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OPMA Quarterly Report, Q3 2025

OCT 2025

THE ONTARIO PRODUCE MARKETING ASSOCIATION

What were Canadian consumers’ main concerns in Q3 2025?

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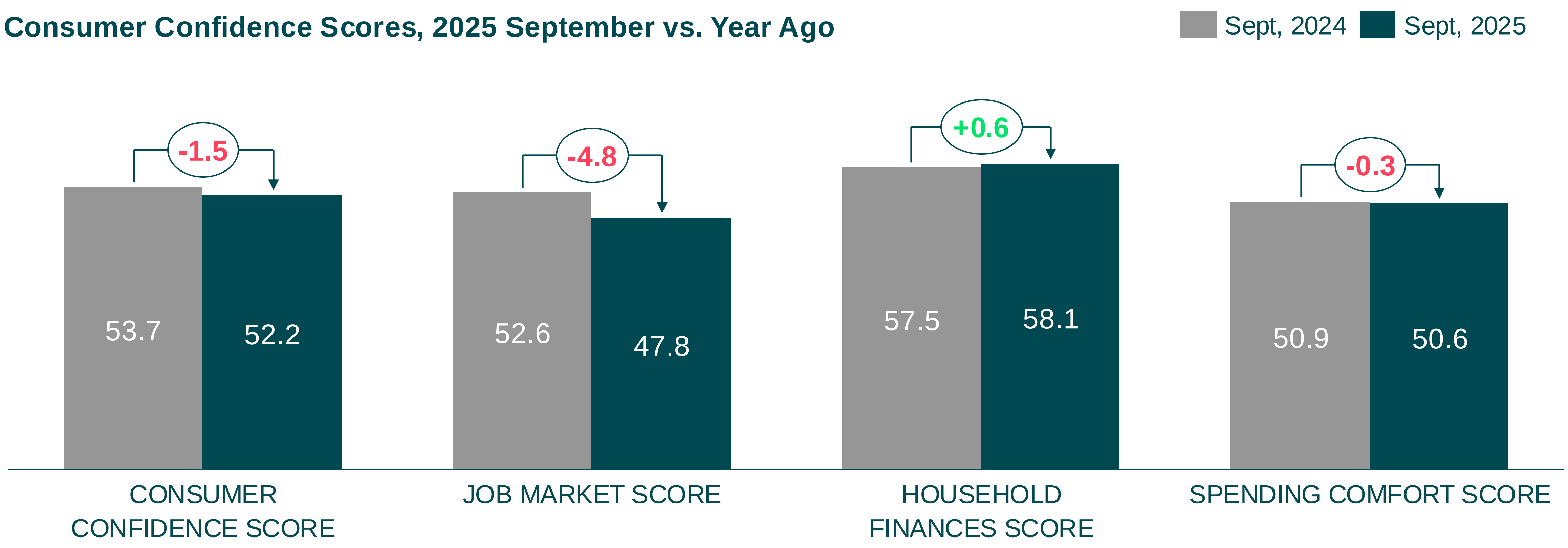
Confidence in the job market continues to decline, reaching its lowest point in recent history



Numerator Canada Monthly Consumer Sentiment Survey

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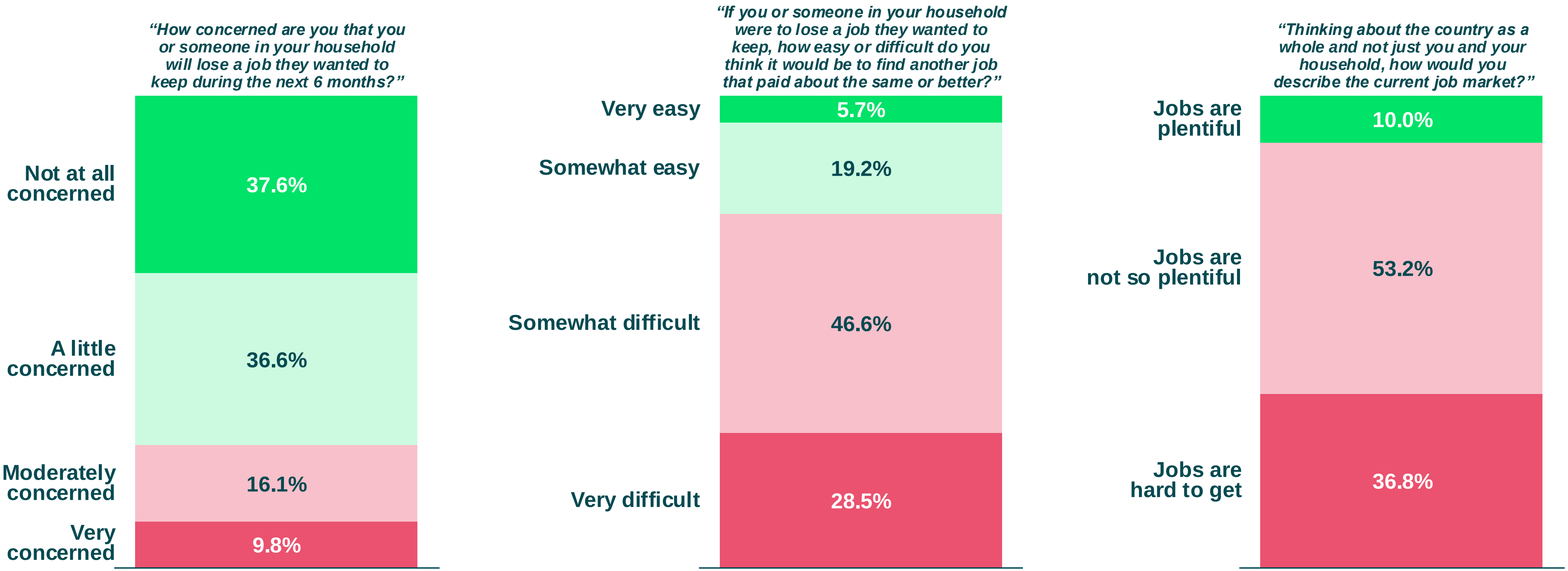
More than half of Canadians feel insecure in their current jobs; majority see the broader labour market as tightening, with few opportunities



