Staple Foods in Canada

November 2025

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Baked Goods in Canada

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

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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

CATEGORY DATA

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

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

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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

CHANNELS

CATEGORY DATA

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