



Breakfast Cereals in Canada

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Value sales improve slightly, while volume sales fall

INDUSTRY PERFORMANCE

Healthy-positioned breakfast cereals are those which perform the best
Health and wellness trends continue to overlap with affordability concerns

WHAT'S NEXT?

Small value growth and flat volume expected for breakfast cereals
Indulgent categories to lean on snacking trends to target younger consumers
Wellness trends and labelling updates to dampen growth of cereals

COMPETITIVE LANDSCAPE

WK Kellog maintains leading place thanks to strength of overall portfolio
PepsiCo sees strongest company growth after recovering from product recalls in 2024

CHANNELS

Supermarkets maintains distribution lead, despite an erosion of share due to competition from budget-friendly outlets
Retail e-commerce sees the strongest channel growth

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EXECUTIVE SUMMARY

Low stable growth in both value and volume terms, while challenges remain

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Still-high prices continue to restrict stronger volume sales
Health and wellness trends continue to overlap with affordability concerns
Snacking trends continue, supporting baseline sales

WHAT'S NEXT?

Flat volume and low value growth expected, supported by baseline demand and suppressed by ongoing challenges
International/multicultural flavour trends look set to stay over the coming years
Evolving labelling requirements set to impact indulgent and high-sugar products

COMPETITIVE LANDSCAPE

Loblaw Cos, Canada Bread, and FGF Brands are all attracting attention

Maple Lodge Farms, Nissin Foods, and Mondelez attract attention to their brands to support growth

Mergers and acquisitions and leveraging growing categories boost competitive strength of companies and brands

CHANNELS

Supermarkets maintains distribution lead, despite an erosion of share due to competition from budget-friendly outlets

Retail e-commerce sees the strongest channel growth

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