



# Processed Meat, Seafood and Alternatives To Meat in Canada

November 2025

## 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

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 3 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

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## 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

Table 15 - Sales of Staple Foods by Category: Volume 2020-2025  
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## SOURCES

Summary 1 - Research Sources

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