Source: Numerator Canada Monthly Econ Sentiment Survey, 9/10/2025 – 9/15/2025 (N = 1,000)

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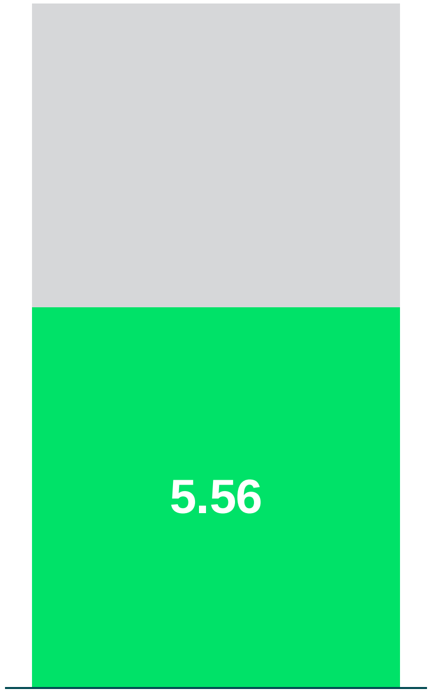
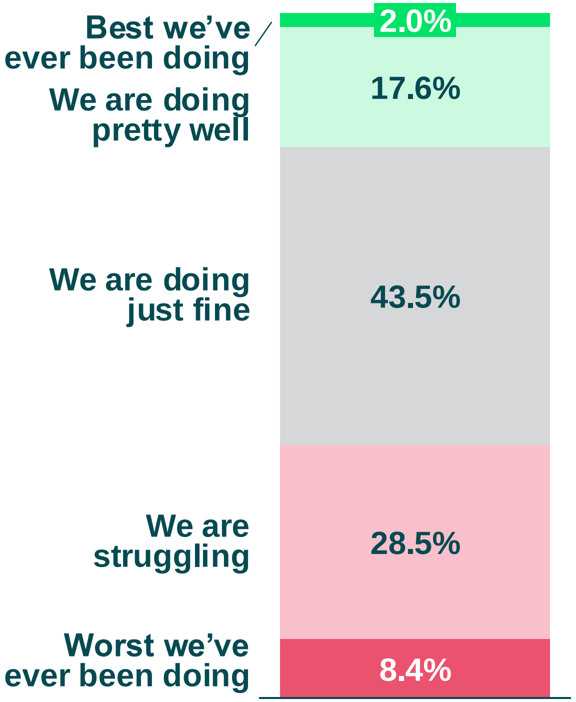
Canadians' perceptions of their household financial well-being are middling and cautious, with most feeling "just fine" or better

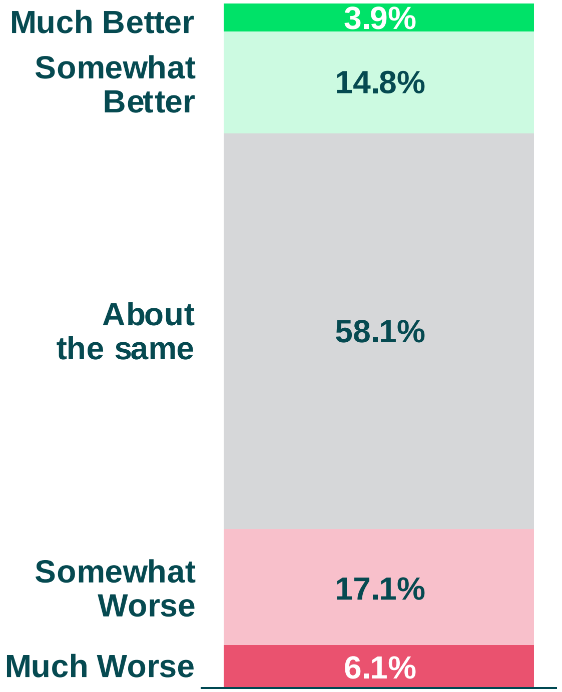
"On a scale of 1 to 10, 1 being the worst and 10 being the best, how would you rank how you and any members of your household are doing in today's economy?"



