



Over nine out of every ten Canadians believe it is important to ensure Canada has as much control as possible over our food supply.

National Survey | Summary

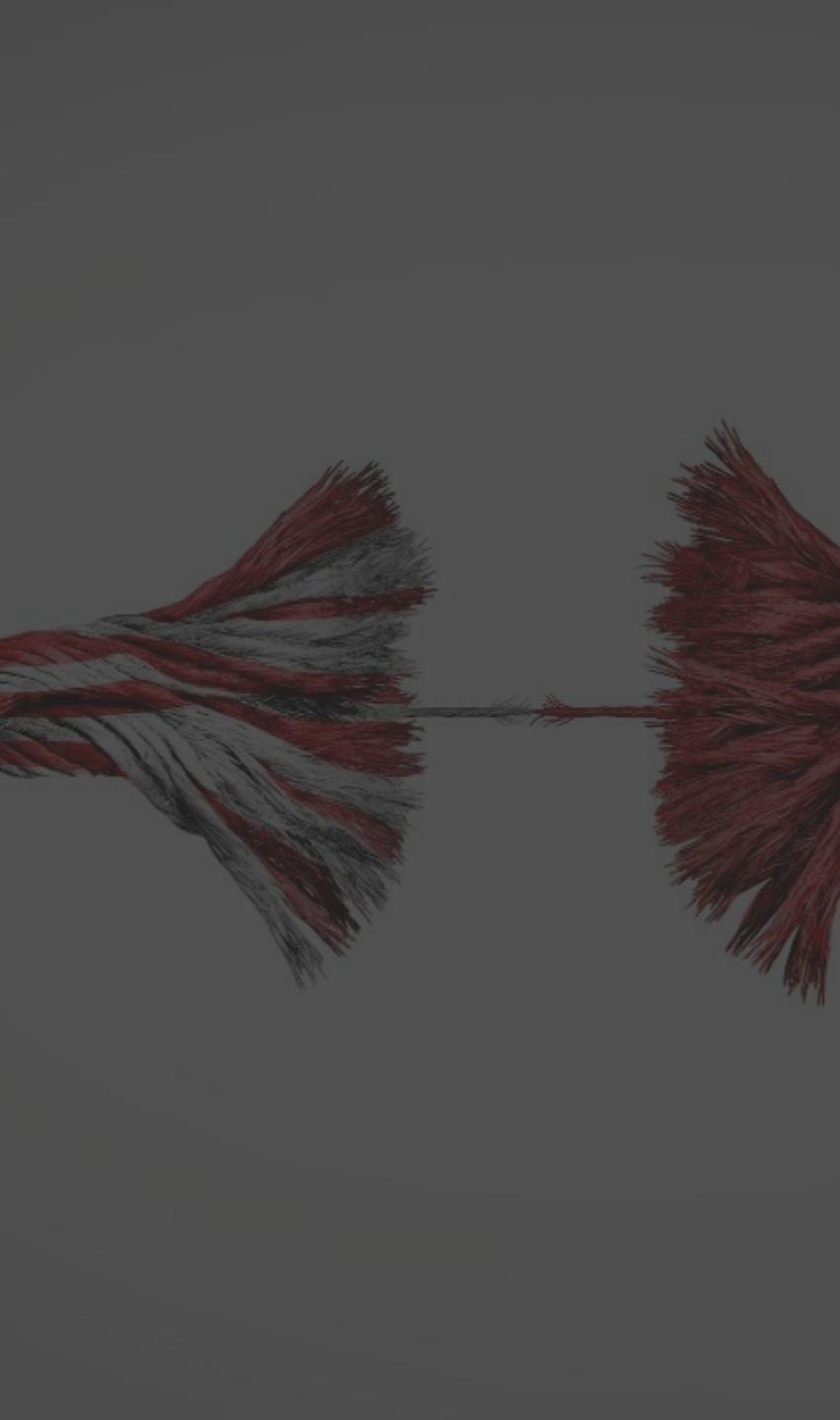
Conducted by Nanos for the Dairy Farmers of Canada, December 2025

Field: November 29 to December 2, 2025

Submission 2025-2947



Methodology



The research gauged the opinions among Canadians on trade negotiations between Canada and the United States.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1009 Canadians, 18 years of age or older, between November 29 and December 2, 2025, as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

Individuals were randomly called using random digit dialing with a maximum of five call backs.

