







# VOLUME 2, ISSUE 1: FALL 2025 TABLE OF CONTENTS

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The Canadian Food
Sentiment Index: BiAnnual 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 30). 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.



AGRI-FOOD ANALYTICS LAB

SUPPORTED BY:



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 third issue includes comparison analysis with the previous report, highlighting emerging trends.

## **KEY INSIGHTS FROM FALL 2025**

Latest CPI Food Inflation in Stores<sup>1</sup>

4.0%

(September 2024: 2.4%)

Latest CPI Food Inflation in Restaurants<sup>1</sup>

3.3%

(September 2024: 3.4%)

Canada's Food Insecurity<sup>2</sup>

25.5%

YoY: (+2.6%)<sup>3</sup>

% of Expenditure on Food (Retail) to Overall Expenditure (Excluding Restaurant & Housing)<sup>7</sup>

20.1%

YoY: (+0.6%)

Food Spending (Retail) per month, per Canadian<sup>4,5</sup>

\$316.80

YoY: (+1.1%)

Food Spending (Service) per month, per Canadian<sup>5,6</sup>

\$204.60

YoY: (+5.9%)

**Current Food Retail/Food Service Ratio** 

61% / 39%

YoY: (no change)





2. PROOF Research Program, uToronto

3. Numbers in parenthesis denote the Year-over-Year variation.

4. Statistics Canada. Table 20-10-0056-01 Monthly retail trade sales by province and territory (x 1,000), up to July 2025

5. Population estimate: Statistics Canada. Table 17-10-0009-01 Population estimates, quarterly, up to Q3

6. Statistics Canada. Table 21-10-0019-01 Monthly survey of food services and drinking places (x 1,000), up to July 2025

7. Statistics Canada Table 20-10-0037-01 — Retail trade, sales by trade group based on the North American Industry Classification System (NAICS), quarterly, inactive (x 1,000).



## **FOOD PRICE EXPERIENCES**



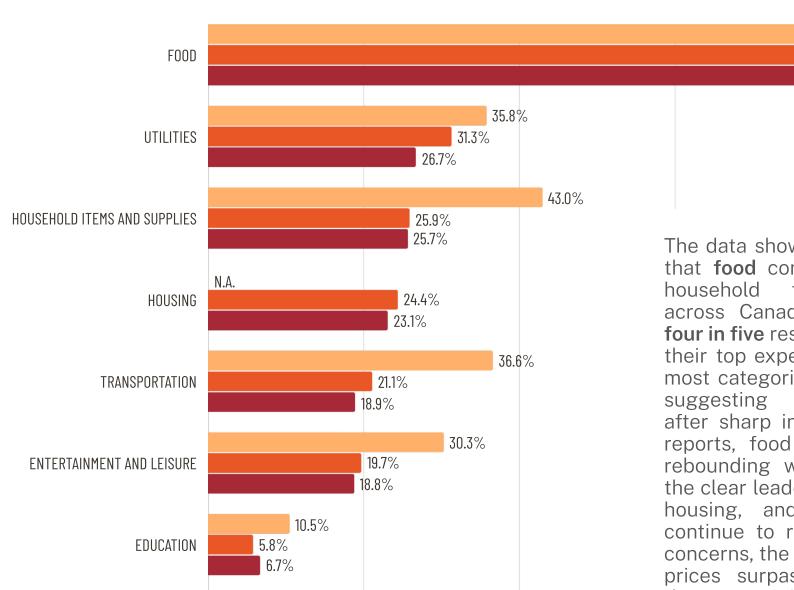
FIGURE 1: For which of the following expenses have prices increased the MOST in the past 12 months? (Please select all that apply)<sup>8</sup>



84.1%

79.7%

80.6%



The data shown in Figure 1 reveal that food continues to dominate financial concerns across Canada, with more than four in five respondents citing it as their top expense pressure. While most categories have levelled off, suggesting some stabilization after sharp increases in previous reports, food and education are rebounding with food remaining the clear leader. Although utilities, housing, and household items continue to rank among the top concerns, the impact of rising food prices surpasses that of these three categories combined.

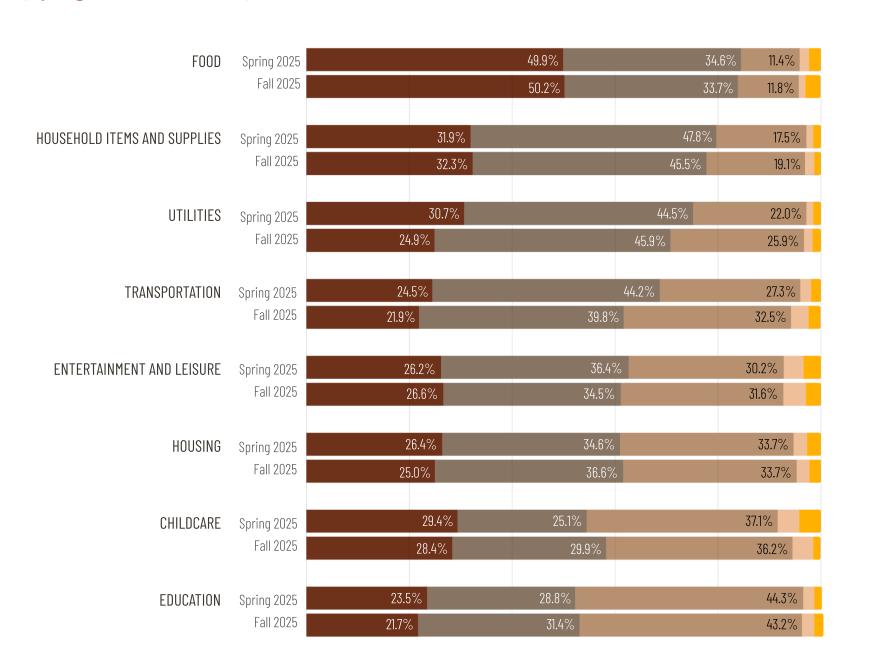
CHILDCARE

9.1%

4.7% 4.7%

<sup>8. &#</sup>x27;Housing' was omitted in the Fall 2024 Survey.

