



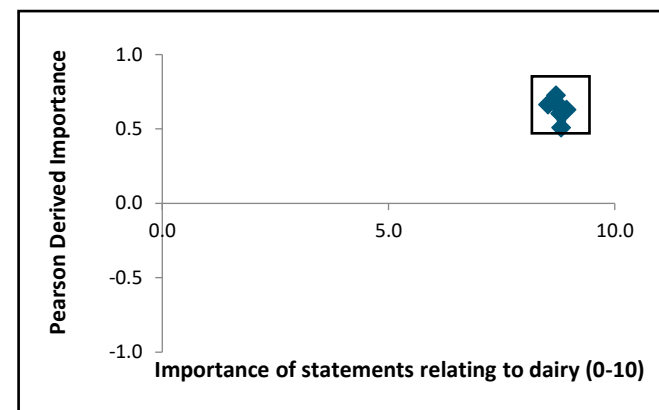
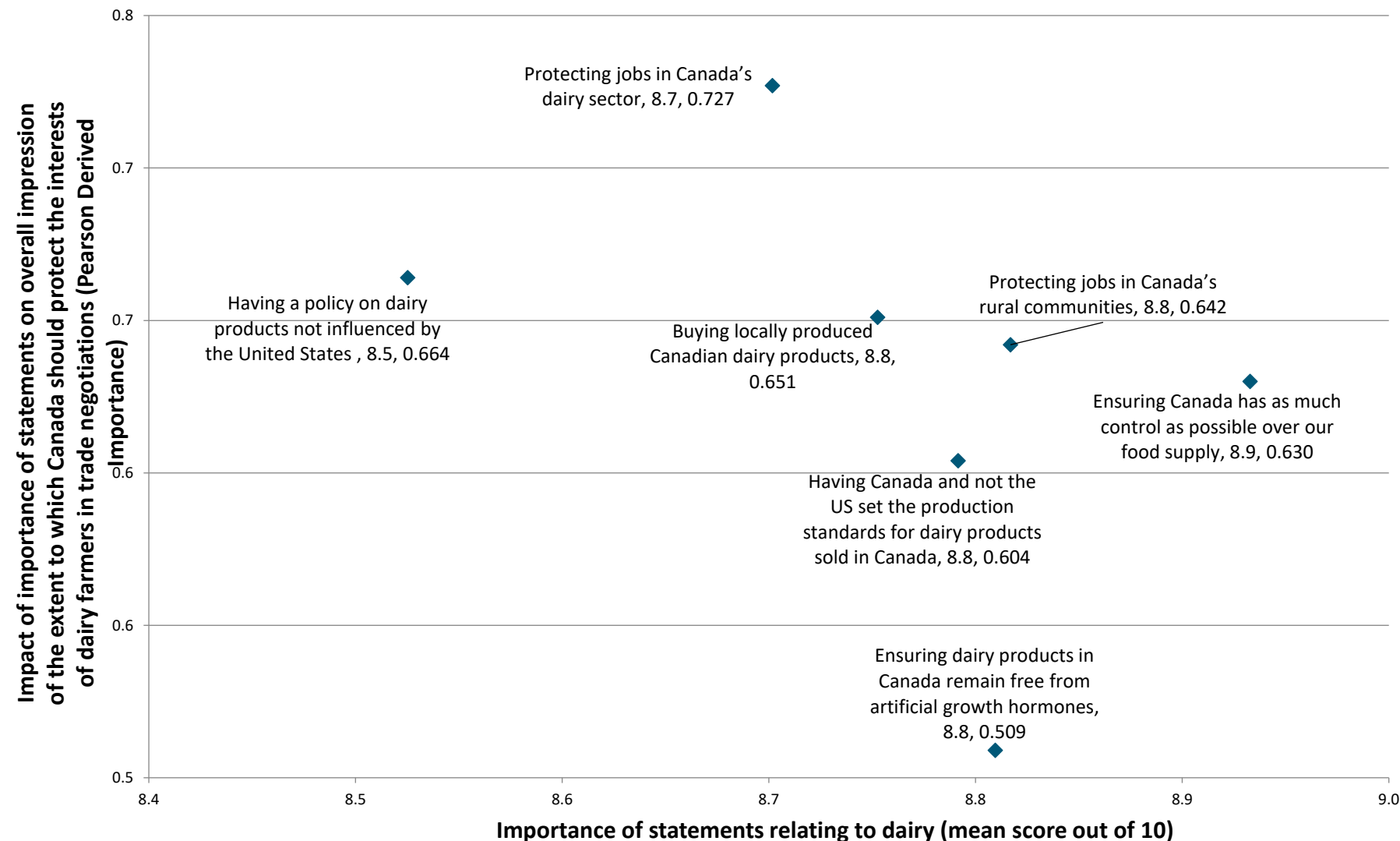
Dairy Farmers of Canada – Trade Negotiations Study 2025.

National Survey | Summary
Conducted by Nanos for the Dairy Farmers of Canada, July 2025
Field: July 8th to 11th, 2025
Submission 2025-2866



A. Driver Analysis

Driver Analysis – Defending the interests of dairy farmers



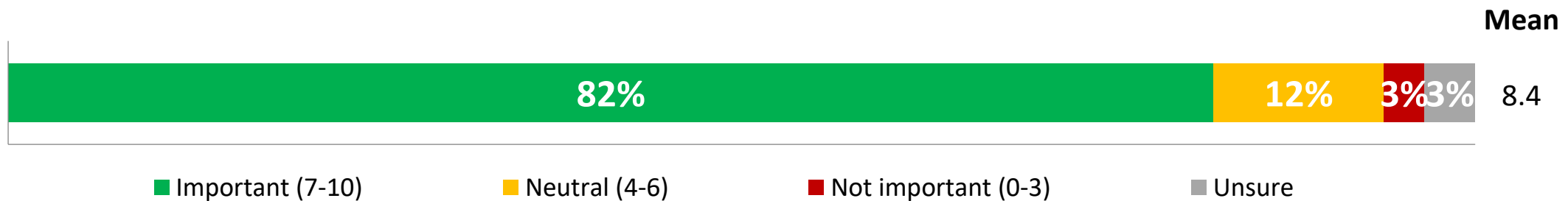
The Pearson Correlation score indicates the relationship between the extent to which the Canadian government should defend or not defend the interests of Canadian dairy farmers in trade negotiations and the importance of various statements related to dairy in Canada. A value of +1 is total positive linear correlation, 0 is no linear correlation, and -1 is a total negative linear correlation.

The variables have scores between +0.509 and +0.727. These scores indicate that "protecting jobs in Canada's dairy sector" is most likely to drive impressions of defending the interests of Canadian dairy farmers in trade negotiations (+0.727), while "ensuring dairy products in Canada remain free from artificial growth hormones" has least impact on impressions (+0.509).

B. Canada-US Trade Negotiations

Importance of Canada US trade negotiations

Q – On a scale of 0 to 10 where 0 is not at all important and 10 is very important, how important would you say are the Canada US trade negotiations to the future of the Canadian economy?



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

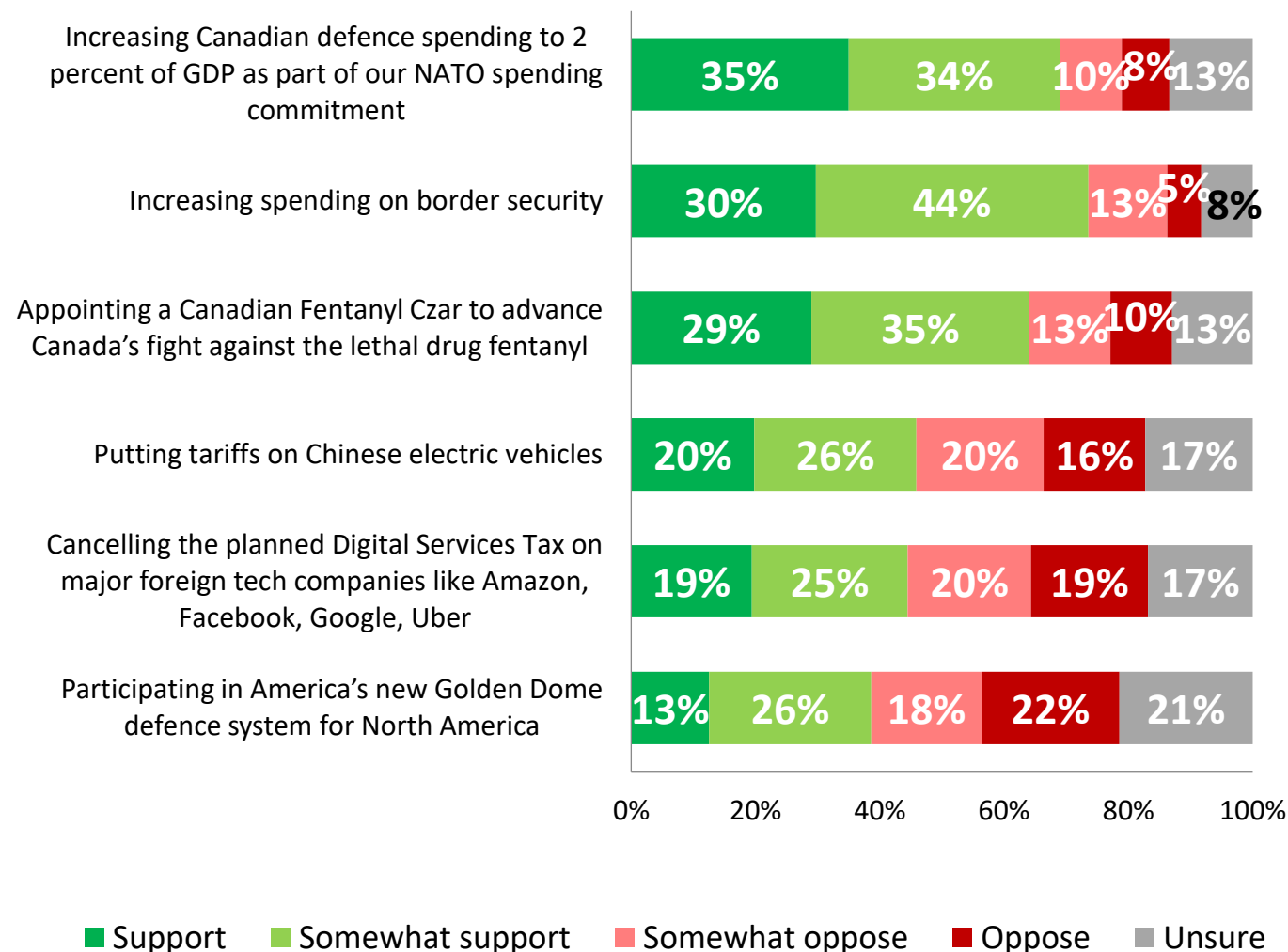
Mean (0 to 10 scale)	Atlantic (n=301)	Quebec (n=753)	Ontario (n=945)	Prairies (n=646)	BC (n=404)
	8.5	8.5	8.3	8.3	8.3
	Men (n=1515)	Women (n=1527)	18 to 34 (n=728)	35 to 54 (n=1064)	55 plus (n=1257)
	8.4	8.4	8.1	8.2	8.7

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,049 Canadians.

