DALHOUSIE UNIVERSITY | AGRI-FOOD ANALYTICS LAB

SUPPORTED BY: CADDLE

VOLUME 3, ISSUE 1:
FALL 2026

CANADIAN FOOD SENTIMENT INDEX

BI-ANNUAL INSIGHT REPORT

**Agri-Food Analytics Lab,
Dalhousie University**



VOLUME 3, ISSUE 1: FALL 2026

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‘Canada’s food landscape is changing, and so are Canadians.

The Food Sentiment Index tracks how consumer attitudes, priorities, and behaviours are shifting and where they may be heading.’



INTRODUCTION

The **Canadian Food Sentiment Index: Bi-Annual Insight Report** is a flagship initiative of Dalhousie University's Agri-Food Analytics Lab, supported by Caddle Insights. This comprehensive report measures Canadians' perceptions and attitudes across a broad range of food-related issues, drawing on responses from approximately 3,000 Canadians every six months (for methodological details, see page 38). By repeating a core set of questions in each survey cycle, the Index tracks changes in consumer sentiment over time, providing consistent and meaningful insights into emerging trends.

Inspired by Purdue University's Consumer Food Insights Report, the Index examines six key themes:

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

Together, these measures provide insight into how Canadians perceive food affordability, quality, security, and trust, offering valuable information for industry stakeholders, policymakers, researchers, and the public.

This fifth issue expands the comparative analysis with previous editions, highlighting emerging trends and shifts in Canadian attitudes and behaviours toward food. Since last fall, Canada's food and consumer landscape has continued to evolve. The Canadian population has experienced a modest decline following policy changes affecting non-permanent residents, while food inflation remains a significant concern for households. At the same time, **affordability pressures, trade tensions with the United States, evolving dietary preferences, new nutrition-labelling requirements, and growing interest in health and wellness** are influencing how Canadians shop for and think about food. Together, these developments are reshaping purchasing priorities, perceptions of value, and expectations of Canada's food system, providing important context for the changes documented in this edition of the Canadian Food Sentiment Index.

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Latest CPI Food Inflation in Stores[1]:

2.8%

(August 2025: 3.5%)

Latest CPI Food Inflation in Restaurants[1]:

3.1%

(August 2025: 3.3%)

Food Spending (Retail) per month, per Canadian[4, 5]:

$319.06

YoY: (-0.85%)[2]

Food Spending (Service) per month, per Canadian[5, 6]:

$213.66

YoY: (+ 6.47%)[2]

Canada's Food Insecurity[3]:

24.0%

YoY: (-1.7 percentage point)[2]

Current Food Retail/Food Service Ratio:

59.9% / 40.1%

YoY: (Retail Food down 1.7%)[2]

% of Expenditure on Food (Retail) to Overall Expenditure (Excluding Restaurant and Housing)[7]:

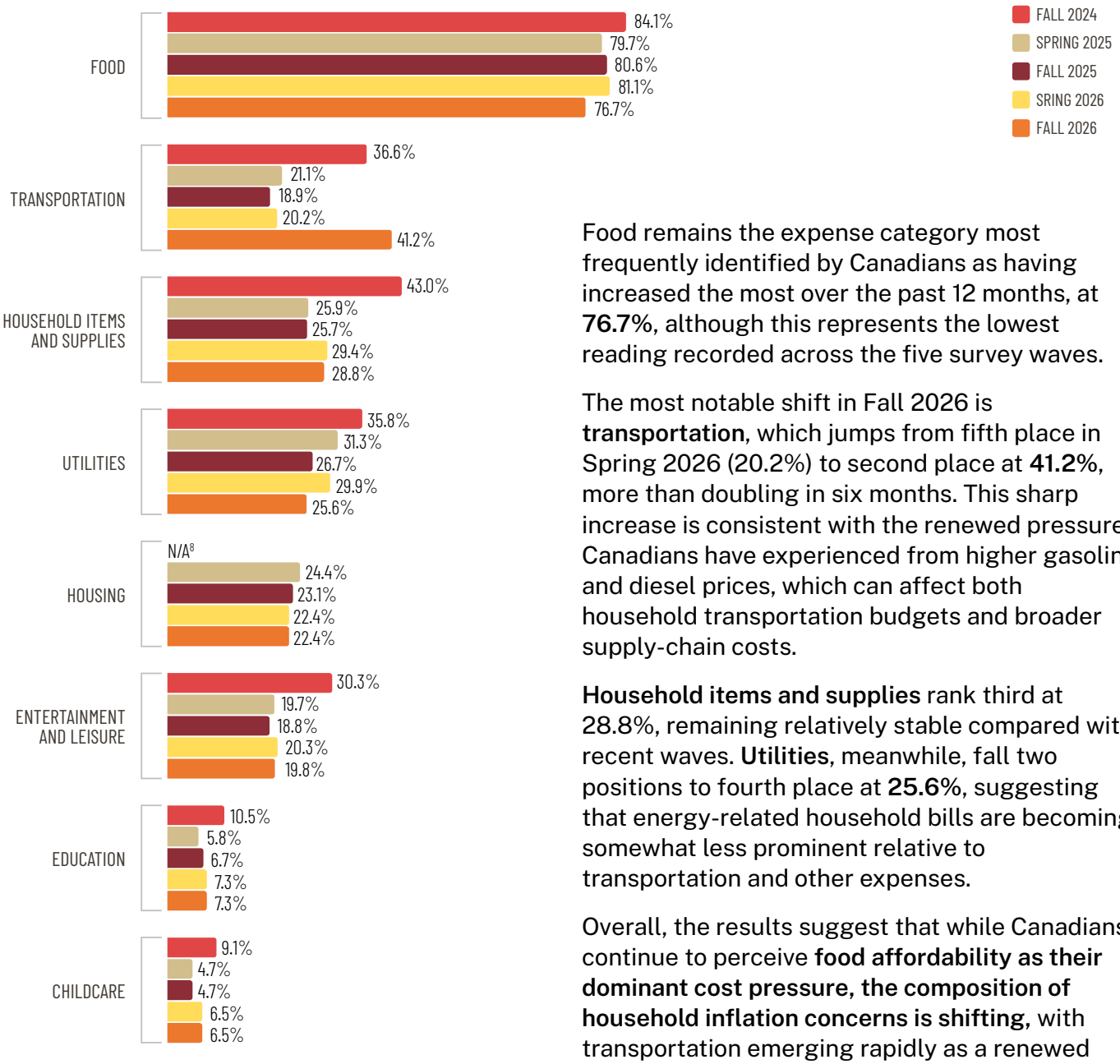
17.8%

YoY: (-1.2%)[2]

1: Statistics Canada, August 2026
2: Numbers in parenthesis denote the Year-over-Year variation.
3: PROOF Research Program, uToronto
4: Statistics Canada. Table 20-10-0056-01 Monthly retail trade sales by province and territory (x 1,000), Food and Beverage Retailers [445], seasonally adjusted, up to June 2026
5: Statistics Canada. Table 17-10-0009-01 Population estimates, quarterly, up to Q2 2026
6: Statistics Canada. Table 21-10-0019-01 Monthly survey of food services and drinking places (x 1,000), seasonally adjusted, up to June 2026
7: Statistics Canada. Table 20-10-0056-01 Monthly retail trade sales by province and territory (x 1,000), NAICF Retail trade [44-45] up to June 2026

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)



8. 'Housing' was omitted in the Fall 2024 Survey

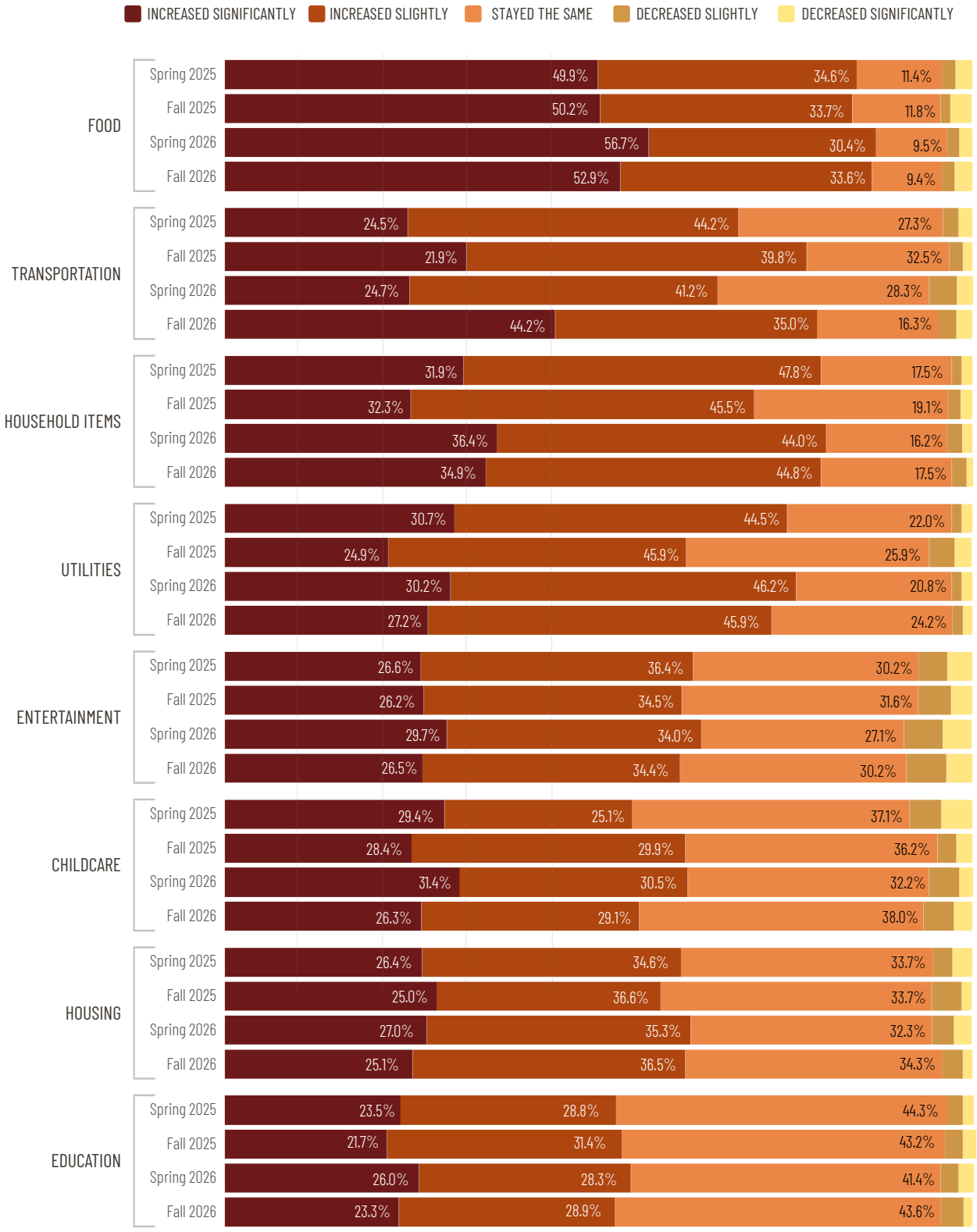
Food remains the expense category most frequently identified by Canadians as having increased the most over the past 12 months, at **76.7%**, although this represents the lowest reading recorded across the five survey waves.

The most notable shift in Fall 2026 is **transportation**, which jumps from fifth place in Spring 2026 (20.2%) to second place at **41.2%**, more than doubling in six months. This sharp increase is consistent with the renewed pressure Canadians have experienced from higher gasoline and diesel prices, which can affect both household transportation budgets and broader supply-chain costs.

Household items and supplies rank third at 28.8%, remaining relatively stable compared with recent waves. **Utilities**, meanwhile, fall two positions to fourth place at **25.6%**, suggesting that energy-related household bills are becoming somewhat less prominent relative to transportation and other expenses.

Overall, the results suggest that while Canadians continue to perceive **food affordability as their dominant cost pressure, the composition of household inflation concerns is shifting,** with transportation emerging rapidly as a renewed source of financial strain

FIGURE 2:
Change of Household Expenses Over the Last 12 Months[9]



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

When compared to Spring 2026, Fall 2026 results suggest some easing in perceived household cost pressures across several major categories, although there are notable exceptions.

Among the four categories most frequently associated with rising costs, the share of respondents reporting that prices had “increased significantly” declined modestly for **food, household items and utilities. Transportation** moved in the opposite direction, with 44.2% of respondents reporting a significant increase in costs. This placed transportation second among household expense categories and highlights its growing importance as a source of financial pressure for Canadian households.

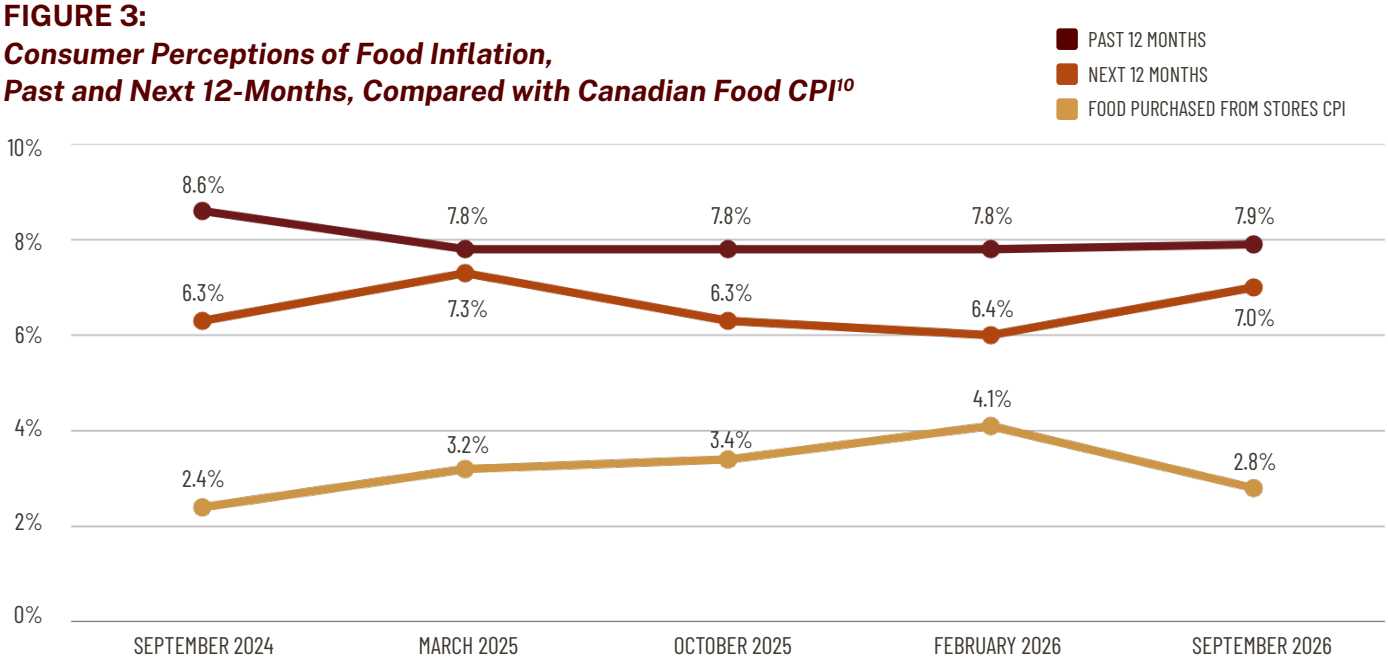
Food remains the most persistent source of household price pressure, but perceptions are beginning to ease: 52.9% report prices increased significantly, down from 56.7% in Spring 2026, while 86.5% still report at least some increase. **Household items and supplies** remained elevated, with 79.7% reporting either significant or slight increases, while utilities showed comparatively more moderate perceptions of price growth. **Housing** and **entertainment** also appear relatively stable, with roughly one-third of respondents reporting prices had stayed the same (34.3% and 30.2%, respectively).

Overall, the results point to a redistribution rather than a disappearance of affordability pressures, with transportation becoming substantially more prominent in Canadian household budgets in Fall 2026.