FIGURE 2: Change Of Household Expenses Over The Last 12 Months (Spring 2025 vs Fall 2025)<sup>9</sup>





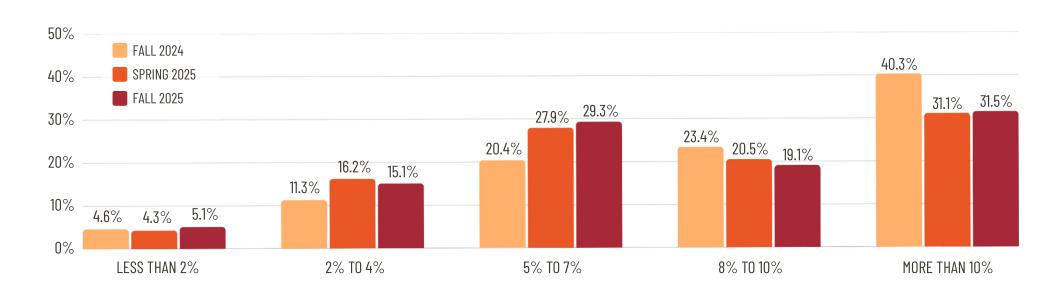


Canadians continue to experience widespread increases in household expenses across most categories. Food stands out as the most affected area: 80% of respondent report higher costs with approximately half saying their food expenses have increased significantly. Similar patterns are seen for household items, utilities, and transportation, although fewer people report steep rises compared to food. Only a small minority in any category saw their costs decrease. Notably, expenses in education and childcare remained relatively stable, with a larger share of respondents indicating no significant change. Overall, the data suggest that cost pressures have persisted into late 2025, particularly for essential goods and services, keeping affordability top of mind for many households.

<sup>9.</sup> Figure 2 excludes 'does not apply' answers to reflect the distribution of results only among households for which the expense category is relevant.

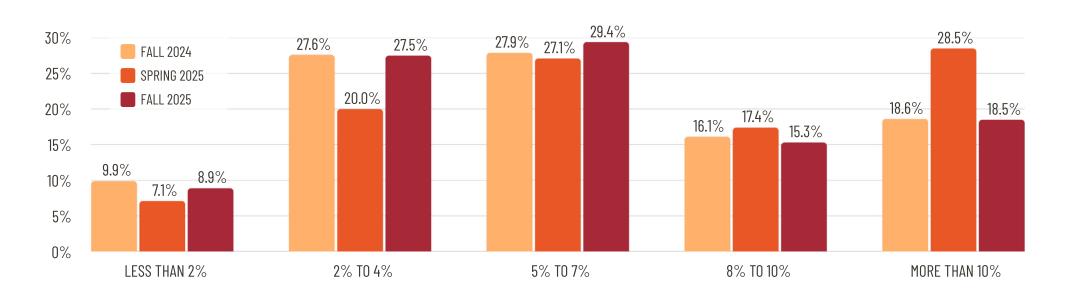
## **FOOD EXPENDITURES**

FIGURE 3: Over the past 12 months, how much do you believe food prices have increased?



Even if their number has decreased, Canadians continue to perceive food prices as rising sharply, with **nearly one in three believing prices have increased by more than 10% over the past year.** While that share is lower than in Fall 2024, more consumers now estimate moderate increases between 5% and 7%, suggesting a perception of slower but still persistent inflation.

FIGURE 4: What do you expect the rate of food price inflation to be over the next 12 months?



Canadians expect food prices to keep rising over the next year, though **fewer anticipate extreme increases compared to Spring 2025.** Most now foresee moderate inflation between 2% and 7%, signalling cautious optimism that food costs may stabilize somewhat in 2026.



## For 2026, Canadians express cautious optimism Regarding inflation

FIGURE 5: Canadians Expecting the Highest Level of Food Inflation by Province in Fall 2025, (Answered Expect More Than 10% Inflation Over Next 12 Months)

