

PASTA, RICE, NOODLES AND STARCHES – CANADA – 2024

Canada's diversity is defining and enormously impacts pasta, rice, noodle and starch consumption. Looking to international flavours and preparations when innovating is a must.



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Pasta, Rice, Noodles And Starches - Canada - 2024

This report looks at the following areas:

- Consumption of pasta, rice, noodles and starches
- Awareness of starches and grains
- Purchase factors
- Understandings of side dishes vs main dish vs breakfast
- Perceptions of pasta quality
- Attitudes toward pasta, rice, noodles and starches

Overview

Though Canadians are finally starting to see inflation returning down to an expected level, consumers are still feeling the pinch and are seeking affordable options. Luckily for pasta brands and retailers alike, 92% of consumers agree that pasta is one of the easiest meals to make and 79% agree that with the rising cost of groceries, eating more pasta makes sense financially. Furthermore, 84% of parents agree that pasta is one of their children's favourite foods. With 'affordable' (59%) and 'easy to make' (48%) topping consumers' list of purchase factors when buying pasta, rice, starches and grains, messaging is key. Foregrounding simplicity is essential when appealing to time-strapped consumers.

But, it is important to recognize that while pasta is popular, rice, noodles and other starches should not be ignored; younger consumers, multicultural consumers and newcomers to



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Canada show clear preferences for these. For example, while 50% of consumers eat unflavoured dry rice, 75% of Chinese consumers do. And, while only 15% of consumers eat yucca/cassava, a staggering 55% of Black consumers and 52% of Filipino consumers do. When innovating new products, look internationally for inspiration.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities

CONSUMER INSIGHTS

Consumer fast facts

Pasta and noodle consumption

- Dry pasta is primo, but egg and rice noodles are formidable opponents
 - Graph 1: typical pasta and noodle consumption, 2024
- Dry pasta is primo, but egg and rice noodles are formidable opponents
- Pasta is good for kids!
- Affordability is key
 - Graph 2: typical pasta and noodle consumption (select), by household financial situation, 2023
- Cooking skills and preferences for fresh pasta
 - Graph 3: typically consumes fresh pasta, by cooking skills, 2023
- Asian consumers dominate noodle consumption
 - Graph 4: typical noodle consumption (select), by race, 2023
- Inspiring multicultural consumers with dry pasta
 - Graph 5: dry pasta consumer, by race, 2023
- French-speaking Quebecers are feeling the noodle vibe
 - Graph 6: typical noodle consumption (select), English-speaking Quebecers vs French-speaking Quebecers, 2023
- Indigenous consumers are prioritizing convenience
 - Graph 7: typical pasta and noodle consumption (select), overall vs First Nations, Métis or Inuk, 2023

Rice consumption

- The rice roundup: typical rice consumption
- Reminding younger consumers plain rice doesn't have to be a plain affair
 - Graph 8: typical rice consumption (select), by age, 2023
- Recognizing rice is affordable
 - Graph 9: typical rice consumption (select), by household financial situation
- Race and rice

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- Region's impact on rice consumption
 - Graph 10: typical rice consumption (select), by region, 2023

Grain and starch consumption

- The standard starches captivate Canadians
 - Graph 11: typical grain and starch consumption, 2023
- Girls and guys gravitate toward different grains
 - Graph 12: typical grain and starch consumption, by gender, 2023
- Younger Canadians are open to options
 - Graph 13: typical grain and starch consumption, by age, 2023
- Multicultural Canadians' standout consumption
 - Graph 14: typical grain and starch consumption (select), by race, 2023
- Multicultural Canadians' standout consumption
- Newer Canadians' niche grain consumption is notable...
 - Graph 15: typical grain and starch consumption (select), overall vs consumers living in Canada for less than ten years, 2023
- ...but they remain unaware of more commonplace products
 - Graph 16: "I have never heard of this" (select), overall vs newer Canadians, 2023
- Quebec is keen on couscous
- The perception of quinoa is premium
- McCain's packaging doesn't quite hit the mark
- Cooking grains is an adventure to those with the skills
- Opportunity abounds around naturally gluten-free options
 - Graph 17: "I have never heard of this" (select), by consumers who look for pasta, rice, starch or grains that are gluten-free when shopping for groceries, 2023