FOOD EXPENDITURES

FIGURE 3:
Consumer Perceptions of Food Inflation, Past and Next 12-Months, Compared with Canadian Food CPI[10]



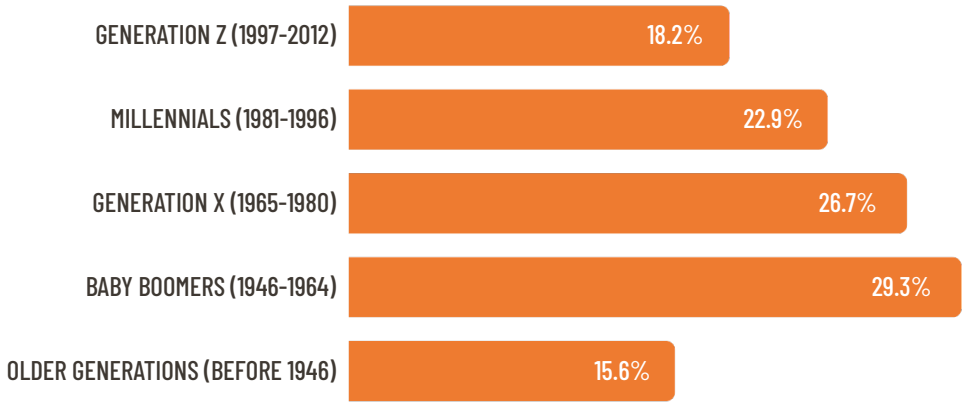
10. September 2026 CPI not yet available; August 2026 grocery CPI shown. ***Survey estimates calculated from response-band midpoints, the response options were as follows: Less than 2%, 2% to 4%, 5% to 7%, 8% to 10% and More than 10%, and assigning a 12% value for the category 'More than 10%'.***

Consumer perceptions of food inflation remain significantly higher than measured grocery inflation. The estimated rate of food inflation perceived over the previous 12 months declined from 8.6% in Fall 2024 to 7.8% in 2025 and early 2026, before increasing slightly to 7.9% in Fall 2026. Expectations for the next 12 months have generally remained below perceptions of past inflation, ranging from 6.3% to 7.3% over the period and reaching 7.0% in Fall 2026.

The latest results indicate that 53.0% of respondents believe food prices increased by 8% or more during the past year, while 25.1% expect prices to increase by more than 10% over the next year, compared with 18.5% in Spring 2026. These findings suggest that Canadians generally expect food inflation to moderate relative to what they believe they have recently experienced, although expectations remain elevated. Importantly, throughout the survey period, both perceived inflation over the past 12 months and expected inflation over the next 12 months have remained well above the actual rate of grocery inflation measured by the Consumer Price Index. This persistent gap suggests that consumer perceptions continue to reflect the cumulative impact of several years of higher food prices, rather than movements in the current annual inflation rate alone.



FIGURE 4:
High Food Inflation perception by Generation for the next 12 months



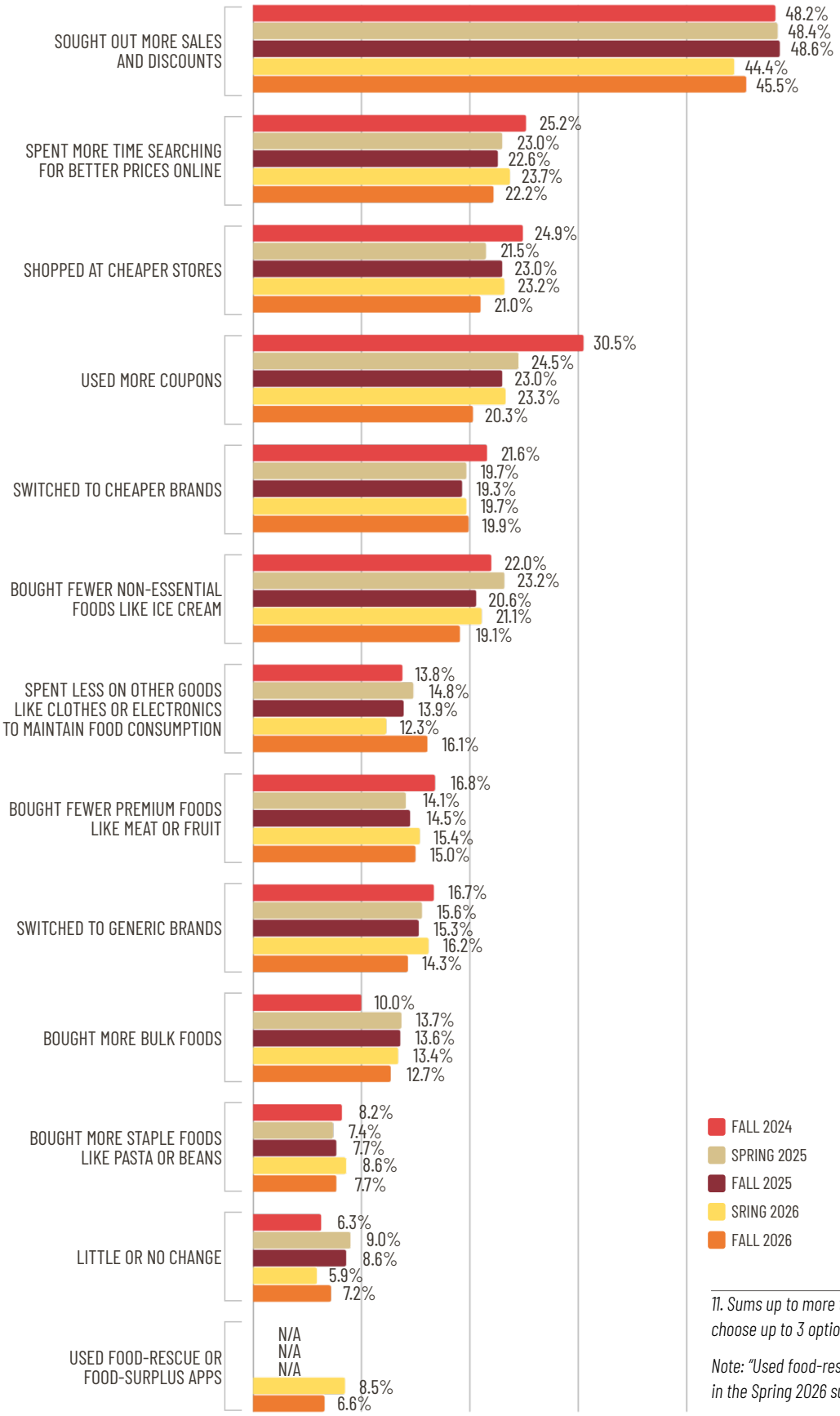
Expectations of very high food inflation (expecting inflation of more than 10% for next 12 months) vary considerably by generation. Baby Boomers are the most concerned, with about 29.3% expecting food prices to rise by more than 10% over the next 12 months, followed by Gen X at roughly 27% and Millennials at almost 23%. Expectations are notably lower among Gen Z (18.2%) and the Older Generations (about 15.6%), suggesting that concerns about another sharp increase in food prices are concentrated more heavily among middle-aged and older Canadians.

"Perceptions of food inflation are easing, but anxiety remains deeply entrenched.

One in four Canadians still expects food prices to rise by more than 10% over the next year, even as actual grocery inflation sits below 3%. The perception gap remains enormous."



FIGURE 5:
Change in Grocery Habits Due to Food Price Inflation[11]





11. Sums up to more than 100% as respondents were allowed to choose up to 3 options

Note: "Used food-rescue or food-surplus apps" was first introduced in the Spring 2026 survey.

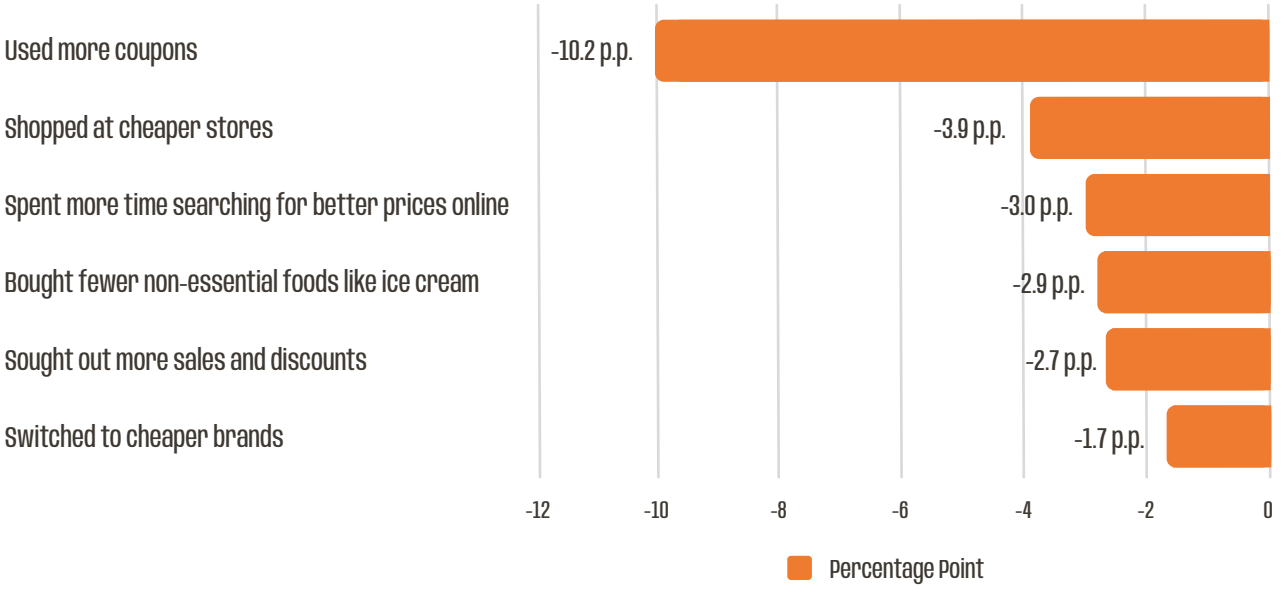
Seeking out **sales and discounts remains the most common response to food price inflation**, reported by 45.5% of Canadians in Fall 2026. While this is slightly higher than Spring 2026 (44.4%), it remains below the roughly 48% recorded throughout 2024 and 2025, suggesting that bargain-seeking remains widespread but may have stabilized.

Coupon use continues its steady decline, falling from 30.5% in Fall 2024 to 20.3% in Fall 2026 and dropping from the **second-most common strategy to fourth place.** At the same time, more consumers appear to be making trade-offs outside the grocery basket: **16.1% report spending less on other goods, such as clothing or electronics, to maintain food consumption**, moving this strategy from ninth to seventh place over the latest six-month period. This suggests that persistent food costs are increasingly affecting how households allocate spending beyond food itself.

Also worth noting, **switching stores and brands is becoming somewhat less common**. Shopping at cheaper stores declined from 24.9% in Fall 2024 to 21.0% in Fall 2026, while switching to generic brands fell from 16.7% to 14.3%. Buying fewer non-essential foods also declined from 22.0% to 19.1%. That suggests consumers may be reaching a degree of **adaptation or strategy fatigue** after several years of elevated food prices.

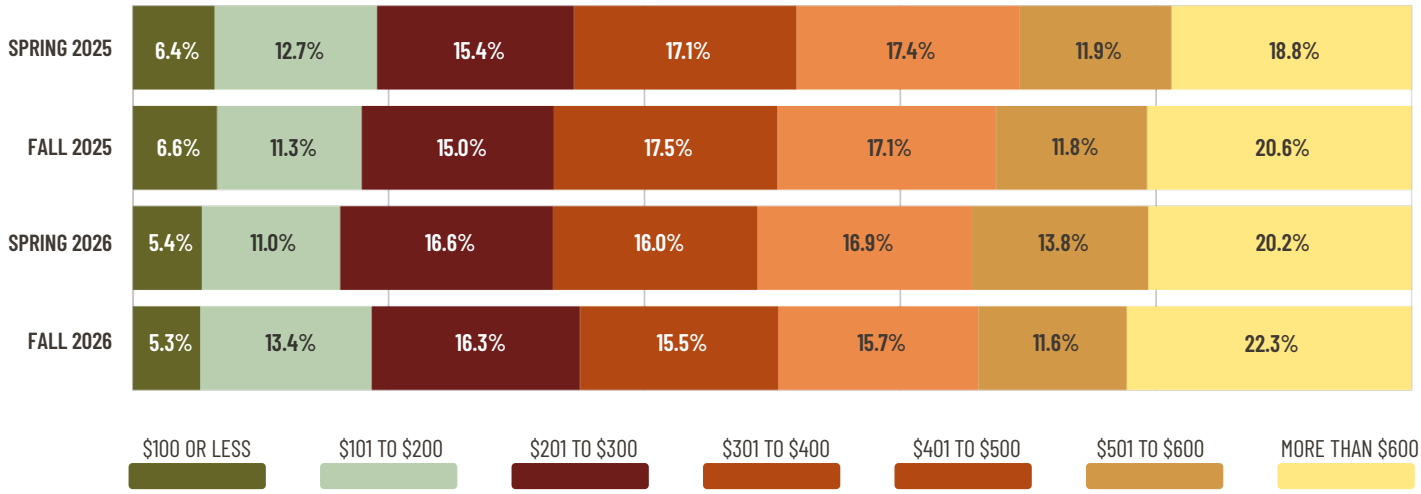
Finally, the use of **food-rescue or food-surplus apps slipped from 8.5% in Spring 2026 to 6.6% in Fall 2026,** representing a modest step backward after their relatively strong showing six months earlier.

Fall 2024 vs Fall 2026 Variation



"With all six of the top grocery-saving behaviours declining overall since Fall 2024, it appears Canadians are doing less to chase grocery savings."

FIGURE 6:
On average, how much do you spend on groceries (Food at Home) each month?[12]



12. Note: Percentages shown are original survey values: bars normalized to 100% to account for rounding.

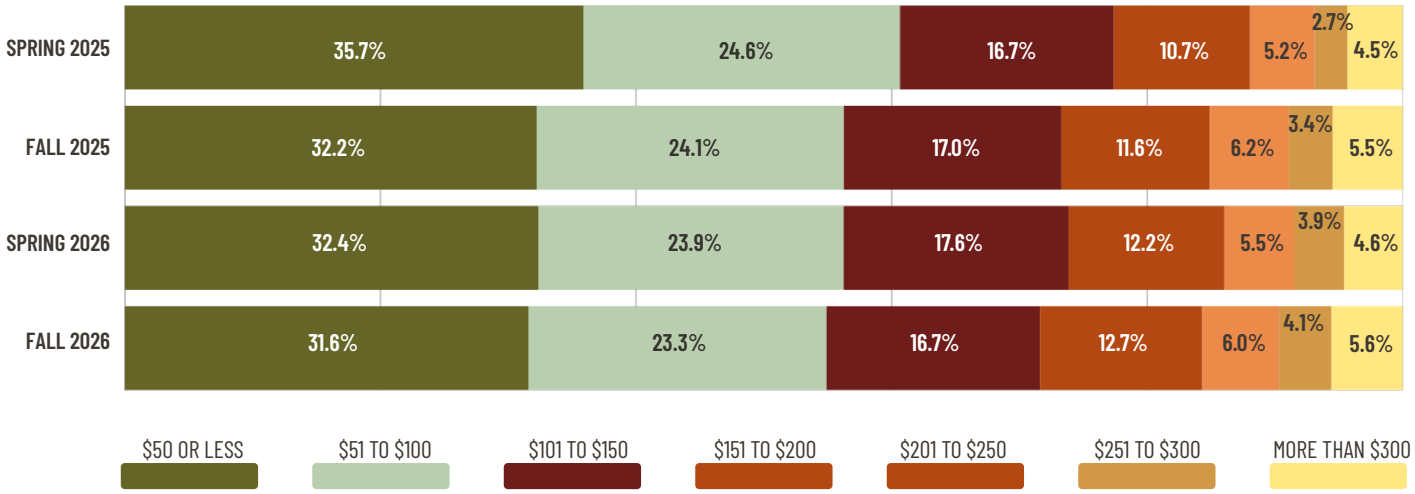
Monthly Grocery Spending Is Shifting Toward Higher Spending Brackets



Monthly grocery spending continues to shift gradually toward higher spending brackets. In Fall 2026, **22.3% of respondents reported spending more than $600 per month on groceries,** the highest share recorded across the four survey waves, up from 18.8% in Spring 2025. When combined with those spending between $501 and $600, **33.9% of Canadians surveyed now report monthly grocery expenditures above $500.**

At the other end of the distribution, only 5.3% spend $100 or less, compared with 6.4% in Spring 2025. The middle spending categories remain relatively stable, suggesting that the change is occurring primarily through a gradual movement of households toward the upper end of the spending distribution. Overall, grocery spending is shifting upward, though the reasons remain unclear. Beyond inflation, changing shopping habits and reduced emphasis on cost-saving strategies may also explain this trend.

