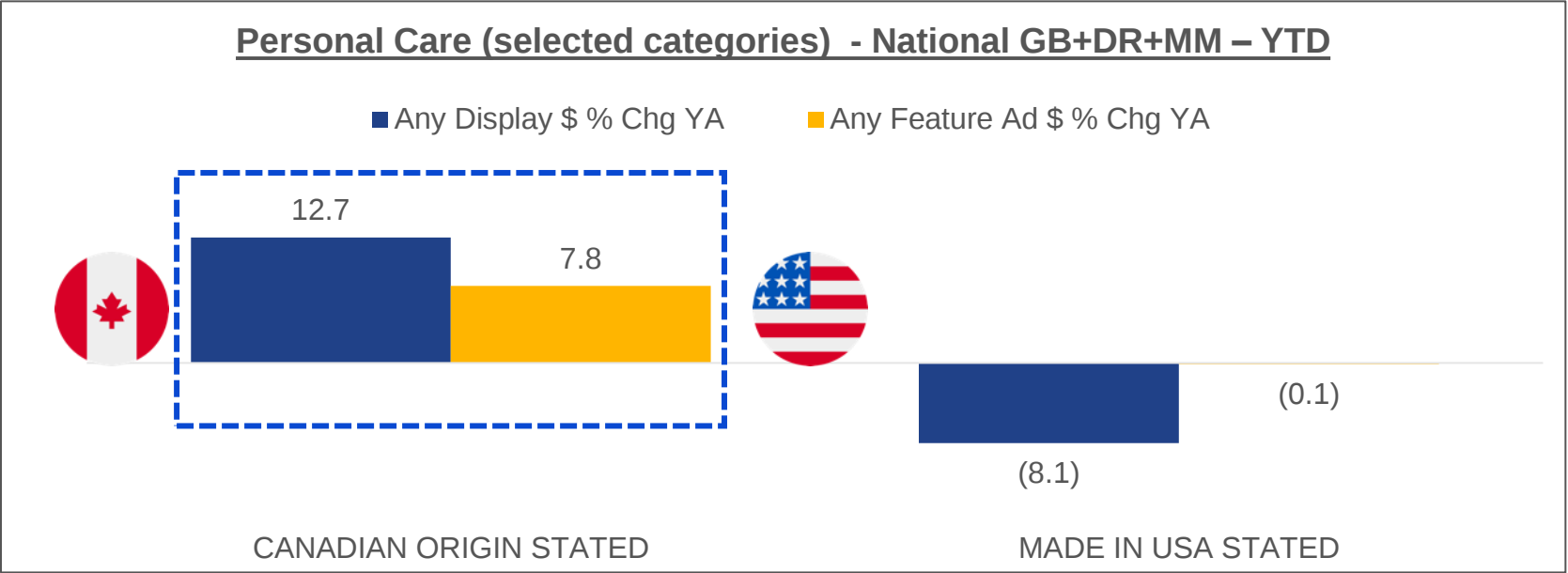
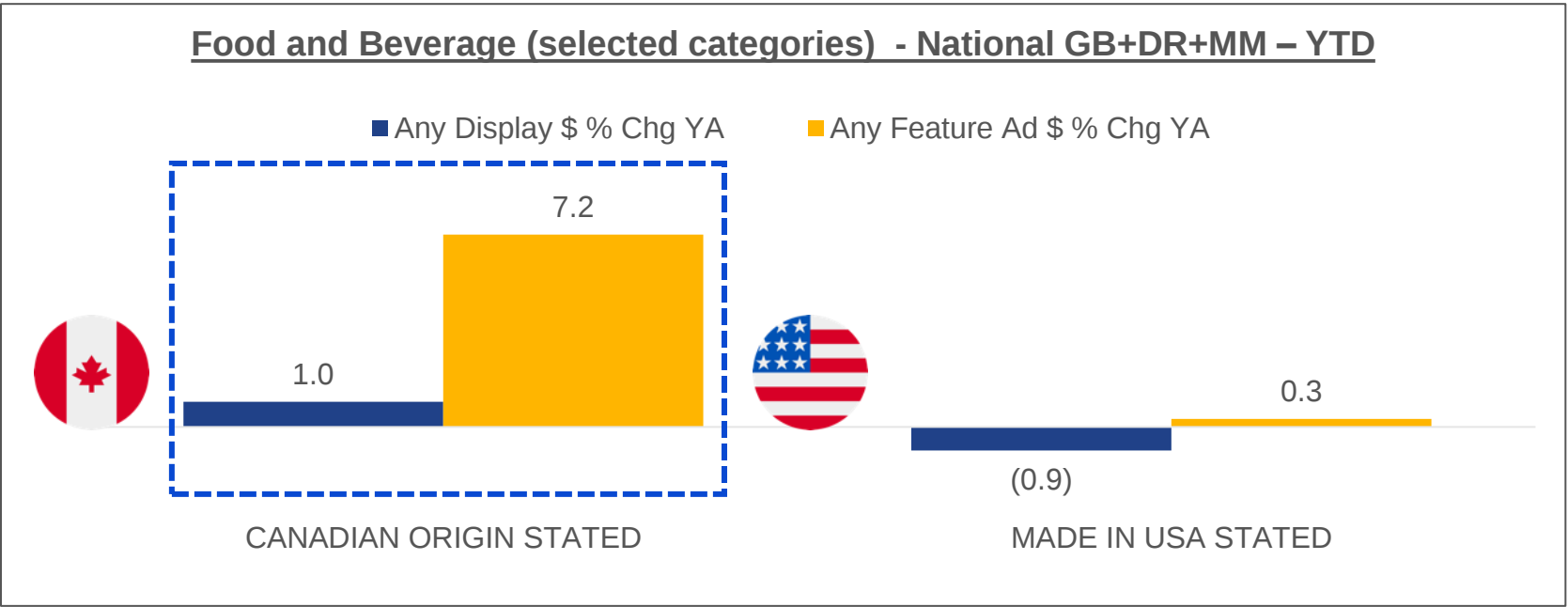
Increased demand drives growth of Canadian Origin Food and Beverage products despite higher Avg Unit Price