The margin of error for a random survey of 1009 Canadians is ± 3.1 percentage points, 19 times out of 20.

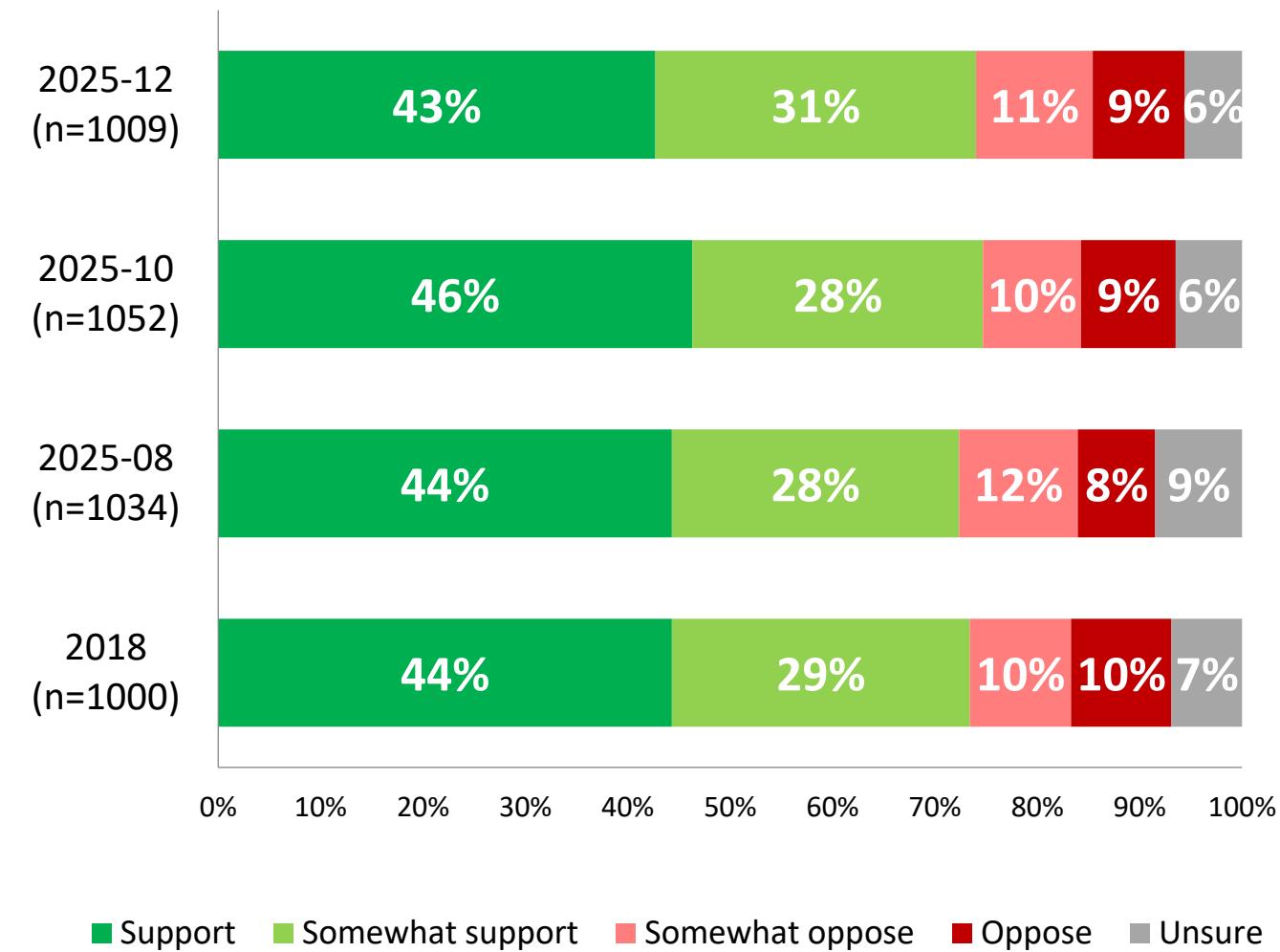
[The statistical tabulations including the unweighted and weighted number of interviews can be accessed here.](#)

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.