FIGURE 7:
On average, how much do you spend on dining out or takeout (Food Away from Home) each month?[12]



12. Note: Percentages shown are original survey values: bars normalized to 100% to account for rounding.

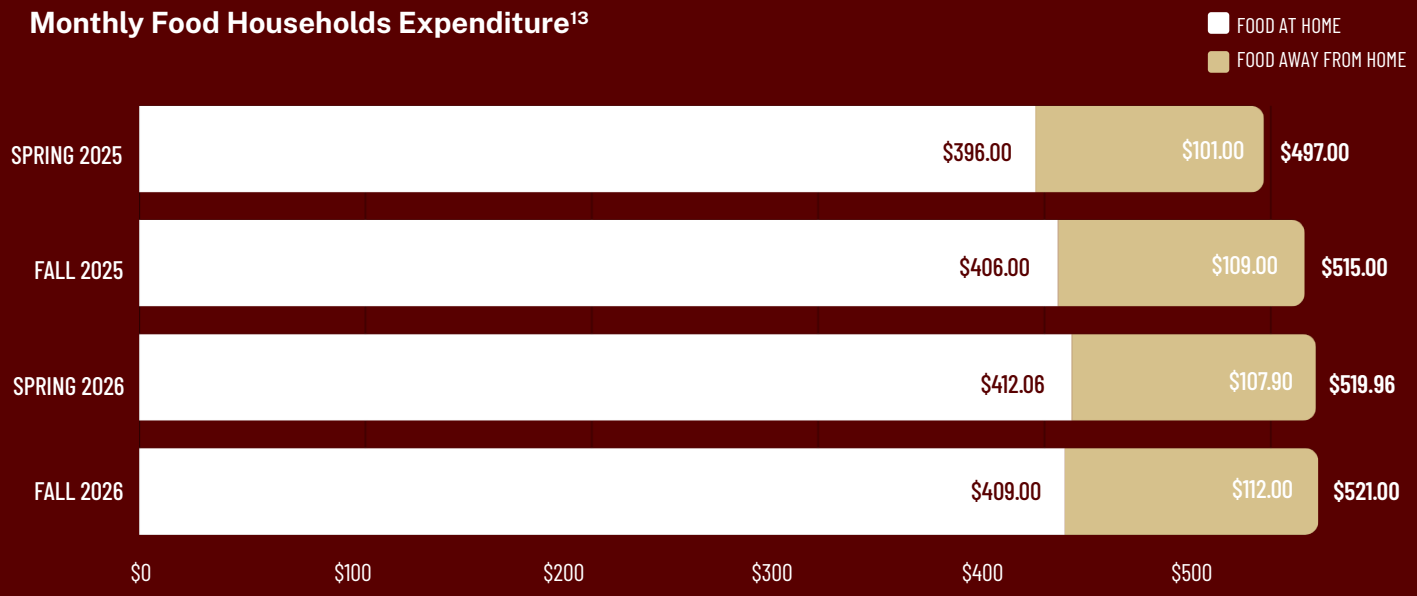
Monthly Dining Out and Take Out Spending is Gradually Shifting Higher



Spending on dining out and takeout is showing a **gradual shift toward higher monthly spending brackets.** In Fall 2026, 31.6% of respondents reported spending $50 or less per month on food away from home, down from 35.7% in Spring 2025. At the same time, the share spending **more than $150 per month increased from 23.1% to 28.4%,** with growth visible across each of the three highest spending brackets. The proportion spending more than $300 reached **5.6%,** its highest level across the four survey waves. Despite these shifts, lower spending remains prevalent, with more than half of respondents (54.9%) spending $100 or less per month. Overall, the results suggest **a modest but persistent upward movement in food away from home expenditures, in the higher spending brackets,** even as many households continue to limit restaurant and takeout spending.



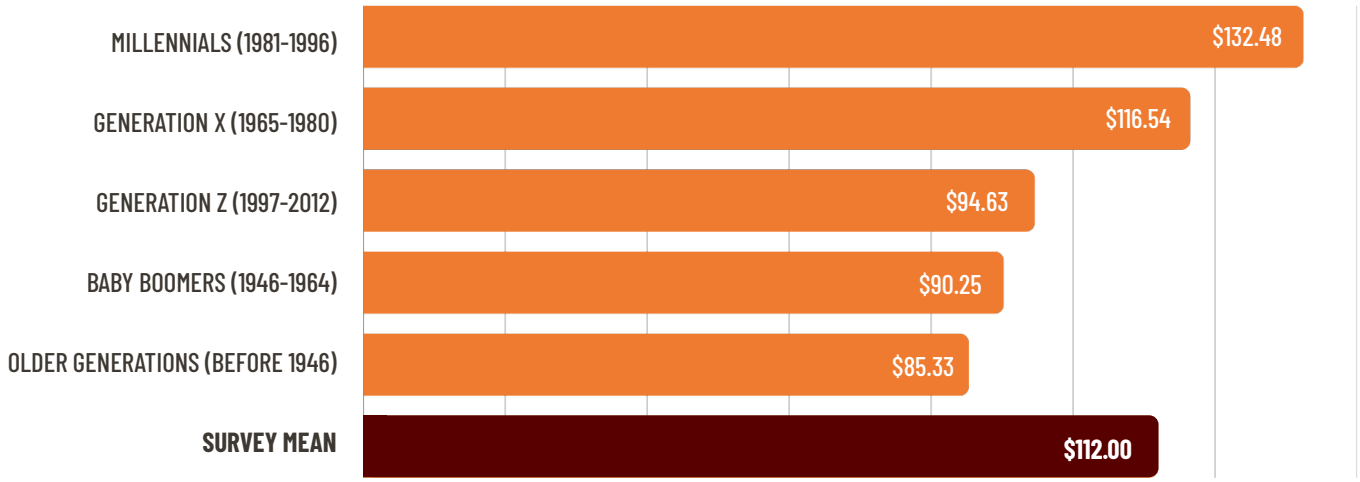
FIGURE 8:
Monthly Food Households Expenditure[13]



*13. Mean calculated using midpoints, assigning a value of **$700** for the "More than $600" category (FAH) and **$325** for the "More than $300" category (FAFH).*

Household food spending shows an overall upward trend across the four survey waves, despite some modest fluctuations between food at home and food away from home. **Total monthly spending increased from an estimated $497 in Spring 2025 to $521 in Fall 2026, an increase of $24, or 4.8%.** Grocery spending rose from $396 to $409 over the period, reaching a high of $412.06 in Spring 2026 before easing slightly in Fall 2026. Spending on dining out and takeout also increased overall, from $101 to $112 per month, despite a small dip in Spring 2026. Taken together, the results suggest a gradual increase in Canadians' total monthly food expenditures, with recent growth increasingly driven by food away from home.

FIGURE 9:
Estimated Average Monthly Spending on Dining Out and Takeout, by Generation

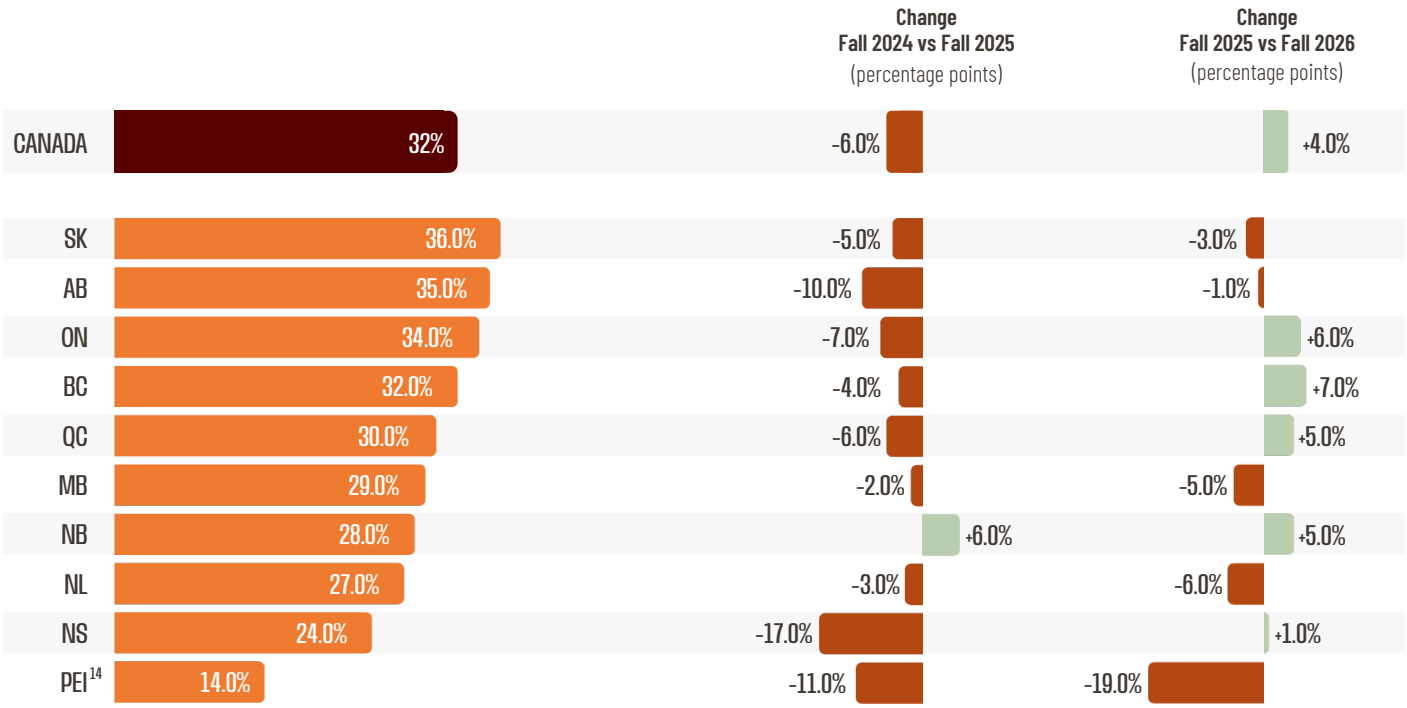


Fall 2026 results suggest Millennials are the biggest spenders on food away from home, averaging an estimated $132.48 per month, followed by Gen X at $116.54. Both are above the survey-wide average of $112.00. Gen Z averages $94.63, Baby Boomers $90.25, and the Older Generations $85.33 per month.

Dining Out Dollars: Millennials Lead Spending Away from Home



FIGURE 10:
Need to Draw from Savings or Borrowing Money to Purchase Food in the past 12 months, by Province



At the national level, financial pressure appears to be rising again: 32% of Canadians reported needing to draw from savings or borrow money to pay for food in Fall 2026, up 4 percentage points from Fall 2025, after a 6-point decline the previous year. Provincial trends vary considerably.

British Columbia (+7 points), Ontario (+6), Quebec (+5), and New Brunswick (+5) all recorded noticeable increases over the past year. Alberta remains among the provinces with the highest incidence at **35%**, although its rate edged down by 1 point from Fall 2025.

Although it's rate has constantly decreased since Fall 2024, Saskatchewan recorded the highest Fall 2026 rate at **36%**, while PEI showed the lowest at 14%, though its small sample warrants caution.

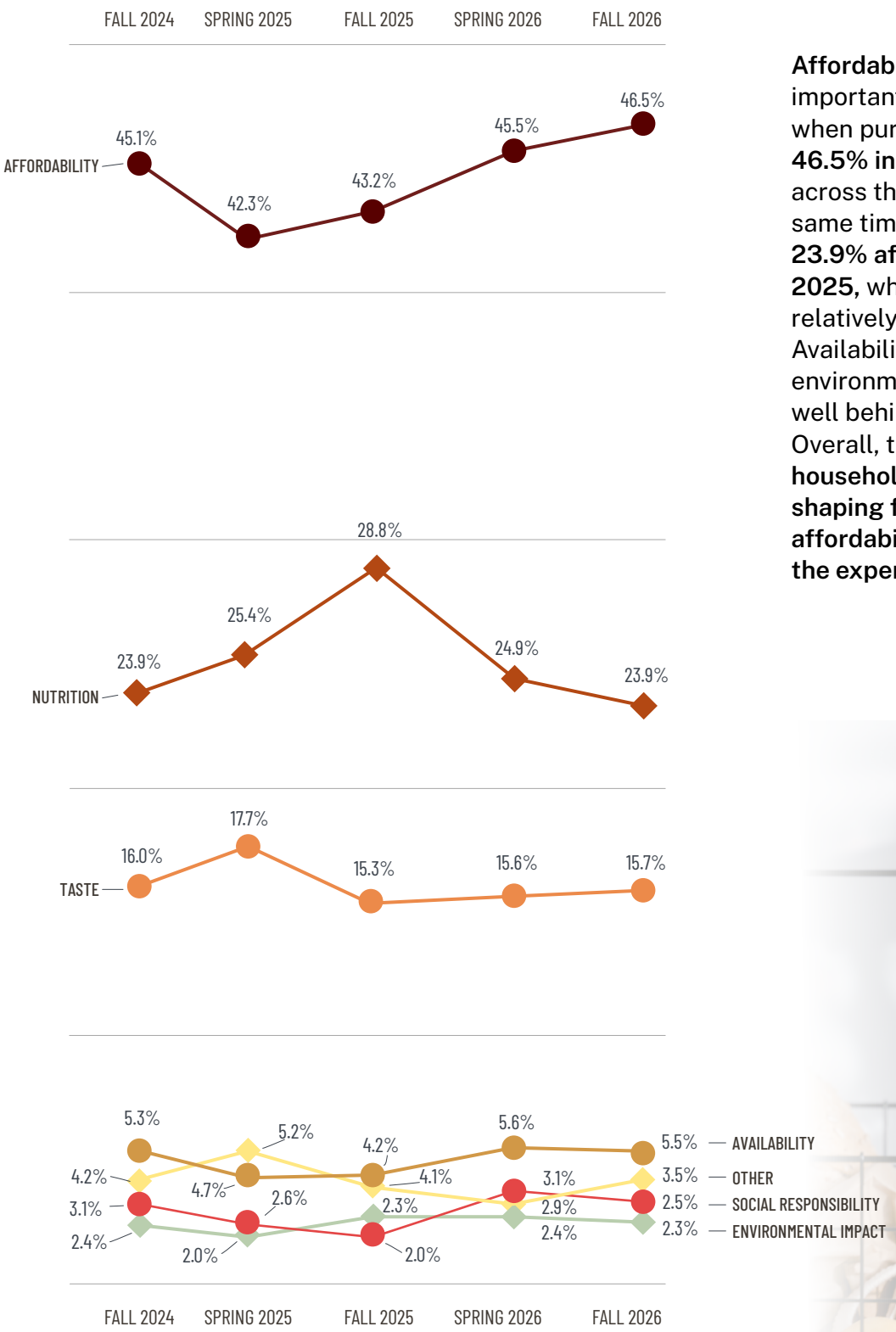
Financial Pressure for Food Varies Across Canada



14. Fall 2025 and Fall 2026 results for Prince Edward Island are based on fewer than 30 respondents, approximately 60% of whom are Baby Boomers, which may influence the results. The Fall 2024 PEI sample was also below 30 respondents, with just under half identifying as Baby Boomers. Results for PEI should therefore be interpreted with caution.