"How are you and any members of your household doing in today's economy?"



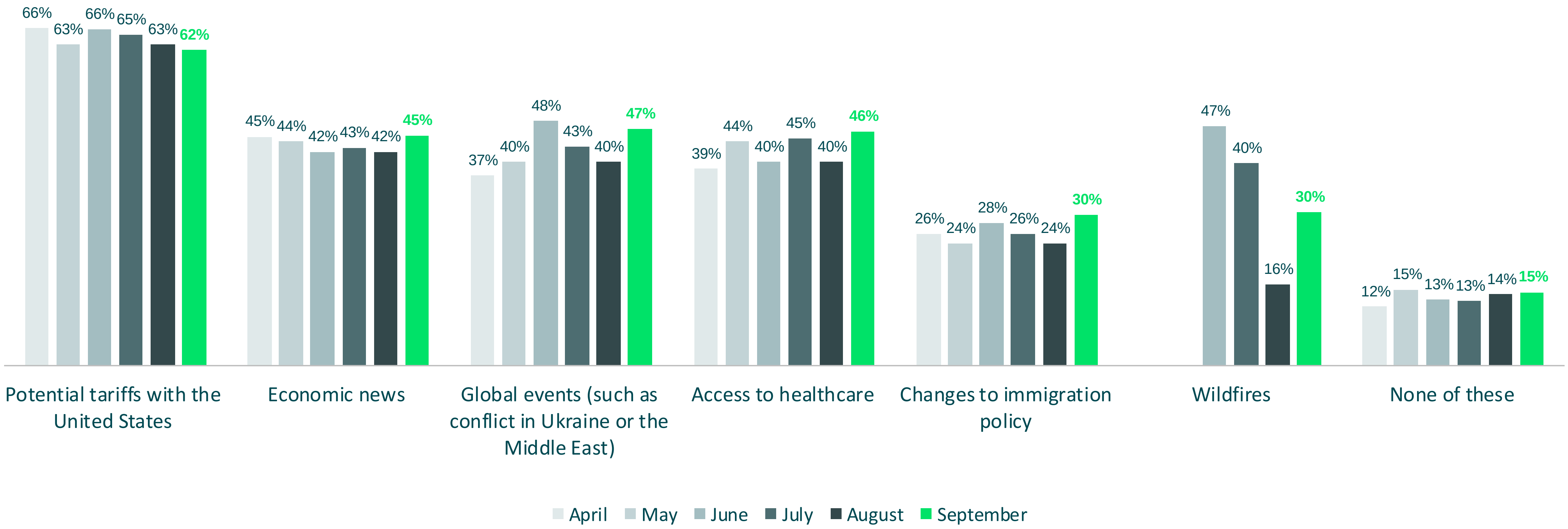
"And looing ahead to 12 months from now, how do you think you and any members of your household will be doing relative to today?"



Source: Numerator Canada Monthly Econ Sentiment Survey, 9/10/2025 – 9/15/2025 (N = 1,000)

Canadian consumers remain most focused on tariffs and economic news, while attention to wildfires fell, and other issues held steady

EVENTS FOLLOWED BY CANADIAN CONSUMERS



Numerator Custom Tariff Survey, September 2025 Update (n=1825), August 2025 Update (n=1831), July 2025 Update (n=1800), June 2025 Update (n=1800), May 2025 Update (n=1800), April 2025 Update (n=1800)