Canadians remain supportive of the general objectives of the supply management system, with about three in four either supporting (43%) or somewhat supporting (31%) them. Women (81%) are more likely to report supporting or somewhat supporting the general objectives of the supply management system than men (67%), as is the case for Atlantic Canadians (86%) relative to those in the Prairies (63%).

Support for the general objectives of the supply management system – Tracking



Q – As you may know, supply management is a system by which Canada's dairy, poultry, and chicken 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.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, November 29 to December 2, 2025, n=1009, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Support for the general objectives of the supply management system – by demographics

Q – As you may know, supply management is a system by which Canada's dairy, poultry, and chicken 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?



■ 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=106)	Quebec (n=208)	Ontario (n=343)	Prairies (n=205)	BC (n=147)
	86.3%	79.6%	74.7%	63.3%	70.3%
Men (n=584)			18 to 34 (n=186)	35 to 54 (n=346)	55 plus (n=477)
	66.8%	81.0%	73.4%	72.4%	75.6%

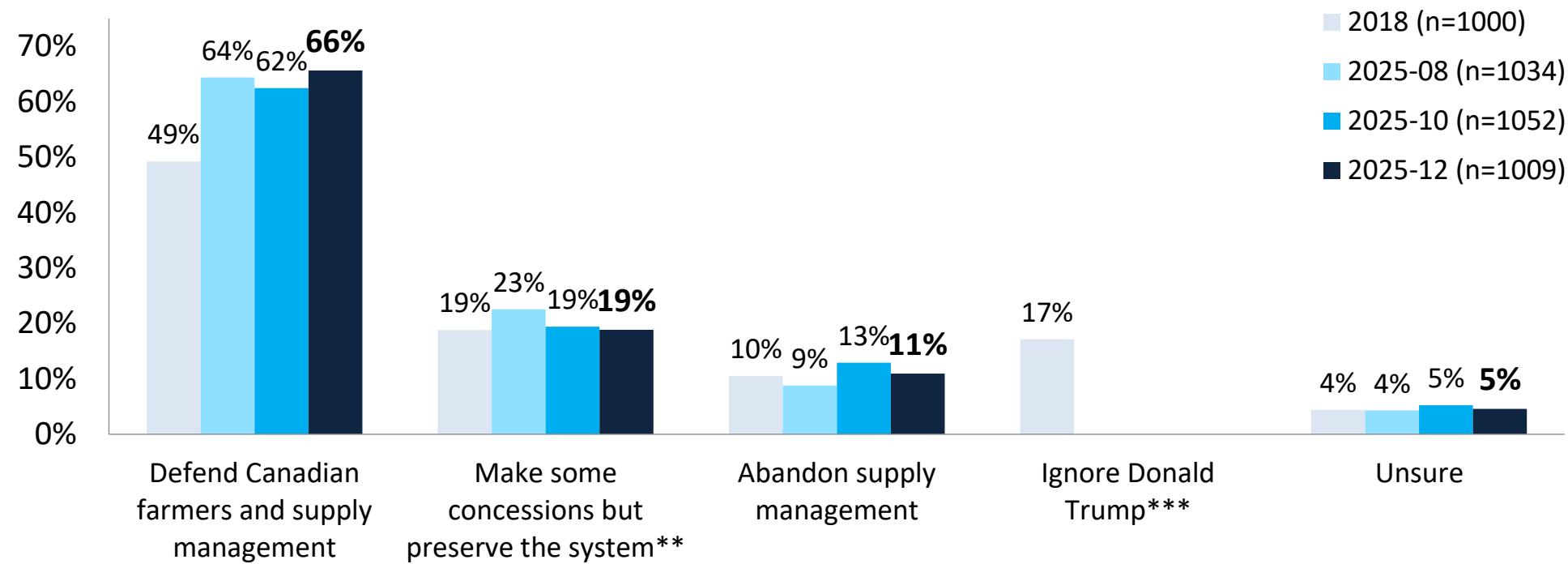
Oppose/Somewhat oppose	Atlantic (n=106)	Quebec (n=208)	Ontario (n=343)	Prairies (n=205)	BC (n=147)
	8.9%	14.3%	19.8%	31.4%	24.0%
Men (n=584)			18 to 34 (n=186)	35 to 54 (n=346)	55 plus (n=477)
	30.0%	11.1%	20.2%	20.6%	20.3%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, November 29 to December 2, 2025, n=1009, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Canadian response to US targeting of Canada's farmers – Tracking