FOOD VALUES

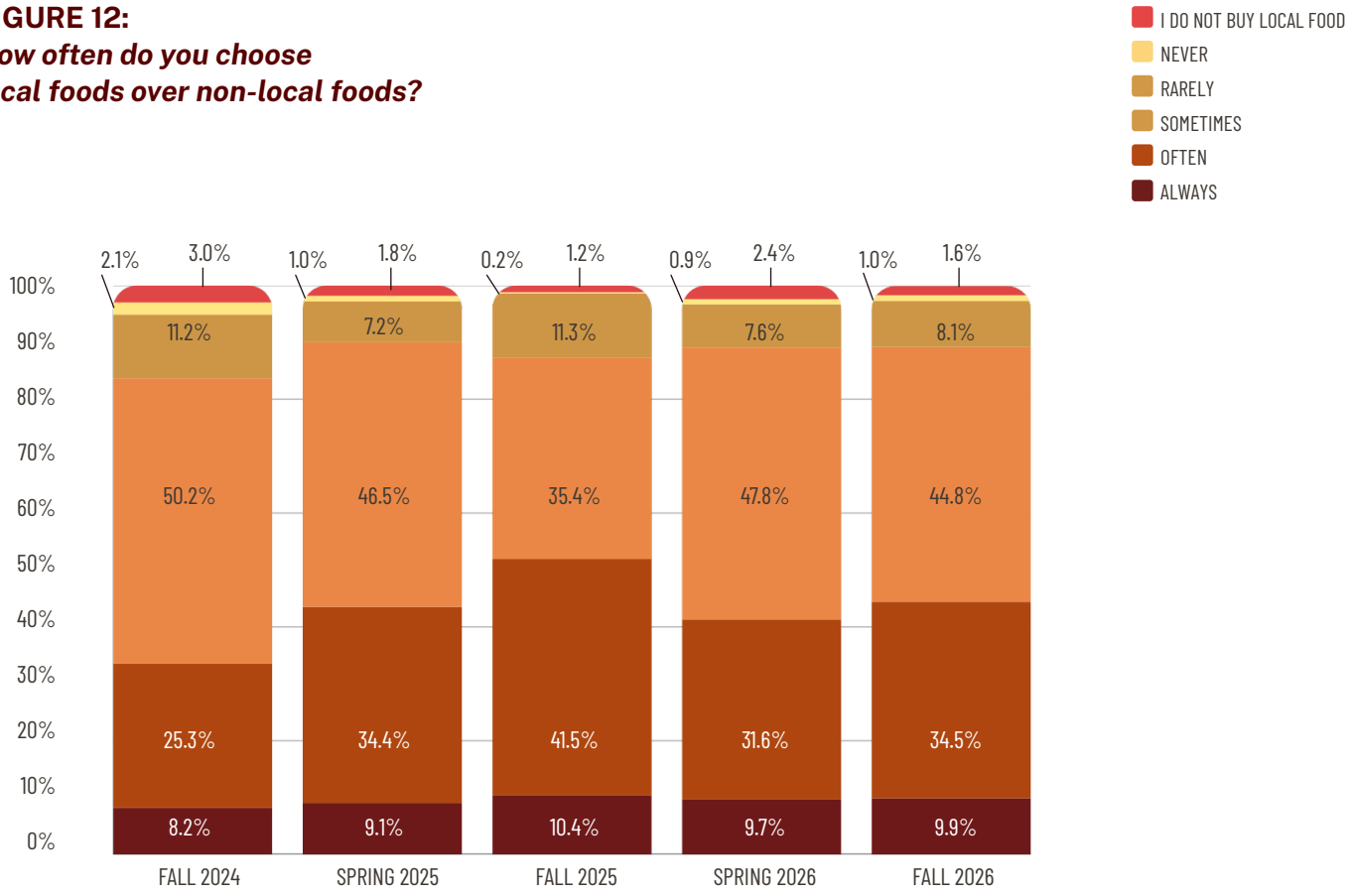
FIGURE 11:
Food Values Evolution



Affordability remains by far the most important consideration for Canadians when purchasing food, rising to **46.5% in Fall 2026,** its highest level across the five survey waves. At the same time, **nutrition declined to 23.9% after peaking at 28.8% in Fall 2025,** while taste has remained relatively stable at around 16%. Availability, social responsibility and environmental impact continue to rank well behind these three priorities. Overall, the results suggest that **household budgets are increasingly shaping food choices, with affordability gaining importance at the expense of other considerations.**



FIGURE 12:
How often do you choose local foods over non-local foods?



Canadians appear **increasingly inclined to choose local foods**. The share reporting that they 'Always' or 'Often' choose local rose from 33.5% in Fall 2024 to 44.4% in Fall 2026, an increase of 10.9 percentage points, although it remains below the 51.9% peak in Fall 2025. At the same time, the proportion saying they do not buy local food declined from 3.0% to 1.6% over the two-year period.

Overall, the results point to a broader shift toward local food purchasing, despite some fluctuation between survey waves. This shift coincides with heightened Canada–U.S. trade tensions and the broader "Buy Canadian" movement. Although these survey results cannot establish that trade tensions caused the increase in local-food purchasing, the timing suggests they may be reinforcing consumers' interest in buying closer to home.

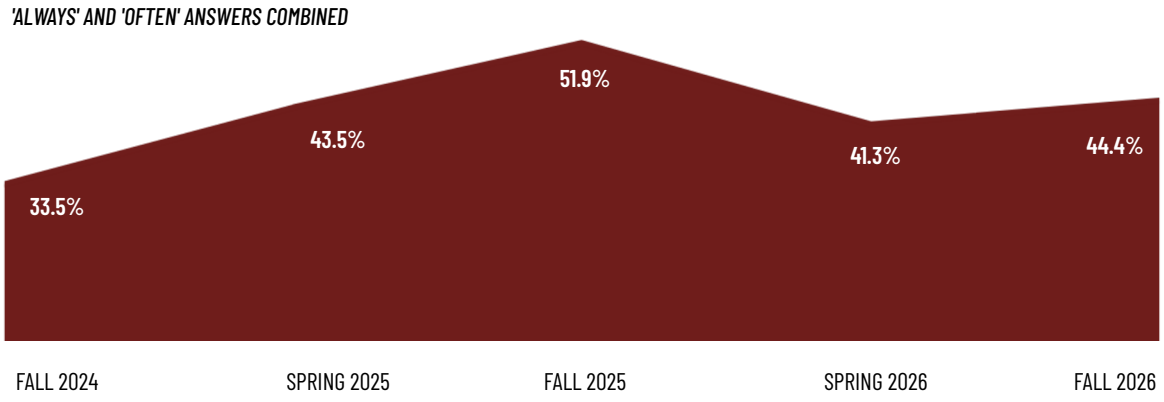


TABLE 1:
Value-Based Behaviours[15]

	Fall 2024	Spring 2025	Fall 2025	Spring 2026	Fall 2026	YoY Variation Fall 2026 vs Fall 2025	Fall 2024 vs Fall 2026
Check nutrition label on products before buying new foods	3.47	3.47	3.51	3.63	3.59	0.08	0.12
Choose generic or store brand foods over brand-name foods	2.91	3.50	3.50	3.55	3.47	-0.03	0.56
Choose local foods over non-local foods	3.27	3.38	3.43	3.43	3.45	0.02	0.18
Choose wild-caught fish over farm-raised fish	3.19	3.29	3.27	3.29	3.26	-0.01	0.07
Choose grass-fed beef over conventional beef	2.69	2.85	2.85	2.97	2.92	0.07	0.23
Choose cage-free eggs over conventional eggs	2.57	2.72	2.68	2.76	2.78	0.10	0.21
Choose organic foods over non-organic foods	2.52	2.54	2.57	2.58	2.59	0.02	0.07
Choose plant-based proteins over animal proteins	2.43	2.34	2.33	2.41	2.38	0.05	-0.05

15. Tables 1 to 3 show weighted mean score, excluding answers other than Always to Never (e.g.: I do not eat..., I am not sure)

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

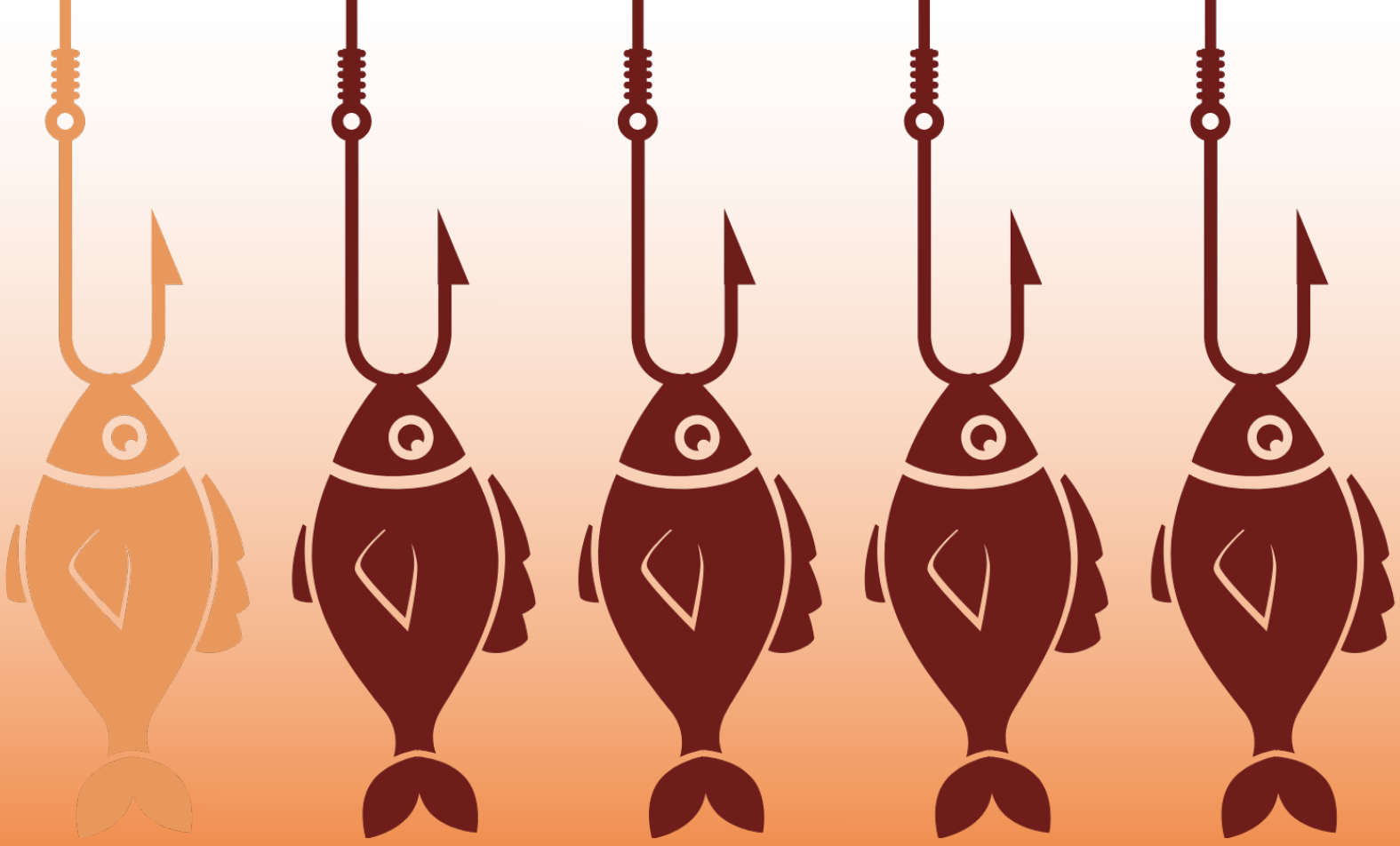
Across the five survey waves, value-based food behaviours have generally strengthened, with two exceptions, although the magnitude of change varies considerably.

The largest shift since Fall 2024 is in the preference for **generic or store-brand foods,** rising from 2.91 to 3.47 (+0.56), despite a slight year-over-year decline (-0.03) in Fall 2026. Preferences for **grass-fed beef (+0.23), cage-free eggs (+0.21),** and **local foods (+0.18)** have also increased meaningfully over the five-wave period.

Nutrition-label checking remains one of the most prevalent behaviours and is up 0.08 year over year. By contrast, preferences for organic foods and wild-caught fish have changed only modestly, while **plant-based proteins are the only behaviour below their Fall 2024 level (-0.05)**, despite a small year-over-year increase.

"Generic and store-brand foods have seen the strongest increase since Fall 2024, as value increasingly shapes food choices."





INTERESTING FACT:

A notable finding is that one in five Canadians (20.6%) now report that they do not buy fish, up from 18.5% just six months earlier.

By comparison, 9.6% say they do not buy beef, a slight decline from 10.0% in Spring 2026.

The widening difference suggests that avoiding fish is becoming considerably more prevalent than avoiding beef among Canadian consumers.

TABLE 2:
Risk-Based Behaviours[15]

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

	Fall 2024	Spring 2025	Fall 2025	Spring 2026	Fall 2026	YoY Variation Fall 2026 vs Fall 2025	Fall 2024 vs Fall 2026
Check the use-by / sell-by date on products at the store	4.02	4.09	4.08	4.13	4.13	0.05	0.11
Throw away food when it is past the "Use-By" date	3.02	3.02	3.04	3.07	3.16	0.12	0.14
Eat fresh fruits and vegetables without washing them	2.34	2.32	2.35	2.40	2.32	-0.03	-0.02

Table 2 shows that across the five survey waves, risk-based food behaviours have remained relatively stable, with some evidence of increased caution. Checking use-by or sell-by dates remains the most common behaviour, overall increasing from 4.02 in Fall 2024 to 4.13 in Fall 2026 (+0.11). Throwing away food past its “use-by” date shows the largest increase, rising by 0.14 over the five waves and by 0.12 year over year. By contrast, eating fresh fruits and vegetables without washing them has remained largely unchanged and is slightly below its Fall 2024 level (-0.02).



TABLE 3:
Sustainability-Based Behaviours[15]

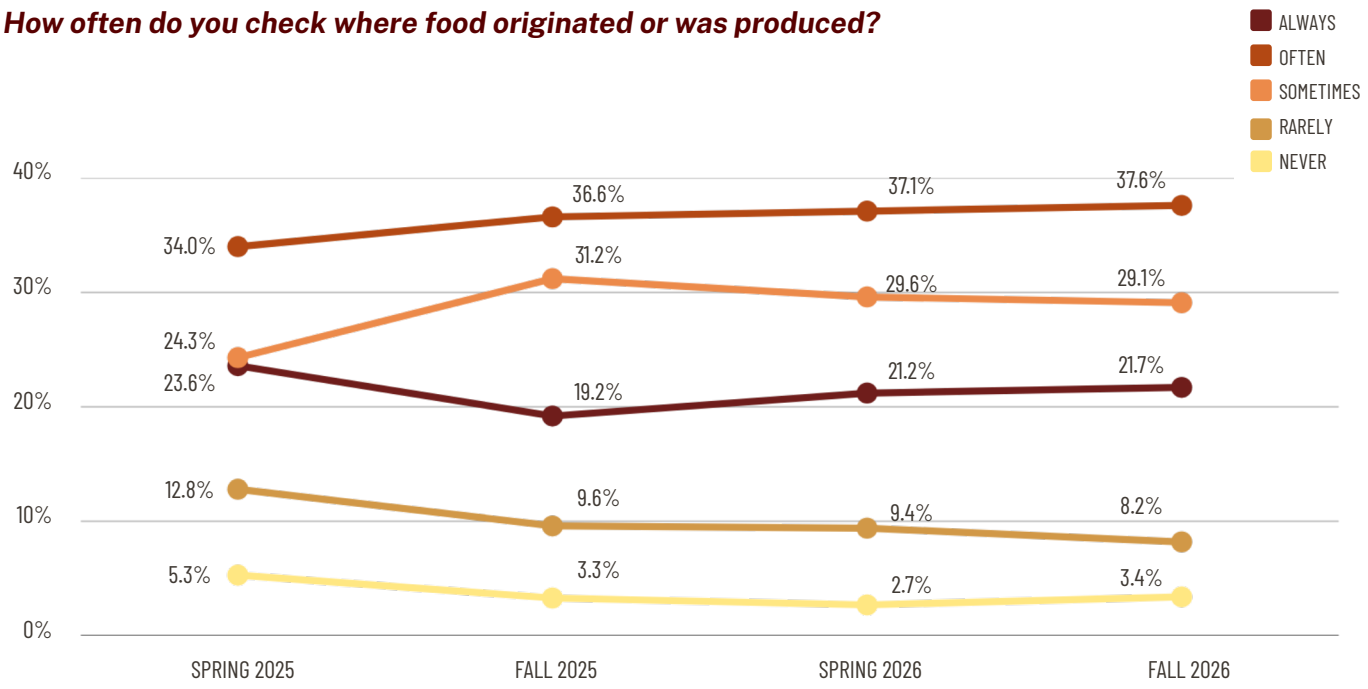
MEAN SCORES
Never: 1
Rarely: 2
Sometimes: 3
Often: 4
Always: 5

	Fall 2024	Spring 2025	Fall 2025	Spring 2026	Fall 2026	YoY Variation Fall 2026 vs Fall 2025	Fall 2024 vs Fall 2026
Recycle food packaging	4.25	4.34	4.34	4.37	4.27	-0.07	0.02
Take steps to reduce food waste at home	4.08	4.16	4.14	4.18	4.13	-0.01	0.05
Compost food scraps	3.49	3.48	3.55	3.61	3.52	-0.03	0.03

Sustainability-based food behaviours remain **highly consistent across the five survey waves,** with only modest changes since Fall 2024. **Recycling food packaging remains the most common behaviour,** at 4.27 in Fall 2026, although it declined by 0.07 year over year. Efforts to reduce food waste at home also remain high at 4.13, essentially unchanged from Fall 2025. Composting is less frequent, at 3.52, and also declined slightly year over year (-0.03). Overall, all three behaviours remain slightly above their Fall 2024 levels, pointing to stability rather than a significant shift in sustainability practices.

