VOLUME 1, ISSUE 2: MAY 2025

CANADIAN FOOD SENTIMENT INDEX

BI-ANNUAL INSIGHT REPORT

PREPARED BY

Dr. Sylvain Charlebois
Dr. Armağan Özbilge
Dr. Stacey Taylor
Samantha Taylor
Janet Music

DALHOUSIE UNIVERSITY | AGRI-FOOD ANALYTICS LAB

supported by: CADDLE

Volume 1, Issue 2: May 2025

TABLE OF CONTENTS

INTRODUCTION

The Canadian Food Sentiment Index: Bi-Annual Insight Report is a flagship initiative by Dalhousie University's Agri-Food Analytics Lab, supported by Caddle Insights. This comprehensive report measures Canadians' perceptions and sentiments on a wide range of food-related issues, gathering insights from approximately 3,000 respondents every six months (for details, see page 24).

By asking the same questions across each cycle, the report tracks trends and shifts in consumer sentiment, providing consistent and meaningful data.

Inspired by Purdue University's Consumer Insight Report, the index covers key themes, including:

Food Price Experiences, Food Expenditures, Food Values, Consumer Behaviours, Consumer Beliefs & Consumer Trust.

This report provides critical insights into how Canadians feel about food affordability, quality, security, and trust, offering valuable guidance for industry stakeholders, policymakers, and the public. This second issue also includes comparison analysis with the previous report, highlighting emerging trends.

DALHOUSIE UNIVERSITY

AGRI-FOOD ANALYTICS LAB

supported by:

CADDLE

Key Insights from Spring 2025

+3.2%

(YoY: +3.0%)[1]

LATEST CPI FOOD INFLATION IN STORES[2]

LATEST CPI FOOD INFLATION IN RESTAURANTS[2]

+3.2%

(YoY: +5.2%)

22.9%

(YoY: 0%)

CANADA'S FOOD INSECURITY[3]

Footnotes:

1. *Numbers in the parentheses denote the Year-over-Year variation.*
2. *Statistics Canada, March 2025*
3. *PROOF Research Program, uToronto*

THIS COMPREHENSIVE REPORT MEASURES CANADIANS' PERCEPTIONS AND SENTIMENTS ON A WIDE RANGE OF *food-related* ISSUES AND HIGHLIGHTS EVOLVING TRENDS.

61%/39%

(YoY Retail: -1%)

CURRENT FOOD RETAIL/FOOD SERVICE RATIO

19.9%

(+0.4%)[7]

PERCENTAGE OF EXPENDITURE ON FOOD (RETAIL) TO OVERALL EXPENDITURE (EXCLUDING RESTAURANT AND HOUSING)

$311.16

(YoY Retail: -0.58%)

FOOD SPENDING (RETAIL) PER MONTH, PER CANADIAN[4,5]

FOOD SPENDING (SERVICE) PER MONTH, PER CANADIAN[5,6]

$198.73

(YoY: +3.8%)

Footnotes:

4. Statistics Canada, using NAICS 445 to January 2025 and population estimates, up to July 2024
5. Statistics Canada makes regular changes to database which forces small revisions of past reported results.
6. Statistics Canada, Table: 21-10-0019-01 excluding alcohol to January 2025, and population estimates, up to July 2024
7. Variation since the last Food Sentiment Index Issue.

FOOD PRICE EXPERIENCES

Figure 1 compares Fall 2024 (purple) and Spring 2025 (green) —on which expenses Canadians believe have increased the most over the past 12 months.

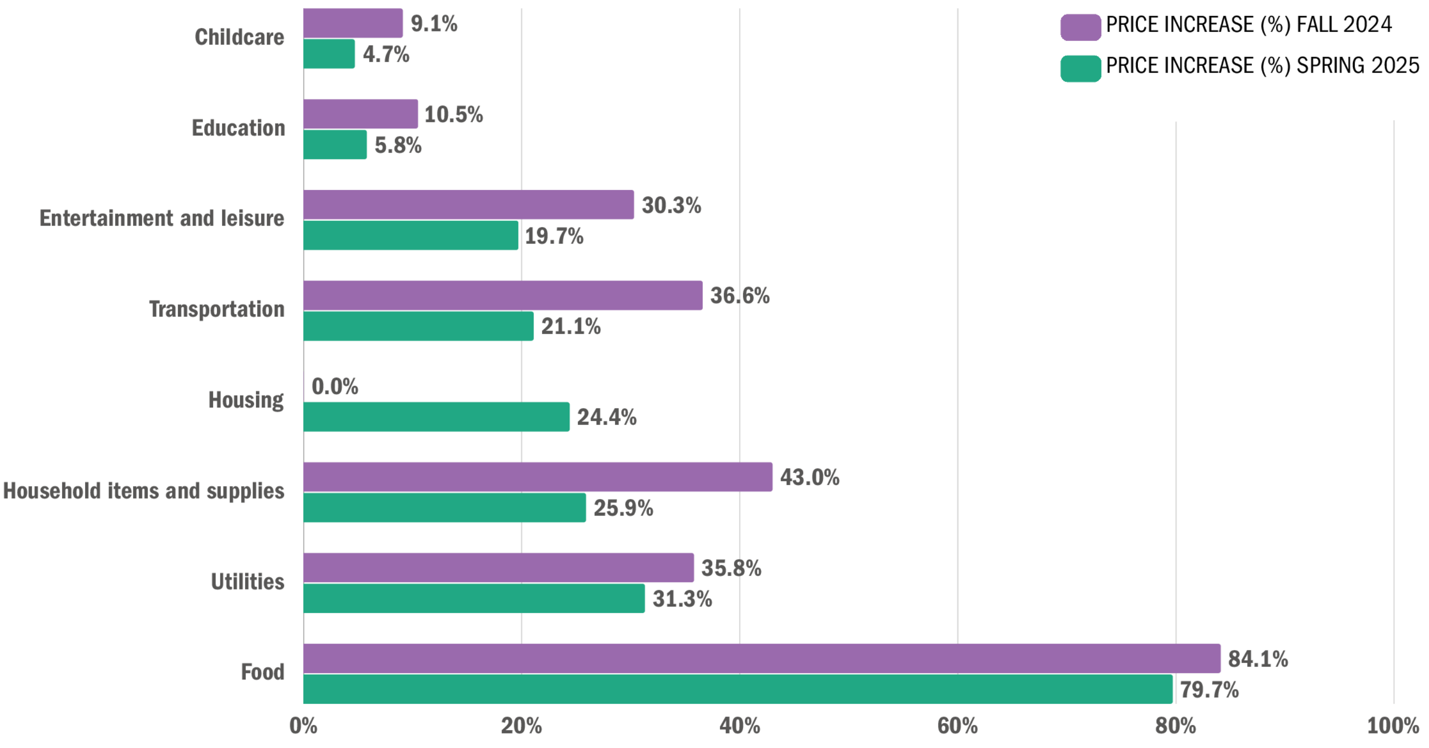
KEY FINDINGS:

- Food is the most important category in both periods, with more respondents in Fall 2024 (84.1%) reporting price increases than in Spring 2025 (79.7%), still indicating consistently high concern.
- Household items and utilities show a decline in perceived inflation from Fall to Spring, suggesting slight easing in those categories or shifting consumer focus.
- Transportation dropped from 36.6% (Fall) to 21.1% (Spring), and household items from 43.0% to 25.9%, marking some of the largest declines.

INSIGHTS:

While food remain the top inflationary concern across both periods, the data suggests a softening perception of rising prices in other key categories like utilities and household items as of Spring 2025.

FIGURE 1:
For which of the following expenses have prices increased the MOST in the past 12 months? (Please select all that apply)[8]



Footnotes:

8. The first survey omitted to include 'Housing' as an option, explaining the 0% result for Fall 2024.

The results in Figure 2 reveal that Food leads all categories, with 49.9% of respondents reporting prices have increased significantly, and another 34.6% saying they have increased slightly—suggesting widespread concern about food inflation.

Household items and supplies and utilities follow, with the majority also noticing price increases, though fewer label them as "significant."

Categories like transportation, entertainment and leisure, and housing show a more balanced distribution, with around one-third of respondents feeling prices have remained stable.