Canadians are more likely to outright support increasing Canadian defense spending to 2 percent of GDP as part of our NATO spending commitment (35%), increasing spending on border security (30%) and appointing a Canadian Fentanyl Czar to advance Canada's fight against the lethal drug fentanyl (29%).

Q – Do you support, somewhat support, somewhat oppose or oppose the following actions by the Government of Canada to help relations with the United States.
[RANDOMIZE]

Support for actions to help relations with the U.S.

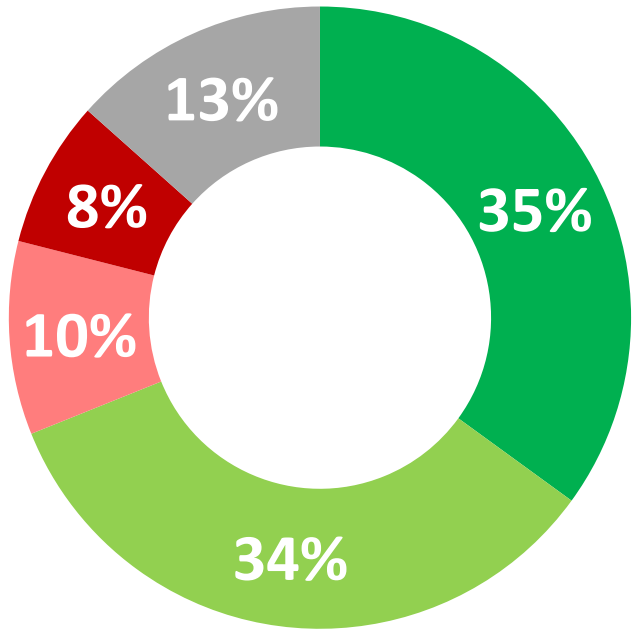


*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,054 Canadians.

Support for increasing Canadian defence spending to 2 percent of GDP



■ Support
■ Somewhat support
■ Somewhat oppose
■ Oppose
■ Unsure

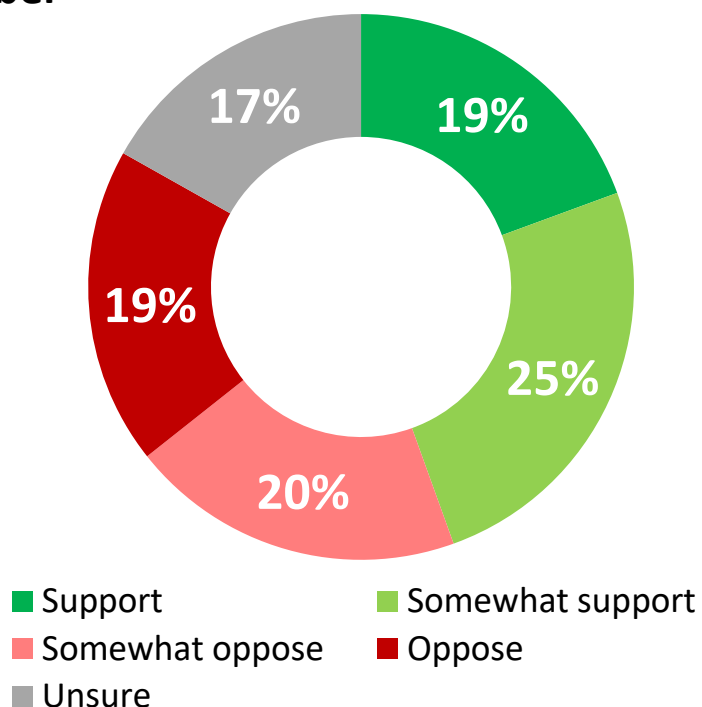
*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Support/Somewhat support	Atlantic (n=302)	Quebec (n=755)	Ontario (n=946)	Prairies (n=646)	BC (n=405)
	81.8%	60.9%	71.3%	70.2%	67.7%
	Men (n=1517)	Women (n=1530)	18 to 34 (n=728)	35 to 54 (n=1064)	55 plus (n=1262)
Oppose/Somewhat oppose	73.5%	64.7%	57.7%	64.1%	79.9%
	Atlantic (n=302)	Quebec (n=755)	Ontario (n=946)	Prairies (n=646)	BC (n=405)
	7.9%	22.5%	17.1%	16.4%	17.7%
	Men (n=1517)	Women (n=1530)	18 to 34 (n=728)	35 to 54 (n=1064)	55 plus (n=1262)
	18.1%	17.2%	24.2%	21.0%	10.9%

Q – Do you support, somewhat support, somewhat oppose or oppose the following actions by the Government of Canada to help relations with the United States. [RANDOMIZE]
Increasing Canadian defence spending to 2 percent of GDP as part of our NATO spending commitment

Support for cancelling Digital Services Tax

Q – Do you support, somewhat support, somewhat oppose or oppose the following actions by the Government of Canada to help relations with the United States. [RANDOMIZE] **Cancelling the planned Digital Services Tax on major foreign tech companies like Amazon, Facebook, Google, Uber**



*Weighted to the true population proportion.

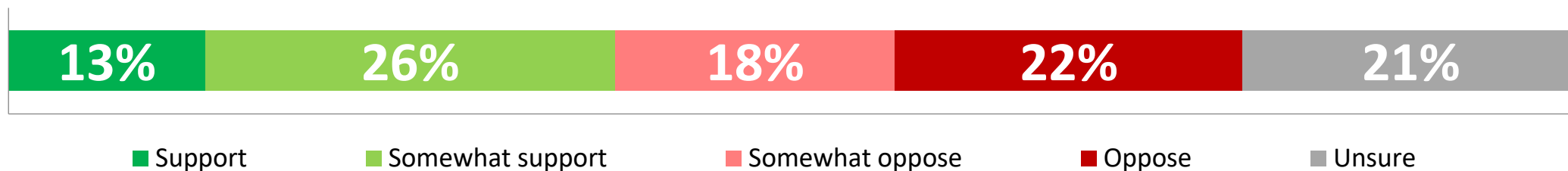
*Charts may not add up to 100 due to rounding.

Support/Somewhat support	Atlantic (n=302)	Quebec (n=756)	Ontario (n=946)	Prairies (n=646)	BC (n=404)
	50.9%	37.9%	45.3%	48.9%	44.5%
	Men (n=1518)	Women (n=1529)	18 to 34 (n=729)	35 to 54 (n=1064)	55 plus (n=1261)
Oppose/Somewhat oppose	48.4%	40.9%	50.4%	47.9%	38.0%
	Atlantic (n=302)	Quebec (n=756)	Ontario (n=946)	Prairies (n=646)	BC (n=404)
	32.3%	48.7%	36.0%	34.1%	38.2%
Oppose/Somewhat oppose	Men (n=1518)	Women (n=1529)	18 to 34 (n=729)	35 to 54 (n=1064)	55 plus (n=1261)
	40.5%	36.8%	33.0%	33.9%	46.0%

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,054 Canadians.

Support for Canada participating in Golden Dome defence system

Q – Do you support, somewhat support, somewhat oppose or oppose the following actions by the Government of Canada to help relations with the United States. [RANDOMIZE] **Participating in America's new Golden Dome defence system for North America**



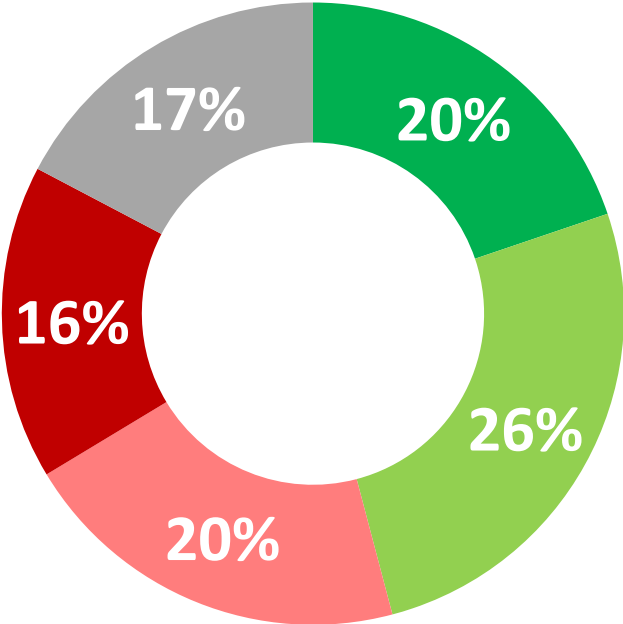
*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Support/Somewhat support	Atlantic (n=302)	Quebec (n=756)	Ontario (n=945)	Prairies (n=646)	BC (n=404)
	43.8%	33.3%	40.3%	41.5%	36.6%
	Men (n=1516)	Women (n=1530)	18 to 34 (n=729)	35 to 54 (n=1064)	55 plus (n=1260)
	46.5%	31.3%	42.2%	39.1%	36.0%

Oppose/Somewhat oppose	Atlantic (n=302)	Quebec (n=756)	Ontario (n=945)	Prairies (n=646)	BC (n=404)
	31.5%	44.9%	39.7%	35.3%	42.2%
	Men (n=1516)	Women (n=1530)	18 to 34 (n=729)	35 to 54 (n=1064)	55 plus (n=1260)
	41.1%	38.6%	37.7%	37.5%	43.3%

Support for putting tariffs on Chinese electric vehicles



■ Support
■ Somewhat support
■ Somewhat oppose
■ Oppose
■ Unsure

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

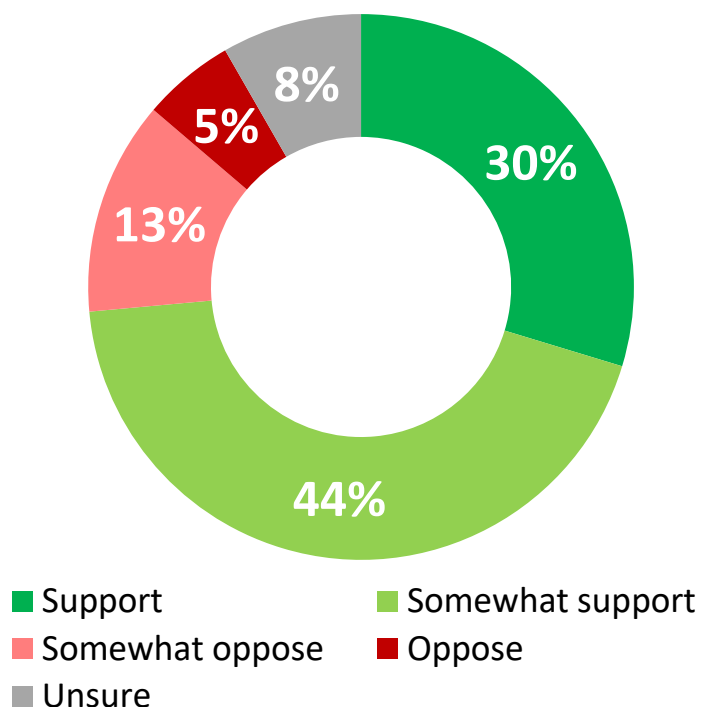
Support/Somewhat support	Atlantic (n=301)	Quebec (n=756)	Ontario (n=941)	Prairies (n=646)	BC (n=404)
	53.1%	38.7%	48.7%	46.3%	46.0%
	Men (n=1512)	Women (n=1529)	18 to 34 (n=726)	35 to 54 (n=1061)	55 plus (n=1261)
	48.6%	43.4%	39.4%	43.2%	52.2%
Oppose/Somewhat oppose	Atlantic (n=301)	Quebec (n=756)	Ontario (n=941)	Prairies (n=646)	BC (n=404)
	26.6%	44.1%	34.6%	36.2%	36.4%
	Men (n=1512)	Women (n=1529)	18 to 34 (n=726)	35 to 54 (n=1061)	55 plus (n=1261)
	39.9%	33.8%	41.8%	38.0%	32.6%

Q – Do you support, somewhat support, somewhat oppose or oppose the following actions by the Government of Canada to help relations with the United States. [RANDOMIZE] **Putting tariffs on Chinese electric vehicles**

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,048 Canadians.