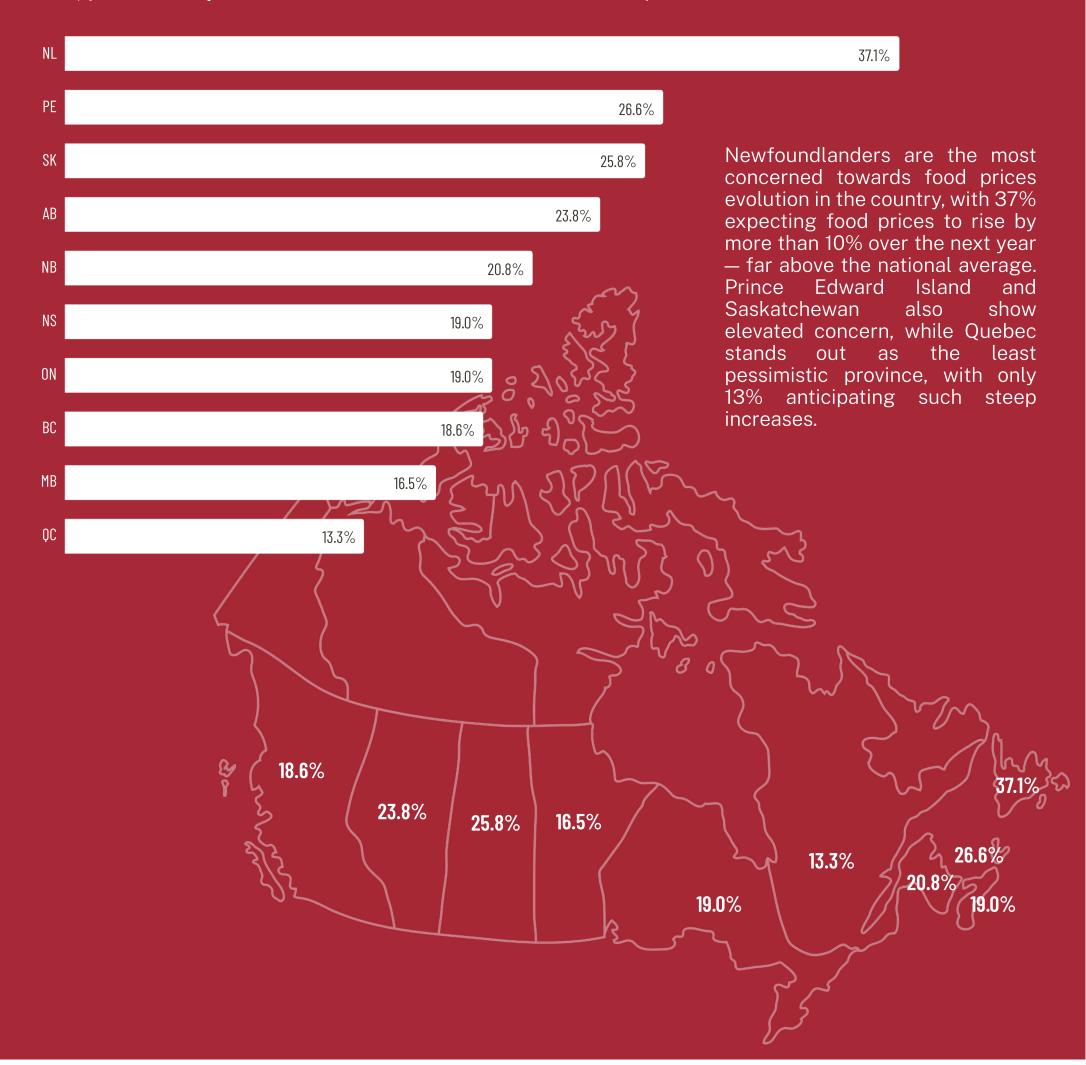


FIGURE 6: Change in Grocery Habits Due to Food Price Inflation<sup>10</sup>

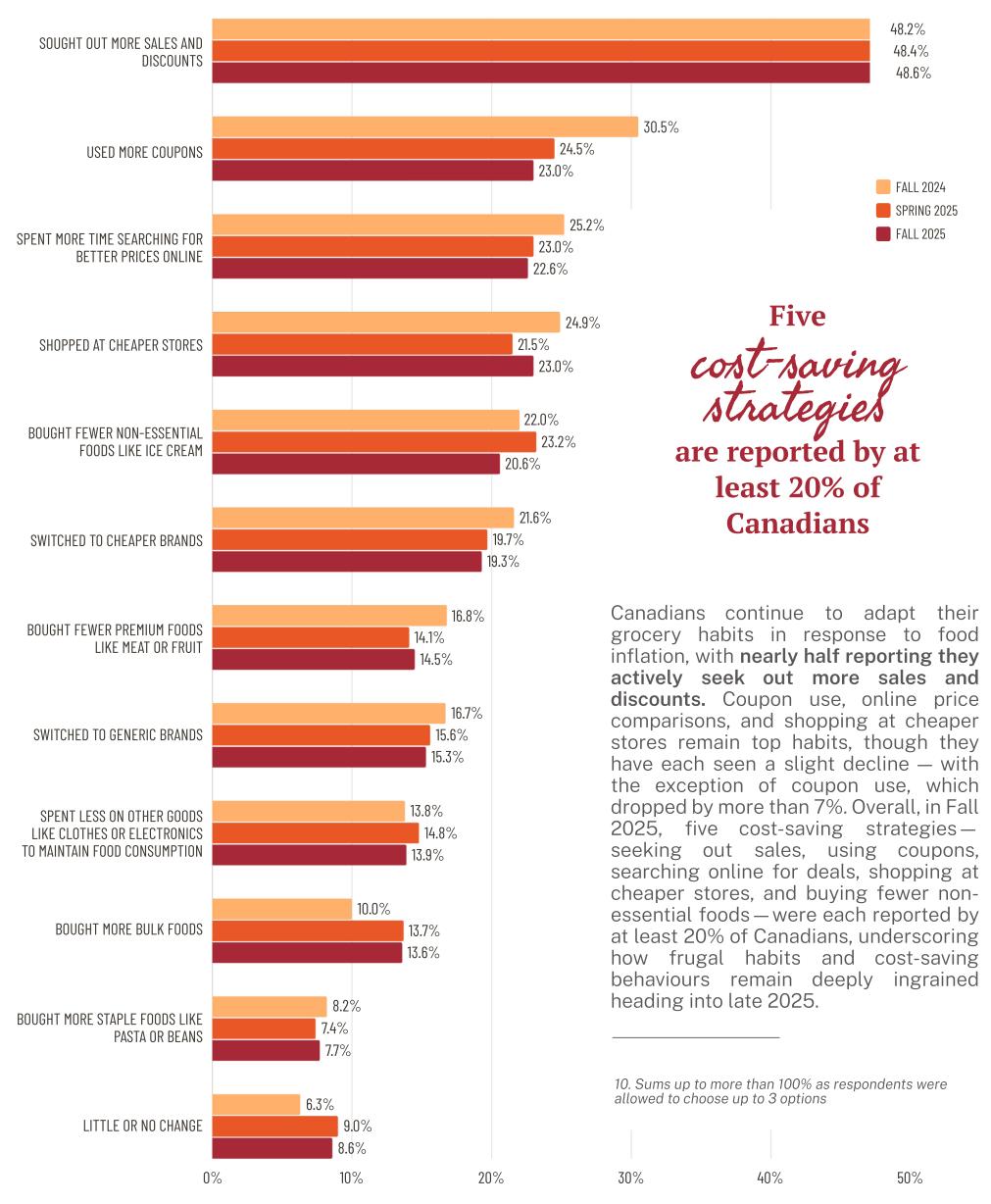
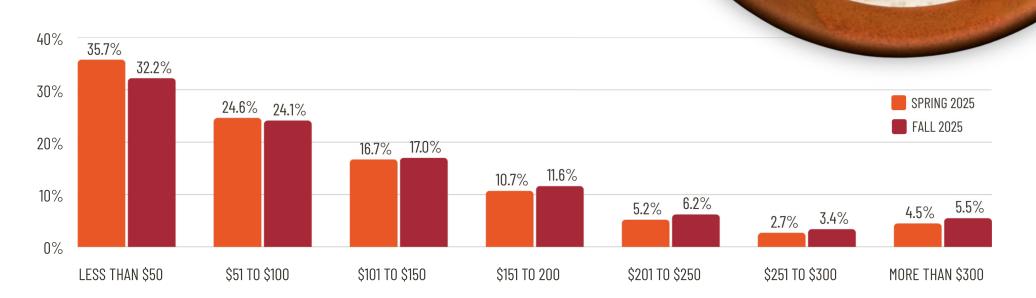


FIGURE 7: On average, how much do you spend on groceries (Food at Home) each month?



Grocery spending continues to climb, with one in five Canadians now spending more than \$600 per month on food at home—up slightly from Spring 2025. Mid-range spending levels between \$300 and \$500 remain the most common, highlighting how persistent food inflation is gradually pushing more households into higher spending brackets. However, since the food price index has increased, we can assume that consumers can't buy the same value of items with their current spending.

FIGURE 8: On average, how much do you spend on dining out or takeout (Food Away from Home) each month?