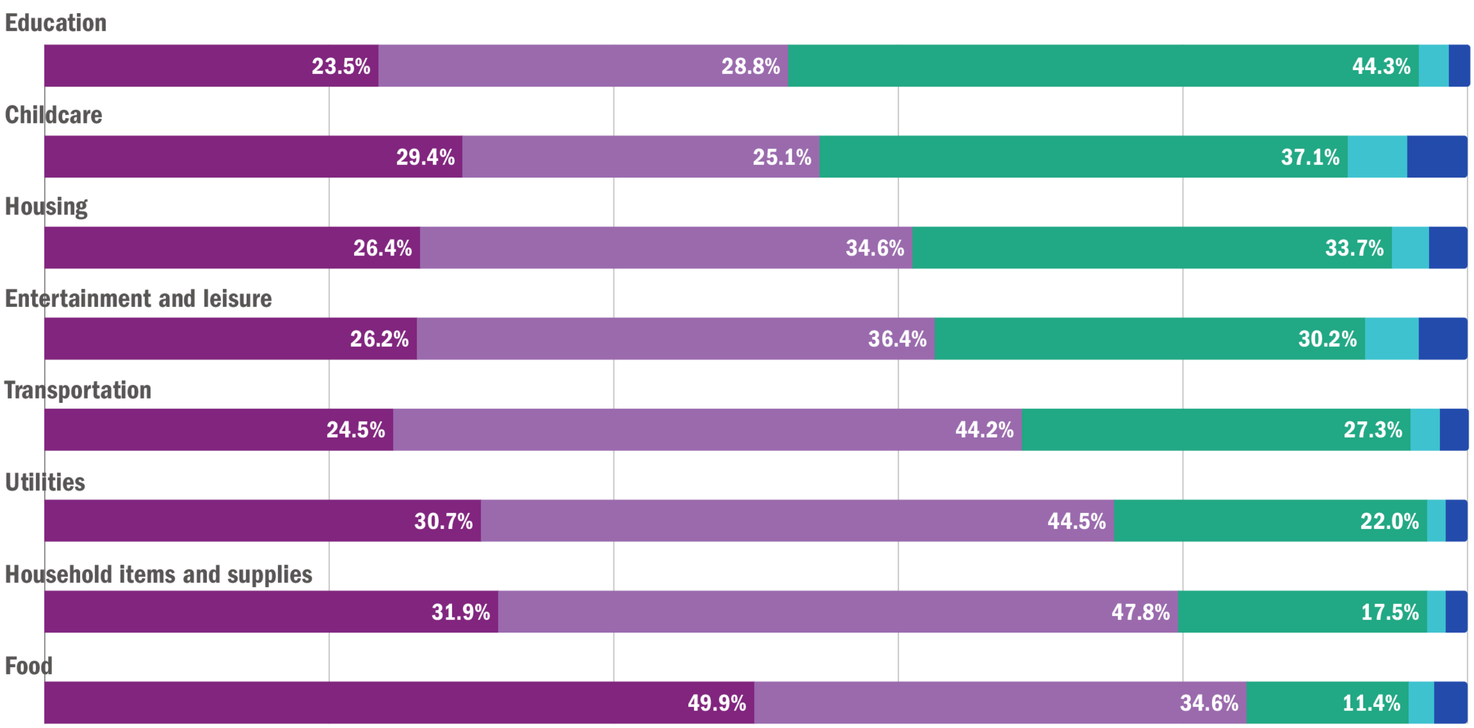
Education had the lowest share of respondents reporting a significant price increase (23.5%), and the highest percentage indicating prices have stayed the same (44.3%).

Overall, across all categories, price increases (especially "slight" ones) dominate the perception, while price decreases remain relatively rare. It highlights the acute perception of inflation—especially in food—among households over the past year.

almost 85%

OF RESPONDENTS REPORTED THAT FOOD PRICES HAVE INCREASED OVER THE LAST 12 MONTHS SUGGESTING WIDESPREAD CONCERN ABOUT FOOD INFLATION

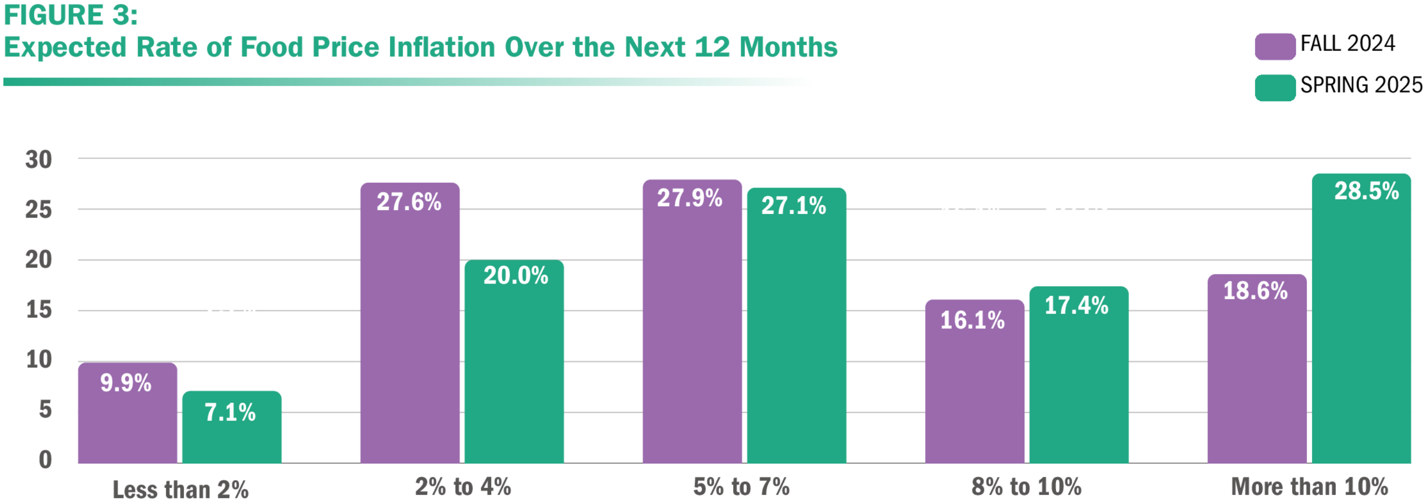
FIGURE 2:
How have prices for the following expenses changed over the last 12 months for you and your household?



** Figure 2 excludes 'does not apply' answers to reflect the distribution of results only among households for which the expense category is relevant.*

FOOD EXPENDITURES

FIGURE 3:
Expected Rate of Food Price Inflation Over the Next 12 Months



DRAMATIC

shift of perception

IN THE "MORE THAN 10%" CATEGORY, WHICH JUMPED TO A NEARLY 10 PERCENTAGE POINT INCREASE.

Figure 3 on expected inflation over the next 12 months reveals that:

- The percentage of respondents expecting less than 2% food inflation decreased slightly, from 9.9% in Fall 2024 to 7.1% in Spring 2025.
- Expectations for inflation in the 2% to 4% range dropped significantly, from 27.6% to 20.0%, indicating declining optimism.
- The 5% to 7% category remained relatively stable, dropping marginally from 27.9% to 27.1%.
- Expectations of 8% to 10% inflation increased slightly, from 16.1% to 17.4%.The most dramatic shift was in the "more than 10%" category, which jumped from 18.6% to 28.5% — a nearly 10 percentage point increase.

INTERPRETATION:
There is a clear shift in consumer sentiment toward expecting higher food price inflation in Spring 2025. While moderate inflation expectations (2–4%) declined, a growing number of Canadians now anticipate double-digit food inflation, suggesting rising concerns about affordability and economic pressures in the months ahead.

DESPITE A SLIGHT VARIATION (+0.2%), THE HABIT OF LOOKING FOR MORE SALES AND DISCOUNTS REMAINS THE MOST POPULAR RESPONSE AT 48.4%

The graphic in Figure 4 illustrates the percentage point change in various grocery shopping behaviours between Spring 2025 and Fall 2024. It shows that:

INCREASED BEHAVIOURS (SHOWN IN GREEN):

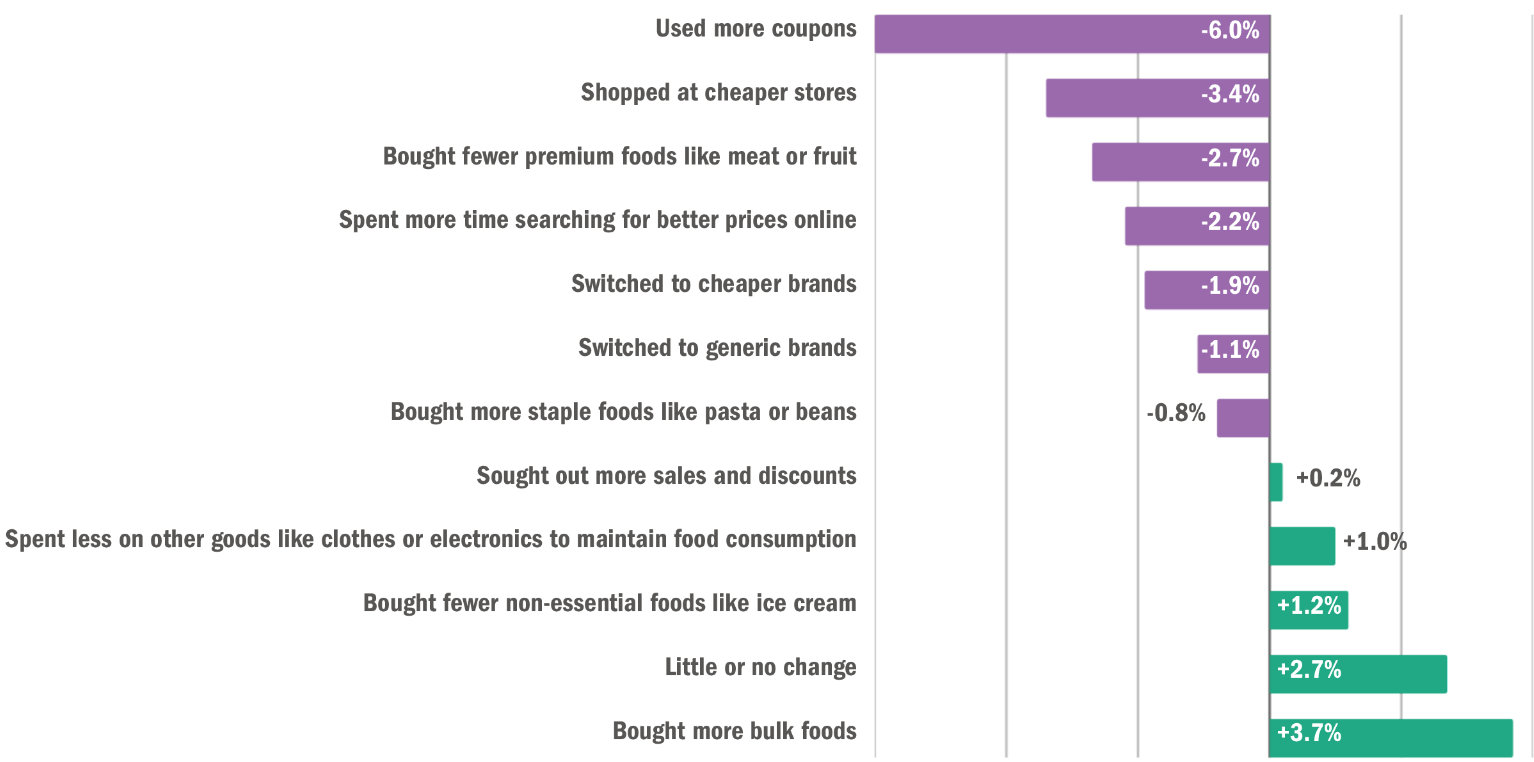
- More people are buying bulk foods (+3.7%) and reporting little or no change in their habits (+2.7%).
- There is a modest increase in buying fewer non-essential foods (+1.2%), spending less on other goods to maintain food consumption (+1.0%), and seeking more sales and discounts (+0.2%)

DECREASED BEHAVIOURS (SHOWN IN PURPLE):

- The largest decline is in using more coupons (-6.0%), followed by shopping at cheaper stores (-3.4%) and buying fewer premium foods (-2.7%).
- Slight declines were also observed in time spent looking for better prices, switching to cheaper or generic brands, and buying more staple foods.

