



Staple Foods in Canada

November 2025

Table of Contents

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

MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2020-2025

Table 2 - Sales of Staple Foods by Category: Value 2020-2025

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

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

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

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

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

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

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

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

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

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

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

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

CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2020-2025

Table 14 - Sales of Baked Goods by Category: Value 2020-2025

Table 15 - Sales of Baked Goods by Category: % Volume Growth 2020-2025

Table 16 - Sales of Baked Goods by Category: % Value Growth 2020-2025

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

Table 18 - NBO Company Shares of Baked Goods: % Value 2021-2025

Table 19 - LBN Brand Shares of Baked Goods: % Value 2022-2025

Table 20 - Distribution of Baked Goods by Format: % Value 2020-2025

Table 21 - Forecast Sales of Baked Goods by Category: Volume 2025-2030

Table 22 - Forecast Sales of Baked Goods by Category: Value 2025-2030

Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2025-2030

Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[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

CATEGORY DATA

Table 25 - Sales of Breakfast Cereals by Category: Volume 2020-2025

Table 26 - Sales of Breakfast Cereals by Category: Value 2020-2025

Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2020-2025

Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2020-2025

Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2021-2025

Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2022-2025

Table 31 - Distribution of Breakfast Cereals by Format: % Value 2020-2025

Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2025-2030

Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2025-2030

Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2025-2030

Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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

CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2020-2025

Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2020-2025

Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2020-2025

Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2020-2025

Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2020-2025

Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2021-2025

Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2022-2025

Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2020-2025

Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2025-2030

Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2025-2030

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2025-2030

Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2020-2025

Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2020-2025

Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2020-2025

Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2025

Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2022-2025

Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2020-2025

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2025-2030

Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2025-2030

COUNTRY REPORTS DISCLAIMER

[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

CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2020-2025

Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2020-2025

Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2020-2025

Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2020-2025

Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2020-2025

Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2021-2025

Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2022-2025

Table 69 - NBO Company Shares of Rice: % Value 2021-2025

Table 70 - LBN Brand Shares of Rice: % Value 2022-2025

Table 71 - NBO Company Shares of Pasta: % Value 2021-2025

Table 72 - LBN Brand Shares of Pasta: % Value 2022-2025

Table 73 - NBO Company Shares of Noodles: % Value 2021-2025

Table 74 - LBN Brand Shares of Noodles: % Value 2022-2025

Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2020-2025

Table 76 - Distribution of Rice by Format: % Value 2020-2025

Table 77 - Distribution of Pasta by Format: % Value 2020-2025

Table 78 - Distribution of Noodles by Format: % Value 2020-2025

Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2025-2030

Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2025-2030

Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2025-2030

Table 82 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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/staple-foods-in-canada/report.