Spending on dining out or takeout remains modest, with **around one-third of Canadians spending less than \$50 a month** and nearly a quarter spending between \$51 and \$100. While higher spending brackets show slight growth since Spring 2025, the data suggest most households continue to limit restaurant spending amid ongoing price pressures.

# FIGURE 9: Monthly Food Households Expenditure<sup>11</sup>



Average household food spending increased slightly in Fall 2025, reaching \$515 per month compared to \$497 in Spring 2025. Most of the rise came from higher spending on groceries, while dining out remained relatively stable, suggesting Canadians continue to prioritize eating at home to manage costs.

<sup>11.</sup> Mean calculated using midpoints, assigning a value of \$700 for the "More than \$600" category Food at Home and \$325 for the "More than \$300" category Food Away From Home.



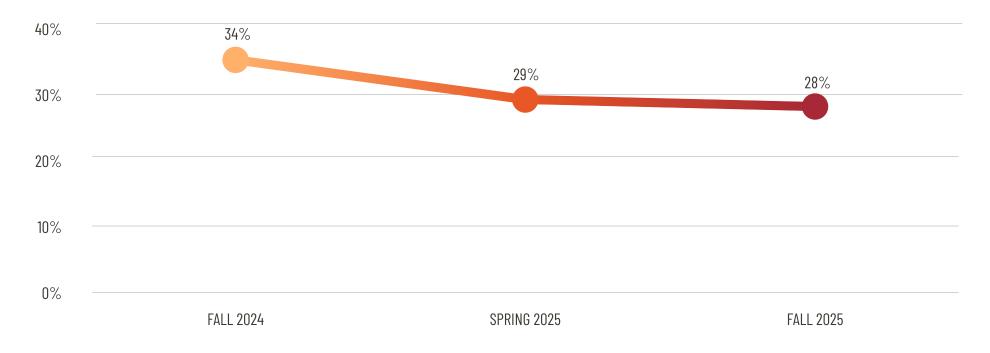


## **FOOD SECURITY**

As seen on the dashboard on page 5, new research conducted by Proof found third а consecutive increase in food security, bringing it to the **record high of** 25.5% in Canadian households. Concerns over nutritional security and strains on food banks persist, keeping Canadians in a very tough spot.



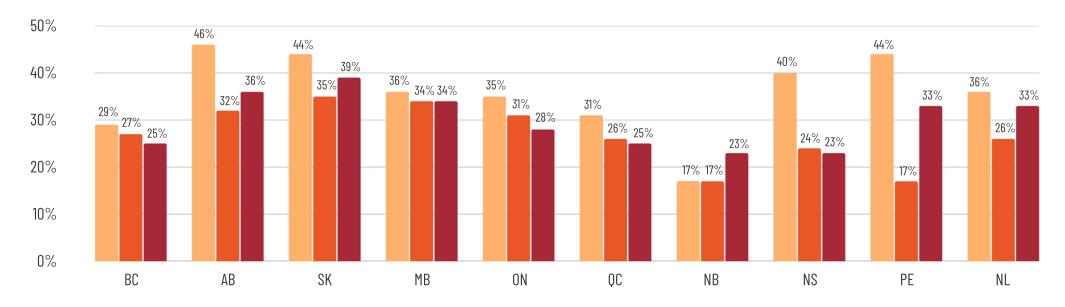
FIGURE 10: Need to Draw from Savings or Borrowing Money to Purchase Food in the Past 12 Months



Percentage of overall respondents having to need to draw from savings or borrow money to pay for food has decreased from 34% in Fall 2024 to 28% in Fall 2025. A clearer picture emerges when these numbers are analyzed by province.

FIGURE 11: Need to Draw from Savings or Borrowing Money to Purchase Food in the Past 12 Months, by Provinces



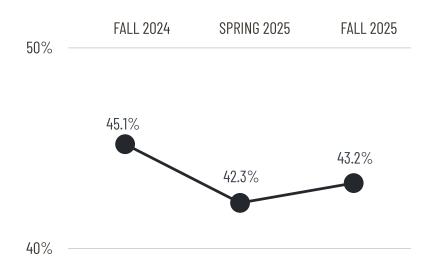


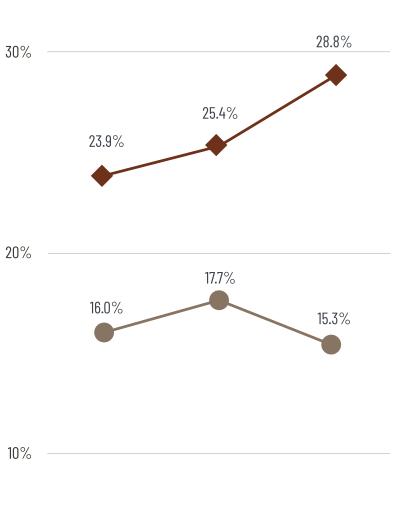
The share of Canadians who needed to use savings or borrow money to buy food has decreased for all provinces from Fall 2024 to Fall 2025 - except New Brunswick where it increased by 6%. Nevertheless, it remains alarmingly high across provinces. Alberta, Saskatchewan and Manitoba continue to show the highest levels of financial strain, while Quebec, New Brunswick and Nova Scotia report the lowest, suggesting regional differences in affordability and household resilience.