Overall, the data suggests a nuanced shift: while some frugal behaviours have declined, others like bulk buying and reducing non-essentials are gaining traction. These results might indicate that many consumers had already adopted frugal behaviours in response to rising food prices and had already reached their limit, indicating a strategic rebalancing of household budgets.

FIGURE 4:
Change in Grocery Habits (Spring 2025 vs Fall 2024)



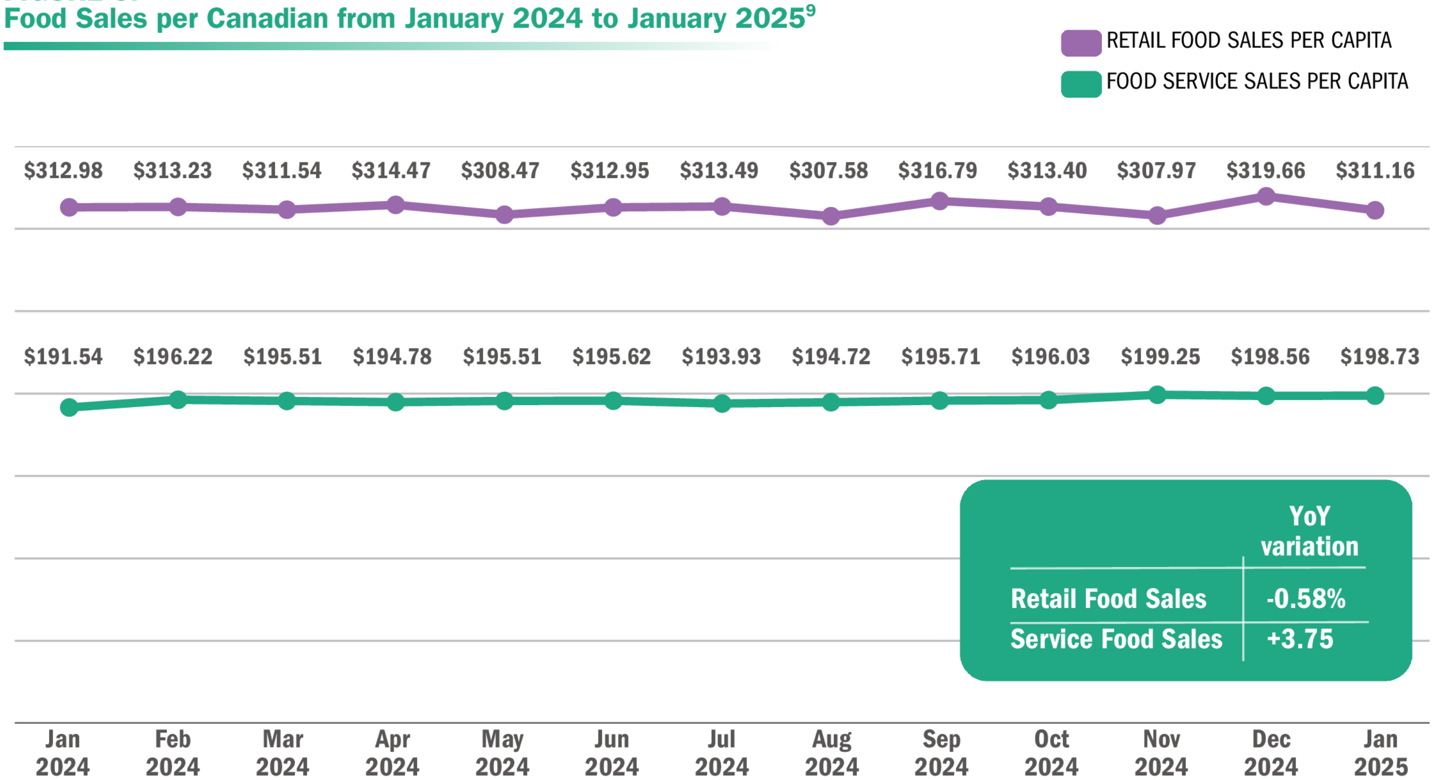
The graph shown in Figure 5 indicates that retail food sales per Canadian declined slightly from $312.98 in January 2024 to $311.16 one year later, while food service spending increased modestly from $191.54 to $198.73.

Despite high food inflation during this period, the flat or modest growth in per capita food sales means that, in real terms, Canadians are buying less food per person today than they were a year ago.

This trend suggests a shift in consumer behaviour likely driven by affordability concerns, with households cutting back or turning to lower-cost options in both retail and restaurant settings.

CANADIANS ARE *spending less* ON FOOD PER PERSON TODAY THAN THEY WERE A YEAR AGO.

FIGURE 5:
Food Sales per Canadian from January 2024 to January 2025[9]



	YoY variation
Retail Food Sales	-0.58%
Service Food Sales	+3.75

Footnotes:

9. *Statistics Canada. Table 21-10-0019-01 Monthly survey of food services and drinking places (x 1,000) ; DOI: https://doi.org/10.25318/2110001901-eng*

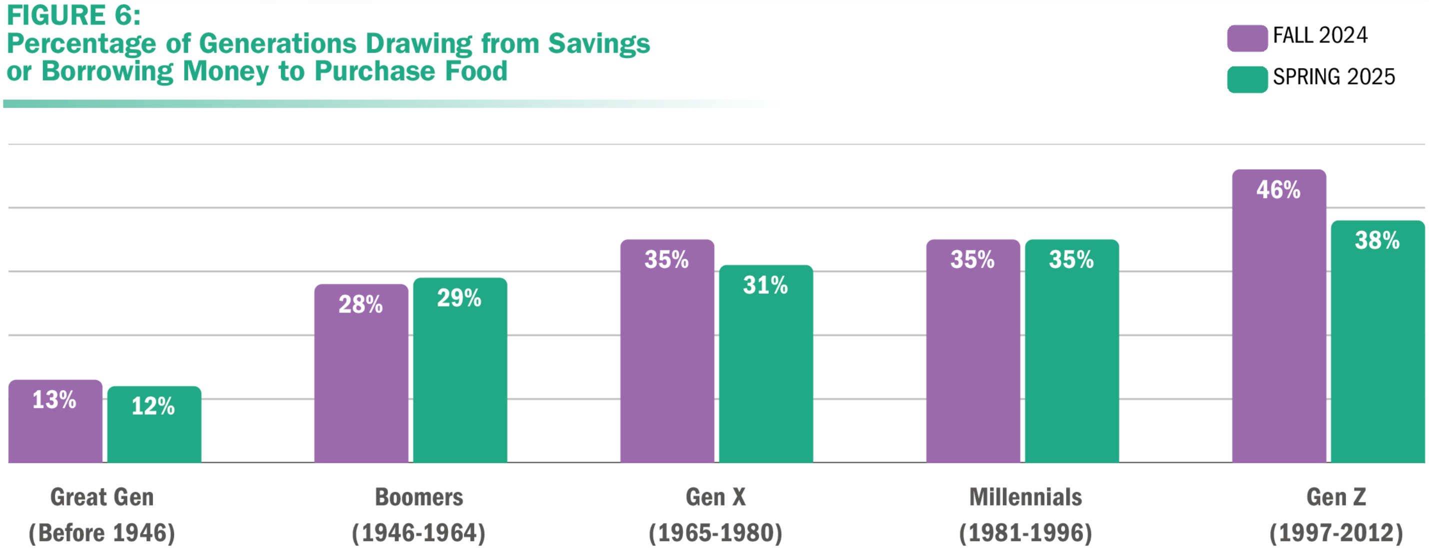
FOOD SECURITY

As seen in Figure 6, when comparing the need to draw from savings or borrow money to pay for food between Fall 2024 and Spring 2025, Gen Z had the highest percentage in both periods but showed the largest decrease (-8%) in reliance on savings or borrowing to purchase food.

Millennials remained stable at 35%.The Great Generation and Boomers saw only minor fluctuations.

Overall, the trend, particularly pronounced among younger generations like Gen Z, may suggest slight improvements or adjustments in financial resilience. Alternatively, reduced withdrawals could reflect depleted savings, potentially signalling financial hardship for Canadians.