[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]



**Note: This response option appeared as “Make some concessions but preserve the model” in the 2018 survey.

***Note: The “Ignore Donald Trump” response option appeared in the 2018 survey but was removed in the 2025 survey.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, November 29 to December 2, 2025, n=1009, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Canadian response to US targeting of Canada's 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]

	2025-12 (n=1009)	Atlantic (n=106)	Quebec (n=208)	Ontario (n=343)	Prairies (n=205)	BC (n=147)	Men (n=584)	Women (n=425)	18-34 (n=186)	35-54 (n=346)	55 plus (n=477)
Defend Canadian farmers and supply management	65.6%	75.4%	73.0%	66.0%	58.1%	57.0%	53.3%	77.5%	67.2%	64.9%	65.1%
Make some concessions but preserve the system	18.9%	15.3%	14.9%	20.9%	13.9%	27.8%	25.8%	12.2%	20.8%	15.7%	20.1%
Abandon supply management	10.9%	4.2%	6.4%	9.2%	21.9%	12.6%	17.2%	4.9%	8.7%	11.9%	11.6%
Unsure	4.6%	5.1%	5.7%	3.9%	6.1%	2.6%	3.7%	5.5%	3.4%	7.5%	3.1%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, November 29 to December 2, 2025, n=1009, accurate 3.1 percentage points plus or minus, 19 times out of 20.