Support for increasing spending on border security

Q – Do you support, somewhat support, somewhat oppose or oppose the following actions by the Government of Canada to help relations with the United States. [RANDOMIZE] **Increasing spending on border security**



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Support/Somewhat support	Atlantic (n=302)	Quebec (n=754)	Ontario (n=944)	Prairies (n=646)	BC (n=405)
	79.5%	70.1%	73.2%	74.0%	76.7%
	Men (n=1515)	Women (n=1529)	18 to 34 (n=729)	35 to 54 (n=1062)	55 plus (n=1260)
	76.6%	70.9%	64.2%	71.5%	81.3%
Oppose/Somewhat oppose	Atlantic (n=302)	Quebec (n=754)	Ontario (n=944)	Prairies (n=646)	BC (n=405)
	13.6%	18.9%	19.5%	18.4%	14.9%
	Men (n=1515)	Women (n=1529)	18 to 34 (n=729)	35 to 54 (n=1062)	55 plus (n=1260)
	17.7%	18.4%	25.2%	18.7%	13.1%

Support for appointing a Canadian Fentanyl Czar

Q – Do you support, somewhat support, somewhat oppose or oppose the following actions by the Government of Canada to help relations with the United States. [RANDOMIZE] **Appointing a Canadian Fentanyl Czar to advance Canada's fight against the lethal drug fentanyl**



■ Support

■ Somewhat support

■ Somewhat oppose

■ Oppose

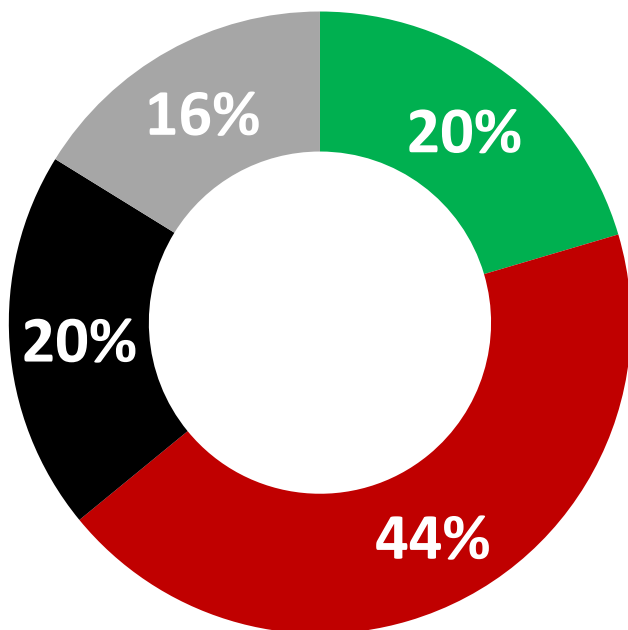
■ Unsure

*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Support/Somewhat support	Atlantic (n=302)	Quebec (n=754)	Ontario (n=945)	Prairies (n=646)	BC (n=405)
	71.5%	56.8%	66.9%	65.2%	62.9%
	Men (n=1516)	Women (n=1530)	18 to 34 (n=729)	35 to 54 (n=1062)	55 plus (n=1261)
	66.5%	61.8%	65.5%	64.2%	62.9%

Oppose/Somewhat oppose	Atlantic (n=302)	Quebec (n=754)	Ontario (n=945)	Prairies (n=646)	BC (n=405)
	15.8%	27.2%	21.7%	21.6%	24.8%
	Men (n=1516)	Women (n=1530)	18 to 34 (n=729)	35 to 54 (n=1062)	55 plus (n=1261)
	23.6%	22.2%	20.6%	21.8%	25.4%



- Stronger bargaining position
- Weaker bargaining positions
- No impact on bargaining position
- Unsure

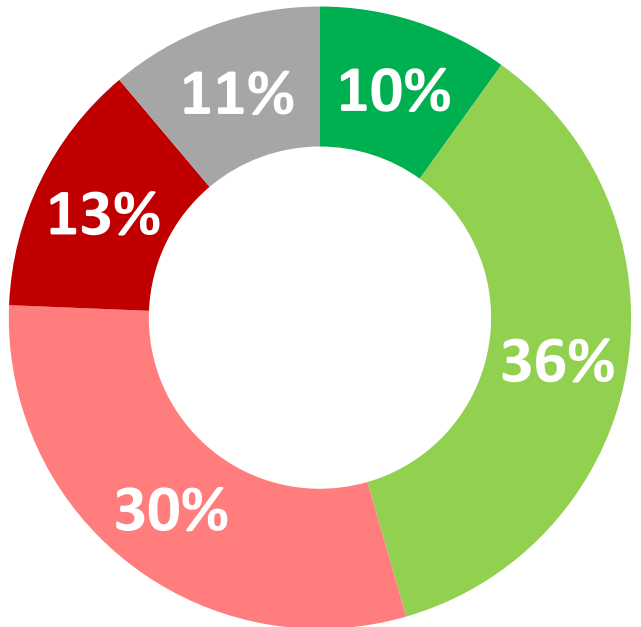
*Weighted to the true population proportion.
 *Charts may not add up to 100 due to rounding.

Impact of accommodations to U.S. requests on Canada's bargaining position

Stronger bargaining position	Atlantic (n=302)	Quebec (n=755)	Ontario (n=941)	Prairies (n=646)	BC (n=405)
	19.9%	19.1%	21.8%	21.3%	17.9%
	Men (n=1513)	Women (n=1529)	18 to 34 (n=726)	35 to 54 (n=1061)	55 plus (n=1262)
Weaker bargaining position	22.7%	18.3%	29.3%	20.5%	14.6%
	Atlantic (n=302)	Quebec (n=755)	Ontario (n=941)	Prairies (n=646)	BC (n=405)
	37.8%	48.2%	41.9%	44.3%	43.1%
Weaker bargaining position	Men (n=1513)	Women (n=1529)	18 to 34 (n=726)	35 to 54 (n=1061)	55 plus (n=1262)
	44.9%	42.4%	43.6%	43.7%	43.7%

Q – Do you believe that each time Canada accommodates a request from the US to continue trade discussions that it makes Canada's negotiating position, stronger, weaker or that it has no impact on Canada's bargaining position.

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,049 Canadians.



■ Likely
 ■ Somewhat likely
■ Somewhat not likely
 ■ Not likely
■ Unsure

*Weighted to the true population proportion.
 *Charts may not add up to 100 due to rounding.

Likelihood of positive trade agreement with the U.S. for Canadian economy

	Atlantic (n=301)	Quebec (n=755)	Ontario (n=945)	Prairies (n=644)	BC (n=405)
Likely/Somewhat likely	48.9%	41.3%	49.7%	43.6%	41.8%
Men (n=1516)	50.9%	40.6%	52.9%	45.4%	40.8%
Women (n=1527)	41.9%	45.8%	39.8%	44.5%	48.1%
18 to 34 (n=727)	39.5%	46.8%	37.0%	41.2%	49.1%
35 to 54 (n=1062)					
55 plus (n=1261)					

Q – In your opinion is it likely, somewhat likely, somewhat unlikely or unlikely that Canada can reach a trade agreement with the United States that will be positive for the Canadian economy.

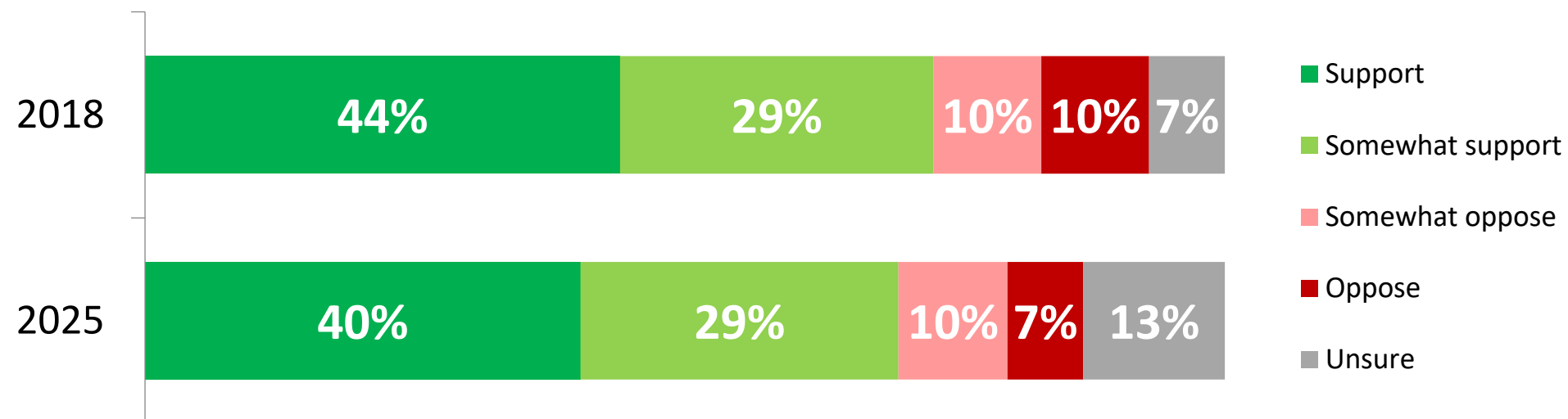
Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,050 Canadians.



C. Supply Management and CUSMA

Support for supply management system

Q – Supply management is a system by which Canada's dairy, chicken, turkey and egg farmers work to ensure a stable supply of their products, lessening price fluctuations, while ensuring a stable income for Canadian farmers. Do you support, somewhat support, somewhat oppose or oppose the general objectives of this system?