FIGURE 6:
Percentage of Generations Drawing from Savings or Borrowing Money to Purchase Food



FOOD VALUES

When asked about the importance of decision factors in food purchase in Spring 2025, respondents' answers demonstrated that:

- Affordability (42%) remains the leading factor.
- Nutrition (25%) and Taste (18%) follow as key drivers.
- Lesser factors include Availability (5%), Social Responsibility (3%), Environmental Impact (2%), and Other (5%).

The variations in Food Purchase Priorities between the Spring 2025 and Fall 2024 results are presented in Figure 7. This bar graph shows the shift in consumer priorities:

- Interest in Taste (+1.7%), Nutrition (+1.5%), and Other factors (+1.0%) increased.
- Focus on Affordability (-2.8%) declined the most, though it remains the top factor overall.

Minor declines in Availability (-0.6%), Social Responsibility (-0.5%), and Environmental Impact (-0.4%) suggest a subtle shift toward personal preferences over ethical/environmental concerns.

FIGURE 7:
Change in Food Purchase Priorities: Spring 2025 vs Fall 2024

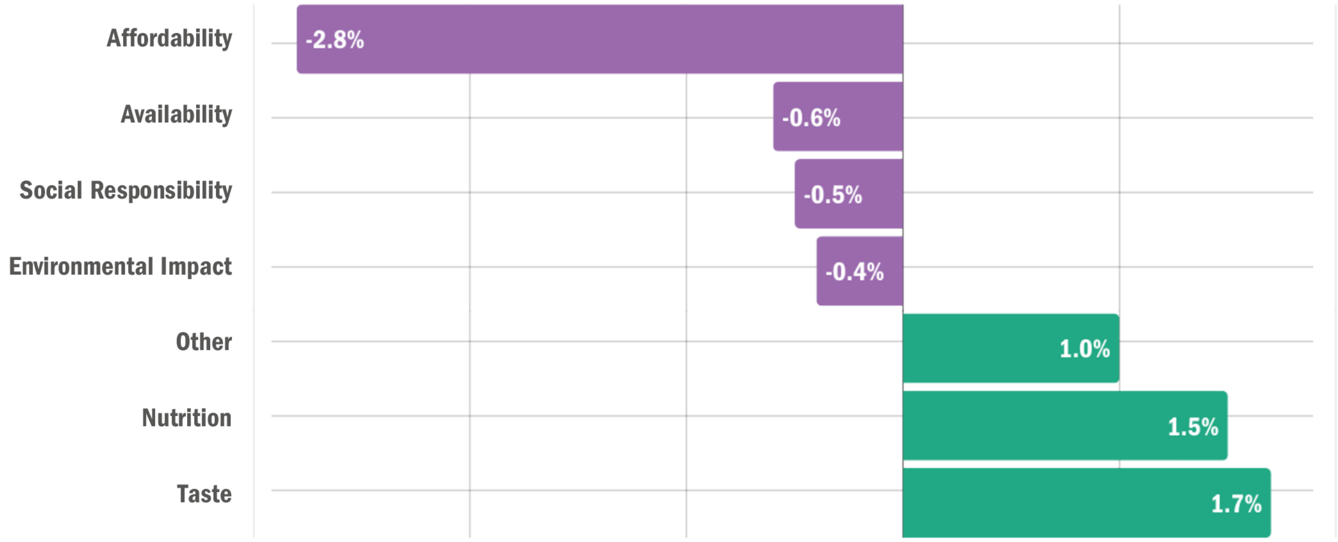
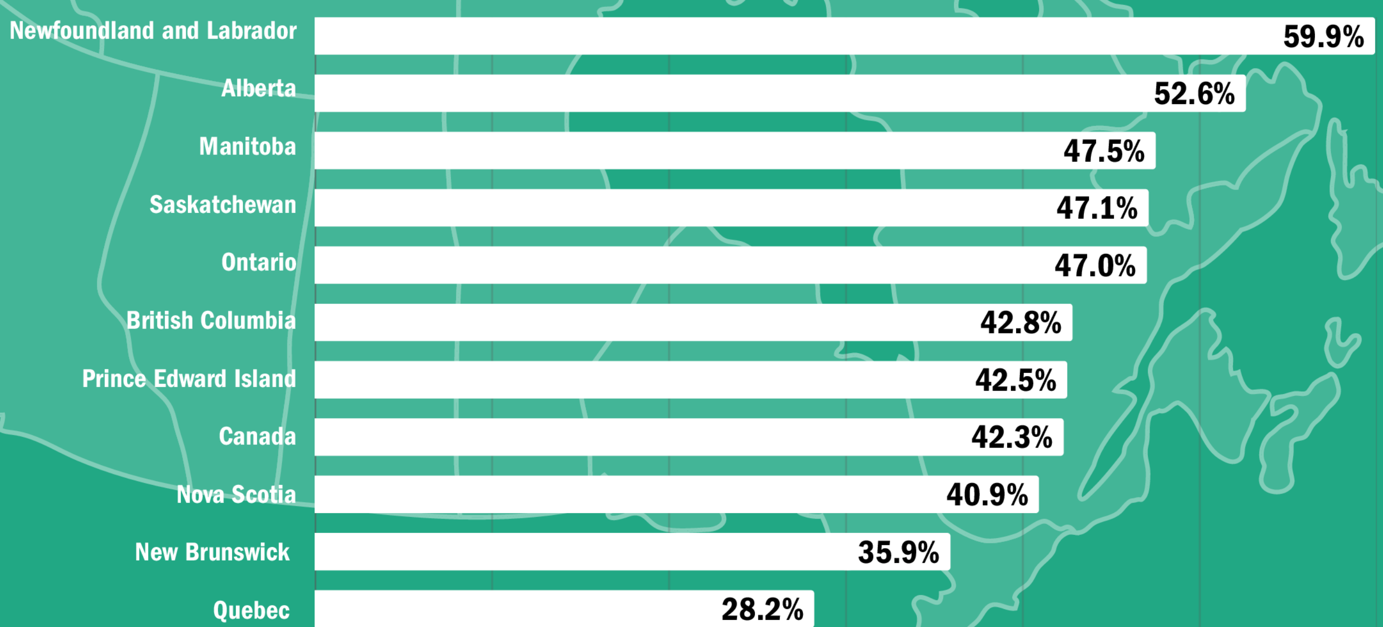


Figure 8 on food affordability suggests notable regional variation in how it is prioritized. The Eastern part of Canada shows both the highest (Newfoundland & Labrador) and lowest (Quebec) levels of concern, while western and central provinces generally trend above the national average.

This variation may reflect differences in cost of living, economic conditions, or cultural attitudes toward affordability.

FIGURE 8:
Importance of Food Affordability by Province



The chart presented in Figure 9 clearly indicates a positive seasonal shift toward more frequent purchasing of local foods in Spring 2025. Consumers are moving away from "Rarely" or "Sometimes" toward "Often," with small but meaningful gains in the "Always" category as well.

This trend may reflect increased access to local foods in Spring (e.g., markets reopening, seasonal harvests) or rising awareness of sustainability and support for local producers. It is also important to note that the survey took place during the start of a pro-Canada movement, which emerged amid growing uncertainty over Canada-US tariffs.

TEN PERCENT OF RESPONDENTS ARE CHOOSING LOCAL FOODS MORE OFTEN THAN SIX MONTHS AGO, BRINGING THE TOTAL TO

43.5%

WHO NOW MAKE THAT CHOICE ALWAYS OR OFTEN.

FIGURE 9:
How often do you choose local foods over non-local foods?

Figure 10 delves into the generational differences over respondents who answered they chose local food ''Always'' or ''Often''.

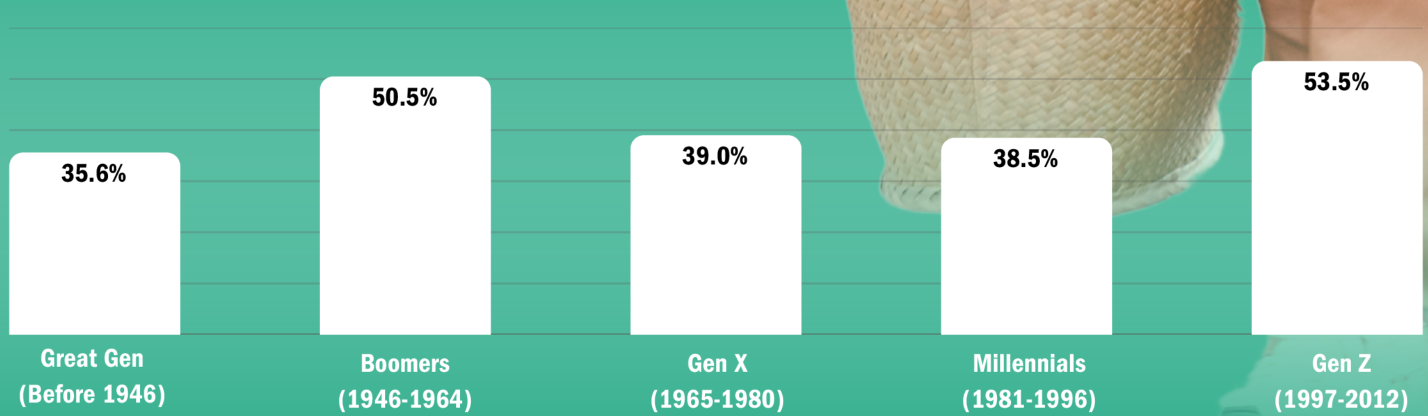
The results demonstrate that Gen Z leads all age groups, with 53.5% of respondents indicating they frequently buy local foods. This suggests strong interest among younger consumers in sustainability, local economies, and food system transparency.