Unit Price - Food and Beverage (selected categories) - National GB+DR+MM – YTD 2025



Source: NielsenIQ Retail Measurement Services, NielsenIQ Product Insight, National EX NLFD All Channels, L16W PE April 19, 2025

Retailers are supporting Canadian origin products through display and flyer



Source: NielsenIQ Retail Measurement Services, NielsenIQ Product Insight, National EX NLFD GB+DR+MM, L16W PE April 19, 2025

Retailers are highlighting Canadian products on dedicated web pages and Flyers

Sobey's (AB, SK & MB)

Choose Canada for your table

2⁹⁹ Living Lettuce product of Canada

1⁹⁹ Mini Seedless Cucumbers product of Canada, Canada no 1 grade 6 pk

2⁴⁹ Rhubarb product of Canada 5.49/kg

8⁹⁹ Portabella Mushroom Caps product of Canada 454 g

3⁹⁹ Red, Orange or Yellow Sweet Bell Peppers product of Western Canada 8.80/kg

7⁴⁹ Assorted Snacking Tomatoes product of Western Canada 680 g

2/\$8 GOODLEAF Microgreens product of Canada 50 g

100 PTS when you buy 1

100 PTS when you buy 2

FRESH GUARANTEE

Shoppers Drug Mart, ON

RED HOT DEALS
Prepared in Canada

\$8 each PC PUB RECIPE CHICKEN NUGGETS or STRIPS 700g

2/\$9 or 4.79 each DANONE Oikos YOGURT 4 x 100g Selected Types

6⁵⁰ each BEN & JERRY'S ICE CREAM 473mL Selected Types

2/3⁵⁰ or 1.99 each NO NAME EVAPORATED MILK 354mL Selected Types

No Frills, ON

Members get more
Apr 17-19, 2025

APP EXCLUSIVE OFFER
Get **1,000 pts** when you spend \$10* or more on all Frozen Prepared in Canada products

\$1 back in points

BUY CANADIAN

IGA, Quebec

RABAIS DE 15\$ SUR VOS AUTRES ACHATS*

À l'achat de 2 caisses de bière sélectionnées (sélection variée, produits participants seulement)

\$15 REBATE on your other products* With the purchase of 2 selected cases of beer (assorted selection, participating products only)

À partir de/From 44⁹⁹

BIÈRE BUDWEISER, COORS LIGHT, OU/OR SLEEMAN CLEAR 2.0 BEER 30 x 355 mL Canettes ou bouteilles consignées Deposit cans or bottles

On a le local à cœur

Made in Canada

Walmart, Online

Made in Canada!*

Learn more

*These products qualify as made in Canada with domestic and/or imported components.