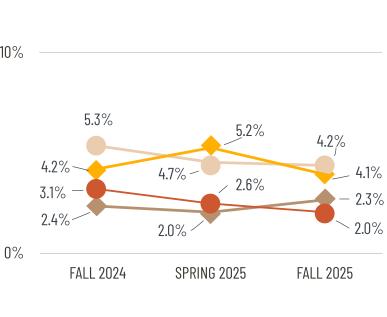


## **FOOD VALUES**

#### FIGURE 12: Food Values Evolution







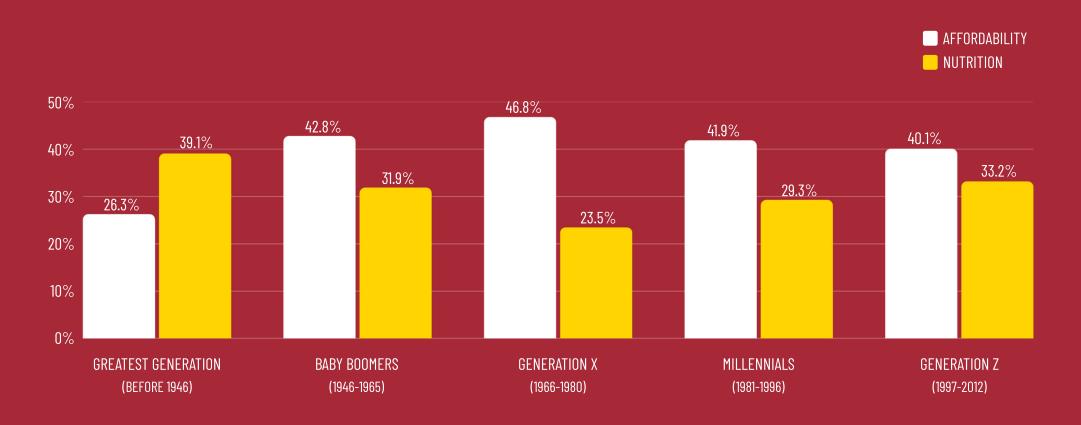


Affordability remains Canadians' top food value, holding steady at just over 43% in Fall 2025 after a brief dip earlier in the year. Nutrition continues to gain importance, rising to nearly 29%, while taste has declined slightly, showing that consumers are prioritizing cost and health over indulgence as economic pressures persist.





FIGURE 13: Importance of Affordability and Nutrition by Generation (Fall 2025)



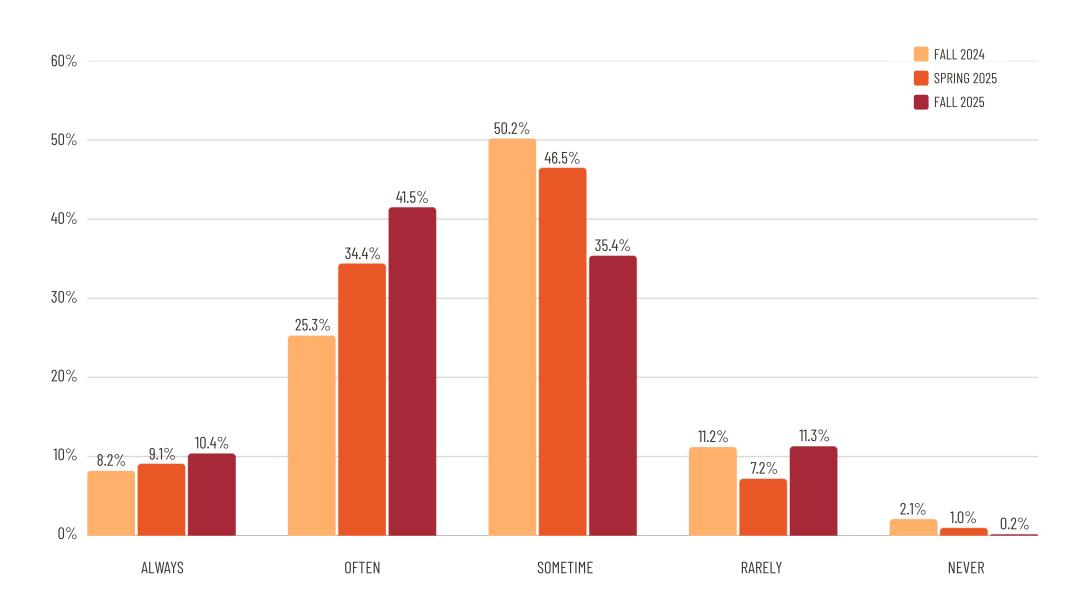
Affordability is the leading concern for each generation category except the Greatest Generation, with nearly half of Gen X respondents ranking it highest among food values. In contrast, Greater Generation place more emphasis on nutrition, showing a generational divide where **younger Canadians** are more focused on managing costs while older consumers prioritize health.



The majority of Canadians, 51.9%, are now always or often choosing local food over other options. A drastic increase as it was 33.5% a year ago.



FIGURE 14: How often do you choose local foods over non-local foods?<sup>12</sup>



Between Fall 2024 and Fall 2025, Canadians have shown a stronger preference for local foods. The share of those who "often" choose local options jumped from 25.3% to 41.5%, while "sometimes" responses fell from 50.2% to 35.4%. This suggests that occasional buyers are becoming regular supporters of local products, with a modest rise in those who "always" buy local as well. The proportion of consumers who "rarely" or "never" buy local remained stable, indicating little change among the least engaged. Overall, the trend points to growing loyalty toward local foods and heightened awareness of sustainability and food origin.

YoY VARIATION:
Always +2.2%
Often +16.2%
Sometime -14.8%
Rarely +0.1%
Never -1.9%

<sup>12.</sup> The total is less than 100% as answers "I'm not sure" are excluded from the graph.

## **CONSUMER BEHAVIOURS**

TABLE 1

Value-Based Behaviours <sup>13</sup>	Fall 2024	Spring 2025	Fall 2025	YoY Variation
Check nutrition label on products before buying new foods	3.47	3.47	3.56	0.09
Choose local foods over non-local foods	3.27	3.38	3.35	0.08
Choose generic or store brand foods over brand-name foods	2.91	3.50	3.50	0.59
Choose wild-caught fish over farm-raised fish	3.19	3.29	2.59	-0.60
Choose organic foods over non-organic foods	2.52	2.54	2.70	0.18
Choose cage-free eggs over conventional eggs	2.57	2.72	2.70	0.13
Choose grass-fed beef over conventional beef	2.69	2.85	2.93	0.24
Choose plant-based proteins over animal proteins	2.43	2.34	2.34	-0.09

Canadians are showing stronger value-based food choices in 2025, especially around affordability and transparency. The biggest increase came from choosing generic or store-brand foods, which rose sharply year over year (+0.59), reflecting consumers' efforts to manage budgets amid inflation. Meanwhile, checking nutrition labels and preferring local foods also became slightly more common. However, interest in wild-caught fish declined significantly (-0.60), suggesting that price sensitivity is outweighing environmental or ethical considerations for many households.

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



Risk-Based Behaviours <sup>13</sup>	Fall 2024	Spring 2025	Fall 2025	YoY Variation
Check the use-by / sell-by date on products at the store	4.02	4.09	4.08	0.06
Throw away food when it is past the Best Before date	3.02	3.02	2.84	-0.18
Eat fresh fruits and vegetables without washing them	2.34	2.32	2.38	0.04
Eat rare or undercooked meat	1.96	1.81	1.92	-0.04
Eat raw dough or batter	1.84	1.81	1.96	0.12

Canadians remain cautious about food safety, with most consistently checking use-by or sell-by dates when shopping. However, fewer people are discarding food past its Best Before date, suggesting growing efforts to reduce waste amid high food costs. Riskier behaviours such as eating fruits and vegetables without washing them or eating raw dough remain uncommon, though slightly more respondents admitted to them in Fall 2025.

