



Staple Foods in Canada

November 2025

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Staple Foods in Canada

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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Baked Goods in Canada

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales remain in a small negative slump, in both value and volume terms

INDUSTRY PERFORMANCE

Sales of baked goods are yet to fully recover, despite the easing of inflation

Mondelez reported to be investing more strongly in cakes and pastries

WHAT'S NEXT?

Recovery to small value growth and flat-positive volume growth expected
Consumers to seek out freshness and experiential flavours
Consumer demand and legislative shifts to influence labelling and formulations

COMPETITIVE LANDSCAPE

Canada Bread Co, FGF Brands, and Loblaw Cos are the leading players in baked goods
No outstanding company growth seen in baked goods in 2025

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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[Breakfast Cereals in Canada](#)

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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Processed Fruit and Vegetables in Canada

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

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Processed Meat, Seafood and Alternatives To Meat in Canada

KEY DATA FINDINGS

2025 DEVELOPMENTS

A positive performance supported by meat and seafood substitutes and processed meat

INDUSTRY PERFORMANCE

Health and wellness trends influence purchasing behaviours

Meat and seafood substitutes supported by rising vegetarian and vegan trends

WHAT'S NEXT?

Positive sales growth expected over the forecast period

Tariff impact on prices and production

Competition with ready meals and meal kits expected to intensify

COMPETITIVE LANDSCAPE

Maple Leaf Foods (GBO) leads sales, marking expansion with new subsidiary

Companies offering substitutes see double-digit growth

CHANNELS

Supermarkets remain the most convenient outlets, while discounters expand their freezer space

Retail e-commerce sees the strongest growth, reflecting an overall trend

CATEGORY DATA

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[Rice, Pasta and Noodles in Canada](#)

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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