15. Tables 1 to 3 show weighted mean score, excluding answers other than Always to Never (e.g.: I do not eat..., I am not sure)

FIGURE 13a:
How often do you check where food originated or was produced?



Canadians are paying increasingly close attention to where their food comes from. The combined share who 'Always' or 'Often' check where food originated or was produced went from 57.6% in Spring 2025 to 55.8% in Fall 2025, then rose to 58.3% in Spring 2026, and 59.3% in Fall 2026, reaching its highest level in the latest survey. Meanwhile, the share who 'Rarely' or 'Never' check fell from 18.1% in Spring 2025 to 11.6% in Fall 2026. This growing attention to food origin is consistent with the broader shift toward local purchasing, with 44.4% of Canadians now saying they always or often choose local foods over non-local alternatives.

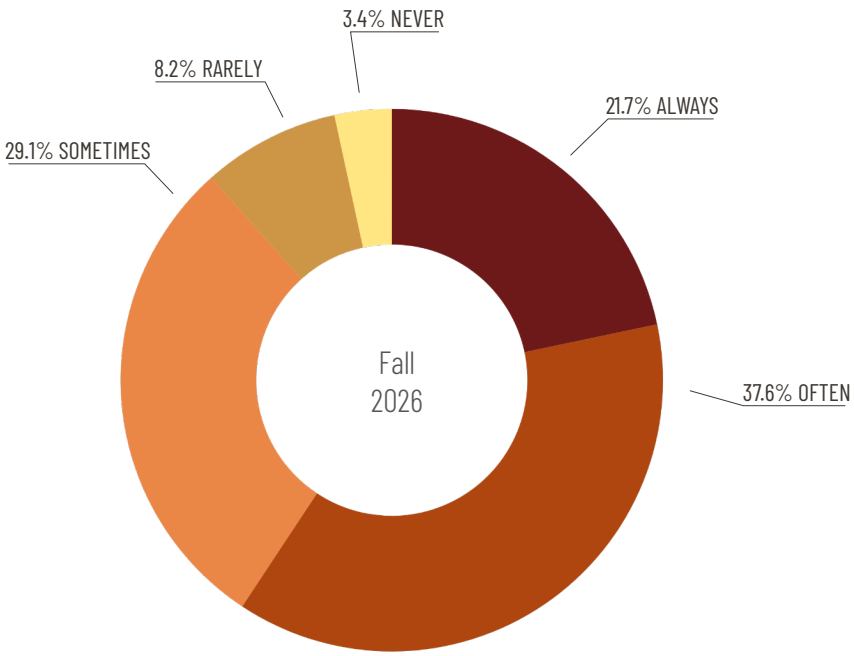
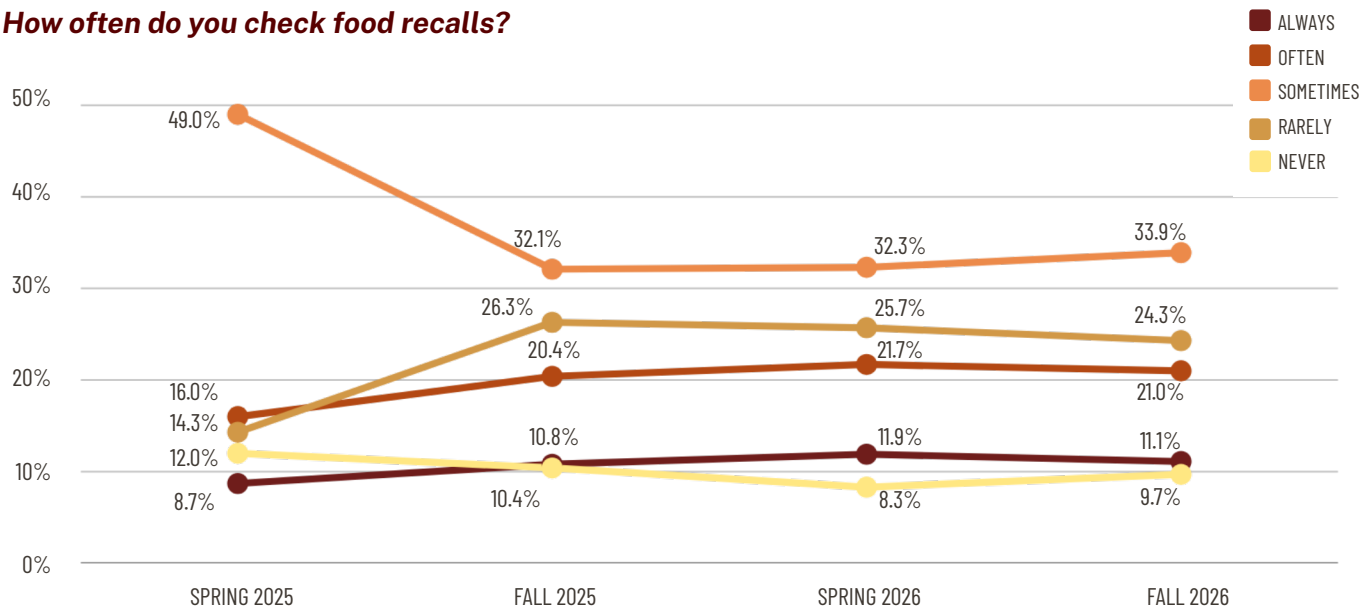




FIGURE 13b:
How often do you check food recalls?



Canadians are checking food recalls more frequently than they were in Spring 2025. The combined share who always or often check recalls increased from 24.7% in Spring 2025 to 31.2% in Fall 2025, reaching 33.6% in Spring 2026 before settling at 32.1% in Fall 2026. At the same time, the proportion who never check recalls declined from 12.0% to 9.7% over the period. The most striking shift is away from the middle: “Sometimes” fell sharply from 49.0% to 33.9%, while “Rarely” increased from 14.3% to 24.3%, suggesting consumers are becoming more divided between those who actively monitor recalls and those who pay relatively little attention to them.

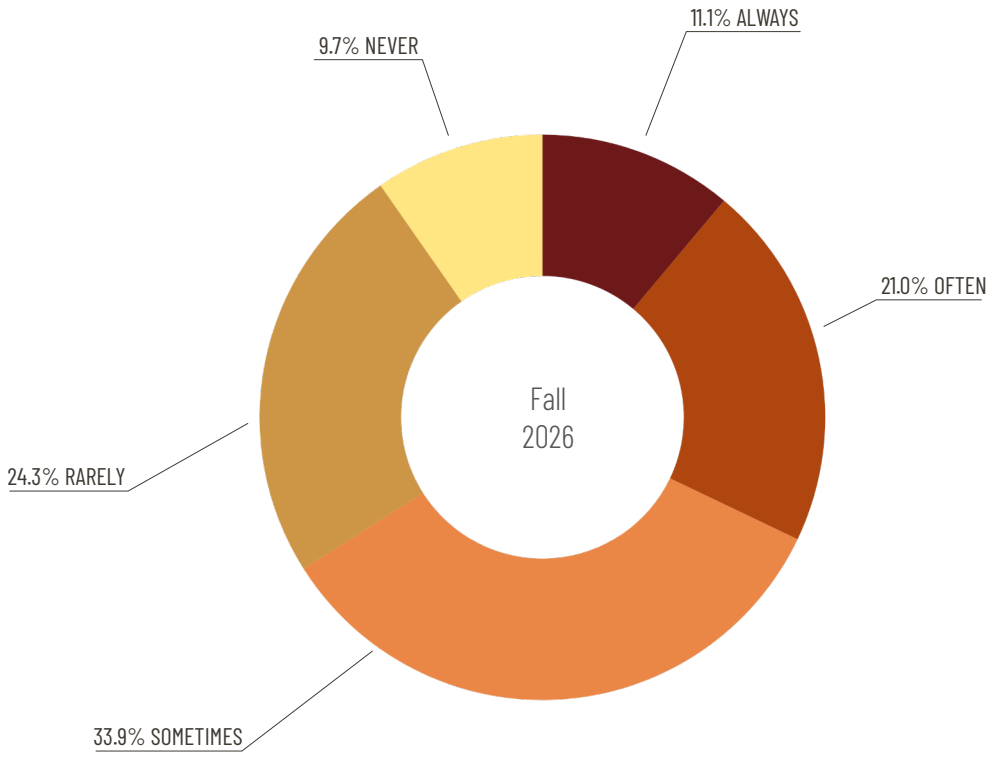
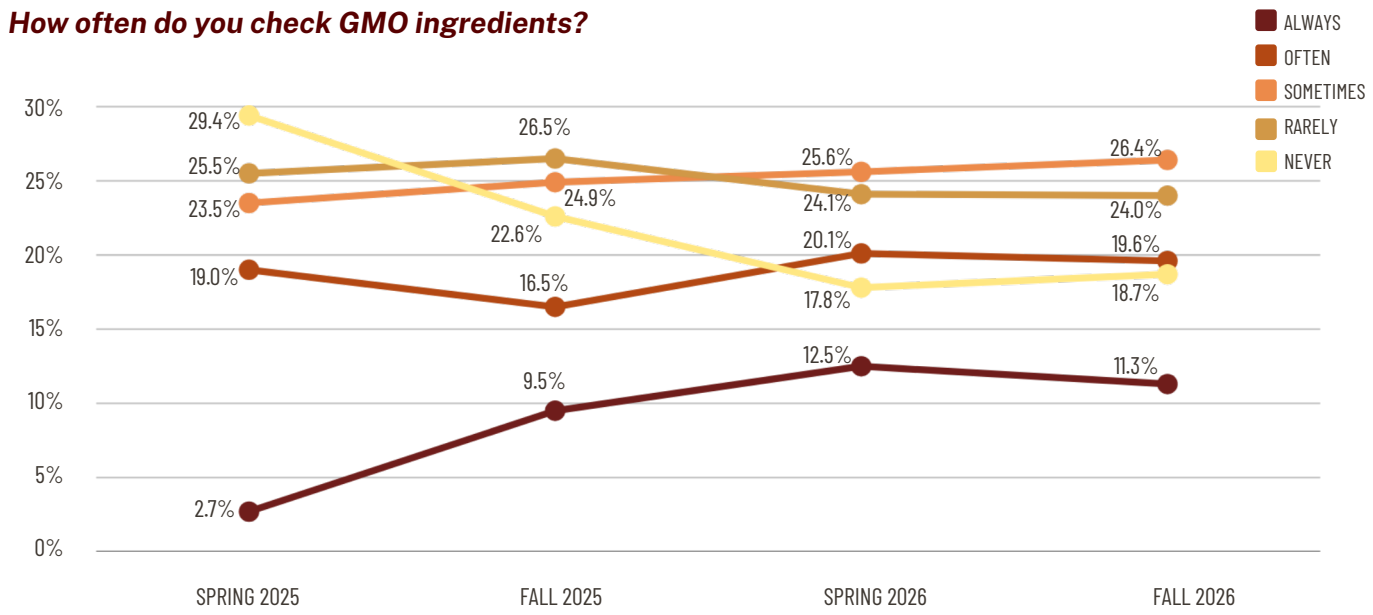
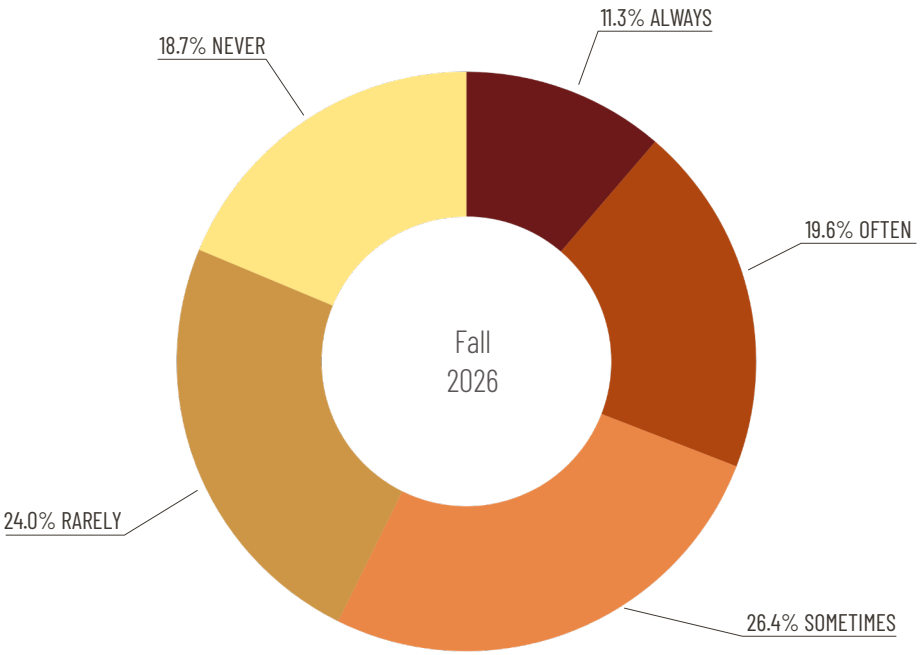


FIGURE 13c:
How often do you check GMO ingredients?

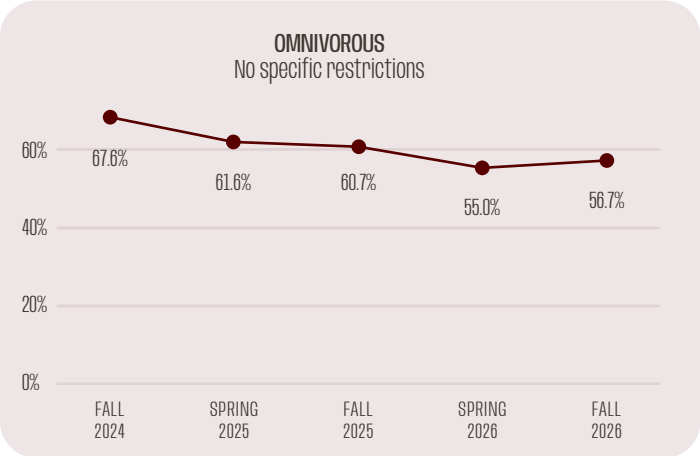


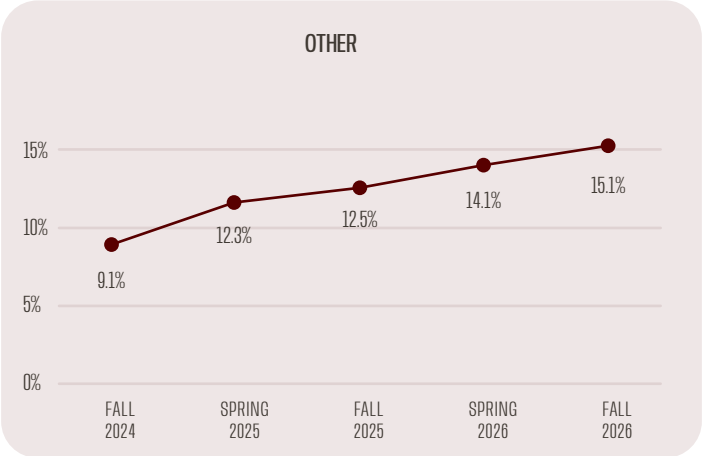
The answers to this question show a clear increase in Canadians paying closer attention to GMO ingredients. The share who always check rose sharply from 2.7% in Spring 2025 to 11.3% in Fall 2026, while the proportion who often check remained relatively stable, moving from 19.0% to 19.6%. Despite a slight decline in Fall 2026, the combined share who always or often check for GMO ingredients saw an overall increased over since Spring 2025 from 21.7% to 30.9%, a gain of 9.2 percentage points.