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

<sup>13.</sup> Weighted means adjusted to exclude 'I am not sure' answers. The results for Fall 2024 differ slightly from Fall 2024 Report given that this distinction had not been made at the time.

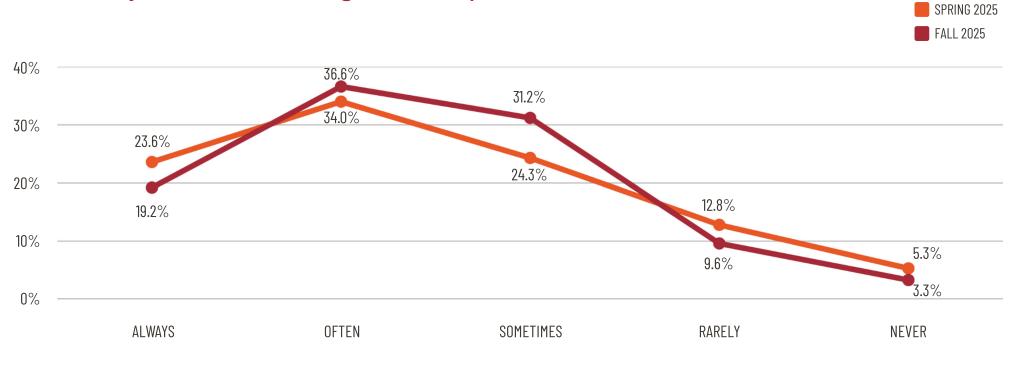


TABLE 3

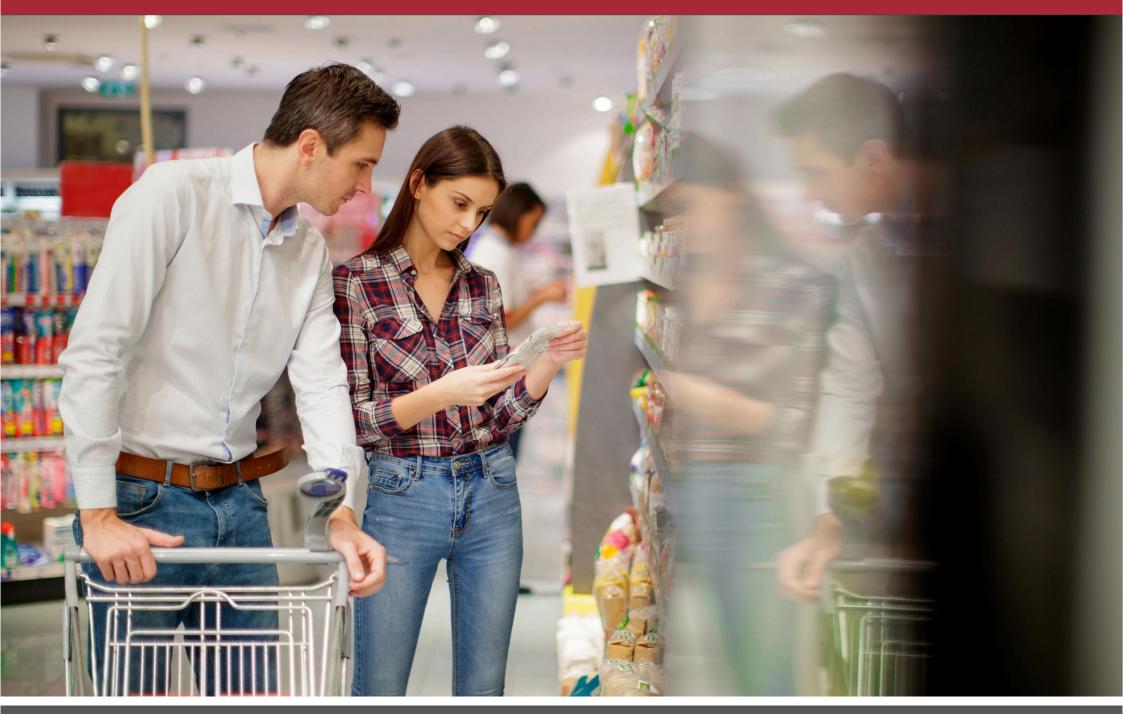
Sustainability-Based Behaviours <sup>13</sup>	Fall 2024	Spring 2025	Fall 2025	YoY Variation
Recycle food packaging	4.25	4.34	4.34	0.09
Take steps to reduce food waste at home	4.08	4.16	4.13	0.05
Compost food scraps	3.49	3.48	3.57	0.08



FIGURE 15a: How often do you check where food originated or was produced

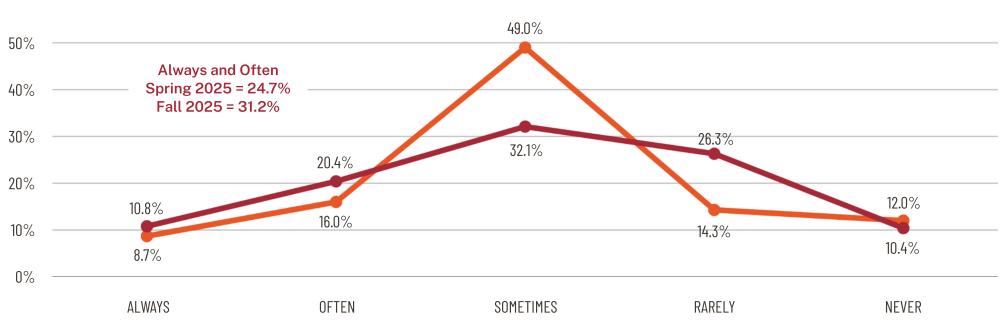


More Canadians are paying attention to where their food comes from, with "often" being the most common response in Fall 2025. The share of those who 'sometimes' check food origin has also increased slightly, while the proportion of those checking 'rarely' and 'never' declined, suggesting growing consumer interest in transparency and local sourcing.