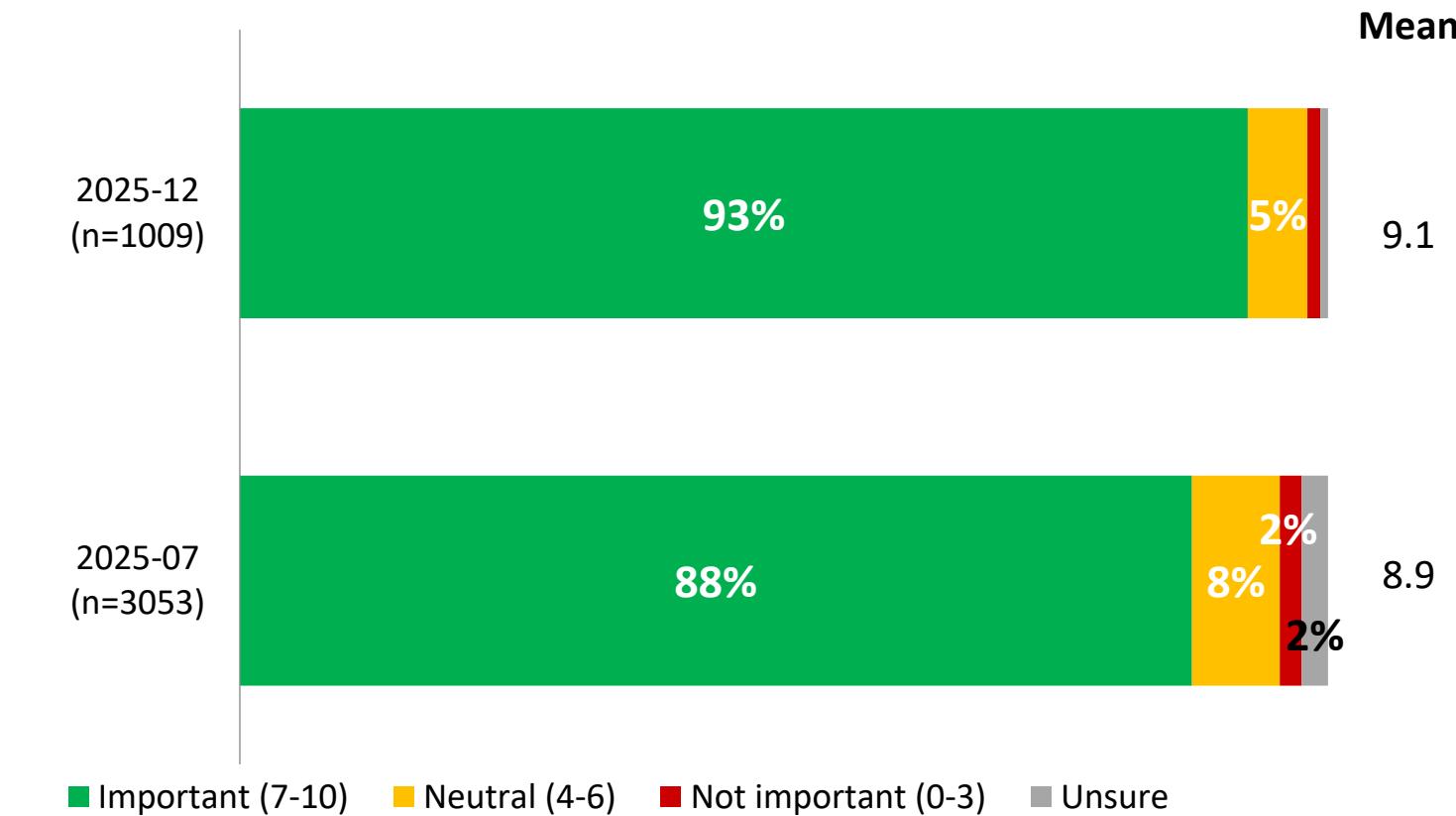
Reported importance of ensuring Canada has as much control as possible over our food supply marginally increased to 93 percent in the December wave, from 88 percent in July.

[2025-07] Q – Please rate your level of importance with the following where 0 is not at all important and 10 very important. [RANDOMIZE]

Ensuring Canada has as much control as possible over our food supply

[STARTING FROM 2025-12] Q – On a scale from 0 to 10, where 0 is not at all important and 10 is very important, please rate your level of importance with ensuring Canada has as much control as possible over our food supply.

Importance of ensuring Canada has as much control as possible over food supply – Tracking



**Note: In the July 2025 survey, this question was asked as part of a battery along with other questions pertaining to the importance of various government policies impacting the Canadian dairy sector and food supply. Starting from the December 2025 survey, this question was asked independently, without the other questions that appeared in the July 2025 battery.