*Weighted to the true population proportion.

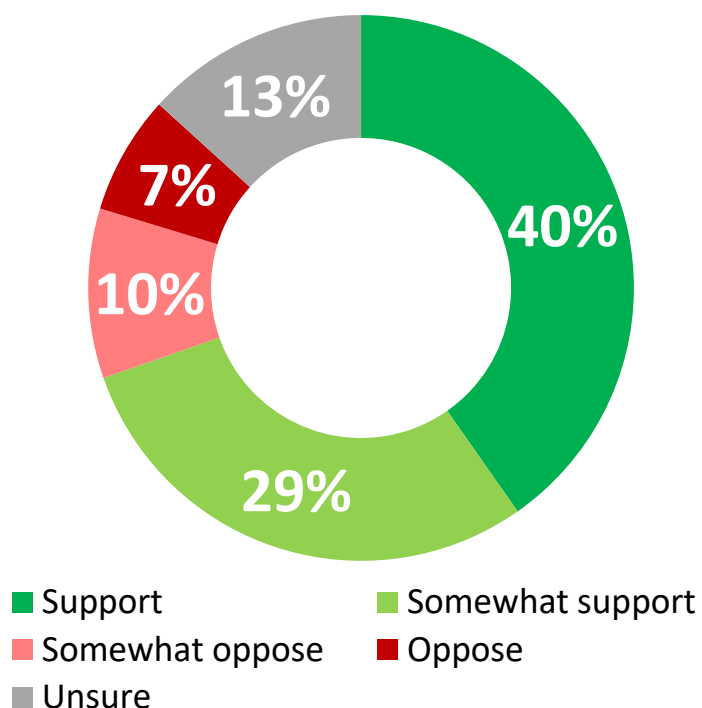
*Charts may not add up to 100 due to rounding.

2018 Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 30th and August 5th, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

2025 Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3046 Canadians.

Support for supply management system

Q – Supply management is a system by which Canada’s dairy, chicken, turkey and egg farmers work to ensure a stable supply of their products, lessening price fluctuations, while ensuring a stable income for Canadian farmers. Do you support, somewhat support, somewhat oppose or oppose the general objectives of this system?



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Support/Somewhat support	Atlantic (n=301)	Quebec (n=753)	Ontario (n=943)	Prairies (n=645)	BC (n=404)
	66.8%	67.7%	69.5%	72.1%	71.5%
	Men (n=1515)	Women (n=1524)	18 to 34 (n=729)	35 to 54 (n=1058)	55 plus (n=1259)
Oppose/Somewhat oppose	68.5%	70.8%	64.7%	66.0%	75.7%
	Atlantic (n=301)	Quebec (n=753)	Ontario (n=943)	Prairies (n=645)	BC (n=404)
	16.4%	16.9%	17.3%	16.3%	18.3%
Oppose/Somewhat oppose	Men (n=1515)	Women (n=1524)	18 to 34 (n=729)	35 to 54 (n=1058)	55 plus (n=1259)
	21.7%	12.6%	19.2%	18.5%	14.6%

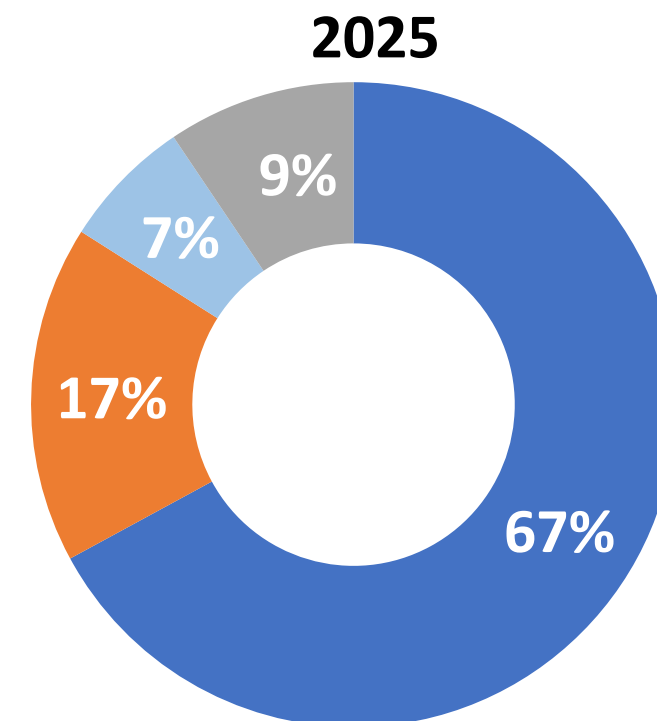
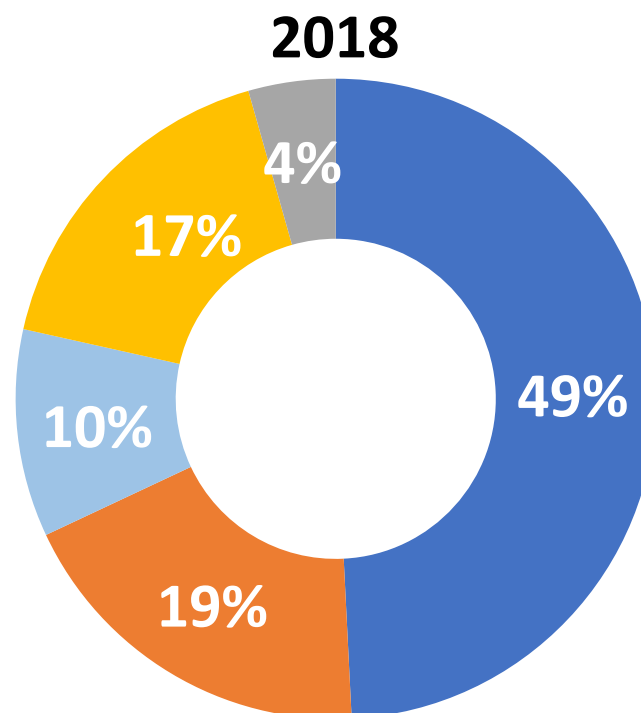
Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,046 Canadians.

Canadian response to US targeting of Canadian farmers

[2018] Q – During the NAFTA renegotiation, US President Donald Trump has been targeting Canadian farmers and the supply management system. What should the Canadian government do? [RANDOMIZE]

[2025] Q – During the trade negotiations, US President Donald Trump has been targeting Canadian farmers and the supply management system. What should the Canadian government do? [RANDOMIZE]

- Defend Canadian farmers and supply management
- Make some concessions but preserve the system***
- Abandon supply management
- Ignore Donald Trump**
- Unsure



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

**This response option was only available in the 2018 survey.

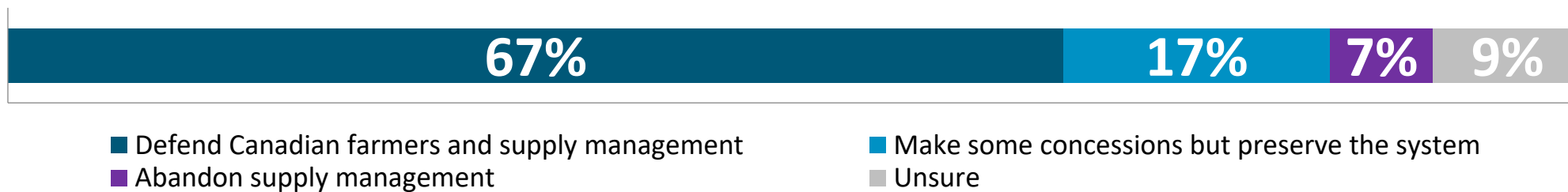
***This response option appeared as "Make some concessions but preserve the model" in the 2018 survey.

2018 Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 30th and August 5th, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

2025 Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3042 Canadians.

Government response to Donald Trump targeting Canadian farmers

Q – During the trade negotiations, US President Donald Trump has been targeting Canadian farmers and the supply management system. What should the Canadian government do? [RANDOMIZE]



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

2 in 3 Canadians

say that the Canadian government should defend Canadian farmers and supply management in trade negotiations, while 17 percent of Canadians believe the Canadian government should make some concessions but preserve the system. Seven percent of Canadians believe the government should abandon supply management and nine percent report being unsure.

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,042 Canadians.

Government response to Donald Trump targeting Canadian farmers – by demographics

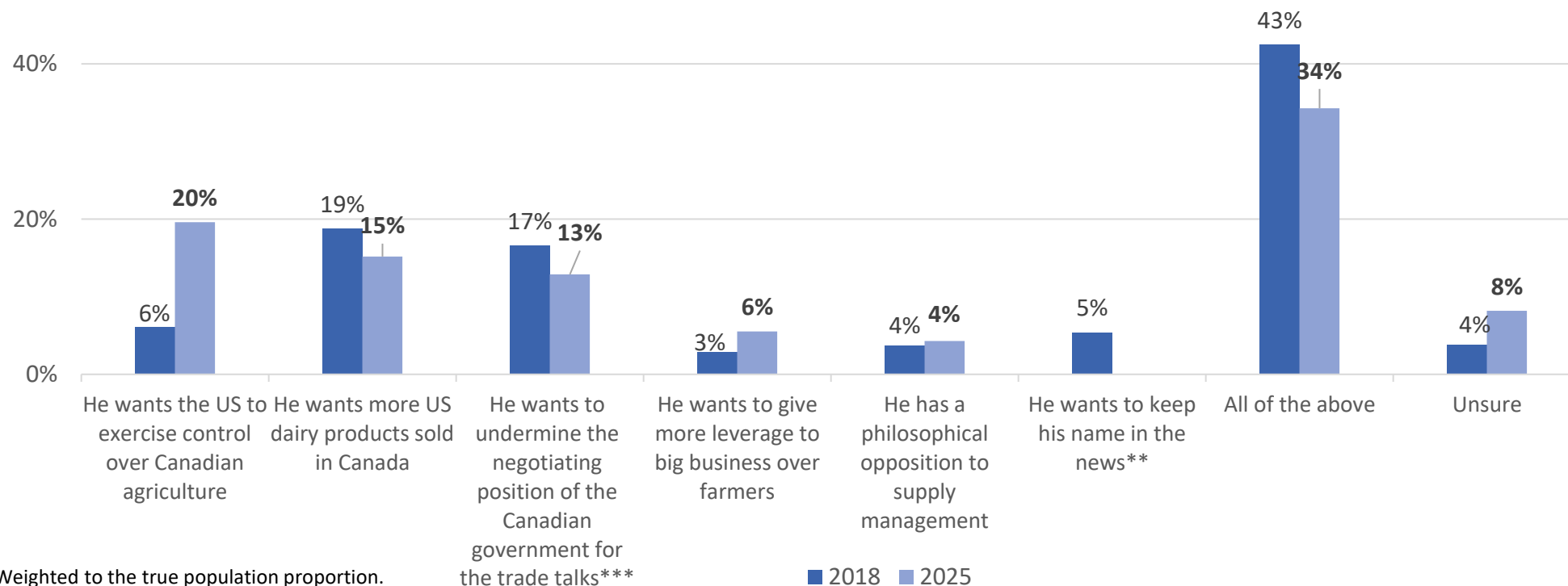
Q – During the trade negotiations, US President Donald Trump has been targeting Canadian farmers and the supply management system. What should the Canadian government do? [RANDOMIZE]

	2025-07 (n=3042)	Atlantic (n=301)	Quebec (n=753)	Ontario (n=939)	Prairies (n=645)	BC (n=404)	Men (n=1511)	Women (n=1524)	18-34 (n=724)	35-54 (n=1060)	55 plus (n=1258)
Defend Canadian farmers and supply management	67.1%	73.6%	68.5%	67.1%	65.8%	63.3%	61.1%	72.8%	66.8%	65.7%	68.4%
Make some concessions but preserve the system	16.9%	14.6%	14.6%	16.4%	18.4%	21.5%	21.4%	12.7%	17.9%	15.2%	17.6%
Abandon supply management	6.6%	4.2%	5.2%	7.8%	7.4%	5.6%	9.3%	4.0%	6.3%	7.4%	6.0%
Unsure	9.4%	7.6%	11.7%	8.8%	8.4%	9.6%	8.2%	10.6%	8.9%	11.7%	8.0%

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,042 Canadians.