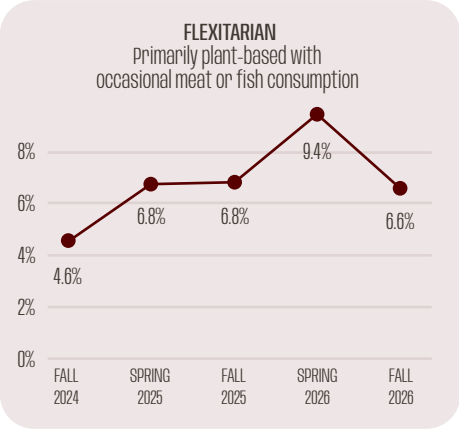


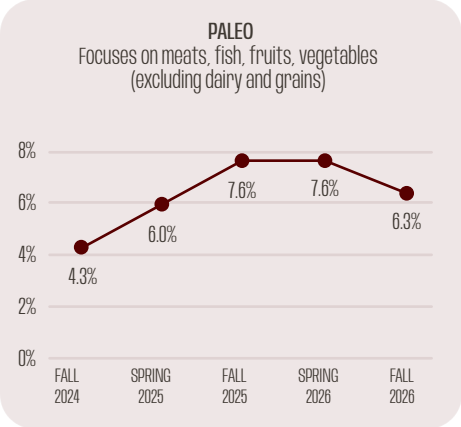
At the same time, the proportion who never check fell substantially, from 29.4% to 18.7%, while “rarely” declined slightly from 25.5% to 24.0%. Overall, the results suggest a meaningful shift toward greater consumer attention to GMO ingredients, driven primarily by growth in the group that consistently checks product information.

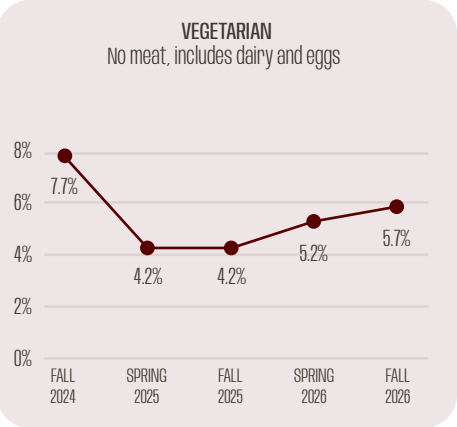
FIGURE 14:
Popularity of Different Diets

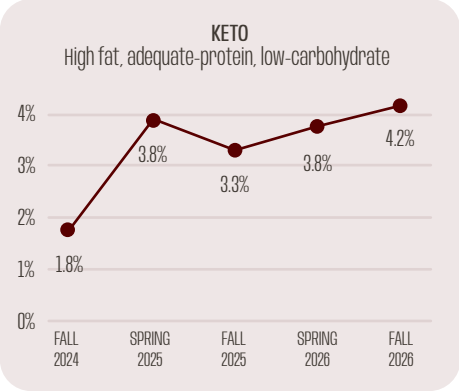


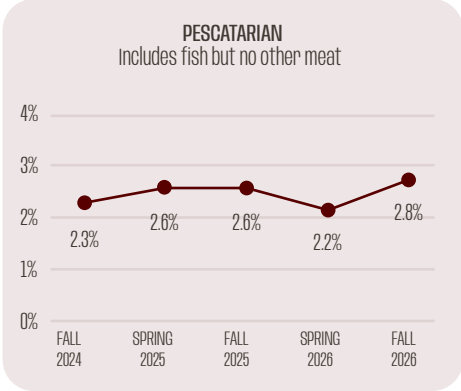


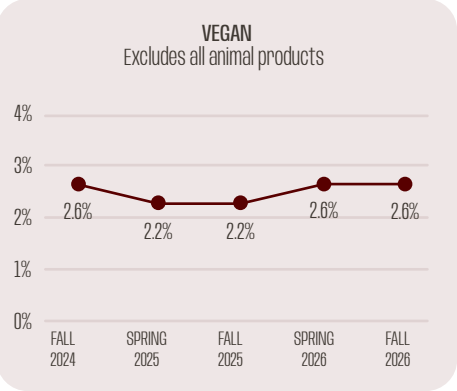








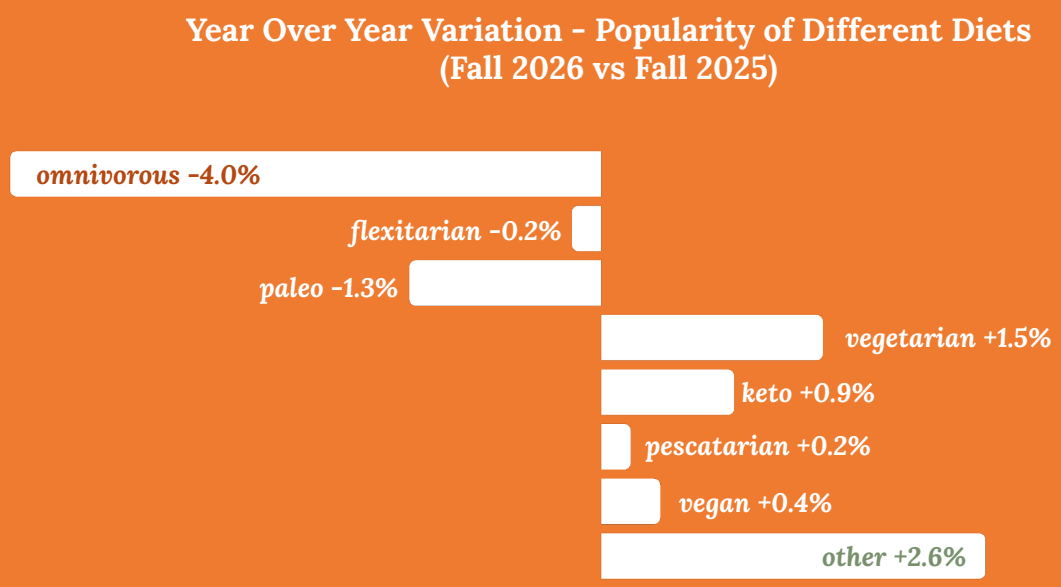




Omnivorous diets remain by far the dominant dietary pattern among Canadians, rebounding to 56.7% in Fall 2026 from 55.0% in Spring 2026, although still well below the 67.6% recorded two years earlier in Fall 2024. Most alternative diets remain relatively niche: flexitarianism has increased from 4.6% to 6.6% over the two-year period, while vegetarianism has declined from 7.7% to 5.7%. Paleo has also gained ground, rising from 4.3% to 6.3%, while keto, pescatarian and vegan diets each remain below 5%.



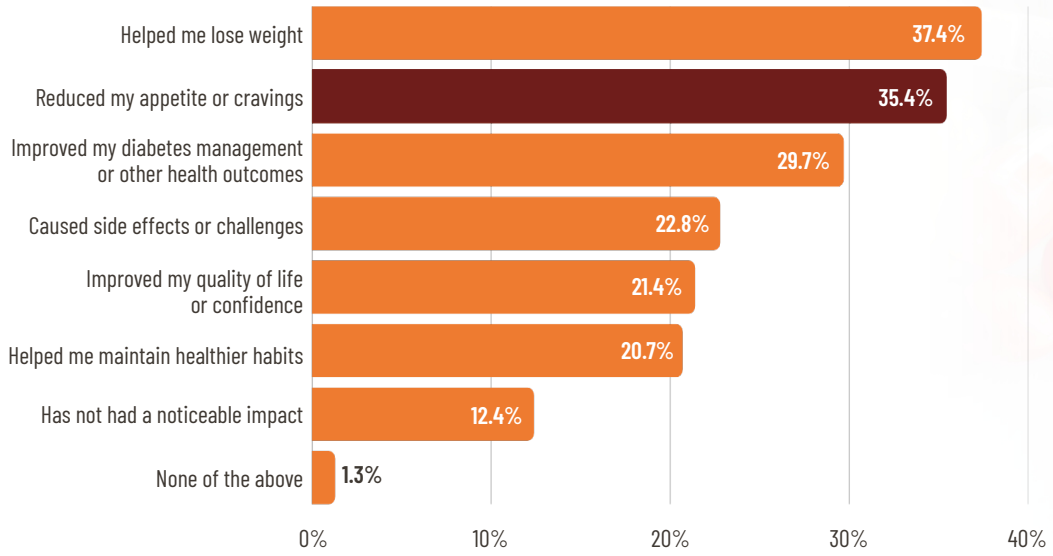
Perhaps the most notable longer-term trend is the **continued growth of the "Other" category**, from 9.1% in Fall 2024 to 15.1% in Fall 2026, now representing the second-largest response. This steady overall increase may warrant more specific questions in the next survey to understand which emerging or less conventional dietary patterns Canadians are adopting. Overall, the results suggest that while omnivorous eating remains firmly dominant, Canadian dietary preferences are becoming increasingly diverse and less easily captured by traditional diet labels.





New Fall 2026!

FIGURE 15:
GLP-1 Medications Usage and Impacts[16]



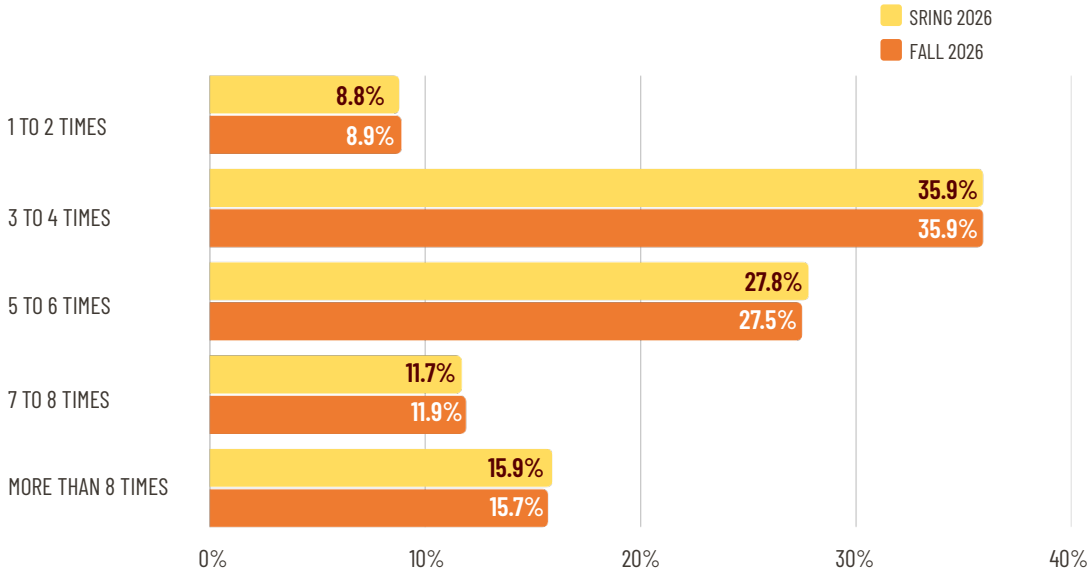
16. Sources: Caddle Rapid Response Survey, July 2026 (N = 8204), Statistics Canada. Table 17-10-0005-01 Population estimates on July 1, by age and gender, July 2026

2.9 Million Canadians are using GLP-1 Medications

These findings are drawn from a separate dataset collected through **Caddle's Rapid Response survey platform** and should therefore be interpreted independently of the Canadian Food Sentiment Index results. The July 2026 Caddle survey found that **8.7% of participants reported currently using a GLP-1 medication,** suggesting that these medications are emerging as a potentially important influence on food consumption in Canada. When extrapolated to the **Canadian population aged 18 and older**, this survey-based estimate represents approximately **2.9 million Canadians using GLP-1 medications.** Among users, **35.4% reported reduced appetite or cravings,** while **37.4% reported weight loss.**

These behavioural changes may have implications for grocery purchasing patterns. Reduced appetite could contribute to smaller basket volumes and fewer discretionary purchases, while increasing consumer interest in foods offering **protein, fibre, nutrient density and satiety.** As GLP-1 adoption evolves, the potential shift from food quantity toward nutritional and functional value will be important to monitor across grocery categories.

FIGURE 16:
In a typical month, how many times do you shop for groceries?





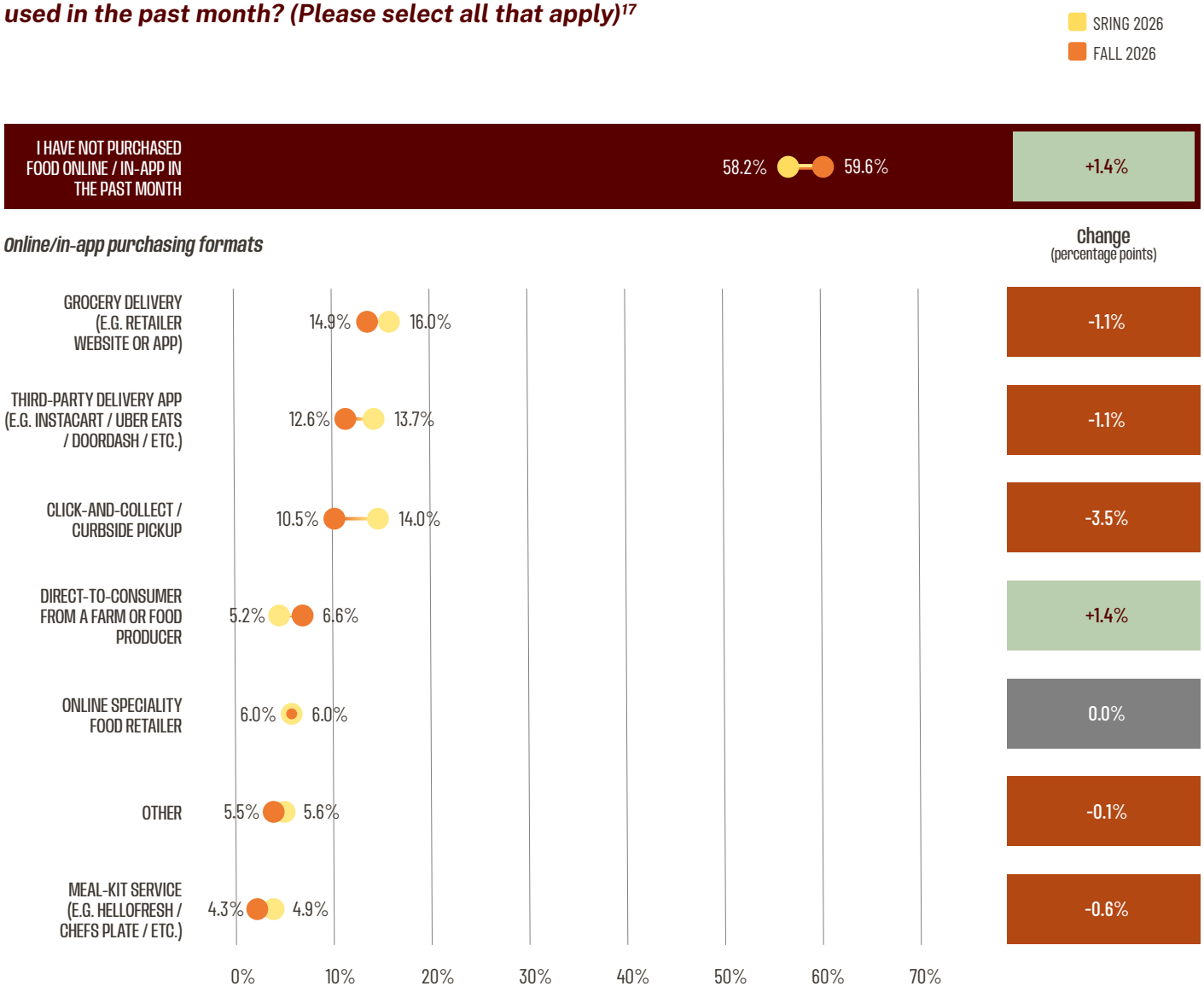
AVERAGE MONTHLY GROCERY TRIPS
Spring 2026: 5.23
Fall 2026: 5.21

Grocery shopping frequency remained remarkably stable between Spring and Fall 2026. Canadians made an estimated 5.21 grocery trips per month in Fall 2026, virtually unchanged from 5.23 trips in Spring 2026. The most common shopping frequency remained 3 to 4 times per month, reported by 35.9% of respondents in both survey waves, followed by 5 to 6 trips, which edged down from 27.8% to 27.5%. At the higher end, 15.7% reported shopping more than eight times per month, compared with 15.9% in the spring, while 11.9% made 7 to 8 trips. Only 8.9% shopped once or twice per month. Overall, the near-identical distribution across every category suggests that Canadians' grocery shopping frequency remains stable, averaging just over five trips per month.



