



Snacks in Canada

June 2025

Table of Contents

Snacks in Canada

EXECUTIVE SUMMARY

Snacks in 2025: The big picture

Key trends in 2025

Competitive Landscape

Channel developments

What next for snacks?

MARKET DATA

Table 1 - Sales of Snacks by Category: Volume 2020-2025

Table 2 - Sales of Snacks by Category: Value 2020-2025

Table 3 - Sales of Snacks by Category: % Volume Growth 2020-2025

Table 4 - Sales of Snacks by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Snacks: % Value 2021-2025

Table 6 - LBN Brand Shares of Snacks: % Value 2022-2025

Table 7 - Penetration of Private Label by Category: % Value 2020-2025

Table 8 - Distribution of Snacks by Format: % Value 2020-2025

Table 9 - Forecast Sales of Snacks by Category: Volume 2025-2030

Table 10 - Forecast Sales of Snacks by Category: Value 2025-2030

Table 11 - Forecast Sales of Snacks by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Snacks by Category: % Value Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Chocolate Confectionery in Canada

KEY DATA FINDINGS

2025 DEVELOPMENTS

Elevated prices lead to stagnating volume sales, but support value growth

Nestlé Canada Inc maintains its leadership while Awake Chocolate Co records strong growth

Small local grocers lead distribution while convenience retailers improve its position

PROSPECTS AND OPPORTUNITIES

Future growth is expected to be impacted by prices and trade disputes

Digital media communications will gain significance as a primary form of consumer engagement

Rising interest in health creates key opportunities for innovation in chocolate confectionery

CATEGORY DATA

Table 13 - Sales of Chocolate Confectionery by Category: Volume 2020-2025

Table 14 - Sales of Chocolate Confectionery by Category: Value 2020-2025

Table 15 - Sales of Chocolate Confectionery by Category: % Volume Growth 2020-2025

Table 16 - Sales of Chocolate Confectionery by Category: % Value Growth 2020-2025

Table 17 - Sales of Chocolate Tablets by Type: % Value 2020-2025

Table 18 - NBO Company Shares of Chocolate Confectionery: % Value 2021-2025

Table 19 - LBN Brand Shares of Chocolate Confectionery: % Value 2022-2025

Table 20 - Distribution of Chocolate Confectionery by Format: % Value 2020-2025

Table 21 - Forecast Sales of Chocolate Confectionery by Category: Volume 2025-2030

Table 22 - Forecast Sales of Chocolate Confectionery by Category: Value 2025-2030

Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2025-2030

Table 24 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2025-2030

Gum in Canada

KEY DATA FINDINGS

2025 DEVELOPMENTS

Products that offer health and wellness attributes drive growth in chewing gum
Perfette Van Melle retains its leads while The Pur Co has a strong performance
Forecourt retailers remain the largest distribution channel but retail e-commerce shows dynamism

PROSPECTS AND OPPORTUNITIES

New product development is expected to support ongoing value growth in gum
Digital media communications will be key to engaging younger consumers
Innovation is set to focus on health and wellness attributes, aligning with consumer demands

CATEGORY DATA

- Table 25 - Sales of Gum by Category: Volume 2020-2025
- Table 26 - Sales of Gum by Category: Value 2020-2025
- Table 27 - Sales of Gum by Category: % Volume Growth 2020-2025
- Table 28 - Sales of Gum by Category: % Value Growth 2020-2025
- Table 29 - Sales of Gum by Flavour: Rankings 2020-2025
- Table 30 - NBO Company Shares of Gum: % Value 2021-2025
- Table 31 - LBN Brand Shares of Gum: % Value 2022-2025
- Table 32 - Distribution of Gum by Format: % Value 2020-2025
- Table 33 - Forecast Sales of Gum by Category: Volume 2025-2030
- Table 34 - Forecast Sales of Gum by Category: Value 2025-2030
- Table 35 - Forecast Sales of Gum by Category: % Volume Growth 2025-2030
- Table 36 - Forecast Sales of Gum by Category: % Value Growth 2025-2030

Sugar Confectionery in Canada

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising health consciousness dampens growth as some consumers limit sugar
Cadbury Adams Canada Inc retains its lead while improving its share during 2025
Retail e-commerce emerges as the largest and most dynamic channel in 2025

PROSPECTS AND OPPORTUNITIES

Sugar confectionery is expected to face challenges as consumers seek healthier options
Players are expected to invest in social media campaigns to connect with Gen Z consumers
The ongoing trade dispute is set to impact sales of sugar confectionery

CATEGORY DATA

- Table 37 - Sales of Sugar Confectionery by Category: Volume 2020-2025
- Table 38 - Sales of Sugar Confectionery by Category: Value 2020-2025
- Table 39 - Sales of Sugar Confectionery by Category: % Volume Growth 2020-2025
- Table 40 - Sales of Sugar Confectionery by Category: % Value Growth 2020-2025
- Table 41 - Sales of Chewy Candies by Type: % Value 2020-2025
- Table 42 - NBO Company Shares of Sugar Confectionery: % Value 2021-2025
- Table 43 - LBN Brand Shares of Sugar Confectionery: % Value 2022-2025
- Table 44 - Distribution of Sugar Confectionery by Format: % Value 2020-2025
- Table 45 - Forecast Sales of Sugar Confectionery by Category: Volume 2025-2030

Table 46 - Forecast Sales of Sugar Confectionery by Category: Value 2025-2030

Table 47 - Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2025-2030

Table 48 - Forecast Sales of Sugar Confectionery by Category: % Value Growth 2025-2030