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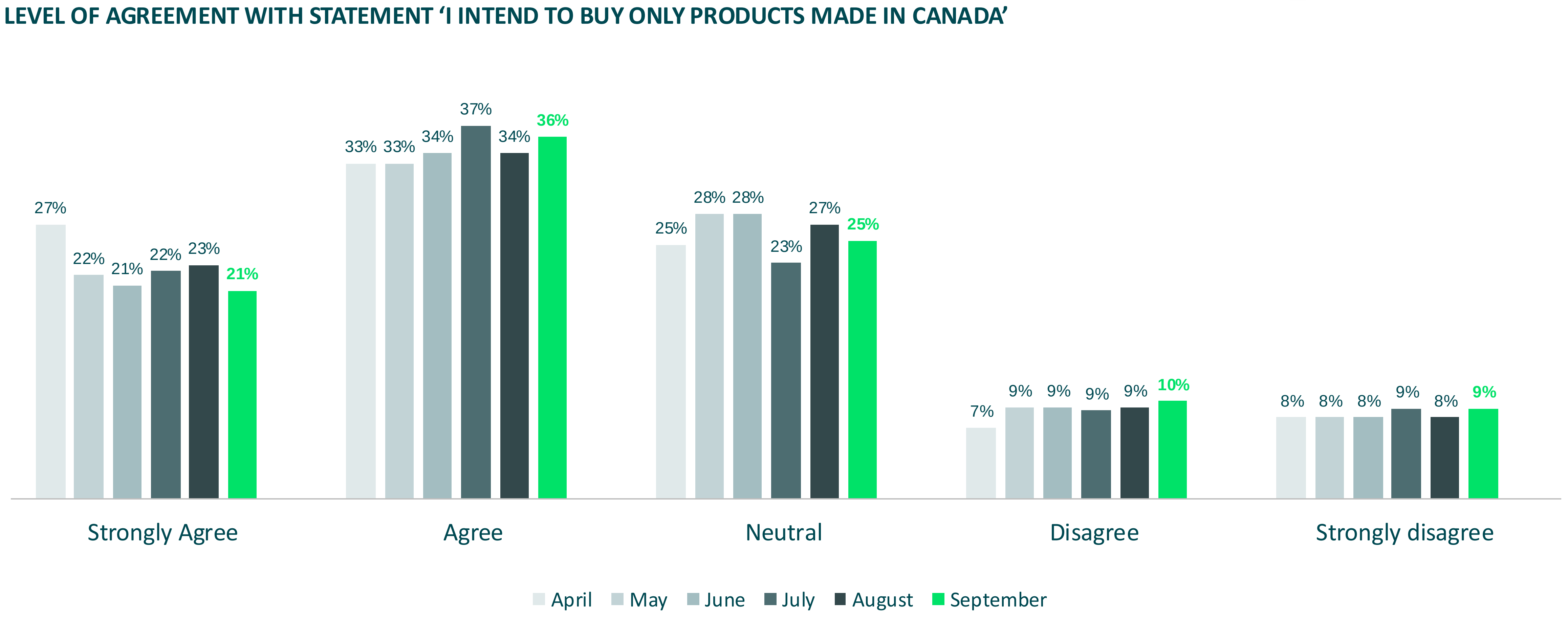
Consumer intent to buy only Canadian-made products is starting to shift in intensity, although the overall sentiment remains high.



Numerator Custom Tariff Survey, September 2025 Update (n=1825), August 2025 Update (n=1831), July 2025 Update (n=1800), June 2025 Update (n=1800), May 2025 Update (n=1800), April 2025 Update (n=1800)

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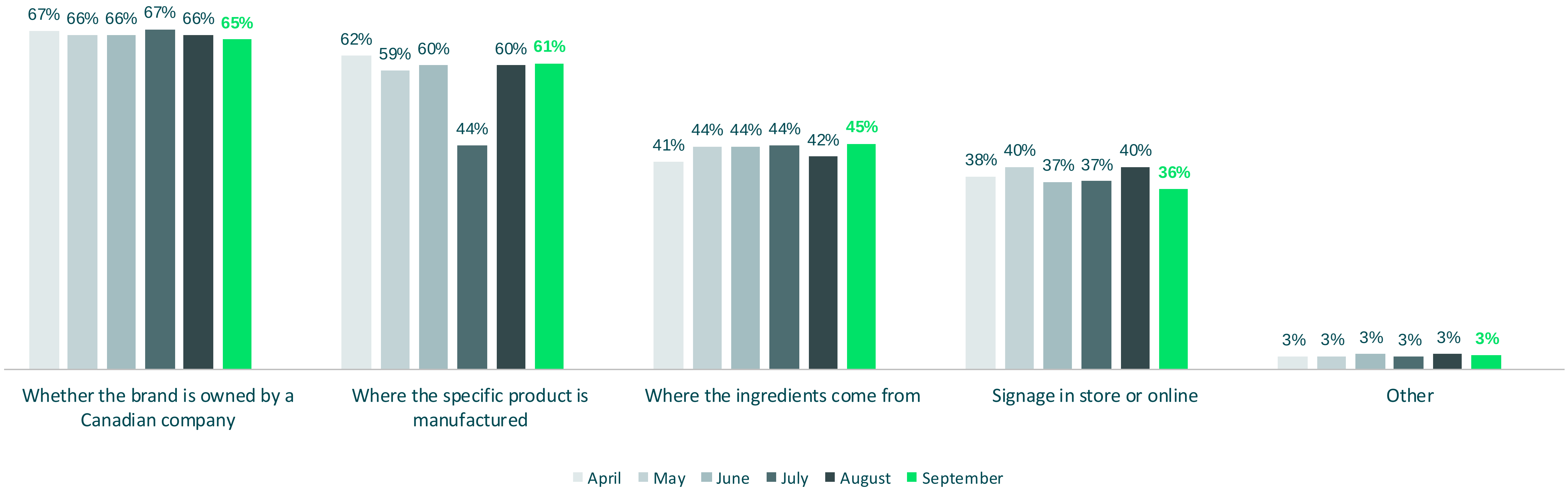
Consumers still most often judge a product as “Canadian” based on brand ownership and manufacturing location