Baby Boomers follow closely, at 50.5%, reflecting long-standing habits and possibly a preference for food quality or community support.

Gen X (39.0%) and Millennials (38.5%) show moderate engagement, with nearly 4 in 10 reporting regular local food purchases.

The Great Generation (35.6%) has the lowest frequency of local food purchasing among the cohorts, though over a third still report doing so often or always.

FIGURE 10:
Buy Local Foods: ''Always'' and ''Often'' Answers by Generation (Spring 2025)



CONSUMER BEHAVIOURS

VALUE-BASED BEHAVIOURS

The 3 following tables denote changes in behaviour on a wide list of subjects.

INCREASING BEHAVIOURS FROM FALL TO SPRING:

- Choosing local foods over non-local foods rose from 3.27 to 3.38.
- Choosing generic/store-brand over brand-name foods showed the largest jump, from 2.91 to 3.50, indicating a significant shift toward value-conscious shopping.
- Choosing grass-fed beef and cage-free eggs also saw increases.

DECREASING BEHAVIOURS:

- Choosing plant-based proteins over animal proteins slightly dropped from 2.43 to 2.34, suggesting a possible plateau or pushback in plant-based adoption.

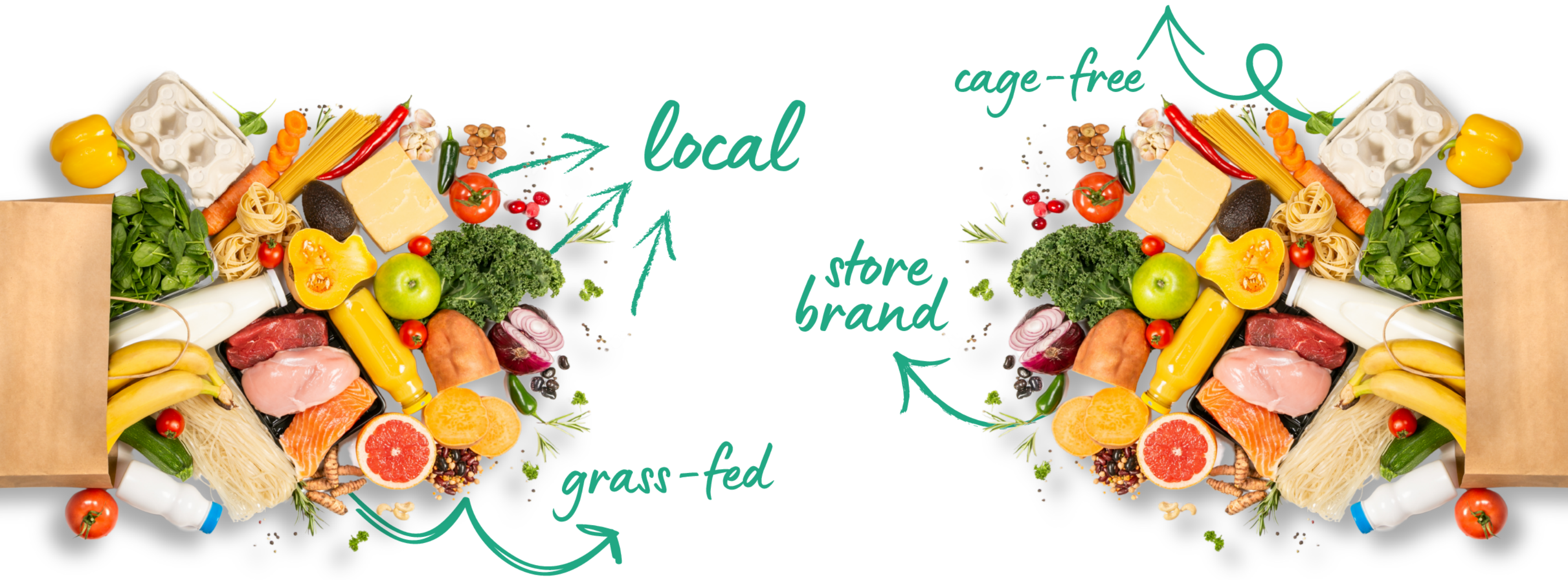
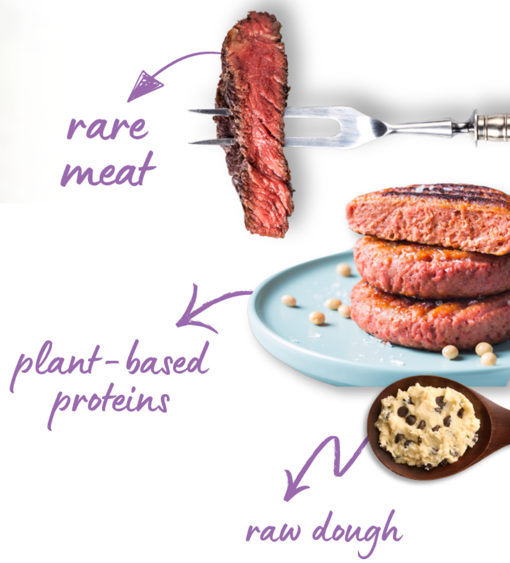


TABLE 1
Value-Based Behaviours

	FALL 2024	SPRING 2025	
Check nutrition label on products before buying new foods	3.47	3.47	—
Choose local foods over non-local foods	3.27	3.38	^
Choose generic or store brand foods over brand-name foods	2.91	3.50	^
Choose wild-caught fish over farm-raised fish	3.19	3.29	^
Choose organic foods over non-organic foods	2.52	2.54	^
Choose cage-free eggs over conventional eggs	2.57	2.72	^
Choose grass-fed beef over conventional beef	2.69	2.85	^
Choose plant-based proteins over animal proteins	2.43	2.34	v

MEAN SCORES:
Never: 1
Rarely: 2
Sometimes: 3
Often: 4
Always: 5

Excluding answers other than Always to Never (e.g.: I do not eat…, I don't know)
The results for Fall 2024 differ slightly from those previously published given that this distinction had not been made at the time.



RISK-BASED BEHAVIOURS

HIGHEST-RATED BEHAVIOUR:

- Checking use-by/sell-by dates at the store rose from 4.02 to 4.09, showing strong and increasing diligence in food safety.
- Throwing away food past the use-by date remained steady at 3.02

CONCERNING BEHAVIOURS (LOWER SCORES):

- Eating fresh fruits/vegetables without washing stayed low (2.34 to 2.32).
- Eating rare or undercooked meat and raw dough or batter both remained under 2, with further declines, especially undercooked meat (from 1.96 to 1.81) and raw dough (steady at 1.81), highlighting risky practices still present among a portion of the population.

TABLE 2
Risk-Based Behaviours

	FALL 2024	SPRING 2025
Check the use-by / sell-by date on products at the store	4.02	4.09
Throw away food when it is past the 'use-by' date	3.03	3.02
Eat fresh fruits and vegetables without washing them	2.34	2.32
Eat rare or undercooked meat	1.96	1.81
Eat raw dough or batter	1.84	1.81

Excluding answers other than Always to Never (e.g.: I do not eat..., I don't know)

MEAN SCORES:
Never: 1
Rarely: 2
Sometimes: 3
Often: 4
Always: 5

SUSTAINABILITY-BASED BEHAVIOURS

TABLE 3 SHOWS THESE FREQUENT SUSTAINABLE BEHAVIOUR:

- Recycling food packaging increased from 4.25 to 4.34, the highest average across all categories.
- Reducing food waste at home also improved from 4.08 to 4.16.
- Composting food scraps remained relatively unchanged (3.49 to 3.48), showing stable but moderate uptake.

TABLE 3
Sustainability-Based Behaviours

	FALL 2024	SPRING 2025
Recycle food packaging	4.25	4.34
Take steps to reduce food waste at home	3.08	4.16
Compost food scraps	3.49	3.48

Excluding answers other than Always to Never (e.g.: I do not eat..., I don't know)

MEAN SCORES:
Never: 1
Rarely: 2
Sometimes: 3
Often: 4
Always: 5

KEY INSIGHTS

Results in Spring 2025 show modest but consistent improvements across most behavioural areas, particularly:

- A sharp rise in value-focused shopping (store brands).
- Continued diligence in food safety.
- Strong commitment to recycling and reducing waste.
- Plant-based choices slightly declined, and food safety risks (e.g., undercooked meat, raw batter) persist, though with minor improvements.

IMPORTANCE OF...

WHERE FOOD ORIGINATED/WAS PRODUCED

- Most actively checked: 36.8% "Often" check the origin of food — the highest "Often" rate across all categories. 18.9% "Always", showing strong consumer interest in local, regional, or national sourcing.

- Least likely to be ignored: Only 3.8% "Never" check origin, the lowest “Never” rate in this chart.

FOOD RECALLS

- Most "Sometimes" checked category at 31.2%, suggesting moderate attention. 25.0% "Often" check recalls; 11.1% "Always" — moderate levels of consistent vigilance.

- Notably, 24.4% "Rarely" check recalls, and 8.3% "Never", showing that a significant share of consumers are disengaged from recall updates.

GMO INGREDIENTS

- Most neglected category: Only 9.5% "Always" and 18.6% "Often" check for GMO content. A significant 22.9% "Never" do so — the highest "Never" percentage of the three categories.

- "Sometimes" (24.7%) and "Rarely" (24.3%) responses show ambivalence or lack of concern/awareness among many consumers.

FIGURE 11:
How often do you check...