Motivation for Donald Trump targeting the Canadian supply management system

Q – US President Donald Trump has been targeting the Canadian supply management system. What, in your opinion, is his MAIN motivation? [RANDOMIZE]



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

**This response option was only available in the 2018 survey

*** Note: This response was labelled as "He wants to undermine the negotiating position of the Canadian government on NAFTA" in the 2018 survey.

2018 Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 30th and August 5th, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

2025 Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3053 Canadians.

Trump's motivation to targeting Canadian supply management system

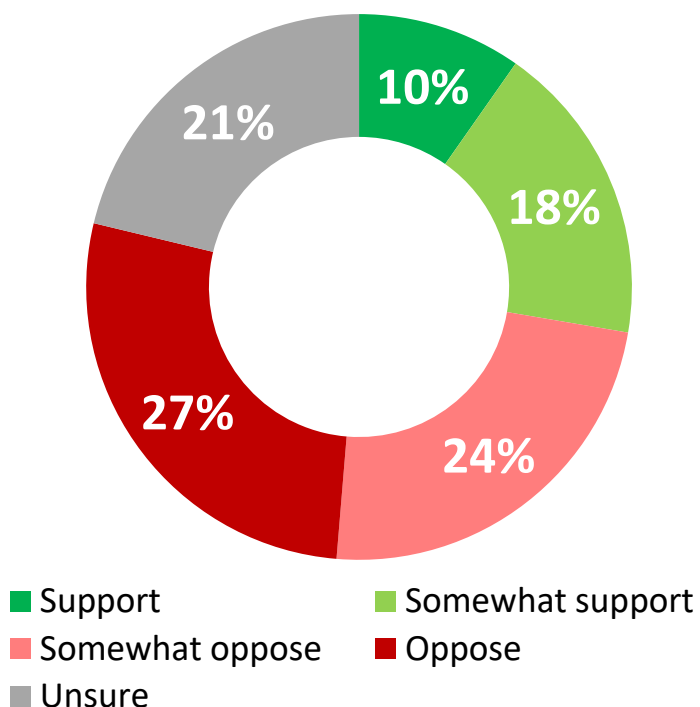
Q – [TRACKING - TWEAKED] US President Donald Trump has been targeting the Canadian supply management system. What, in your opinion, is his MAIN motivation? [RANDOMIZE]

	2025-07 (n=3053)	Atlantic (n=302)	Quebec (n=755)	Ontario (n=946)	Prairies (n=646)	BC (n=404)	Men (n=1517)	Women (n=1529)	18-34 (n=729)	35-54 (n=1062)	55 plus (n=1262)
He wants the US to exercise control over Canadian agriculture	19.6%	15.7%	22.7%	18.3%	20.1%	19.5%	16.4%	22.7%	23.5%	20.6%	16.3%
He wants more US dairy products sold in Canada	15.2%	15.2%	18.1%	15.8%	12.6%	11.9%	18.7%	11.9%	11.0%	16.2%	17.1%
He wants to undermine the negotiating position of the Canadian government for the trade talks	12.9%	11.5%	11.6%	14.2%	10.6%	15.1%	12.7%	13.1%	16.2%	12.8%	10.8%
He wants to give more leverage to big business over farmers	5.5%	6.5%	6.0%	4.6%	6.8%	5.2%	6.8%	4.3%	9.7%	5.7%	2.7%
He has a philosophical opposition to supply management	4.3%	5.2%	4.8%	5.3%	2.6%	2.3%	5.4%	3.3%	6.3%	4.6%	2.8%
All of the above	34.3%	37.3%	27.8%	34.3%	38.4%	38.5%	32.6%	35.9%	23.1%	30.8%	44.3%
Unsure	8.2%	8.7%	9.1%	7.5%	8.9%	7.6%	7.4%	8.9%	10.2%	9.3%	6.0%

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,053 Canadians.

Level of support for the US's right to be consulted on changes to the Canadian Dairy system per the CUSMA

Q – Do you support, somewhat support, somewhat oppose or oppose the US's right under the Canada-United States-Mexico Agreement (CUSMA) to be consulted on changes to the Canadian Dairy system?



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

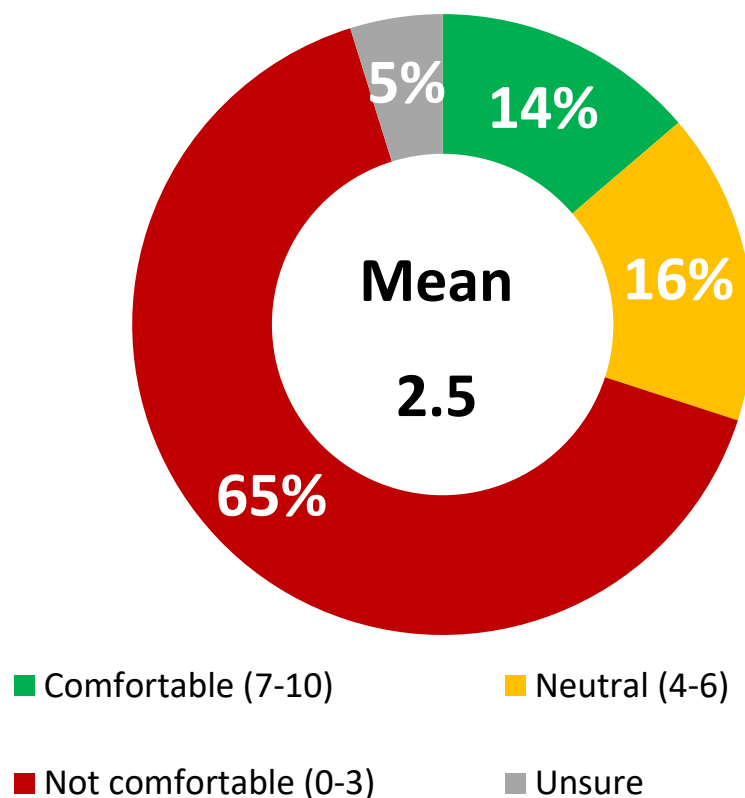
Support/Somewhat support	Atlantic (n=302)	Quebec (n=751)	Ontario (n=938)	Prairies (n=641)	BC (n=404)
	26.8%	26.1%	28.9%	29.5%	25.1%
	Men (n=1510)	Women (n=1519)	18 to 34 (n=722)	35 to 54 (n=1056)	55 plus (n=1258)
Oppose/Somewhat oppose	33.5%	22.3%	31.0%	27.2%	25.8%
	Atlantic (n=302)	Quebec (n=751)	Ontario (n=938)	Prairies (n=641)	BC (n=404)
	48.9%	54.5%	50.3%	47.6%	53.2%
	Men (n=1510)	Women (n=1519)	18 to 34 (n=722)	35 to 54 (n=1056)	55 plus (n=1258)
	49.5%	52.5%	44.9%	49.4%	56.4%

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,036 Canadians.

D. US Dairy Products in the Canadian Market

Level of comfort with the US government influence on Canada's food policy on dairy

Q – On a scale of 0 to 10 where 0 is not comfortable at all and 10 is completely comfortable, how comfortable are you in having the US government influence Canada's food policy on dairy?



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

About 2 in 3 Canadians

report not being comfortable (65%) with having the US government influence Canada's food policy on dairy, as opposed to 16 percent who hold a neutral view on the matter and fourteen percent who report being comfortable with this. Respondents aged 55 and over (81%) are more likely to report being not comfortable with this than respondents aged 35 to 54 (60%) and respondents aged 18 to 34 (47%).

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,048 Canadians.

Level of comfort with the US government influence on Canada's food policy on dairy - by demographics