FACTORS EVALUATED WHEN DECIDING IF A PRODUCT IS CANADIAN



Numerator Custom Tariff Survey, August 2025 Update (n=1831), July 2025 Update (n=1800), June 2025 Update (n=1800), May 2025 Update (n=1800), April 2025 Update (n=1800); March 2025 Update (n=1800); Numerator Custom Tariff Survey, Feb 2025 (n=5000)

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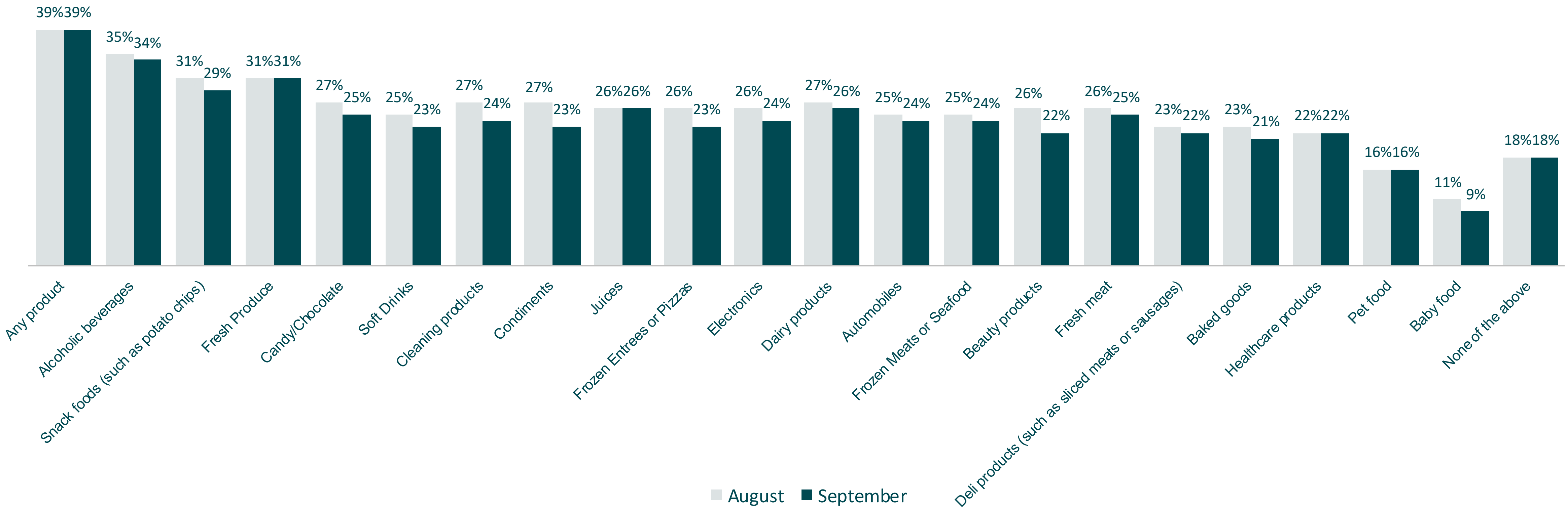
Canadians in September showed less intent to avoid certain U.S.-made products (e.g., fresh meat, baked goods) compared to August