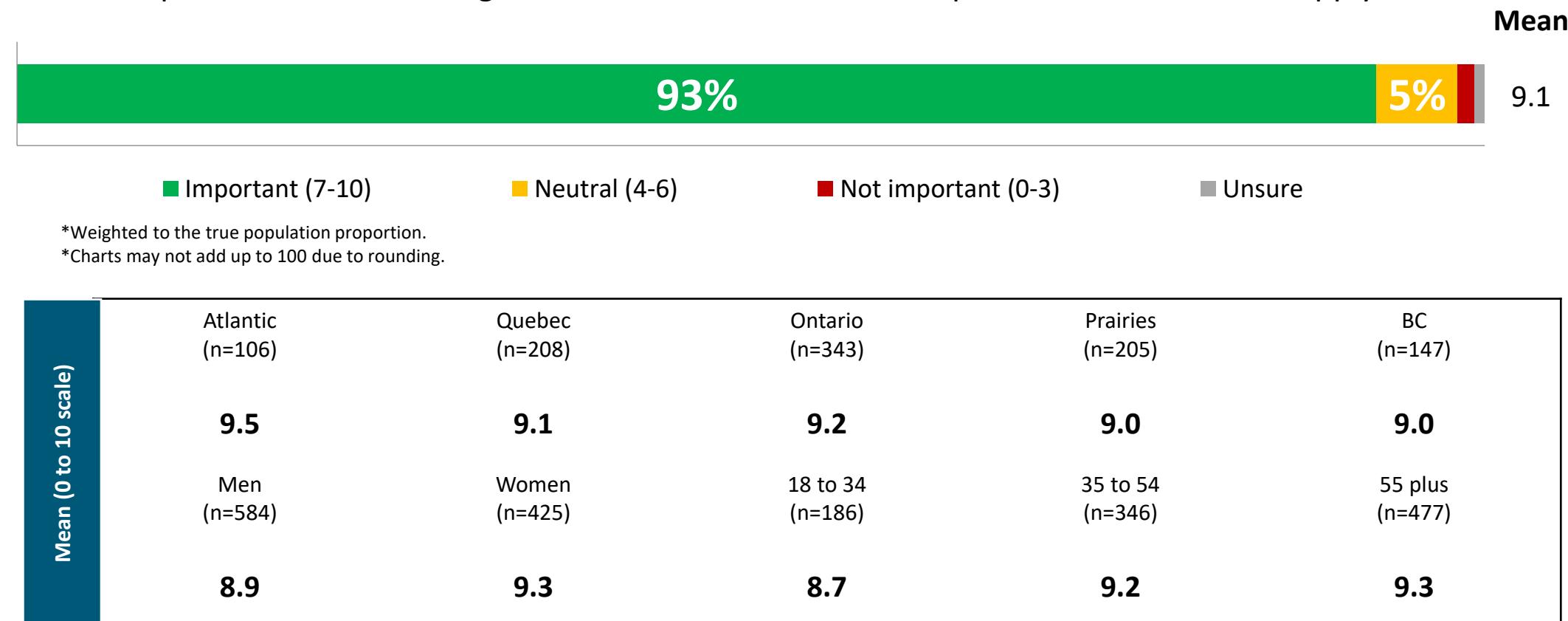
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*Charts may not add up to 100 due to rounding.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, November 29 to December 2, 2025, n=1009, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Importance of ensuring Canada has as much control as possible over food supply – by demographics

Q – On a scale from 0 to 10, where 0 is not at all important and 10 is very important, please rate your level of importance with ensuring Canada has as much control as possible over our food supply.

