



Rice, Pasta and Noodles in Canada

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Positive sales for rice, pasta and noodles, thanks to stable baseline demand

INDUSTRY PERFORMANCE

Affordability and health and wellness offerings drive sales

Success of noodles supported by Asian immigration demographics

WHAT'S NEXT?

Economic and demographic shifts signal varied opportunities for category growth

Snacking and convenience trends present growth opportunities

Protein claims lead health and wellness demand

COMPETITIVE LANDSCAPE

Catelli Foods maintains overall lead thanks to strength in pasta

Nissin benefits from popularity of instant noodles and strong marketing activities

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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