INTENT TO BUY LESS OF PRODUCT TYPE IF MADE IN THE US

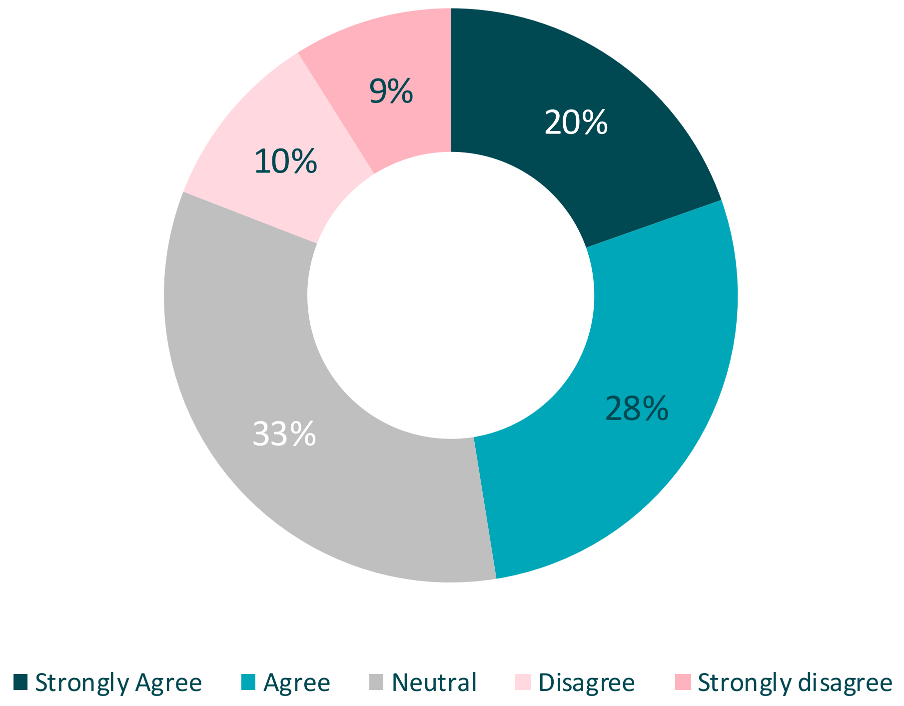


Numerator Custom Tariff Survey

Attitudes towards US-owned retailers remained largely stable, with little sign of growing avoidance or preference shifts month over month

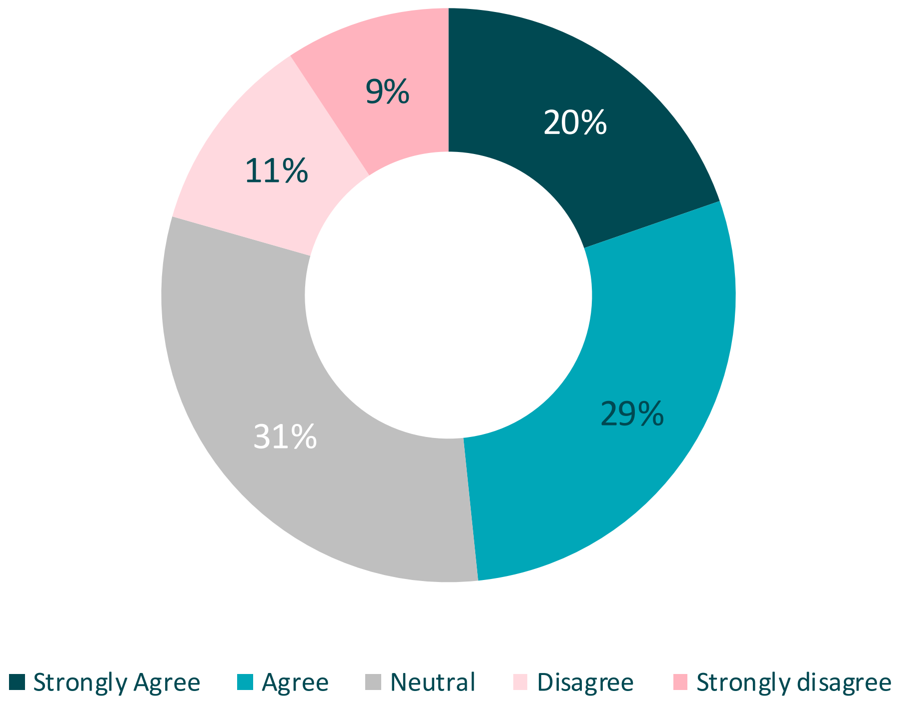
August 2025

AGREEMENT WITH STATEMENT 'I INTEND TO AVOID SHOPPING AT RETAILERS THAT ARE US-OWNED'



September 2025

AGREEMENT WITH STATEMENT 'I INTEND TO AVOID SHOPPING AT RETAILERS THAT ARE US-OWNED'



Numerator Custom Tariff Survey

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How did these concerns translate into shopping decisions?

Total FMCG Overview, Ontario Shoppers, Q3 2025

Ontarians spent less per household on FMCG products compared to the same period last year, while spend per trip slightly increased.