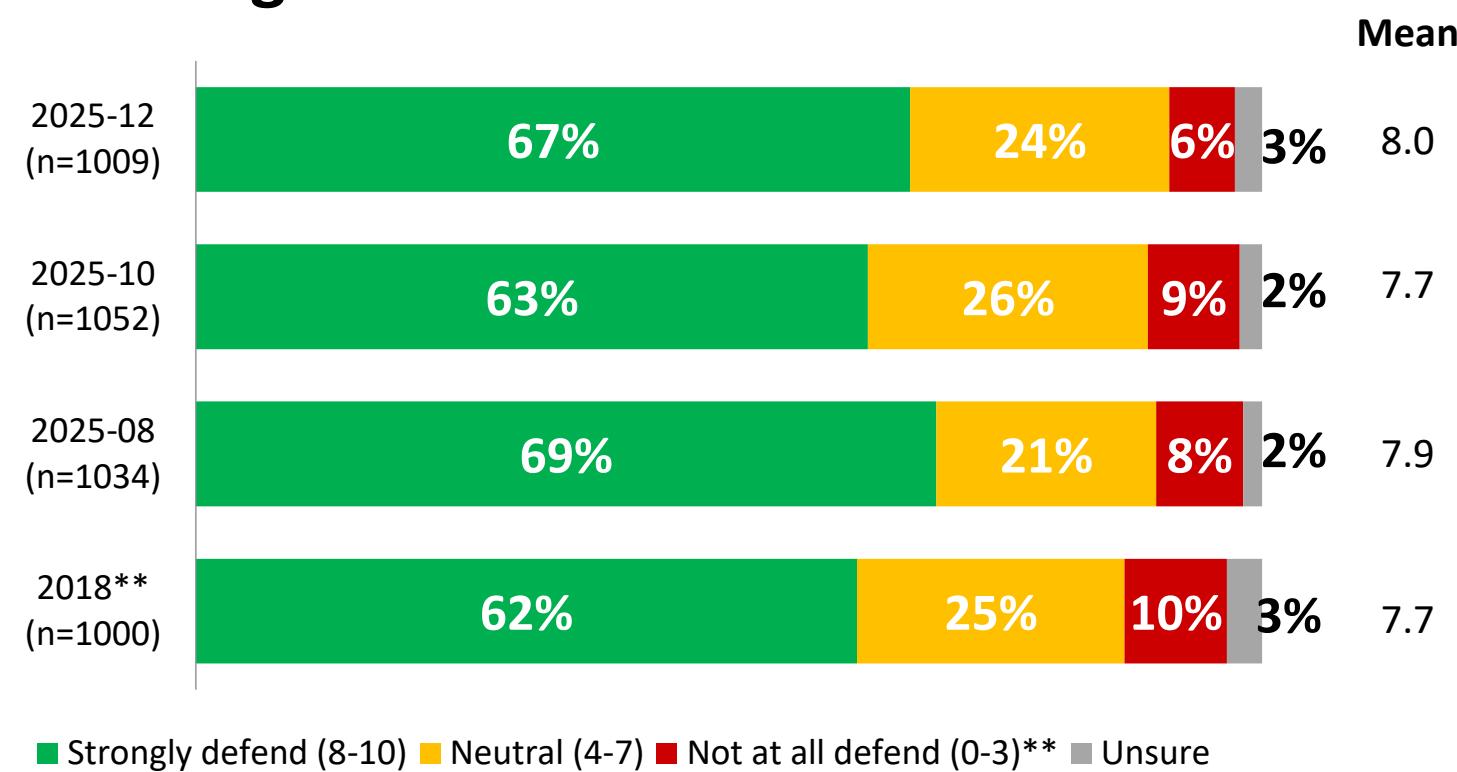


Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, November 29 to December 2, 2025, n=1009, accurate 3.1 percentage points plus or minus, 19 times out of 20.

The percentage of Canadians who report believing that Canada should strongly defend the interests of dairy farmers in trade negotiations marginally increased to 67 percent in the current wave from 63 percent in the previous wave conducted in October 2025. Women (mean score of 8.6 on a 0-10 scale) are more likely than men (mean score of 7.4 on a 0-10 scale) to report believing that Canada should strongly defend the interests of dairy farmers in the trade negotiations.

[2018] Q – 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 is very strongly defend, how strongly should the Canadian government defend the interests of the Canadian dairy farmers in the trade negotiations?

Impressions on how strongly Canada should protect its dairy sector in negotiations – Tracking