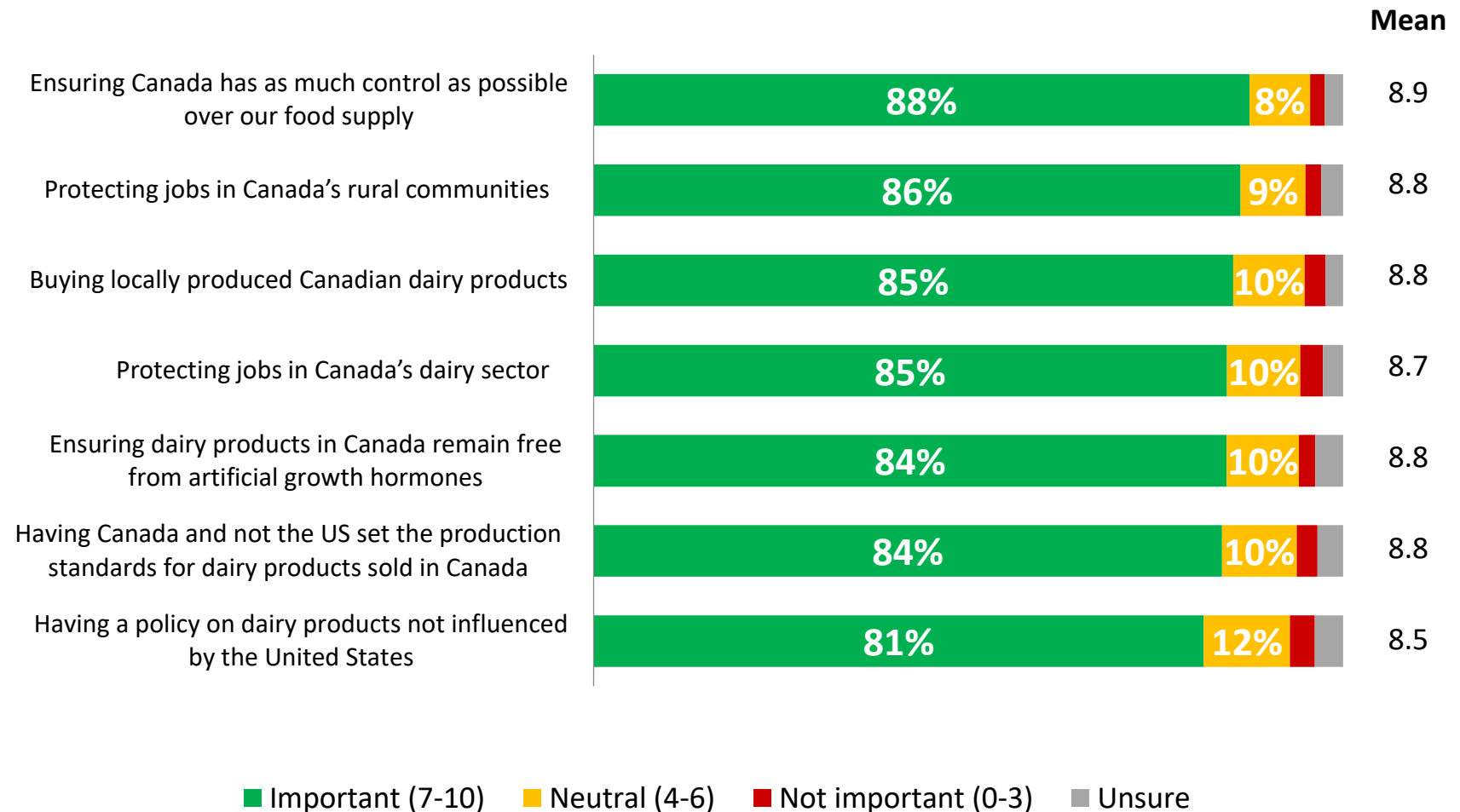
Q – On a scale of 0 to 10 where 0 is not comfortable at all and 10 is completely comfortable, how comfortable are you in having the US government influence Canada's food policy on dairy?

	2025-07 (n=3048)	Atlantic (n=301)	Quebec (n=753)	Ontario (n=944)	Prairies (n=647)	BC (n=403)	Men (n=1514)	Women (n=1527)	18-34 (n=728)	35-54 (n=1060)	55 plus (n=1260)
Mean	2.5	2.0	2.8	2.5	2.5	2.4	3.0	2.1	3.7	2.9	1.5
Not comfortable (0-3)	65.2%	69.0%	60.8%	66.0%	66.4%	66.7%	59.4%	70.6%	47.4%	60.4%	80.5%
Neutral (4-6)	16.3%	11.7%	19.8%	14.9%	16.1%	16.7%	19.7%	13.1%	24.6%	18.8%	8.9%
Comfortable (7-10)	13.7%	10.5%	13.1%	14.8%	13.7%	13.4%	16.7%	11.0%	21.4%	16.3%	6.7%
Unsure	4.8%	8.8%	6.3%	4.3%	3.8%	3.2%	4.3%	5.3%	6.7%	4.5%	3.9%

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,048 Canadians.

Over four in five Canadians report each of the statements presented being important to them, including ensuring Canada has as much control as possible over our food supply (88%), protecting jobs in Canada's rural communities (86%), buying locally produced Canadian dairy products (85%), protecting jobs in Canada's dairy sector (85%), ensuring dairy products in Canada remain free from artificial growth hormones (85%), having Canada and not the US set the production standards for dairy products sold in Canada (84%) and having a policy on dairy products not influenced by the United States (81%).

Issues of importance related to dairy



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,053 Canadians.

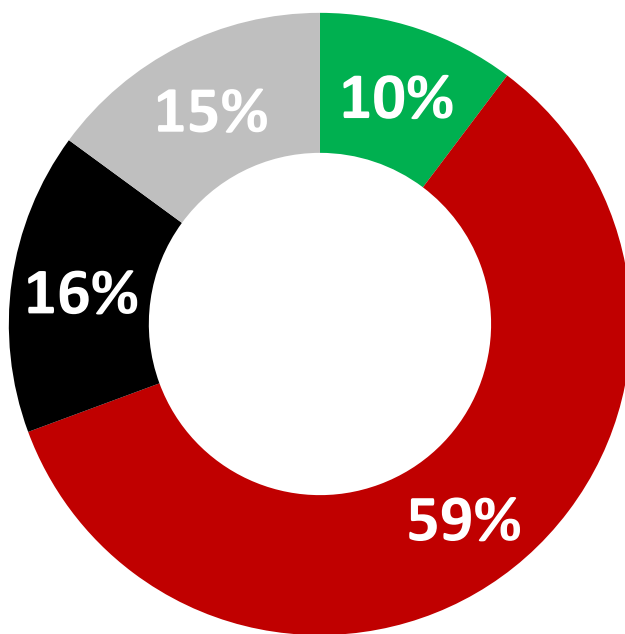
Q – Please rate your level of importance with the following where 0 is not at all important and 10 very important. [RANDOMIZE]

Issues of importance related to dairy – by demographics

Q – Please rate your level of importance with the following where 0 is not at all important and 10 very important. [RANDOMIZE]

		2025-07 (n=3053)	Atlantic (n=302)	Quebec (n=756)	Ontario (n=944)	Prairies (n=647)	BC (n=404)	Men (n=1518)	Women (n=1528)	18-34 (n=728)	35-54 (n=1062)	55 plus (n=1263)
Mean (Score out of 10)	Ensuring Canada has as much control as possible over our food supply	8.9	9.3	8.9	8.9	8.8	9.0	8.7	9.1	8.3	8.8	9.4
	Protecting jobs in Canada’s rural communities	8.8	9.2	8.9	8.8	8.7	8.7	8.5	9.1	8.3	8.7	9.2
	Buying locally produced Canadian dairy products	8.8	9.1	8.9	8.7	8.5	8.7	8.5	9.0	8.1	8.7	9.2
	Protecting jobs in Canada’s dairy sector	8.7	9.1	8.8	8.7	8.5	8.6	8.4	9.0	8.1	8.7	9.1
	Ensuring dairy products in Canada remain free from artificial growth hormones	8.8	9.2	8.8	8.8	8.6	8.8	8.6	9.0	8.1	8.7	9.3
	Having Canada and not the US set the production standards for dairy products sold in Canada	8.8	9.2	8.8	8.8	8.7	8.6	8.6	9.0	8.1	8.7	9.3
	Having a policy on dairy products not influenced by the United States	8.5	8.9	8.5	8.5	8.4	8.5	8.3	8.8	7.8	8.5	9.0

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,053 Canadians.



- Quality would improve
- Quality would worsen
- No impact
- Unsure

*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

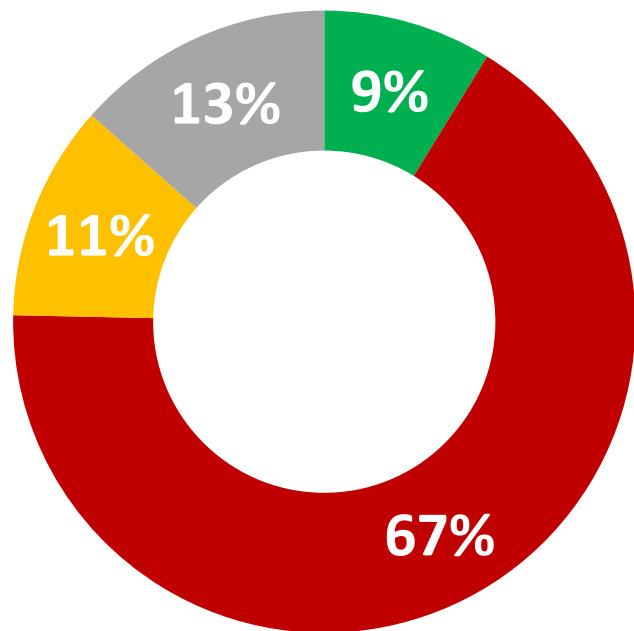
Impact of importing more US dairy products

Improve	Atlantic (n=302)	Quebec (n=755)	Ontario (n=945)	Prairies (n=645)	BC (n=402)
	6.3%	8.3%	12.7%	10.9%	7.9%
Worsen	Men (n=1512)	Women (n=1530)	18 to 34 (n=728)	35 to 54 (n=1061)	55 plus (n=1260)
	13.9%	6.9%	16.6%	12.8%	4.2%
No impact	Atlantic (n=302)	Quebec (n=755)	Ontario (n=945)	Prairies (n=645)	BC (n=402)
	61.7%	62.8%	57.6%	54.1%	62.3%
No impact	Men (n=1512)	Women (n=1530)	18 to 34 (n=728)	35 to 54 (n=1061)	55 plus (n=1260)
	55.5%	62.4%	54.7%	53.7%	66.1%
No impact	Atlantic (n=302)	Quebec (n=755)	Ontario (n=945)	Prairies (n=645)	BC (n=402)
	16.7%	13.3%	15.1%	17.9%	18.1%
No impact	Men (n=1512)	Women (n=1530)	18 to 34 (n=728)	35 to 54 (n=1061)	55 plus (n=1260)
	18.3%	13.3%	14.5%	16.1%	16.1%

Q – Do you think if Canada imported more US dairy products into the Canadian market as proposed by US President Donald Trump that the overall quality of dairy products available for sale in Canada would improve, worsen or it would have no impact?

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,049 Canadians.

Jobs on Canada's dairy farms



- More jobs on Canada's dairy farms
- Fewer jobs on Canada's dairy farms
- Same number of jobs on Canada's dairy farms
- Unsure

*Weighted to the true population proportion.
 *Charts may not add up to 100 due to rounding.