BUY RATE	SPEND PER TRIP	PURCHASE FREQUENCY
$2,629	**$35.2**	**74.7**
-2.1%	+0.4%	-2.6

Source: Numerator Canada Insights, 07/01/2025-09/30/2025 vs YA

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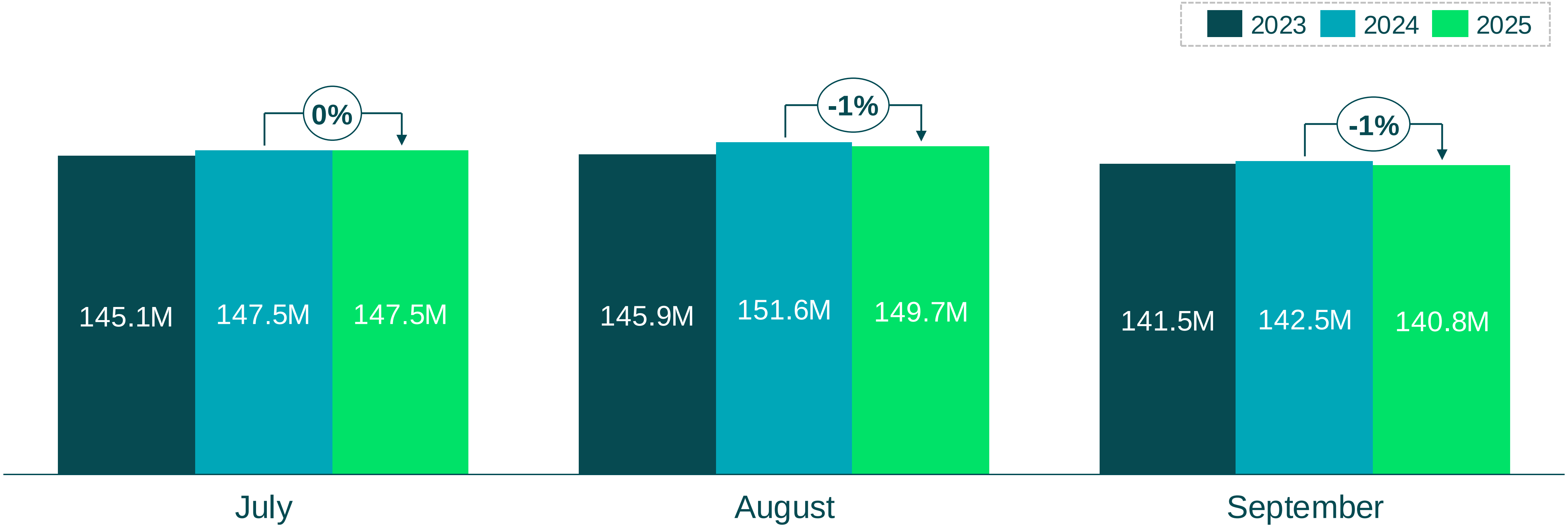
Total FMCG Trips, Ontario Shoppers, Q3 2025

Q3 2025 saw slightly fewer trips than Q3 2024

FMCG Trips, Ontario Total Outlets by Month



Source: Numerator Canada Insights, 2023-2025,

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Consumers are exploring various channels, but their spending per trip has decreased across most of them except Club.

Conventional

+0.2pt	-0.8	-1.1%
Households	Purchase Frequency	Spend per Trip

Discount

+0.8pt	+0.3	-1.6%
Households	Purchase Frequency	Spend per Trip

Mass

-0.3pt	-0.2	-0.8%
Households	Purchase Frequency	Spend per Trip

Club

+1.8pt	+0.2	+4.1%
Households	Purchase Frequency	Spend per Trip

Source: Numerator Canada Insights, Q3 2025 vs YA

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How did Ontario shoppers' Produce purchase behaviour shift in Q1 2025?

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Total Produce Overview, Ontario Shoppers, Q3 2025

Ontarians spent slightly more on Produce in Q3 2025, with slight increase in spend per trip and purchase frequency

BUY RATE	SPEND PER TRIP	PURCHASE FREQUENCY
$324.5	$11.14	28.4
+0.9%	+0.3%	+0.5%

Source: Numerator Canada Insights, Q3 2025 vs YA, Ontario

More Ontarians are buying Produce at Club stores, though spend per trip has slightly decreased

Conventional

+1.0pt	-0.4	+2.2%
Households	Purchase Frequency	Spend per Trip

Discount

+0.8pt	+0.1	-3.2%
Households	Purchase Frequency	Spend per Trip

Mass

-0.7pt	+0.2	+8.1%
Households	Purchase Frequency	Spend per Trip

Club

+1.1pt	+0.1	-1.8%
Households	Purchase Frequency	Spend per Trip

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Source: Numerator Canada Insights, Q3 2025 vs YA, Ontario