Ice Cream in Canada

KEY DATA FINDINGS

2025 DEVELOPMENTS

Value sales of ice cream benefit from consumers reaching for comfort and indulgences

Nestlé Canada Inc focuses on its super-premium segment while Unilever divests its ice cream business

Supermarkets continue to lead distribution, benefiting from extensive freezer infrastructure

PROSPECTS AND OPPORTUNITIES

Ice cream is set to post modest growth, driven by warmer weather and health-focused options

Innovation will focus on flavour experimentation and co-branding products

Health and wellness will remain a key focus of new product developments

CATEGORY DATA

Table 49 - Sales of Ice Cream by Category: Volume 2020-2025

Table 50 - Sales of Ice Cream by Category: Value 2020-2025

Table 51 - Sales of Ice Cream by Category: % Volume Growth 2020-2025

Table 52 - Sales of Ice Cream by Category: % Value Growth 2020-2025

Table 53 - Sales of Ice Cream by Leading Flavours: Rankings 2020-2025

Table 54 - Sales of Impulse Ice Cream by Format: % Value 2020-2025

Table 55 - NBO Company Shares of Ice Cream: % Value 2021-2025

Table 56 - LBN Brand Shares of Ice Cream: % Value 2022-2025

Table 57 - NBO Company Shares of Impulse Ice Cream: % Value 2021-2025

Table 58 - LBN Brand Shares of Impulse Ice Cream: % Value 2022-2025

Table 59 - NBO Company Shares of Take-home Ice Cream: % Value 2021-2025

Table 60 - LBN Brand Shares of Take-home Ice Cream: % Value 2022-2025

Table 61 - Distribution of Ice Cream by Format: % Value 2020-2025

Table 62 - Forecast Sales of Ice Cream by Category: Volume 2025-2030

Table 63 - Forecast Sales of Ice Cream by Category: Value 2025-2030

Table 64 - Forecast Sales of Ice Cream by Category: % Volume Growth 2025-2030

Table 65 - Forecast Sales of Ice Cream by Category: % Value Growth 2025-2030

Savoury Snacks in Canada

KEY DATA FINDINGS

2025 DEVELOPMENTS

Savoury snacks drive positive growth, benefiting from ongoing innovation

Frito-Lay Canada retains its lead while Whole Living Kitchen Inc showcases strong growth

Retail e-commerce continues to gain share while discounters offer competitive price points

PROSPECTS AND OPPORTUNITIES

Ongoing growth is expected to be supported by health and wellness trends

The protein trend is expected to continue, shaping product innovation in savoury snacks

Flavour experimentation is set to bring excitement and innovation to savoury snacks

CATEGORY DATA

Table 66 - Sales of Savoury Snacks by Category: Volume 2020-2025

Table 67 - Sales of Savoury Snacks by Category: Value 2020-2025

Table 68 - Sales of Savoury Snacks by Category: % Volume Growth 2020-2025

Table 69 - Sales of Savoury Snacks by Category: % Value Growth 2020-2025

Table 70 - NBO Company Shares of Savoury Snacks: % Value 2021-2025

Table 71 - LBN Brand Shares of Savoury Snacks: % Value 2022-2025

Table 72 - Distribution of Savoury Snacks by Format: % Value 2020-2025

Table 73 - Forecast Sales of Savoury Snacks by Category: Volume 2025-2030

Table 74 - Forecast Sales of Savoury Snacks by Category: Value 2025-2030

Table 75 - Forecast Sales of Savoury Snacks by Category: % Volume Growth 2025-2030

Table 76 - Forecast Sales of Savoury Snacks by Category: % Value Growth 2025-2030

Sweet Biscuits, Snack Bars and Fruit Snacks in Canada

KEY DATA FINDINGS

2025 DEVELOPMENTS

Canadians continue to seek moments of comfort, supporting value growth in 2025

Mondelez Canada Inc retains its lead, while Nestlé Canada Inc records strong growth

Retail e-commerce continues to rise as consumers appreciate ease and convenience

PROSPECTS AND OPPORTUNITIES

Modest value growth and flat volume sales are predicted for the forecast period

Snack bars are expected to be the key focus of innovation, aligning with consumer demands

Sugar aversion and front-of-label packaging requirements are set to negatively impact sales

CATEGORY DATA

Table 77 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2020-2025

Table 78 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2020-2025

Table 79 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2020-2025

Table 80 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2020-2025

Table 81 - NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2021-2025

Table 82 - LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2022-2025

Table 83 - NBO Company Shares of Sweet Biscuits: % Value 2021-2025

Table 84 - LBN Brand Shares of Sweet Biscuits: % Value 2022-2025

Table 85 - NBO Company Shares of Snack Bars: % Value 2021-2025

Table 86 - LBN Brand Shares of Snack Bars: % Value 2022-2025

Table 87 - NBO Company Shares of Fruit Snacks: % Value 2021-2025

Table 88 - LBN Brand Shares of Fruit Snacks: % Value 2022-2025

Table 89 - Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2020-2025

Table 90 - Distribution of Sweet Biscuits by Format: % Value 2020-2025

Table 91 - Distribution of Snack Bars by Format: % Value 2020-2025

Table 92 - Distribution of Fruit Snacks by Format: % Value 2020-2025

Table 93 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2025-2030

Table 94 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2025-2030

Table 95 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2025-2030

Table 96 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2025-2030

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/snacks-in-canada/report.