

Staple Foods in Canada

November 2023

Table of Contents

Staple Foods in Canada

EXECUTIVE SUMMARY

Staple foods in 2023: The big picture Key trends in 2023 Competitive Landscape Channel developments What next for staple foods?

MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2018-2023
Table 2 - Sales of Staple Foods by Category: Value 2018-2023
Table 3 - Sales of Staple Foods by Category: % Volume Growth 2018-2023
Table 4 - Sales of Staple Foods by Category: % Value Growth 2018-2023
Table 5 - NBO Company Shares of Staple Foods: % Value 2019-2023
Table 6 - LBN Brand Shares of Staple Foods: % Value 2020-2023
Table 7 - Penetration of Private Label by Category: % Value 2018-2023
Table 8 - Distribution of Staple Foods by Category: Volume 2023-2028
Table 9 - Forecast Sales of Staple Foods by Category: Value 2023-2028
Table 10 - Forecast Sales of Staple Foods by Category: % Volume Growth 2023-2028
Table 11 - Forecast Sales of Staple Foods by Category: % Value Growth 2023-2028
Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baked Goods in Canada

KEY DATA FINDINGS

2023 DEVELOPMENTS

Baked goods experience contraction in volume growth amidst high prices Functionality and healthier options drive growth in baked goods Artisanal producers strengthen their market share

PROSPECTS AND OPPORTUNITIES

Baked goods expected to continue gradual decline in the forecast period Growing variety of ethnic products expected in the forecast period Plant-based innovations on the horizon

CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2018-2023Table 14 - Sales of Baked Goods by Category: Value 2018-2023Table 15 - Sales of Baked Goods by Category: % Volume Growth 2018-2023Table 16 - Sales of Baked Goods by Category: % Value Growth 2018-2023Table 17 - Sales of Pastries by Type: % Value 2018-2023Table 18 - NBO Company Shares of Baked Goods: % Value 2020-2023Table 20 - Distribution of Baked Goods by Format: % Value 2018-2023Table 21 - Forecast Sales of Baked Goods by Category: Volume 2023-2028Table 22 - Forecast Sales of Baked Goods by Category: Value 2023-2028Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2023-2028

Breakfast Cereals in Canada

KEY DATA FINDINGS

2023 DEVELOPMENTS

Breakfast cereals continue to experience slower growth Muesli and granola perform relatively well Leading companies embrace social media campaigns to engage with consumers

PROSPECTS AND OPPORTUNITIES

Breakfast cereal sales expected to decline in value and volume Health Canada contemplates restrictions on advertising breakfast cereals to children Social media emerges as a vital tool for consumer engagement

CATEGORY DATA

Table 25 - Sales of Breakfast Cereals by Category: Volume 2018-2023Table 26 - Sales of Breakfast Cereals by Category: Value 2018-2023Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2018-2023Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2018-2023Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2019-2023Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2020-2023Table 31 - Distribution of Breakfast Cereals by Format: % Value 2018-2023Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2023-2028Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2023-2028Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2023-2028Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2023-2028

Processed Fruit and Vegetables in Canada

KEY DATA FINDINGS

2023 DEVELOPMENTS

Contraction in volume growth while value growth improves Private label maintains its growth momentum Supermarkets remain dominant, with e-commerce showing promise

PROSPECTS AND OPPORTUNITIES

Processed fruits and vegetables expected to sustain slower value growth Convenience to drive growth Foodservice industry poised for strong recovery

CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2018-2023Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2018-2023Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2018-2023Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2018-2023Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2018-2023Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2019-2023Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2020-2023Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2018-2023Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2023-2028Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2023-2028

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2023-2028Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2023-2028

Processed Meat, Seafood and Alternatives To Meat in Canada

KEY DATA FINDINGS

2023 DEVELOPMENTS

Processed meat, seafood and alternatives to meat continues to experience slowdown in growth amid hyperinflation Alternatives to meat and seafood demonstrate robust growth driven by health awareness Modern retail supports expansion

PROSPECTS AND OPPORTUNITIES

Slowdown in overall growth primarily attributed to health concerns Growing diversity to drive demand and accessibility of halal meat New product development focuses on healthier options, even in processed meat

CATEGORY DATA

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2018-2023Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2018-2023Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2018-2023Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2018-2023Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2018-2023Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2018-2023Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2018-2023Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2018-2023Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2018-2023Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2019-2023Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2018-2023Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2018-2023Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2023-2028

Rice, Pasta and Noodles in Canada

KEY DATA FINDINGS

2023 DEVELOPMENTS

Value sales show a slight decline Rice emerges as the strongest performer Healthier options gain traction as demand rises

PROSPECTS AND OPPORTUNITIES

Improved volume growth expected for rice, pasta, and noodles Pasta to lead with aggressive new product developments focusing on innovation and health Foodservice sector set to recover to pre-pandemic levels

CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2018-2023Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2018-2023Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2018-2023Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2018-2023Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2018-2023Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2019-2023

Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2020-2023
Table 69 - NBO Company Shares of Rice: % Value 2019-2023
Table 70 - LBN Brand Shares of Rice: % Value 2020-2023
Table 71 - NBO Company Shares of Pasta: % Value 2019-2023
Table 72 - LBN Brand Shares of Pasta: % Value 2020-2023
Table 73 - NBO Company Shares of Noodles: % Value 2019-2023
Table 74 - LBN Brand Shares of Noodles: % Value 2020-2023
Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2018-2023
Table 76 - Distribution of Rice by Format: % Value 2018-2023
Table 77 - Distribution of Pasta by Format: % Value 2018-2023
Table 78 - Distribution of Noodles by Format: % Value 2018-2023
Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2023-2028
Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2023-2028
Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2023-2028

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.