Canadians shop for groceries on average of 5.21 visits per month

FIGURE 17a:
Which online / in-app food purchasing formats have you used in the past month? (Please select all that apply)[17]

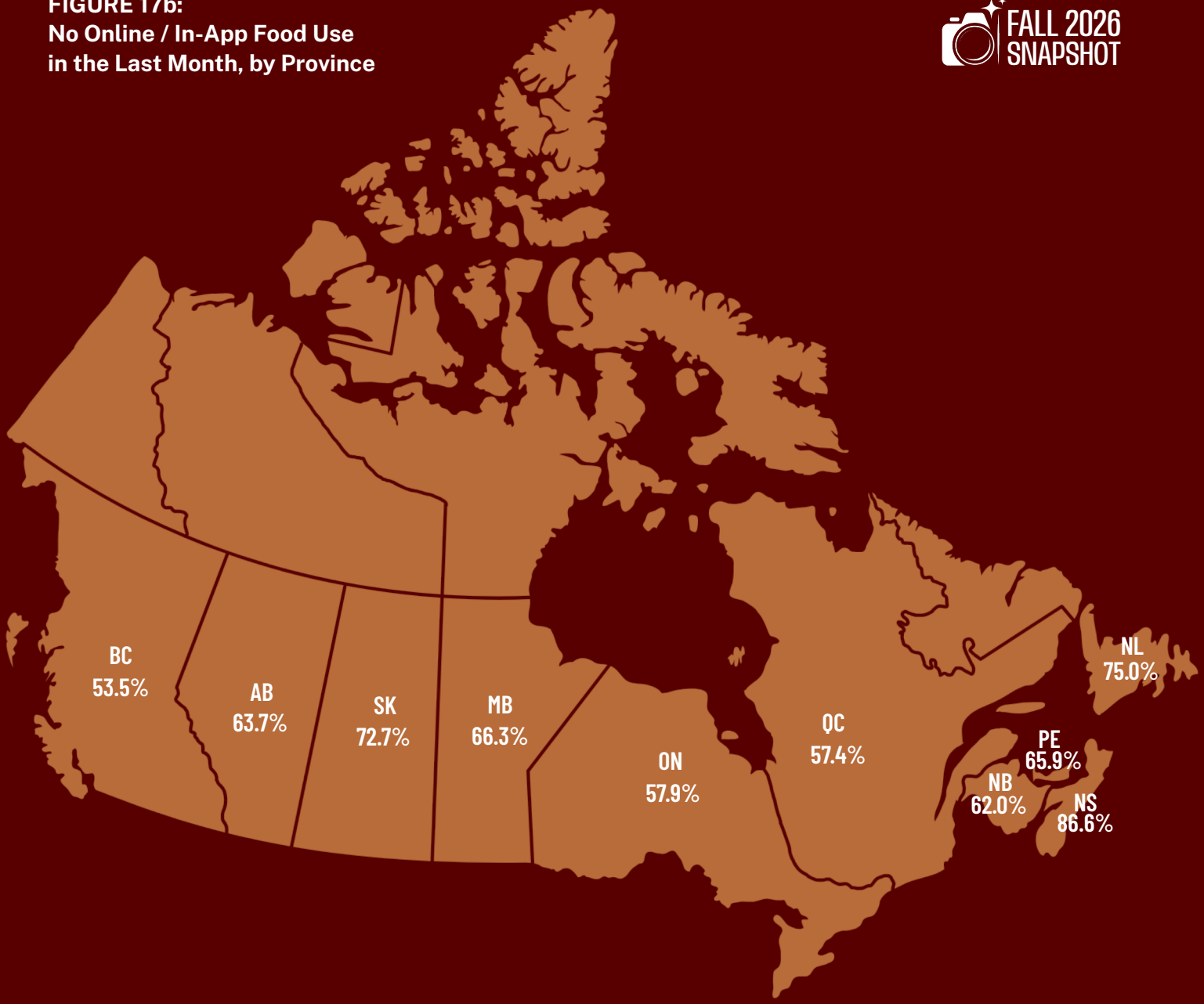


Online and in-app food purchasing softened slightly in Fall 2026, with 59.6% of Canadians reporting no digital food purchases in the previous month, up from 58.2% in Spring 2026. Among digital channels, grocery delivery remained the most widely used at 14.9%, despite declining from 16.0%, followed by third-party delivery apps at 12.6%, down from 13.7%. The largest decline occurred in click-and-collect/curbside pickup, falling 3.5 percentage points from 14.0% to 10.5%. Direct-to-consumer purchasing from farms or food producers was the notable exception, increasing from 5.2% to 6.6%, while online specialty retailers remained unchanged at 6.0%. Overall, the results suggest a modest pullback from digital food purchasing, particularly pickup-based services, alongside growing interest in purchasing food directly from producers.



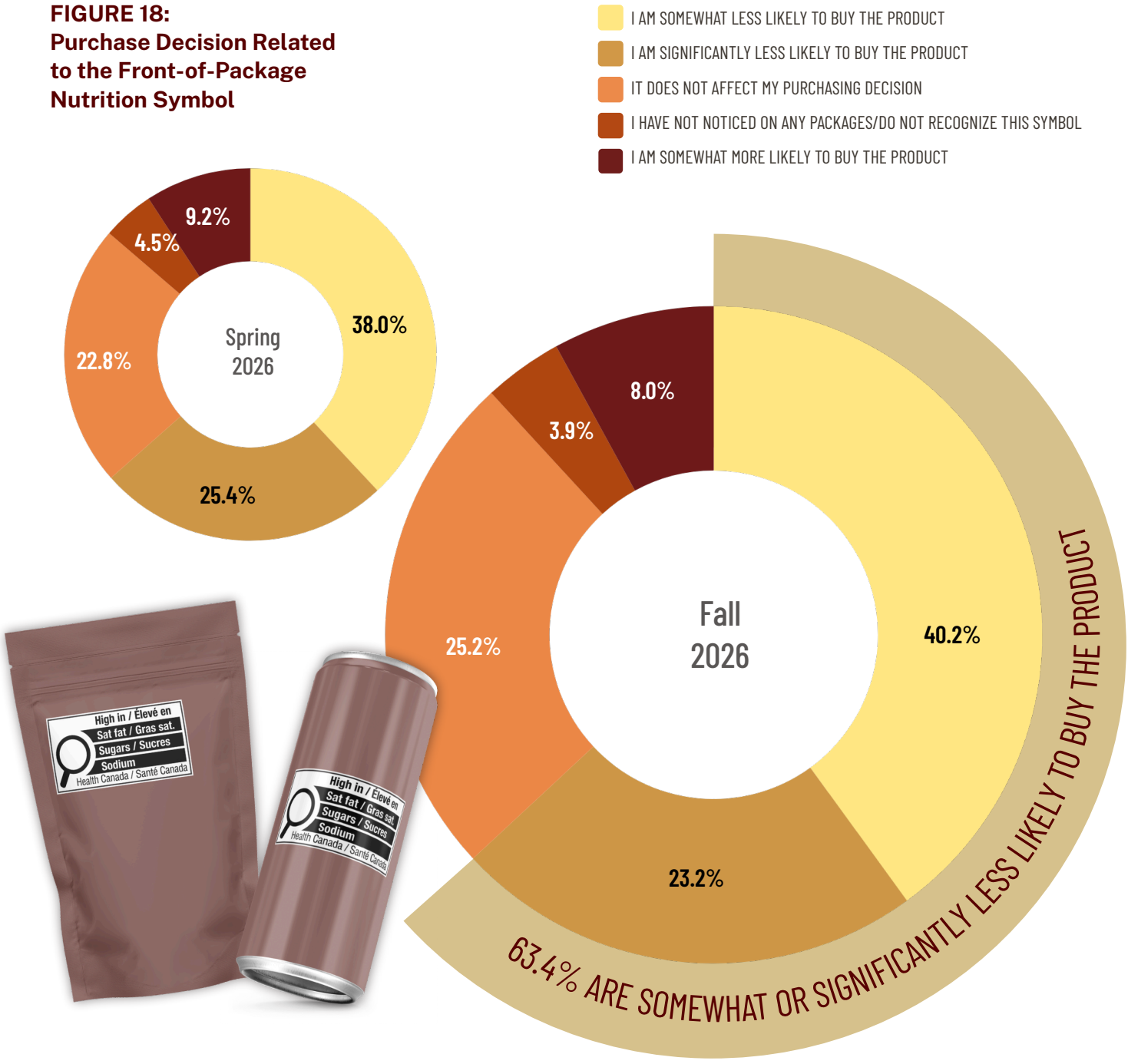
17. Multiple responses allowed. Percentages do not sum to 100%

FIGURE 17b:
No Online / In-App Food Use in the Last Month, by Province



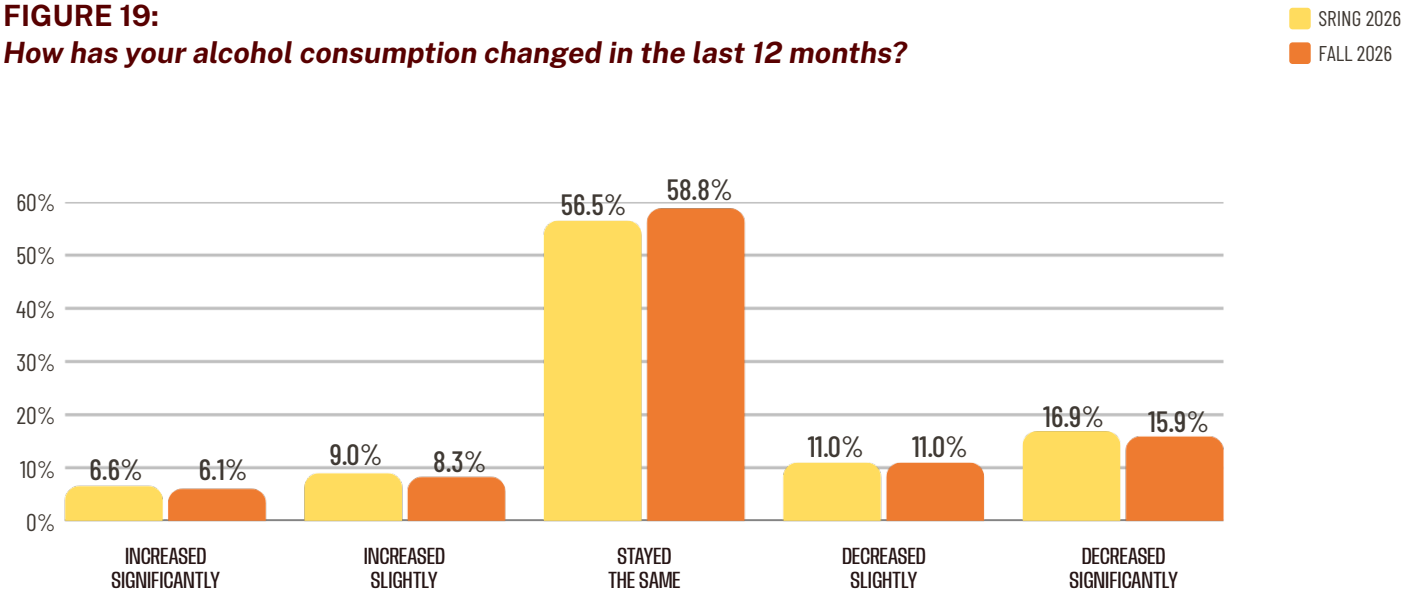
Online food purchasing varies considerably across Canada. British Columbia shows the strongest adoption, with 53.5% reporting no online or in-app food purchases in the past month — meaning 46.5% did purchase food digitally. Ontario (42.1%) and Quebec (42.6%) also show relatively high adoption, while Alberta, Manitoba, New Brunswick and PEI fall closer to the middle of the provincial range. At the other extreme, 86.6% of Nova Scotians reported making no online or in-app food purchases at all during the past month, leaving only 13.4% who did so — the lowest adoption rate among the provinces surveyed. Newfoundland and Labrador (25.0%) and Saskatchewan (27.3%) also show comparatively low levels of online food purchasing, pointing to substantial regional differences in Canadians' use of digital channels to buy food.

FIGURE 18:
Purchase Decision Related to the Front-of-Package Nutrition Symbol



Health Canada's front-of-package nutrition symbol became mandatory on January 1, 2026. Attitudes towards it have already shifted in six months. In Fall 2026, 63.4% of Canadians reported being somewhat or significantly less likely to purchase a product displaying the symbol, unchanged overall from Spring 2026 (63.4%), although the composition shifted: those somewhat less likely to buy increased from 38.0% to 40.2%, while those significantly less likely declined from 25.4% to 23.2%. Meanwhile, the share saying the symbol does not affect their purchasing decision increased from 22.8% to 25.2%, while those somewhat more likely to buy declined from 9.2% to 8.0%. Recognition appears to have improved modestly, with only 3.9% reporting that they had not noticed or did not recognize the symbol, down from 4.5%. Overall, the results suggest that the symbol's negative influence on purchasing remains substantial but has not intensified.

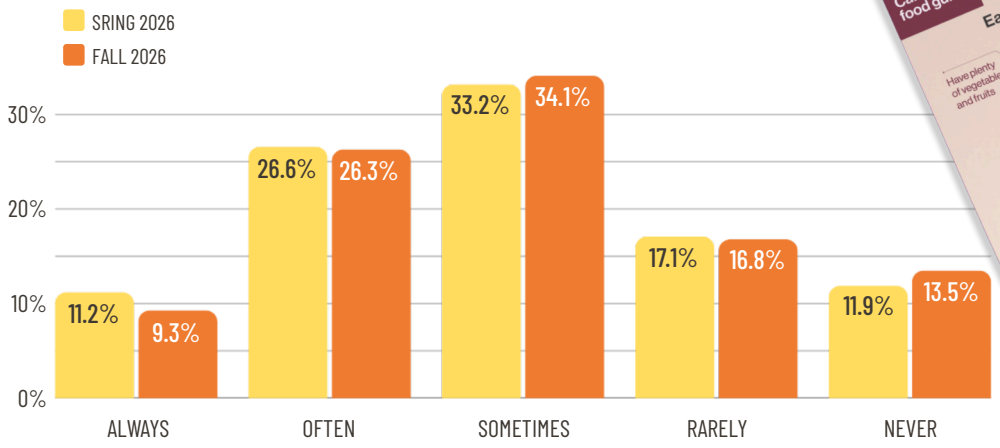
FIGURE 19:
How has your alcohol consumption changed in the last 12 months?

