Processed Fruit and Vegetables in Canada

November 2025

Table of Contents

Processed Fruit and Vegetables in Canada - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

A positive, and slightly improved, performance for processed fruit and vegetables

INDUSTRY PERFORMANCE

Processed fruit and vegetables benefit from popularity and affordable prices

Health and wellness trends influence purchasing behaviour

WHAT'S NEXT?

Modest forecast growth expected due to maturity of category and uncertainty about tariffs

Sustainability and eco-friendliness increasingly incorporated for added value

Snacking and wellness trends present opportunities for innovation and growth

COMPETITIVE LANDSCAPE

Bonduelle Canada maintains lead thanks to strength of its two key brands — Del Monte and Arctic Gardens

McCain enjoys the strongest growth thanks to the extension of its portfolio

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

CATEGORY DATA

COUNTRY REPORTS DISCLAIMER

Staple Foods in Canada - Industry Overview

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

MARKET DATA

COUNTRY REPORTS DISCLAIMER

SOURCES