■ Strongly defend (8-10) ■ Neutral (4-7) ■ Not at all defend (0-3)** ■ Unsure

**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.

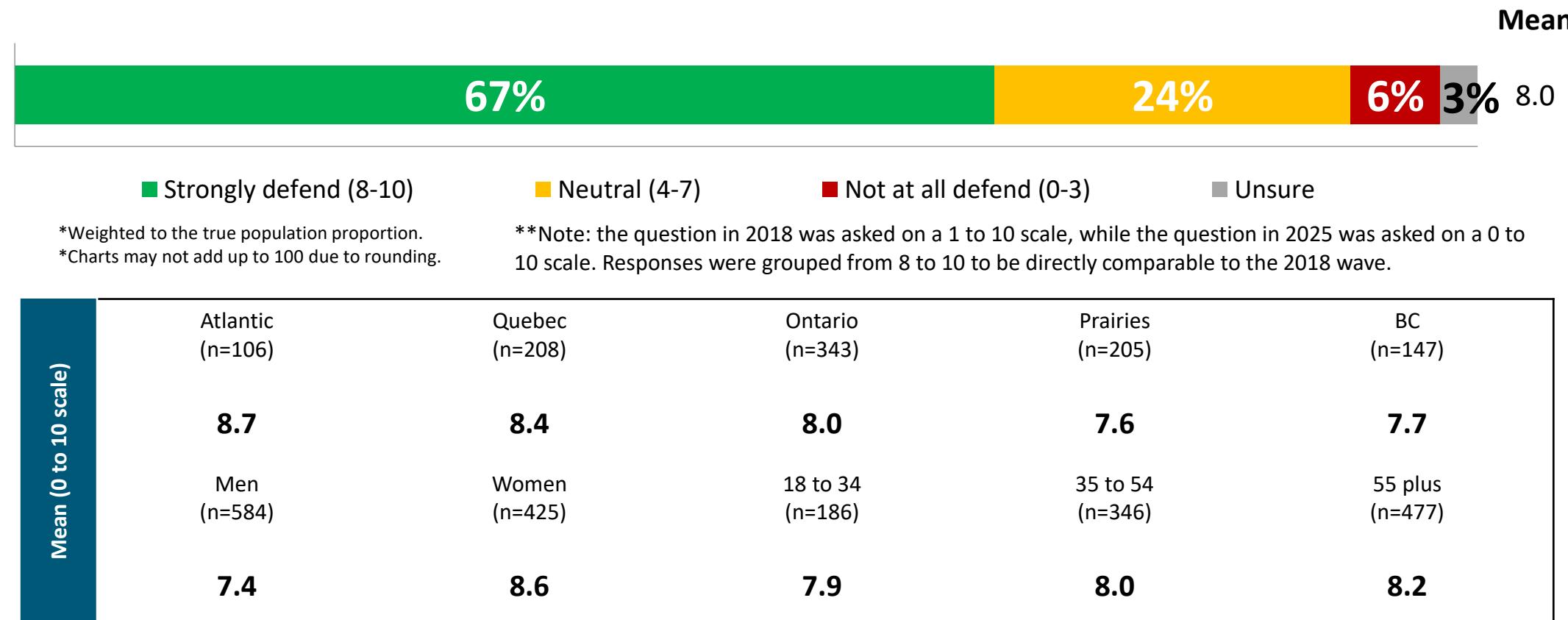
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Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, November 29 to December 2, 2025, n=1009, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Impressions on how strongly Canada should protect its dairy sector in negotiations – by demographics

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



Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, November 29 to December 2, 2025, n=1009, accurate 3.1 percentage points plus or minus, 19 times out of 20.

TECHNICAL NOTE

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	1009 Randomly selected individuals.	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	Nanos Probability Panel	Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines, and individuals without internet access could not participate.
Type of Sample	Probability	Stratification	By age and gender using the latest Census information (2021) and the sample is geographically stratified to be representative of Canada. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample.
Margin of Error	±3.1 percentage points, 19 times out of 20.	Estimated Response Rate	11 percent, consistent with industry norms.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey	Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Question Content	Topics on the omnibus ahead of the survey content included: views on political issues, views on economic issues, financial concerns, barriers to purchasing Canadians goods for the holiday season, the federal budget, artificial intelligence, jet fighters, energy and pipeline-related issues in Western Canada, trade negotiations with the US, priorities for the Major Projects Office, the future standard of living, level of worry about paying housing costs, and the cost of living.
Demographics (Captured)	Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and 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. In addition to the content questions in the report, two questions were asked related to managing the trade relationship which were used for internal purposes.
Fieldwork/Validation	Individuals were recruited using live interviews with live supervision to validate work, the research questions were administered online	Research/Data Collection Supplier	Nanos Research
Number of Calls	Maximum of five call backs to those recruited.	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 .
Time of Calls	Individuals recruited were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.		
Field Dates	November 29 to December 2, 2025.		
Language of Survey	The survey was conducted in both English and French.		
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/	Data Tables	By region, age and gender: 2025-2947 DFC Tables FOR RELEASE - Formatted



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Any questions?



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