Vegetable Scorecard

	HH Penetration		Buy Rate		Purchase Frequency		Spend per Trip	
Fresh Tomatoes	77.9%	0.79	$20.0	-1.6%	5.2	-0.1	$3.82	1.2%
Fresh Potatoes	76.6%	0.28	$17.2	-2.2%	3.7	-0.1	$4.70	0.5%
Fresh Onions	71.8%	1.37	$12.2	-13.7%	3.4	-0.2	$3.54	-9.6%
Fresh Cucumber	71.2%	3.22	$12.6	0.5%	4.5	0.0	$2.79	1.2%
Fresh Peppers	69.4%	2.11	$16.4	-3.7%	4.2	-0.1	$3.95	-1.6%
Fresh Carrots	68.9%	0.55	$9.2	-6.4%	2.9	-0.1	$3.22	-4.3%
Fresh Lettuce	62.1%	0.37	$13.6	-4.1%	3.9	-0.3	$3.44	2.4%
Fresh Mushrooms & Truffles	52.7%	-0.24	$11.6	-2.3%	3.1	0.0	$3.72	-1.8%
Fresh Herbs	51.9%	1.83	$9.2	2.1%	3.7	0.1	$2.49	-0.7%
Fresh Corn	49.6%	-0.17	$6.9	-3.9%	2.6	-0.1	$2.70	-1.4%
Fresh Broccoli	49.5%	-1.29	$9.0	-2.5%	2.8	-0.2	$3.19	3.5%
Fresh Avocado	45.5%	1.43	$15.7	-5.7%	3.2	0.0	$4.94	-4.9%
Salad Greens	42.6%	1.27	$14.5	-4.0%	2.9	-0.1	$4.92	-1.3%
Fresh Garlic	41.9%	0.82	$5.0	1.1%	2.1	-0.1	$2.40	4.6%
Fresh Celery	41.2%	-0.70	$6.0	1.0%	2.1	0.0	$2.94	0.6%

Note: The list only includes top 15 categories by household penetration
Source: Numerator Canada Insights, Q3 2025 vs. YA

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Fruit Scorecard

	HH Penetration		Buy Rate		Purchase Frequency		Spend per Trip	
Fresh Bananas	86.3%	0.81	$15.30	5.5%	8.8	0.0	$1.74	5.5%
Fresh Citrus Fruits	74.5%	0.73	$21.24	-0.1%	4.5	-0.1	$4.76	3.0%
Fresh Apples	66.6%	-2.29	$20.85	7.5%	3.8	-0.1	$5.53	10.2%
Fresh Melons	66.0%	1.35	$20.37	3.7%	4.0	0.1	$5.15	1.0%
Fresh Strawberries	61.5%	3.03	$20.06	-2.0%	3.9	-0.1	$5.11	0.3%
Fresh Blueberries	61.4%	5.57	$17.28	11.6%	3.7	0.5	$4.65	-2.8%
Fresh Grapes	59.6%	-7.52	$21.23	-10.6%	3.2	-0.7	$6.58	8.5%
Fresh Cherries	47.8%	7.29	$19.09	-5.0%	2.6	0.3	$7.39	-14.5%
Fresh Peaches	42.7%	0.08	$14.43	2.7%	2.5	-0.2	$5.78	11.8%
Fresh Raspberries	42.2%	10.49	$14.51	1.2%	3.1	0.5	$4.65	-15.3%
Fresh Pears	30.3%	2.70	$8.58	2.0%	2.1	0.0	$4.06	4.1%
Fresh Mangos	25.5%	-0.69	$12.38	4.8%	2.1	0.0	$5.84	3.0%
Fresh Blackberries	23.9%	4.74	$9.78	-1.0%	2.2	0.2	$4.50	-12.0%
Fresh Pineapple	23.1%	-2.84	$8.88	-0.8%	1.9	-0.1	$4.60	5.1%
Fresh Kiwi	19.9%	0.11	$11.93	12.6%	1.8	0.0	$6.54	14.9%

Note: The list only includes top 15 categories by household penetration
Source: Numerator Canada Insights, Q3 2025 vs. YA

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Surprise Winners & Losers

FRESH CUCUMBER	3.2% ↑	more households bought Fresh Cucumber in Q3 2025 vs Q3 YAGO	*Those who did purchase spent…*	1.2% ↑	more on Fresh cucumber per trip
FRESH FENNEL	0.1% ↑	more households purchased Fresh Blackberries in Q3 2025 vs Q3 YAGO	*Those who did purchase spent…*	39.7% ↑	less on Fresh Fennel per trip
FRESH YUCA ROOT	0.3% ↓	fewer households bought Fresh Yuca Root in Q3 2025 vs Q3 YAGO	*Those who did purchase spent…*	25.0% ↓	less on Fresh Yuca Root per trip
FRESH KALE	0.3% ↓	fewer households bought Fresh Kale in Q3 2025 vs Q3 YAGO	*Those who did purchase spent…*	15.2% ↓	less on Fresh Kale per trip

Source: Numerator Canada Insights, Q3 2025 vs. YA

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Q3 2025 Ontario Shopper Behaviour Summary

Consumer employment concerns remains high for Q3 2025.

Confidence in the job market continues to decline, reaching its lowest point in recent history

Ontario shoppers spending less overall and going on fewer shopping trips.

Ontarians spent less per household on FMCG products compared to the same period last year, mostly due to fewer shopping trips.

More consumers are purchasing Produce at Club and Discount channels.

More people are going to Club and Discount channels for Produce purchases, but those who buy Produce there are slightly decreasing their spend per trip.

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