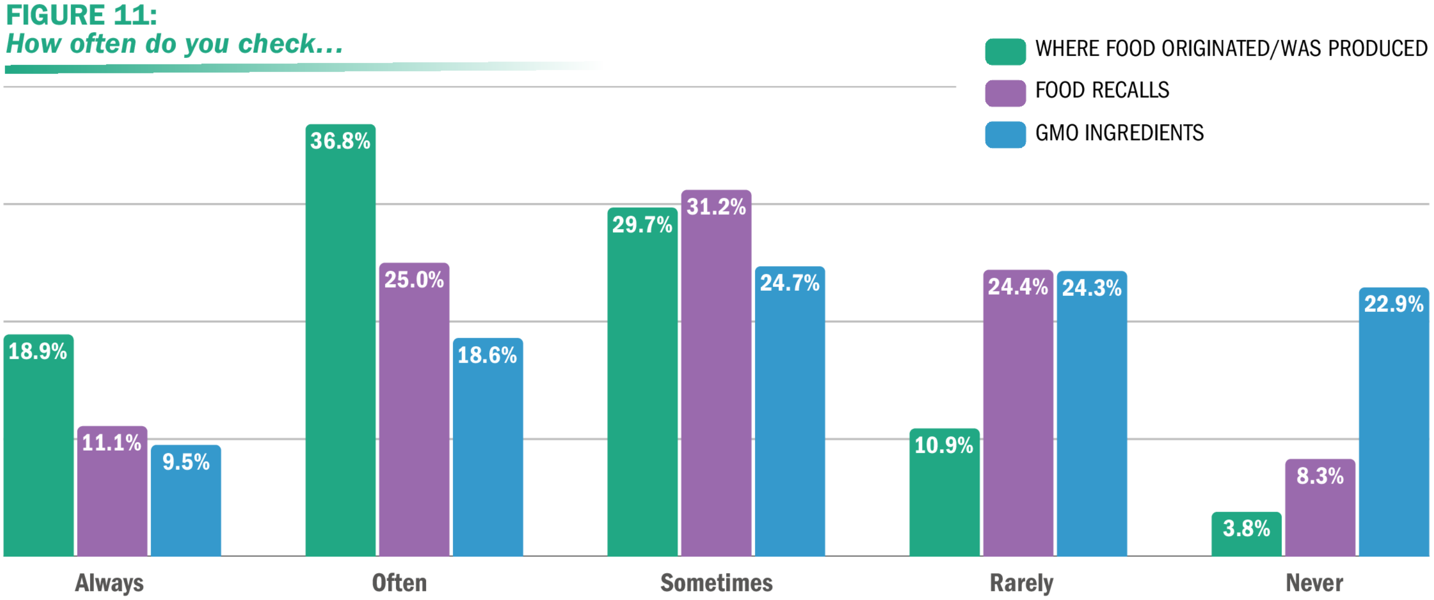
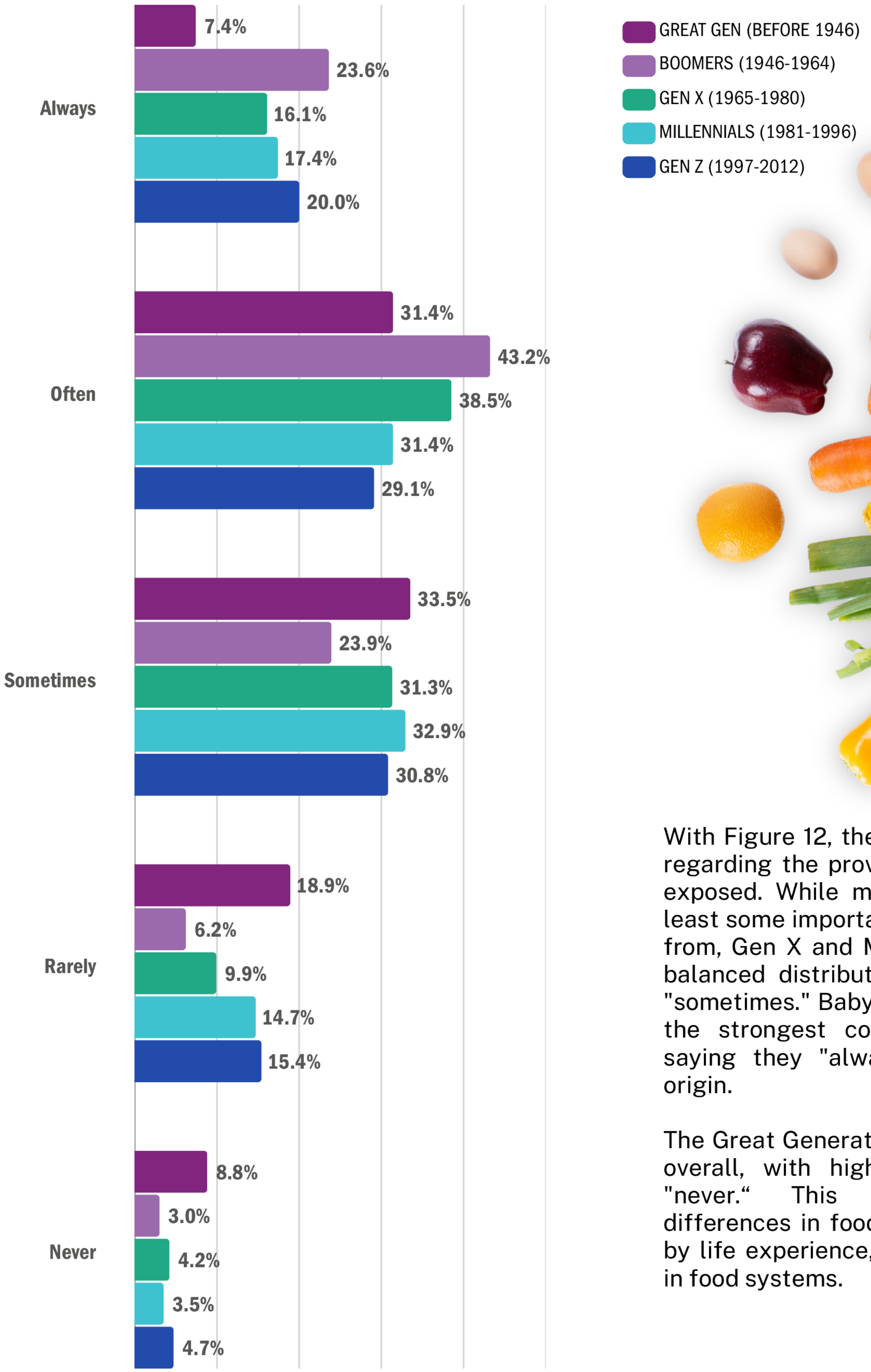


FIGURE 12:
Importance of Where Food Originated or was Produced, by Generation

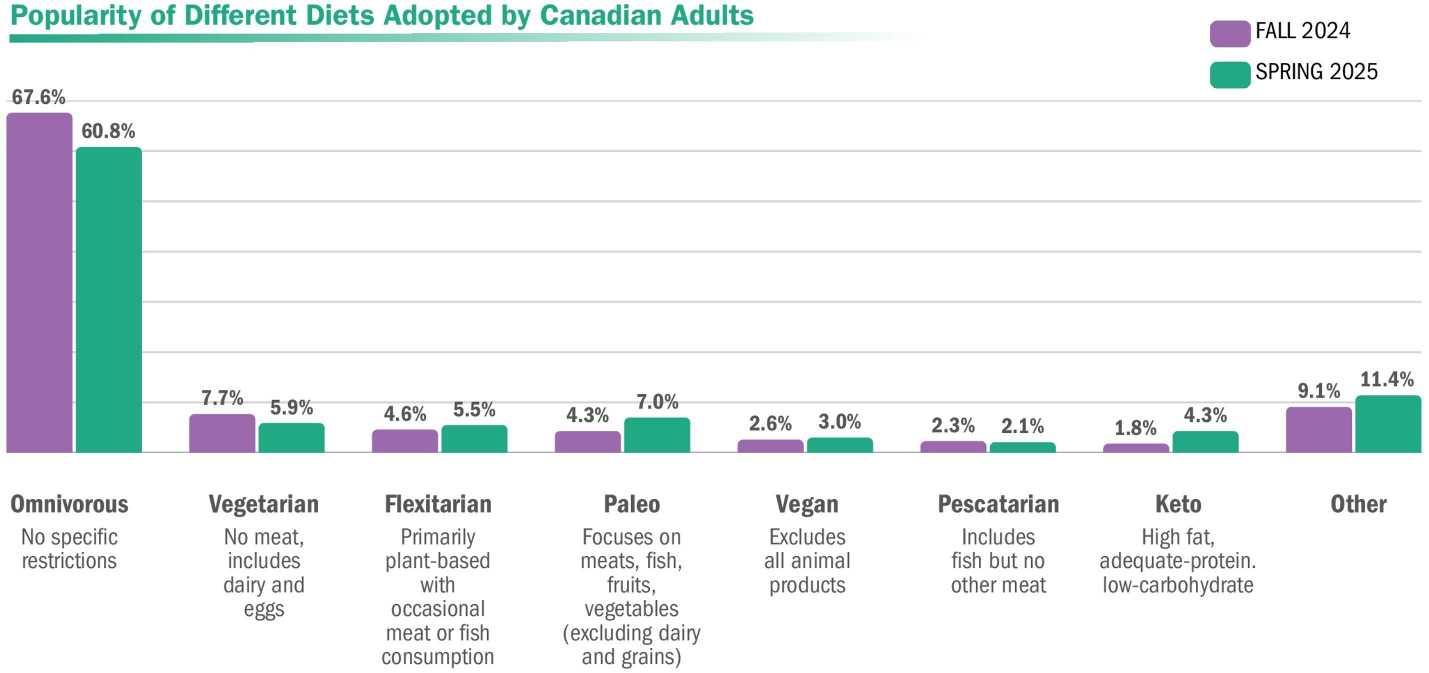


With Figure 12, the generational differences regarding the provenance of food is clearly exposed. While most generations place at least some importance on where food comes from, Gen X and Millennials show the most balanced distribution between "often" and "sometimes." Baby Boomers tend to express the strongest concern, with nearly 67% saying they "always" or "often" consider origin.