More jobs on Canada's dairy farms	Atlantic (n=302)	Quebec (n=756)	Ontario (n=944)	Prairies (n=643)	BC (n=404)
	3.2%	9.1%	9.9%	8.5%	8.1%
	Men (n=1515)	Women (n=1527)	18 to 34 (n=727)	35 to 54 (n=1063)	55 plus (n=1259)
Fewer jobs on Canada's dairy farms	68.4%	66.0%	66.4%	66.8%	66.8%
	64.5%	68.4%	58.2%	61.5%	75.9%
	Men (n=1515)	Women (n=1527)	18 to 34 (n=727)	35 to 54 (n=1063)	55 plus (n=1259)
Same number of jobs on Canada's dairy farms	14.1%	9.8%	10.8%	12.9%	11.3%
	13.5%	9.1%	11.4%	11.4%	11.0%
	Men (n=1515)	Women (n=1527)	18 to 34 (n=727)	35 to 54 (n=1063)	55 plus (n=1259)

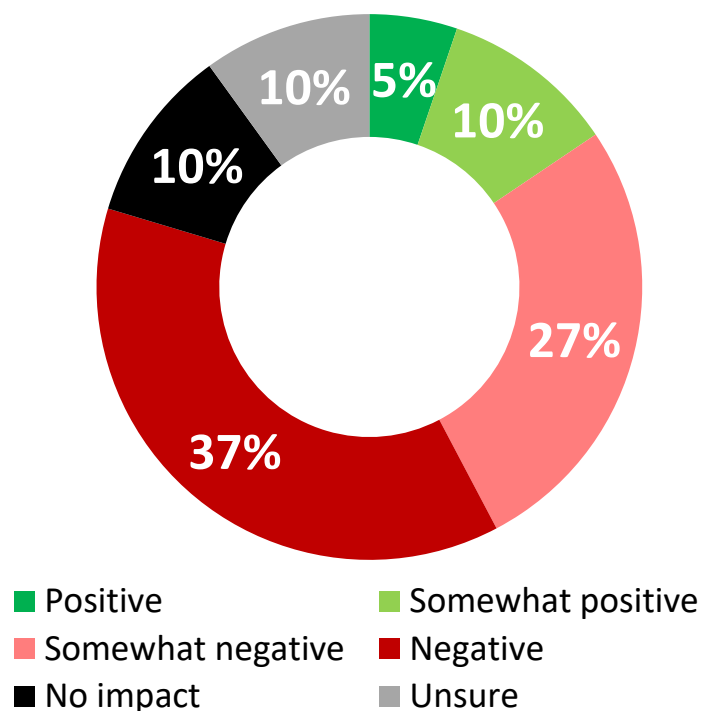
Q – Do you think if Canada imported more US dairy products into the Canadian market as proposed by US President Donald Trump that there would be more, fewer or the same number of jobs on Canada's dairy farms?

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,049 Canadians.

E. Food Sovereignty

Impact of increasing imports from the US on trust in safety of dairy products sold in Canada

Q – Do you think that if Canada imported more dairy products from the United States, it would have a positive, somewhat positive, somewhat negative, negative or no impact on your trust in the safety of dairy products sold in Canada?

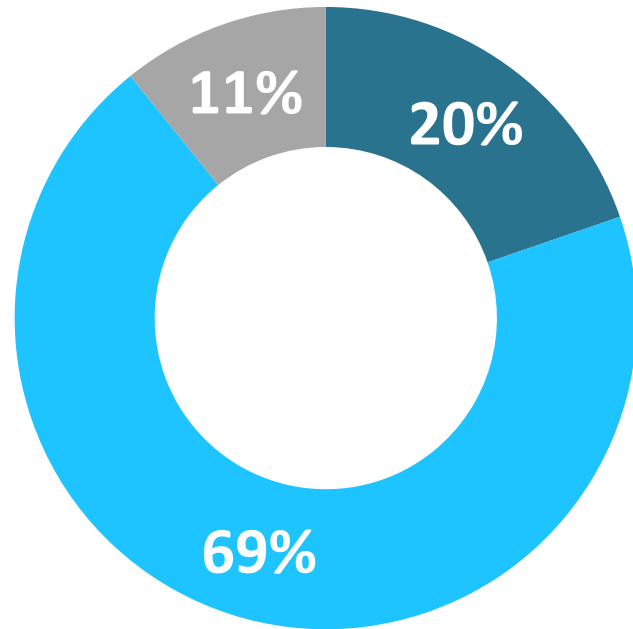


Positive/Somewhat positive	Atlantic (n=301)	Quebec (n=749)	Ontario (n=941)	Prairies (n=644)	BC (n=404)
	9.6%	15.4%	16.6%	16.5%	14.7%
	Men (n=1511)	Women (n=1521)	18 to 34 (n=723)	35 to 54 (n=1057)	55 plus (n=1259)
Negative/Somewhat negative	19.5%	11.9%	26.5%	19.2%	5.7%
	Atlantic (n=301)	Quebec (n=749)	Ontario (n=941)	Prairies (n=644)	BC (n=404)
	71.4%	64.7%	63.1%	62.3%	64.6%
	Men (n=1511)	Women (n=1521)	18 to 34 (n=723)	35 to 54 (n=1057)	55 plus (n=1259)
	58.7%	69.1%	55.6%	60.9%	72.0%

*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,039 Canadians.



- That prices may go down if Canada further opens its market to US milk
- That Canada continues to have high national standards for milk production by not further increasing US milk imports
- Unsure

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Prices going down versus high standard of milk production

That prices may go down if Canada further opens its market to US milk

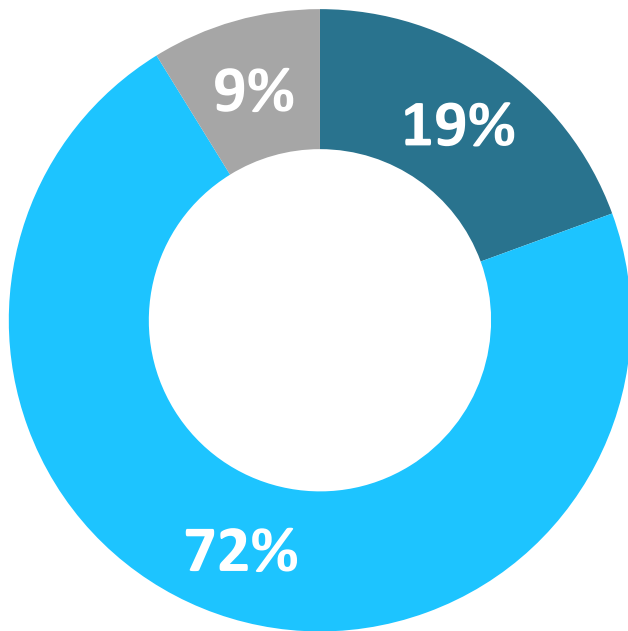
Atlantic (n=300)	Quebec (n=749)	Ontario (n=939)	Prairies (n=644)	BC (n=402)
17.1%	19.2%	21.0%	18.4%	20.0%
Men (n=1510)	Women (n=1517)	18 to 34 (n=722)	35 to 54 (n=1056)	55 plus (n=1256)
25.3%	14.5%	25.9%	22.6%	13.5%

That Canada continues to have high national standards for milk production by not further increasing US milk imports

Atlantic (n=300)	Quebec (n=749)	Ontario (n=939)	Prairies (n=644)	BC (n=402)
75.8%	67.8%	68.6%	69.3%	71.7%
Men (n=1510)	Women (n=1517)	18 to 34 (n=722)	35 to 54 (n=1056)	55 plus (n=1256)
65.2%	73.5%	62.3%	65.4%	77.3%

Q – What is more important to you, [ROTATE] that prices may go down if Canada further opens its market to US milk OR that Canada continues to have high national standards for milk production by not further increasing US milk imports?

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,034 Canadians.



- That prices may go down if Canada further opens its market to US milk
- That Canada maintains its secure domestic source of milk
- Unsure

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Prices going down versus secure domestic source of milk

That prices may go down if Canada further opens its market to US milk

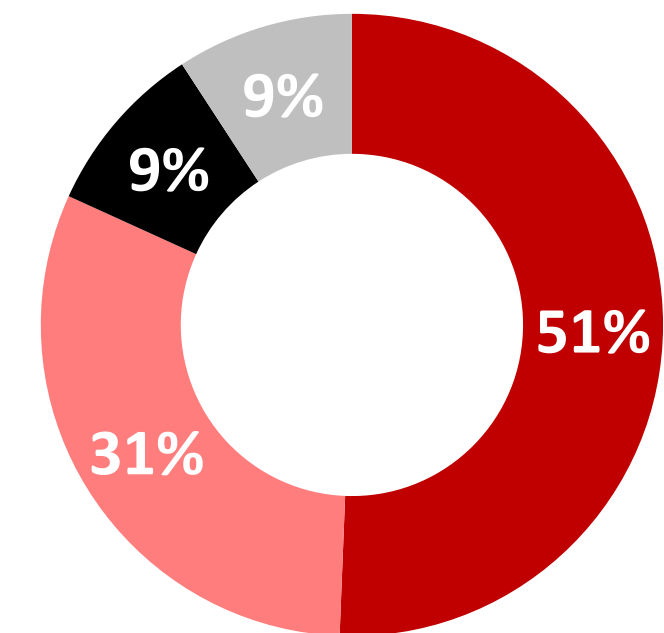
Atlantic (n=298)	Quebec (n=746)	Ontario (n=929)	Prairies (n=644)	BC (n=400)
16.9%	17.5%	20.0%	20.6%	20.7%
Men (n=1495)	Women (n=1515)	18 to 34 (n=720)	35 to 54 (n=1047)	55 plus (n=1250)
24.3%	14.9%	27.0%	22.2%	12.3%

That Canada maintains its secure domestic source of milk

Atlantic (n=298)	Quebec (n=746)	Ontario (n=929)	Prairies (n=644)	BC (n=400)
75.7%	73.5%	71.7%	69.2%	70.5%
Men (n=1495)	Women (n=1515)	18 to 34 (n=720)	35 to 54 (n=1047)	55 plus (n=1250)
67.4%	75.9%	62.5%	68.6%	80.3%

Q – What is more important to you, [ROTATE] that prices may go down if Canada further opens its market to US milk OR that Canada maintains its secure domestic source of milk?

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,017 Canadians.



- Major threat to Canada's food security
- Minor threat to Canada's food security
- No threat to Canada's food security
- Unsure

*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Trump's attacks on supply management as a threat to Canada's food security

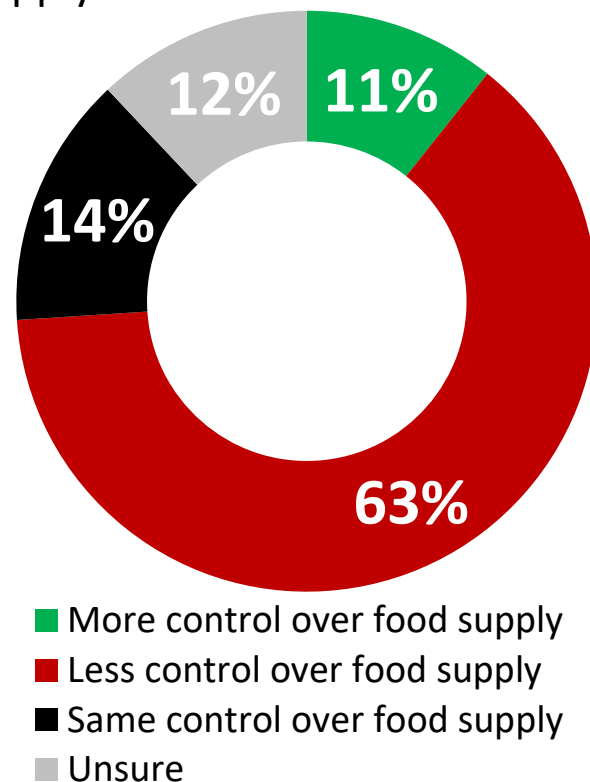
	Atlantic (n=300)	Quebec (n=746)	Ontario (n=942)	Prairies (n=641)	BC (n=401)
Major threat	50.9%	51.9%	51.3%	50.0%	47.4%
	Men (n=1503)	Women (n=1520)	18 to 34 (n=719)	35 to 54 (n=1056)	55 plus (n=1255)
	46.5%	54.4%	43.6%	50.3%	55.4%
	Atlantic (n=300)	Quebec (n=746)	Ontario (n=942)	Prairies (n=641)	BC (n=401)
Minor threat	32.5%	28.0%	31.0%	32.8%	34.2%
	Men (n=1503)	Women (n=1520)	18 to 34 (n=719)	35 to 54 (n=1056)	55 plus (n=1255)
	35.0%	27.6%	39.2%	29.7%	27.1%

Q – Do you think US President Donald Trump and his attacks on supply management is a major, a minor or no threat to Canada's food security?