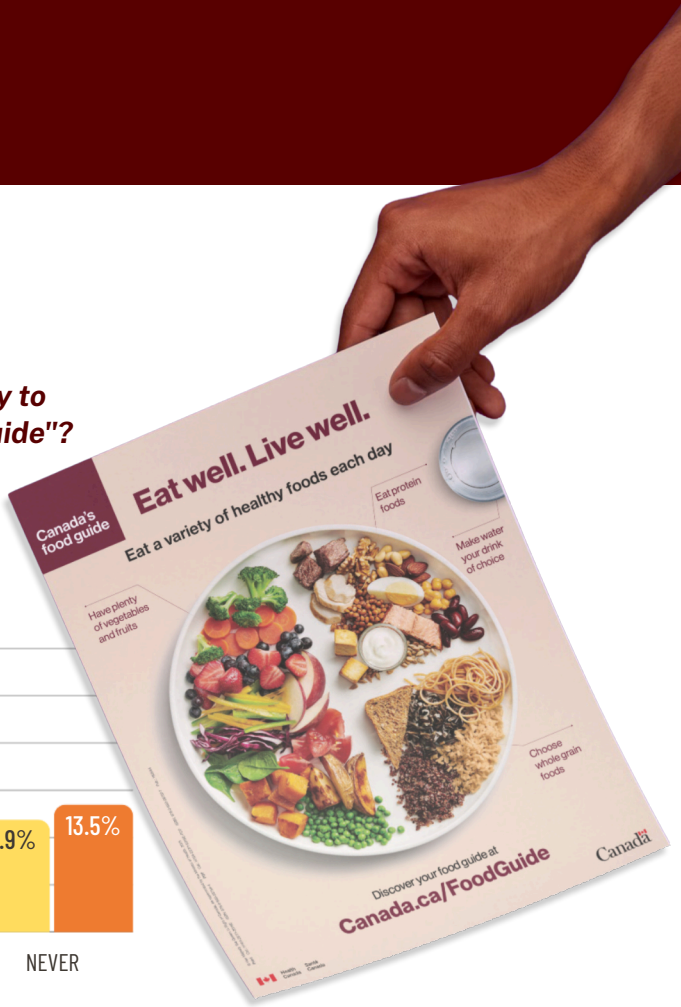


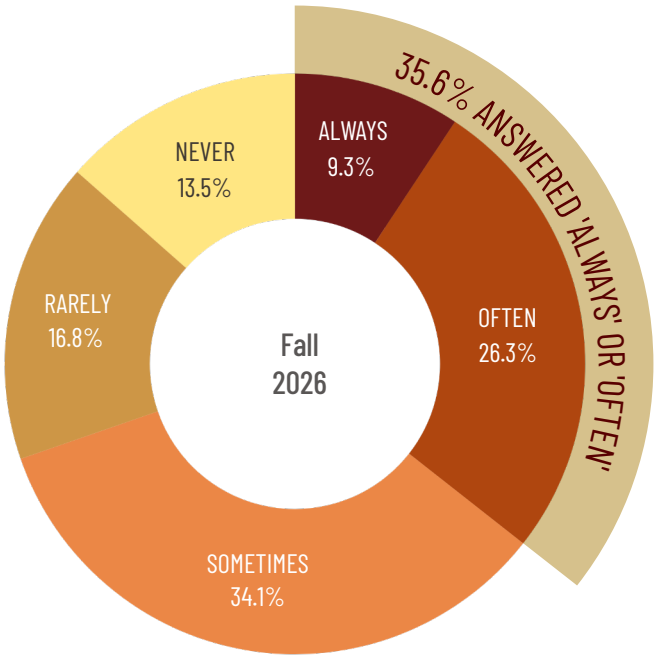
Canadian alcohol consumption appears broadly stable, but the balance continues to tilt toward moderation. In Fall 2026, 58.8% of Canadians reported that their consumption had stayed the same compared with a year earlier, up from 56.5% in Spring 2026. Meanwhile, 26.9% reported drinking less, including 15.9% who had decreased their consumption significantly, compared with 14.4% who reported drinking more. Both increases and decreases eased slightly between the two survey waves, suggesting that consumption patterns are becoming more settled; however, Canadians who are reducing their alcohol intake continue to substantially outnumber those increasing it.

Nearly 6 in 10 Canadians say their alcohol consumption has stayed the same.

FIGURE 20:
To what extent do you agree with the statement: "I actively try to base my meals on the principles outlined in Canada's Food Guide"?





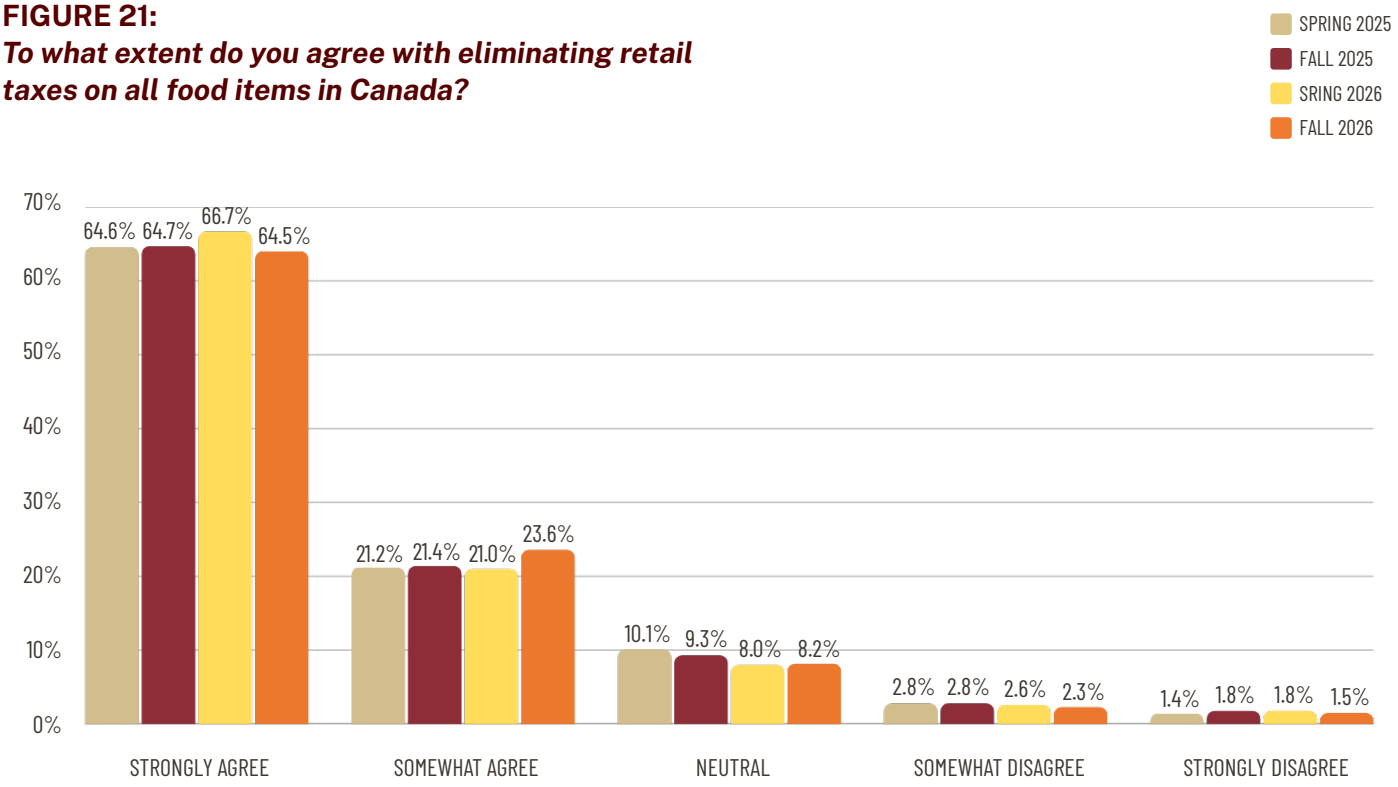


As shown in Figure 20, adherence to Canada's Food Guide remained broadly stable between Spring and Fall 2026, with a slight shift toward the middle of the scale.

The combined share of respondents who always or often try to base their meals on Food Guide principles declined modestly from 37.8% to 35.6%, while "sometimes" increased from 33.2% to 34.1%. At the other end, the combined share responding rarely or never rose slightly from 29.0% to 30.3%, driven by an increase in "never" from 11.9% to 13.5%.

Overall, the results suggest that while roughly one-third of Canadians actively follow Canada's Food Guide principles with some regularity, there has been no indication of stronger adherence over the past six months.

FIGURE 21:
To what extent do you agree with eliminating retail taxes on all food items in Canada?



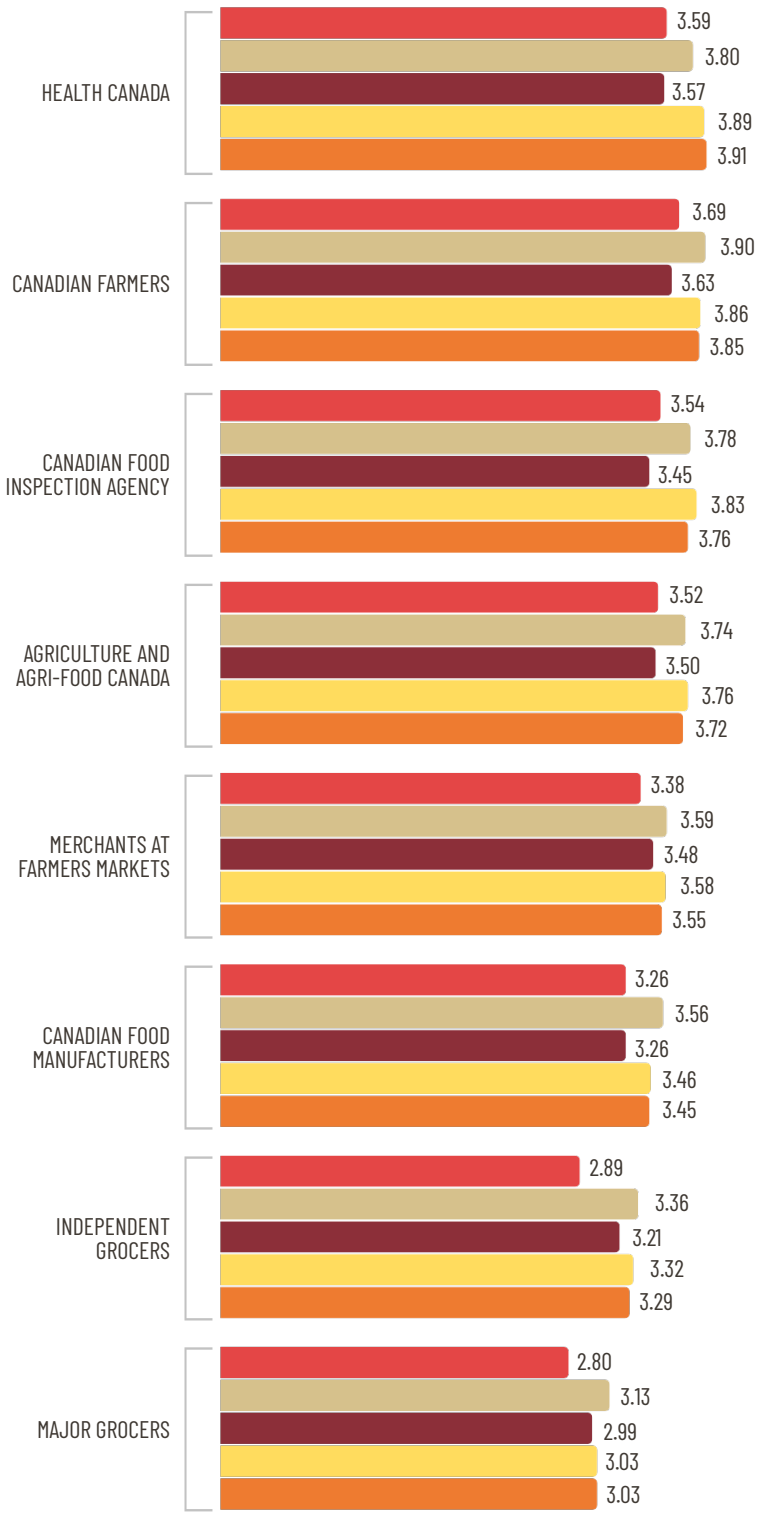
Support for eliminating retail taxes on all food items in Canada remains overwhelming and remarkably stable. In Fall 2026, 88.1% of Canadians either strongly or somewhat agreed with the proposal, up from 86.1% in Fall 2025. During the same period, strong agreement remained essentially unchanged at 64.5%, while somewhat agree increased from 21.4% to 23.6%, suggesting a modest broadening of overall support. Neutral responses declined from 9.3% to 8.2%, while combined opposition fell from 4.6% to just 3.8%. Overall, the results indicate a durable national consensus in favour of removing retail taxes from food purchases, with little evidence of meaningful opposition.

This strong public support coincides with recent provincial moves to broaden tax relief on food. Manitoba[18] eliminated its provincial sales tax on virtually all grocery food items and non-alcoholic beverages effective July 1, 2026, while Quebec[19] expanded its QST zero-rating to several additional food categories effective July 15, 2026. These initiatives suggest that the policy debate is already moving, at least in some provinces, in the same direction as public sentiment.

18: https://news.gov.mb.ca/news/?archive=&item=73202
19: https://www.revenuquebec.ca/en/press-room/tax-news/details/2026-08-07/details-regarding-the-zero-rating-of-certain-products-for-qst-purposes/



Figure 22:
Comparison of Trust in Food Institution[20]



MEAN SCORES

Strongly trust: 5
Somewhat trust: 4
Neutral: 3
Somewhat distrust: 2
Strongly distrust: 1

Trust in organizations protecting Canadians' food interests generally strengthened over the past year, with all eight organizations recording higher Fall 2026 scores than in Fall 2025. Health Canada ranked highest at 3.91 out of 5, up 0.34 points year over year, followed by Canadian farmers at 3.85 (+0.22) and the Canadian Food Inspection Agency at 3.76 (+0.31). Agriculture and Agri-Food Canada also increased to 3.72 (+0.22), while gains were more modest for farmers' market merchants, food manufacturers and independent grocers. Major grocers remained the least trusted group at 3.03, despite a slight 0.04-point improvement. Overall, the results show a broad recovery from the declines observed in Fall 2025, with public institutions and Canadian farmers continuing to command substantially higher levels of trust than grocery retailers and food manufacturers.

20. Weighted means adjusted to exclude 'I am not sure' answers



MOST TO LEAST TRUSTED FALL 2026	FALL 2026 VS FALL 2025 (change in mean)
HEALTH CANADA	+0.34
CANADIAN FARMERS	+0.22
CANADIAN FOOD INSPECTION AGENCY	+0.31
AGRICULTURE AND AGRI-FOOD CANADA	+0.22
MERCHANTS AT FARMERS MARKETS	+0.07
CANADIAN FOOD MANUFACTURERS	+0.19
INDEPENDENT GROCERS	+0.08
MAJOR GROCERS	+0.04

'Trust is on the rise across Canada's food system, but the trust gap remains clear: Canadians place considerably more confidence in public institutions and farmers than in the companies that manufacture and sell their food.'

METHODOLOGY

This survey, conducted on **September 11 to 17, 2026** 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 **2,998 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 was regularly released by the University until April 2026.

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 seven 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.

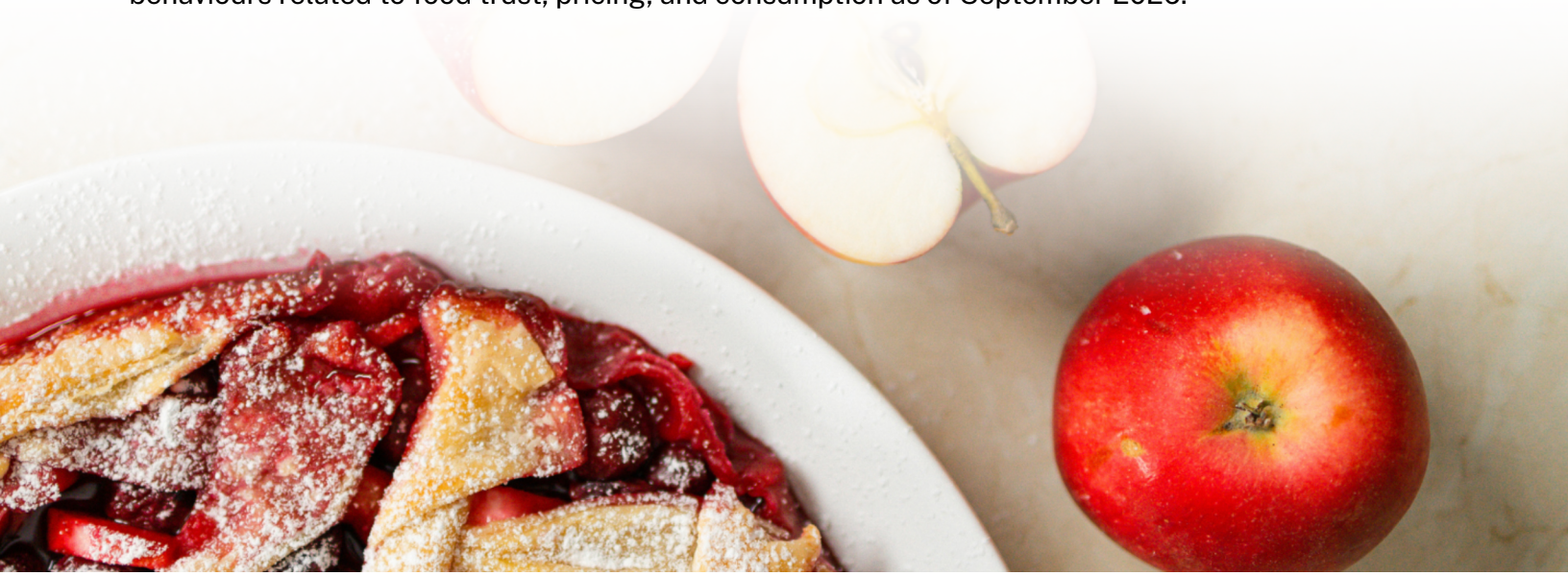
MARGIN OF ERROR:

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 September 2026.



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