The Great Generation is the least concerned overall, with higher rates of "rarely" or "never." This suggests generational differences in food values, likely influenced by life experience, cultural shifts, and trust in food systems.

The data on adopted diets presented in Figure 13 suggests a shift away from traditional omnivorous and vegetarian diets, with notable growth in more specialized or flexible dietary patterns such as keto, paleo, and flexitarian. It may reflect evolving health trends, cultural shifts, or growing access to niche diet options in Canada.

FIGURE 13:
Popularity of Different Diets Adopted by Canadian Adults

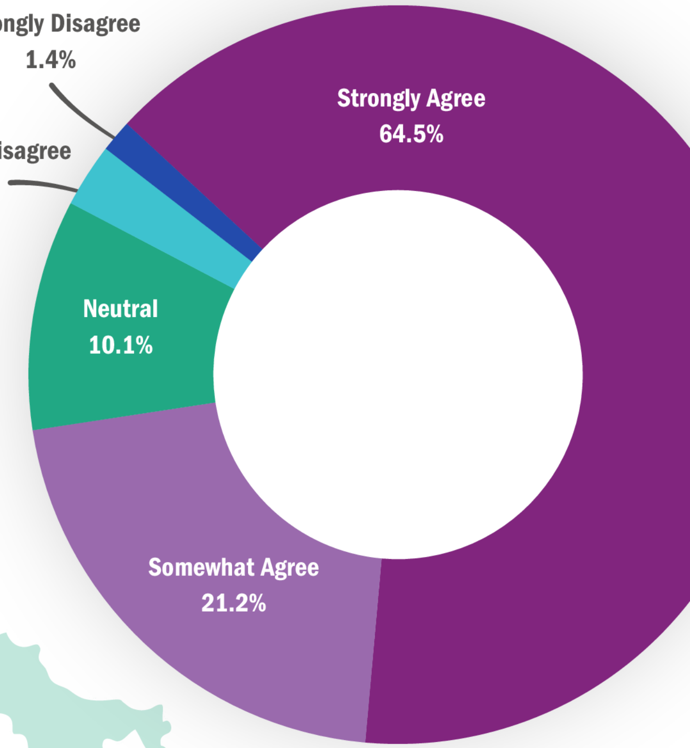


CONSUMER BELIEFS

A question regarding retail taxes on food was added to the Spring 25 Survey. Results shown in Figure 14 reflect broad national consensus in favour of removing taxes on all food items, with minimal resistance.

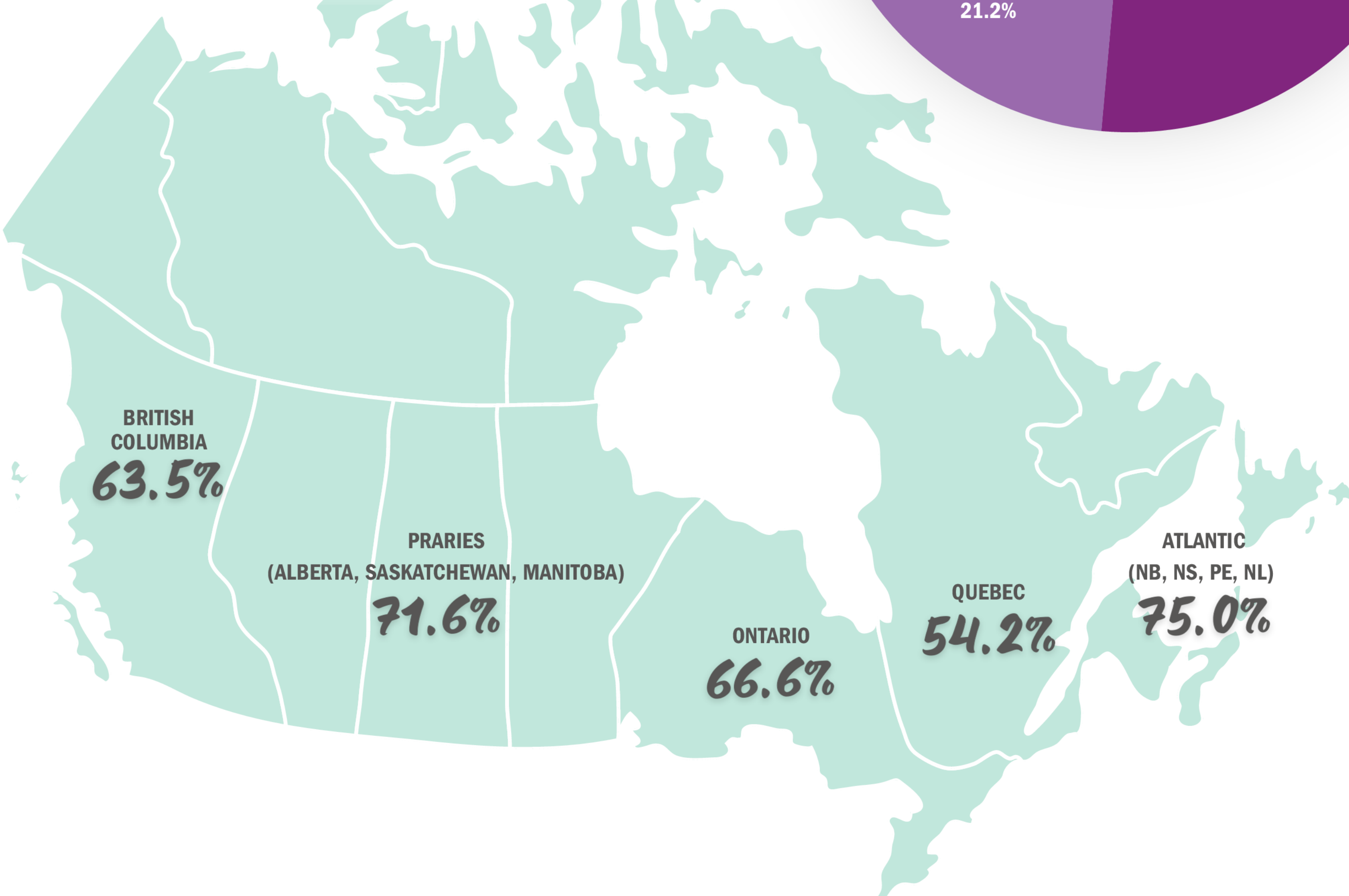
While support is high across the board, there are regional variations. Atlantic Canada and the Prairies are the most supportive, while Quebec is notably less enthusiastic, potentially due to differing tax structures or public sentiment around government revenue.

FIGURE 14:
To what extent do you agree with eliminating retail taxes on all food items in Canada?



Strongly agree answers, by provinces

BRITISH COLUMBIA	63.5%
PRARIES (AB, SK, MB)	71.6%
ONTARIO	66.6%
QUEBEC	54.2%
ATLANTIC (NB, NS, PE, NL)	75.0%



CONSUMER TRUST

Figure 15 shows that trust in all food institutions increased from Fall 2024 to Spring 2025. The largest gain was seen for Independent Grocers. But overall, this indicates a positive shift in consumer confidence across the entire food system.

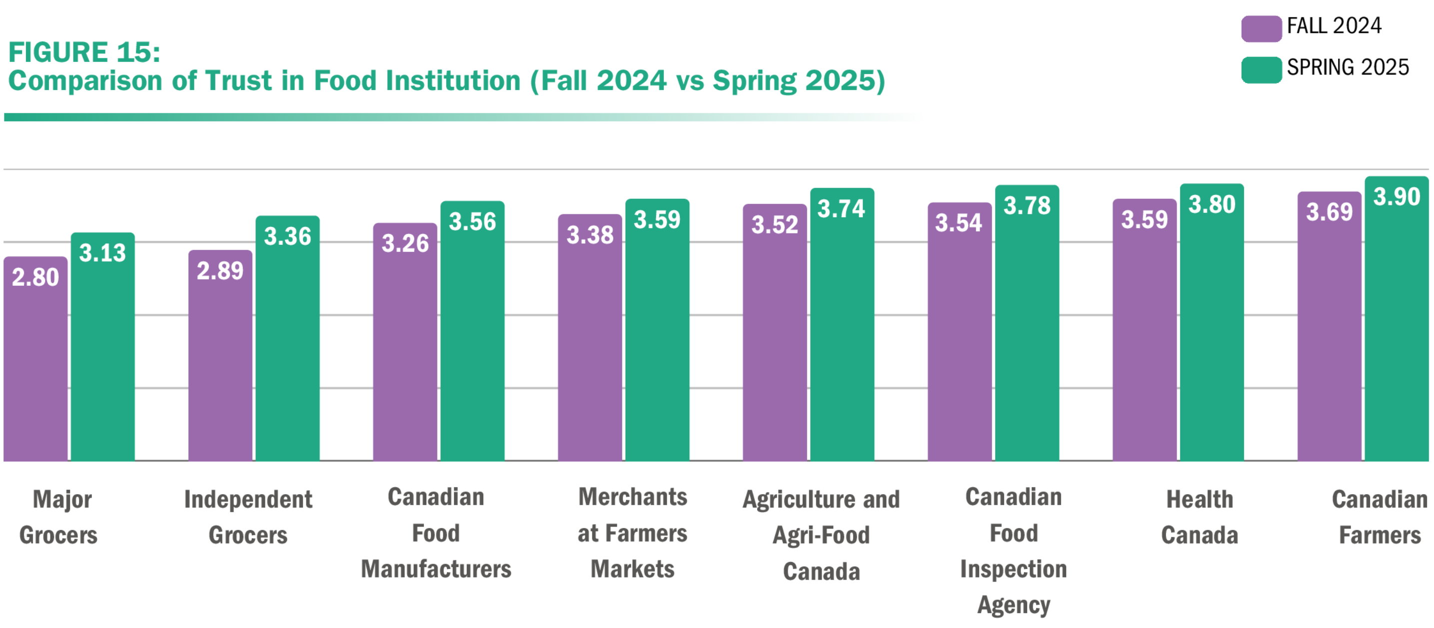
1. Independent Grocers: +0.47 (from 2.89 to 3.36)
2. Major Grocers: +0.33 (from 2.80 to 3.13)
3. Canadian Food Manufacturers: +0.30 (from 3.26 to 3.56)
4. Canadian Food Inspection Agency: +0.24 (from 3.54 to 3.78)
5. Agriculture and Agri-Food Canada: +0.22 (from 3.52 to 3.74)
6. Canadian Farmers: +0.21 (from 3.69 to 3.90)
7. Health Canada: +0.21 (from 3.59 to 3.80)
8. Merchants at Farmers Markets: +0.21 (from 3.38 to 3.59)