Learn more

Metro, ON

i earn with moi rewards

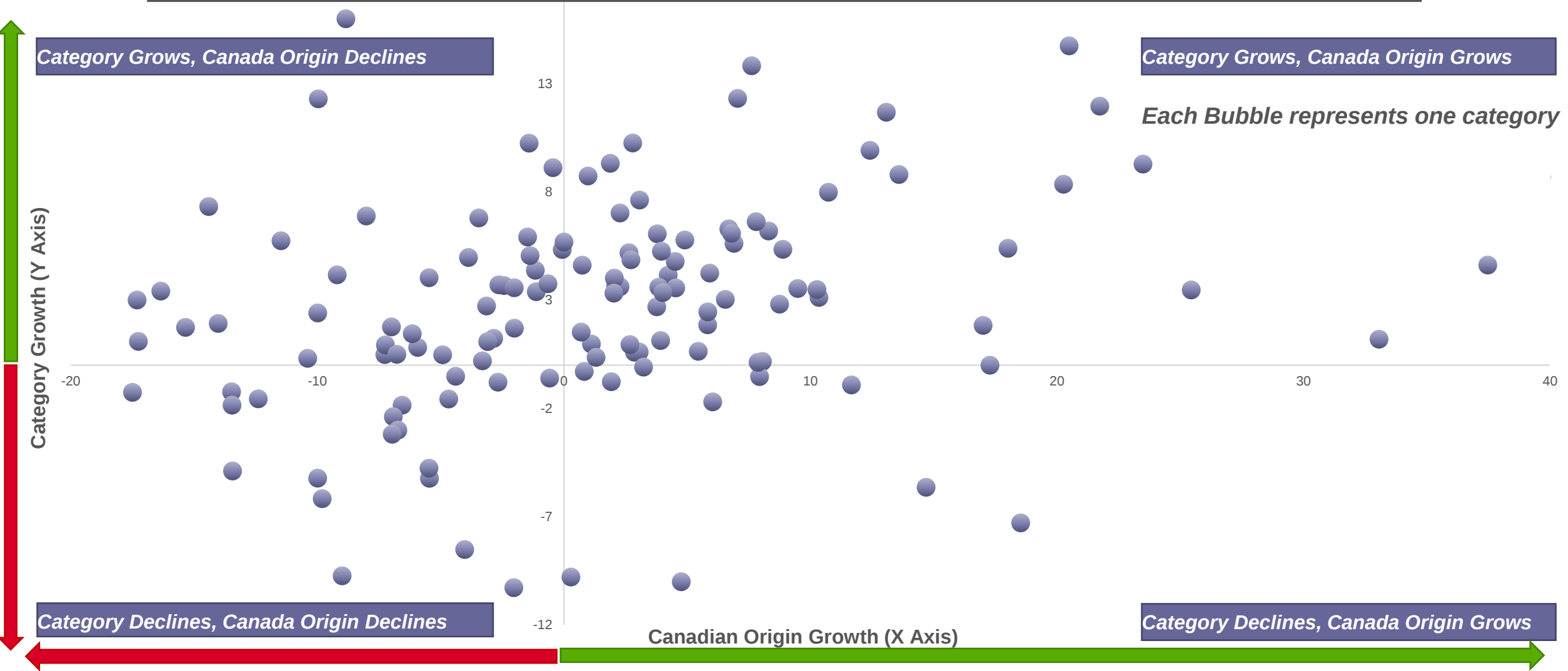
60 points when you buy 2 **2 for 8⁵⁰** MISS VICKIE'S CHIPS OR SMARTFOOD POPCORN SELECTED SIZES SELECTED VARIETIES, OR 4.99 EA.

55 points when you buy 2 **2 for 8⁰⁰** MOTT'S CLAMATO COCKTAIL 1.89 L SELECTED VARIETIES, OR 4.49 EA.