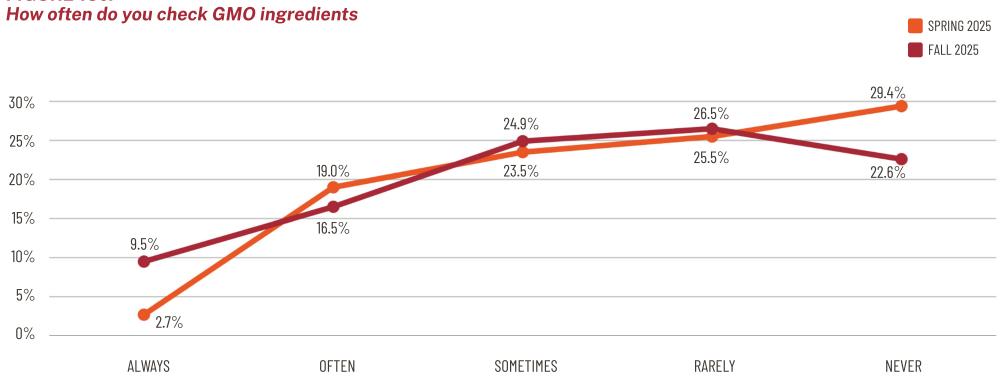






More Canadians are now checking food recalls regularly in Fall 2025 compared to Spring 2025, with "Always" and "Often" answers rising by 6.5 %. Fewer say they do so only occasionally, indicating a rise in active food safety awareness despite ongoing media fatigue around recalls.

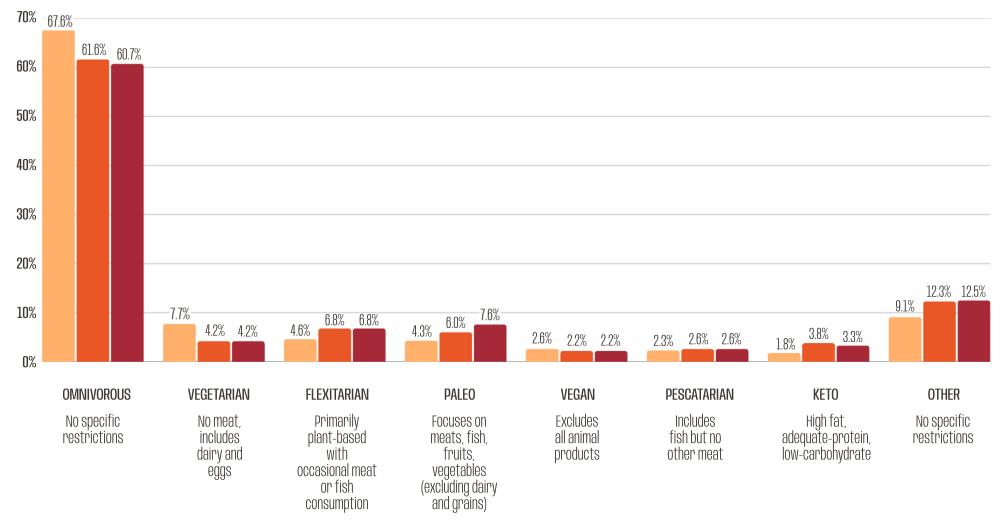
FIGURE 15c:



Interest in checking for GMO ingredients remains modest. While most Canadians say they rarely or never look for this information, a small but steady segment continues to monitor labels for GMO content. This suggests that, for most consumers, genetic modification ranks as a secondary consideration, behind factors such as price, nutrition, and overall food safety.

# FIGURE 16: Popularity Of Different Diets





With meat prices rising over the past 12 months, it's not surprising to see a **6.9% decline in the omnivorous diet.** Diets on the rise include Paleo (+3.3%), and Flexitarian (+2.2%) and the blanket option 'Other' that rose by 3.4%. Surprisingly, the vegetarian diet recorded a 3.5% decrease.

#### **YOY VARIATION:**

**Omnivorous** -6.90 Vegetarian -3.50 **Flexitarian** 2.20 Paleo 3.30 -0.40 Vegan **Pescatarian** 0.30 Keto 1.50 3.40 **Other** 





Interesting findings help explain the decline of the omnivorous diet: among respondents in Fall 2025 who reported dipping into their savings to pay for food, 50.8% follow an omnivorous diet. This proportion rises to 54.7% among those with an annual income below \$75,000.

Finally, one group of consumers stands out clearly: families with three or more children, 65.2% of whom follow an omnivorous diet.

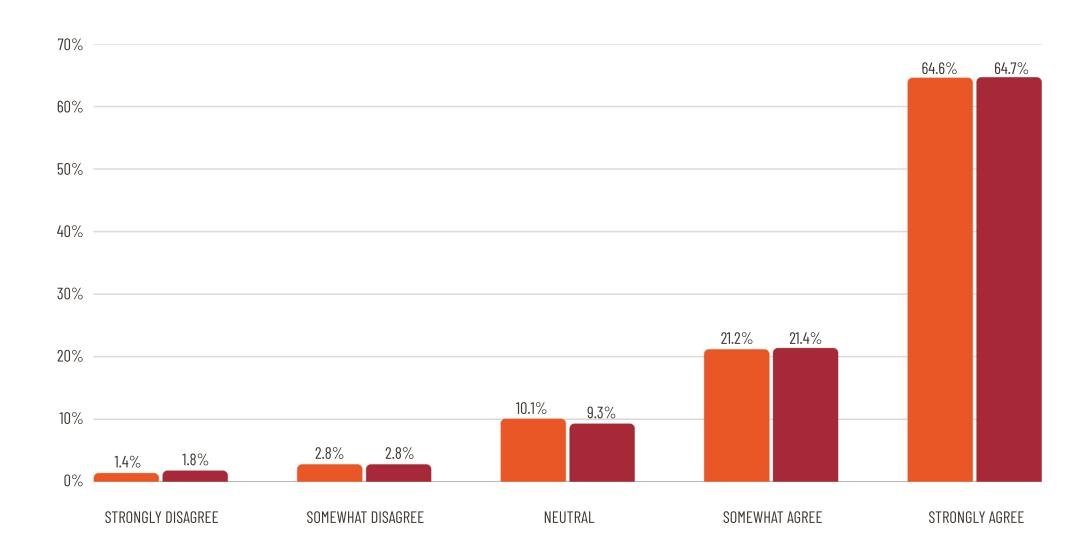




## **CONSUMER BELIEFS**

FIGURE 17: To what extent do you agree with eliminating retail taxes on all food items in Canada





A question regarding retail taxes on food was added to the spring 2025 Survey. Results shown in Figure 17 show very little change to the results from six months ago and reflect broad national consensus in favour of removing taxes on all food items at 86.1%, a slight 0.3% higher than in the spring.