CONSUMER TRUST IN ALL FOOD INSTITUTIONS

increased

FROM FALL 2024 TO SPRING 2025, WITH THE LARGEST GAIN SEEN AMONG INDEPENDENT GROCERS.

FIGURE 15:
Comparison of Trust in Food Institution (Fall 2024 vs Spring 2025)

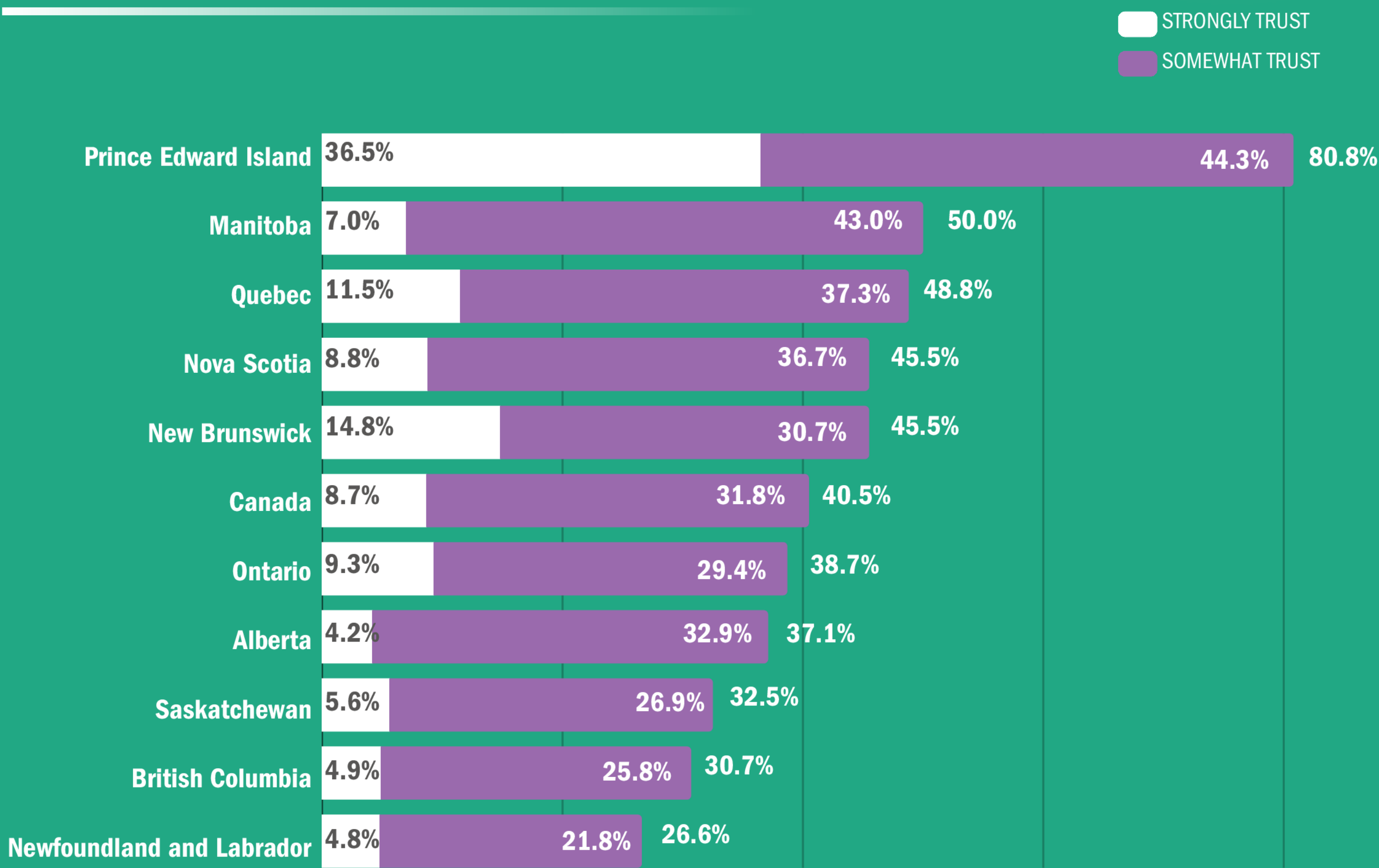


5 = STRONGLY TRUST 1 = STRONGLY DISTRUST

Figure 16 focuses on regional differences in the level of trust felt toward **independent grocers**. The results show that trust in independent grocers varies significantly across provinces. Atlantic provinces (especially PEI) as well as Quebec exhibit much higher levels of trust, likely reflecting stronger local ties and community-based food systems. Meanwhile, Western provinces and Newfoundland show lower trust levels, possibly due to more dominant corporate retail presence or less visibility of independent alternatives.

This data could inform regional marketing and policy strategies aimed at strengthening consumer relationships with local grocers.

FIGURE 16:
Trust Toward Independent Grocers, by Province



SURVEY METHODOLOGY

This survey, conducted from March 4 to 5, 2025 aimed to assess Canadians' perceptions of food-related trust factors, price increases, and behaviours regarding food purchasing and consumption.

SAMPLE SIZE AND POPULATION:

The survey consisted of 2,994 respondents from across Canada.

The sample was designed to be representative of the general Canadian population in terms of demographics such as age, gender, and region.

Respondents were recruited through an online panel, ensuring a diverse cross-section of participants from urban, suburban, and rural areas.

Quotas were applied to ensure appropriate representation across provinces and territories, ensuring that the data accurately reflects the Canadian population.

SURVEY INSTRUMENT:

The survey instrument was a structured questionnaire inspired largely by Purdue University's Consumer Food Insights Report, which is regularly released by the University.

Respondents were asked a series of closed-ended questions, including Likert scales and multiple-choice formats, to gauge their trust in various entities, their food purchasing habits, and their perceptions of price changes.

DATA COLLECTION:

Data collection was facilitated by Caddle Canada, the data provider, via an online survey platform over two days.

The online mode ensured that respondents had access to clear instructions, anonymity, and time to reflect on their answers, reducing potential response bias.

WEIGHTING:

The data was weighted based on the latest Canadian census figures to adjust for over- or under-representation in key demographic variables such as gender, age, region, and education level. This weighting ensures that the results are nationally representative.

QUESTIONNAIRE DESIGN:

The questionnaire covered several key areas:

Food Trust Factors:

Respondents rated their trust in various organizations and entities (e.g., Canadian farmers, major grocers, government bodies like Health Canada and Agriculture and Agri-Food Canada) using a 5-point Likert scale (1 = Strongly distrust, 5 = Strongly trust).

Food Price Perception:

Questions assessed respondents' perceptions of food price changes over the past 12 months and their expectations for the next 12 months. Respondents were also asked how closely they monitored food-related Consumer Price Index (CPI) reports.

Consumer Behaviour:

Questions explored how often respondents purchase specific types of foods (e.g., organic, grass-fed, wild-caught) and their environmental behaviours (e.g., composting, reducing food waste).

Perception of Government Estimates:

Respondents compared their perceived food inflation with official government estimates.

DATA ANALYSIS:

Descriptive statistics were used to summarize the distribution of responses, and average trust scores were calculated for each food trust factor based on the 5-point scale.

Further cross-tabulations and inferential statistical analyses were conducted to explore potential relationships between demographic variables and responses.

MARGIN OF ERROR:

The margin of error for this survey is +/- 1.8%, 19 times out of 20. However, as the survey was conducted online with non-probability sampling, the margin of error is less applicable.

LIMITATIONS:

As this was an online survey, certain population segments, such as Canadians without reliable internet access, may not be fully represented. Self-reporting bias may have affected some responses, particularly those regarding behaviours like food waste and recycling.

This methodology ensures that the findings provide a reliable reflection of Canadian attitudes and behaviours related to food trust, pricing, and consumption as of March 2025.

DALHOUSIE UNIVERSITY

AGRI-FOOD ANALYTICS LAB

supported by:

CADDLE

Dal.ca/aal

Questions? email aal@dal.ca