60 points **8⁹⁹** ea. CASHMERE BATHROOM TISSUE, SPONGE PAPER TOWELS OR SCOTTIES FACIAL TISSUE 3-12 in., SELECTED VARIETIES

There is variability in growth of Canadian Origin products – they are not growing across all categories

Personal Care, Food and Beverage (selected categories) - \$ % Chg - National All Channel – YTD 2025



Source: NielsenIQ Retail Measurement Services, NielsenIQ Product Insight, National EX NLFD All Channels, L16W PE April 19, 2025, 144 Categories with Canadian Origin Products >\$1MM in sales

Executive Summary

45% of consumers indicate they will boycott USA products or only buy Canadian products in response to imposed tariffs...**What is the retail ripple effect of patriotic sentiment?**

USA products are **negatively impacted** YTD, experiencing \$ sales softness across both Food and Beverage (-6.9%) and Personal Care categories (-4.5%)



Food and Beverage Categories

- Manufacturers of Canadian products have an opportunity to continue growth as share shifts from USA products
- Trends are different by category, so manufacturers should ensure to understand their own categories for risks and opportunities



Personal Care Categories

- Manufacturers of Canadian Personal Care products can further capitalize on pro-Canada trends as growth is more subtle
- Trends are different by category, so manufacturers should ensure to understand their own categories for risks and opportunities

Nielsen Product Insights (NPI)

Harness the **power** of product attribution

*Enhance transparency, monitor impact and gain insight into consumer preferences for local Canadian products with **NPI Place of Origin** attributes*

Canadian Origin

- Stated/on-package claims
- Non-regulated language but includes "Made in Canada" and "Product of Canada" claims which are regulated
- This is inclusive any other claims that show some or all the product is Canadian in any capacity
- Products may use language like "Proudly Canadian", "Pure Canadian Maple Syrup", "Finest Canadian Lobster"
- This is inclusive of individual Canadian Territories, e.g., Made In Alberta, Made in British Columbia, Made in Manitoba, etc)

Made In Canada

- Stated/on-package claims
- Regulated language
- Final substantial transformation must occur in Canada
- Requires a qualifying statement (e.g., "from domestic and imported ingredients")
- Allows significant use of imported ingredients
- Products may also use language like "produced in" or "harvested in"

Product Of Canada

- Stated/on-package claims
- Regulated language
- All or virtually all ingredients, processing, and labor used to make the product must be Canadian ($\geq 98\%$ Canadian content)
- Non-Canadian material is negligible; only minor non-Canadian items like spices or additives allowed ($< 2\%$)
- The claim "Canadian" is considered the same as a "Product of Canada" claim and any product carrying this claim must meet the criteria for a "Product of Canada" claim described above



Place of Origin

Canadian Dairy
 Canadian 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
 Made In Quebec
 Made In Saskatchewan
 Made In The Territories
 Made In USA
 Product Of Canada



Available in Discover



Includes 17 Stated Characteristics



References claims Stated on-package

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!