Support for eliminating retail taxes on all food items is strong across generations, with the Greatest Generation showing a notable jump to 85% agreement in Fall 2025. Baby Boomers and younger generations also show broad support, reflecting a shared belief that food should remain tax-free amid ongoing affordability concerns.

FIGURE 18: Strongly Agree To Eliminate Retail Taxes On All Food Items In Canada, By Generation In Fall 2025

SPRING 2025

FALL 2025

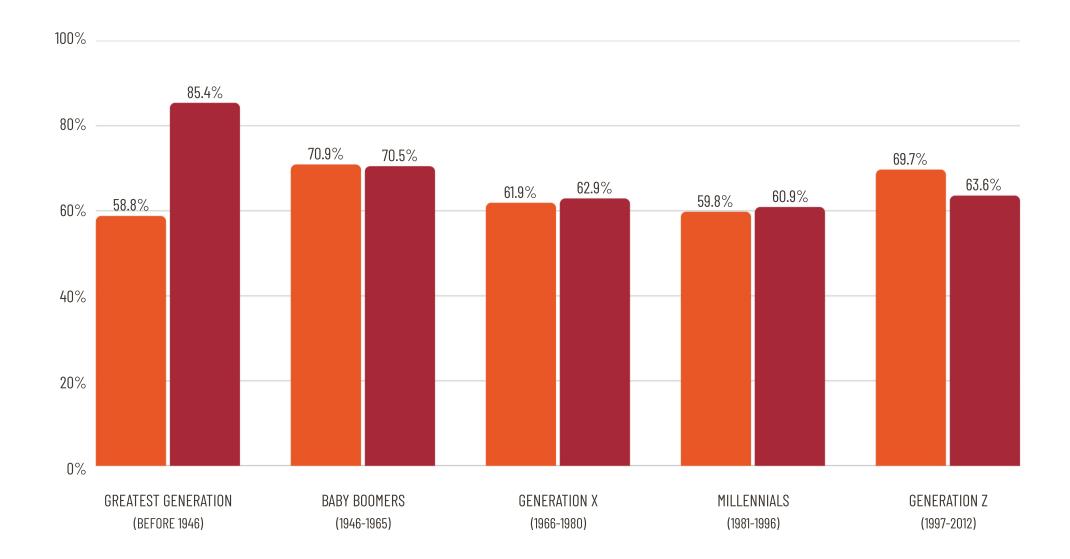


TABLE 4
To what extent do you agree with the statement<sup>13</sup>

	Fall 2024	Spring 2025	Fall 2025	YoY Variation
Organic food is more nutritious than non-organic food	2.97	2.94	2.90	-0.07
Gluten-free food is healthier for you	2.70	2.70	2.67	-0.03
Plant-based milk is healthier than dairy milk	2.60	2.57	2.58	-0.02

Canadians' perceptions of health-related food claims have remained stable, with only slight declines across all categories. Belief in the superior nutrition of organic foods and the health benefits of gluten-free or plant-based milk options has softened marginally, suggesting growing consumer skepticism or a shift toward more evidence-based views on food health claims.

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

13. Weighted means adjusted to exclude 'I am not sure' answers. The results for Fall 2024 differ slightly from Fall 2024 Report given that this distinction had not been made at the time.



## **CONSUMER TRUST**

FIGURE 19: Comparison of Trust in Food Institution<sup>14</sup>

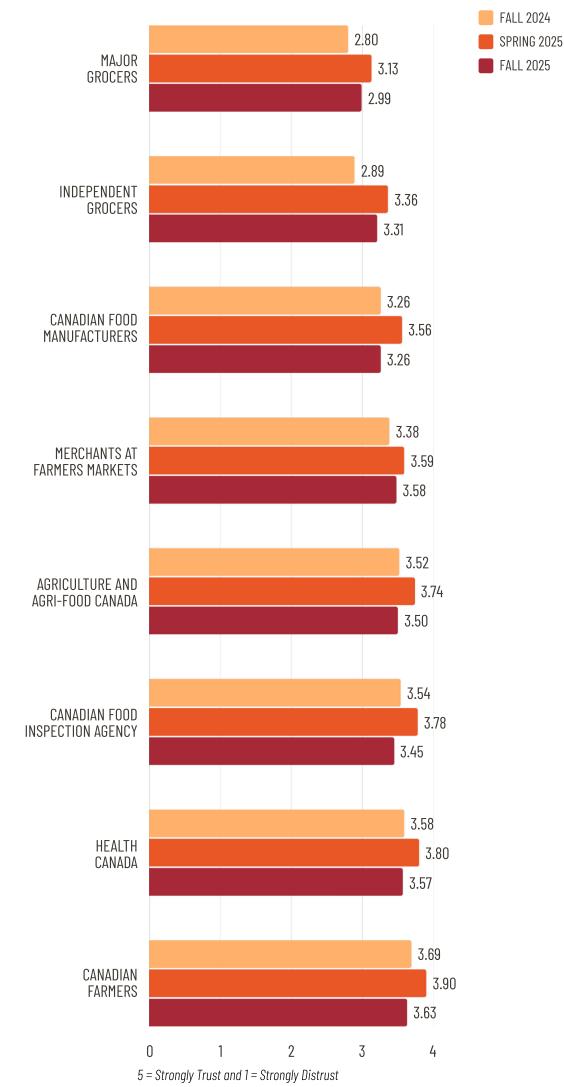




Figure 19 compares levels of trust in key Canadian food system actors across three survey waves and shows that trust has generally weakened slightly between Fall 2024 and Fall 2025. While Canadian farmers remain the most trusted group overall, their average rating slipped modestly from 3.69 to 3.63. Health Canada and the Agriculture and Agri-Food Canada follow closely, but both also saw small declines. Canadian Food Inspection Agency and merchants at farmers' markets maintained mid-range trust levels with minor decreases. Trust in **Canadian food** manufacturers, independent grocers, and major grocers remains comparatively lower, though the gap between independent and major grocers has narrowed somewhat. Overall. these results suggest confidence across Canada's food system actors has softened slightly heading into late 2025, despite farmers and public institutions continuing to lead in perceived trustworthiness.

<sup>14.</sup> Weighted means adjusted to exclude 'I am not sure' answers.

## **METHODOLOGY**

This survey, conducted on **October 9**, **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 2,977 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:

<u>Food Trust Factors:</u> 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).

<u>Food Price Perception:</u> 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).

<u>Perception of Government Estimates:</u> 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 Likert 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 October 2025.





### **AGRI-FOOD ANALYTICS LAB**

SUPPORTED BY:





Questions? Email aal@dal.ca