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,030 Canadians.

Level of control over food supply if more US dairy is imported

Q – Do you think if Canada imported more US dairy products into the Canadian market as proposed by US President Donald Trump that Canada would have more, less or the same amount of control over our food supply?



Over **3 in 5** Canadians

believe that Canada would have less control (63%) over its own food supply if we imported more US dairy products into the Canadian market as proposed by US President Donald Trump, more than two times the percentage of respondents who say that this would make Canada have the same amount of control (14%) or more control (11%) over our food supply.

*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,031 Canadians.

Level of control over food supply if more US dairy is imported – by demographics

Q – Do you think if Canada imported more US dairy products into the Canadian market as proposed by US President Donald Trump that Canada would have more, less or the same amount of control over our food supply?

	2025-07 (n=3031)	Atlantic (n=299)	Quebec (n=752)	Ontario (n=940)	Prairies (n=639)	BC (n=401)	Men (n=1510)	Women (n=1514)	18-34 (n=721)	35-54 (n=1054)	55 plus (n=1256)
More control over food supply	10.7%	3.9%	10.8%	11.5%	12.2%	9.6%	11.8%	9.7%	18.5%	13.7%	3.3%
Less control over food supply	63.3%	67.0%	62.5%	63.8%	60.6%	64.7%	60.5%	65.9%	56.6%	60.6%	69.6%
Same control over food supply	14.0%	14.4%	13.2%	13.6%	15.6%	14.5%	17.9%	10.3%	10.9%	12.5%	17.2%
Unsure	12.0%	14.8%	13.5%	11.1%	11.6%	11.3%	9.8%	14.1%	14.0%	13.1%	9.9%

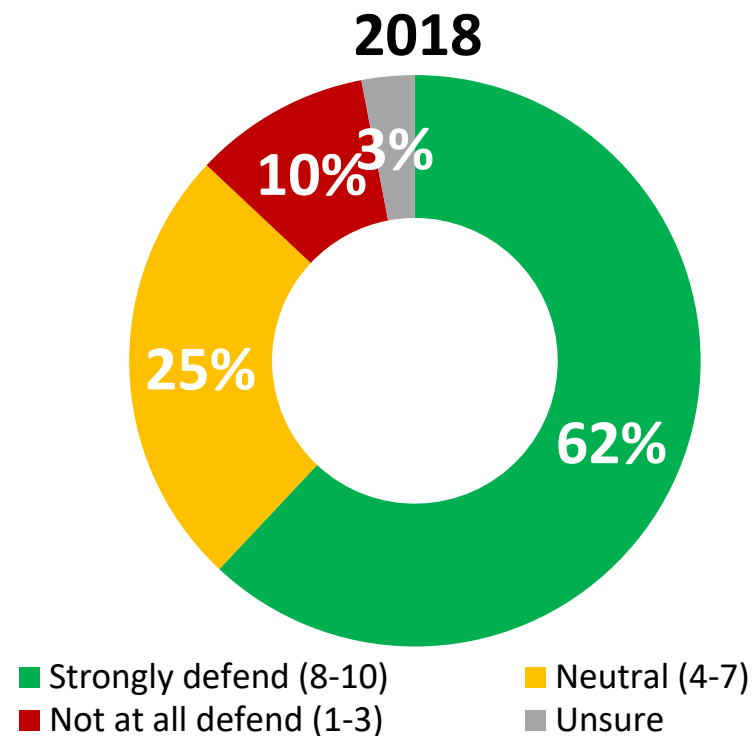
Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,031 Canadians.

F. Views on Defending the Interests of Canadian Dairy Farmers in Trade Negotiations

Canadian government defending the interests of the Canadian dairy farmers

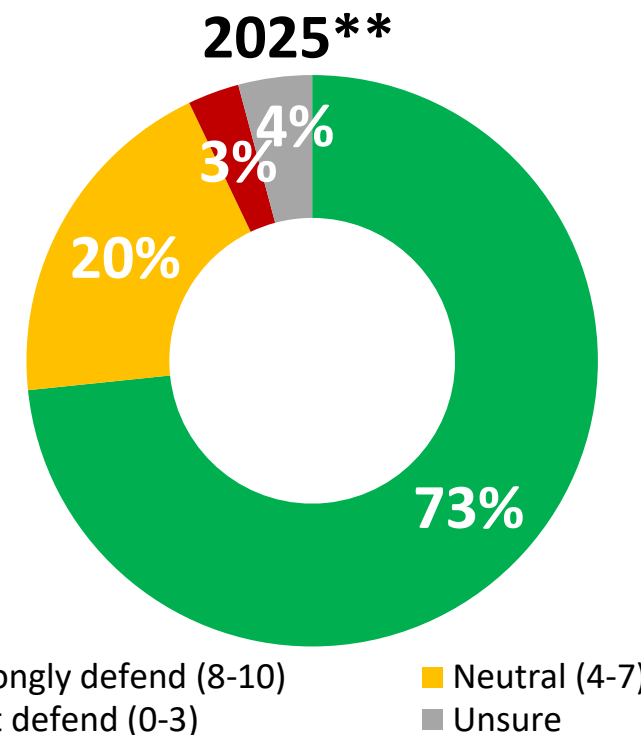
[2018] On a scale of 1 to 10, where 1 is not at all defend and 10 very strongly defend, how strongly should the Canadian government defend the interests of the Canadian dairy sector in the NAFTA renegotiations?

[2025] Q – On a scale of 0 to 10, where 0 is not at all defend and 10 very strongly defend, how strongly should the Canadian government defend the interests of the Canadian dairy farmers in the trade negotiations?



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.



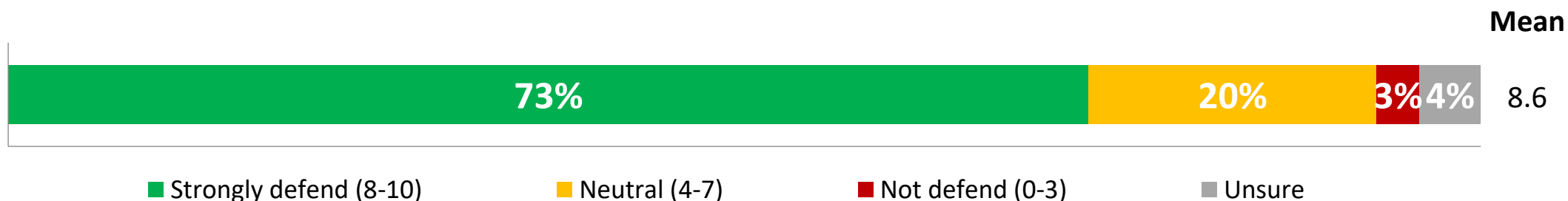
**Note: the question in 2018 was asked on a 1 to 10 scale, while the question in 2025 was asked on a 0 to 10 scale. Responses were grouped from 8 to 10 to be directly comparable to the 2018 wave.

2018 Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 30th and August 5th, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

2025 Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3051 Canadians.

Canadian government defending the interests of the Canadian dairy farmers

Q – On a scale of 0 to 10, where 0 is not at all defend and 10 very strongly defend, how strongly should the Canadian government defend the interests of the Canadian dairy farmers in the trade negotiations?



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

**Note: the question in 2018 was asked on a 1 to 10 scale, while the question in 2025 was asked on a 0 to 10 scale. Responses were grouped from 8 to 10 to be directly comparable to the 2018 wave.

	Atlantic (n=302)	Quebec (n=756)	Ontario (n=941)	Prairies (n=647)	BC (n=405)
Mean (0 to 10 scale)	9.0	8.6	8.5	8.5	8.4
	Men (n=1515)	Women (n=1529)	18 to 34 (n=727)	35 to 54 (n=1061)	55 plus (n=1263)
	8.3	8.8	8.0	8.5	9.0

Source: Nanos Research, online representative survey, July 8th to 11th, 2025, n=3,051 Canadians.

Any questions?



Nanos Research

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For more information on the firm, please visit www.nanos.co

METHODOLOGY

Nanos conducted a representative non-probability online survey of 3,054 Canadians, 18 years of age or older between July 8th and 11th, 2025. The sample is geographically stratified to be representative of Canada.

A margin of error cannot be calculated on a non-probability sample. For comparison purposes, a probability sample of 3,054 Canadians would be accurate ± 1.8 percentage points, 19 times out of 20.

The research was commissioned by the Dairy Farmers of Canada and was conducted by Nanos Research.

Note: Charts may not add up to 100 due to rounding.



Element	Description	Element	Description
Research sponsor	Dairy Farmers of Canada	Weighting of Data	The results were weighted by age and gender using the latest Census information (2021) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure.
Population and Final Sample Size	3,054 Canadians	Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data.
Source of Sample	Sago	Excluded Demographics	Individuals younger than 18 years old; individuals without internet access could not participate.
Type of Sample	Representative non-probability	Stratification	By age and gender using the latest Census information (2021) and the sample is geographically stratified to be representative of Canada.
Margin of Error (for a comparative probability sample)	For comparison purposes, a probability sample of 3,054 respondents would have a margin of error of ± 1.8 percentage points, 19 times out of 20.	Estimated Response Rate	Not applicable.
Mode of Survey	Online survey	Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Sampling Method Base	Non-probability	Question Content	In addition to the content questions in the report, two questions were asked related to managing the trade relationship and one question was asked on the impact of changes to supply management on the agricultural sector which were used for internal purposes.
Demographics (Captured)	Canada; Men and Women; 18 years or older. Six digit postal code was used to validate geography.	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Demographics (Other)	Age, gender, education, income, home ownership	Research/Data Collection Supplier	Nanos Research
Field Dates	July 8 th to 11 th , 2025.	Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanos.co Telephone:(613) 234-4666 ext. 237 Email: info@nanosresearch.com.
Language of Survey	The survey was conducted in both English and French.	Data Tables	By region, age and gender
Standards	Nanos Research is a member of the Canadian Research Insights Council (CRIC) and confirms that this research fully complies with all CRIC Standards including the CRIC Public Opinion Research Standards and Disclosure Requirements. https://canadianresearchinsightscouncil.ca/standards/		



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EthicStratēgies

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