Appendix

Product Definitions

Food and Beverage: All Categories excluding Alcohol and Non UPC Fresh

Personal Care: Categories listed below

BABY CLEANSING CLOTHS	DENTURE ADHESIVES	HAIR SETTING GELS	MENS COLOGNES	SHOWER GELS FOAMS & BODY WASH
BABY LOTIONS	DENTURE CLEANSERS	HAIR SETTING LOTIONS	NAIL POLISH REMOVERS	SKIN CARE PRODUCTS
BABY OILS	EYE MAKE-UP:EYE SHADOW	HAIR SPRAYS	NAIL PRODUCTS	SPECIALTY CREAMS & LOTIONS
BABY POWDER	EYE MAKE-UP:EYELNR/BROW LIN	HAIR STYLING MOUSSE	NON-AEROSOL HAIR SPRAYS	SUNCARE PRODUCTS.
BABY SHAMPOOS	EYE MAKE-UP:MASCARA	HAIR TONICS & DRESSINGS	ORAL ANTISEPTICS	TOILET SOAP FRAG LINE EXTEN.
CHILDRENS BATH ADDITIVES	EYE PREPARATIONS	HAND BODY AND A P CRM AND LTNS	PEDICURE/FOOT BTY PRODUCTS	TONERS & ASTRINGENTS
CHILDRENS FRAGRANCES C.G.	FACE CLEANSERS & COLD CREAM	HAND CLEANERS	PERS DEOD-BODY SPRAYS	TOOTH POLISH KITS
CHILDRENS NOVELTY BATH PRD.(D)	FACE CREAMS & LOTIONS	HAND SANITIZERS	PERS DEOD-CREAMS	WOMENS FRAGRANCES
DIAPER RASH PRODUCTS	FACE MAKE-UP:BLUSHER	HAND&BODY SKIN TRT-OTHER FORMS	PERS DEOD-REM TYPES	
AFTER BATH SPLASHES	FACE MAKE-UP:CONCEALER/REM.	HOME PERM. WAVE SETS	PERS DEOD-ROLL-ONS	
AFTER SHAVE LOTIONS	FACE MAKE-UP:LIQUID/CREME	LADIES SHAVE CREAM	PERS DEOD-SPRAYS	
ALL PURPOSE LOTIONS	FACE MAKE-UP:POWDER	LIP CARE PRODUCTS	PERS DEOD-STICKS	
ARTIFICIAL NAILS & ACCESSORIES	FACE MASKS	LIQUID HAND SOAP	PETROLEUM JELLY	
BATH BEADS	FACE&BODY HAIR BLEACH	LIQUID HAND SOAP DH	PRE-SHAVE LOTIONS	
BATH OILS AND ADDITIVES	FINGER & HANGNAIL TREATMENT	MAKE UP ACCESSORIES	PREMOISTENED TOWELETTES	
BEARD CARE	FOOT POWDERS	MAKE-UP:LIP COLOUR I	REM. HAIR TINTNG/BLEACH PRDTS	
BREATH FRESHENERS & PURIFIERS	FOOT SOAPS	MAKE-UP:NAIL COLOUR	REM.DENTAL CARE PRODUCTS	
BUBBLE BATH	FOOTCARE PRODUCTS	MAKE-UP:TOTAL KITS	REMAINING FACE CARE PRODUCTS	
CHEMICAL DEPILATORY PRODUCTS	HAIR COLORING-PERMANENT	MAKEUP CONCEALERS	REMAINING FOOTCARE PRODUCTS	
COLOR REMOVERS	HAIR COLORING-TEMPORARY	MANICURE PRODUCTS	REMAINING STYLING PRODUCTS	
COLOUR CORRECT MOIST CREAMS	HAIR CONDITIONER	MASSAGE LUBRICANTS	S.D.M. LIFE SHAMPOO	
COSMETIC PADS (DRUG)	HAIR LOSS TREATMENT	MEDICATED SOAPS AND CAKES	SHAKER TOP ADULT TALCUM PWDRS.	
COVER STICKS	HAIR RELAXANTS	MEN S GIFT SETS	SHAMPOOS	
DENTIFRICE PASTE	HAIR REMOVERS - WAX	MEN S HAIR COLOR PREPARATIONS	SHAVING AIDS	
DENTIFRICE POWDERS & LIQUIDS	HAIR RINSES	MENS AEROSOL SHAVE CREAMS	SHAVING LATHER	

Canadian Origin



Example Claims

100% Canadian
 100% Canadian (Ingredient)
 Canadian (Ingredient)
 Made in Canada
 Made with (Ingredient) from Canada
 Product of Canada
 (Canada Territory) Made / Made in (Canada Territory)

Canadian Origin NPI Guidelines

- ✓ **Stated/on-package claims**
- ✓ **Non-Regulated** language but includes "Made in Canada" and "Product of Canada" claims which are regulated
- ✓ This is inclusive any other claims that show some or all the product is Canadian in any capacity
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Made In Canada



Made In Canada NPI Guidelines

- ✓ **Stated/on-package claims**
- ✓ **Regulated language**
- ✓ Final substantial **transformation must occur in Canada**
- ✓ Requires a **qualifying statement** (e.g., "from domestic and imported ingredients")
- ✓ Allows significant use of **imported ingredients**
- ✓ Products may also use language like "produced in" or "harvested in"



Example Claims

Canadian Made
 Crafted in Canada
 Grown and Made in Canada
 Handmade in Canada
 Made in Canada (with Domestic and Imported Ingredients)
 Manufactured in Canada
 Prepared in Canada
 Proudly Made in Canada

Product of Canada



Example Claims
Product of Canada

Product of Canada NPI Guidelines

- ✓ **Stated/on-package claims**
- ✓ **Regulated language**
- ✓ **All or virtually all ingredients, processing, and labor used to make the product must be Canadian (≥98% Canadian content)**
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Coming *into view*