Purchase factors

- Affordability and easiness to make are at top of mind
 - Graph 18: when shopping for groceries, I look for pasta, rice, starch or grains that are..., 2023
- Younger women crave reasonably-priced pasta, rice, starch or grains
 - Graph 19: when shopping for groceries, I look for pasta, rice, starch or grains that are affordable, by gender and age, 2023
- Indigenous consumers want easy-to-make options
 - Graph 20: when shopping for groceries, I look for pasta, rice, starch or grains that are... (select), overall vs First Nations, Métis or Inuk*, 2023
- Food is a connection to culture
- Multicultural consumers are focused on purchase factors differently
 - Graph 21: when shopping for groceries, I look for pasta, rice, starch or grains that are... (select), by race, 2023
- Rural consumers drive desire for affordability

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- Graph 22: when shopping for groceries, I look for pasta, rice, starch or grains that are affordable, by area, 2023
- Not all regions are prioritizing equally
 - Graph 23: when shopping for groceries, I look for pasta, rice, starch or grains that are... (select), by region, 2023
- Appealing to vegetarians with protein-forward options
- New pasta launches show a preference for protein
 - Graph 24: new pasta product launches with high/added protein as the claim, 2023

Brand preferences

- Canadians clearly have their brand preferences
- Income has no bearing on having brand preferences
 - Graph 25: "I am particular about what brand of rice/pasta/noodles I eat" (% agree), by household income, 2023
- Culinary connoisseurs: brand-savvy home chefs
 - Graph 26: "I am particular about what brand of rice/pasta/noodles I eat" (% agree), by cooking skill level, 2023
- Cultural heritage influences brand preferences in multicultural Canadians
 - Graph 27: "I am particular about what brand of rice/pasta/noodles I eat" (% agree), by race, 2023
- Connecting to cultural brand preferences
 - Graph 28: "I am particular about what type of rice I eat" (% agree), overall vs consumers who look for pasta, rice, starch or grains that are way to connect to their culture/part of their culture's cuisine, 2023
 - Graph 29: "I am particular about what type of pasta vs noodles I eat" (% agree), overall vs consumers who look for pasta, rice, starch or grains that are way to connect to their culture/part of their culture's cuisine, 2023
- Gluten-free consumers give brand loyalty
- The gluten-free and protein-forward faces of pasta

Breakfast, side dish or star of the show?

- Sidekicks or mains? It's a toss up
 - Graph 30: attitudes toward pasta, noodles, rice and grains (% agree), 2023
- Multicultural consumers and multiple understandings of main vs side dish
 - Graph 31: attitudes toward pasta, noodles, rice and grains (% agree), by race, 2023
- Looking internationally for breakfast inspiration
 - Graph 32: attitudes toward oatmeal and rice, (% agree), by race, 2023
- Rice is picking up where oatmeal leaves off
 - Graph 33: attitudes toward oatmeal and rice (% agree), by age, 2023
- What's in a breakfast?

Attitudes toward rice and grains

- Consumers crave convenience
- Rice cookers take convenience to the next level
- Race has a lot to do with rice cooker use
 - Graph 34: "I typically use a rice cooker to make rice" (% agree), by race, 2023

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- An uneven adoption of rice cookers is occurring across Canada
 - Graph 35: "I typically use a rice cooker to make rice" (% agree), by region, 2023
- Dads dig their rice cookers
 - Graph 36: "I typically use a rice cooker to make rice" (% agree), overall vs mothers vs fathers, 2023
- Younger consumers yearn for education around grains
 - Graph 37: "I would like to try different types of grains, but I don't know how to cook them" (% agree), by age, 2023

Attitudes toward pasta quality

- Men are more amenable to artisanal pasta
- Draw on the specifics and go beyond the 'bronze die cut'
- Age-based quibbles over pasta quality
 - Graph 38: attitudes toward pasta (% agree), by age, 2023
- Barilla almost hits the mark with its AI Bronzo post
- Income's impact isn't felt
 - Graph 39: attitudes toward pasta (% agree), by household income, 2023
- Chefs know a good thing when they see it
 - Graph 40: attitudes toward pasta (% agree), by cooking skill level, 2023
- Non-meat eaters are keen to choose artisanal
 - Graph 41: "I am more likely to choose artisanal pasta (eg bronze die cut pasta) over regular pasta" (% agree), by dietary preferences, 2023

Perceptions of pasta

- Pasta is easy!
- Pasta is easy
- Pasta is affordable!
- Combat younger consumers' hesitance toward pasta
 - Graph 42: attitudes toward pasta (% agree), by age, 2023
- Newer Canadians need more convincing around pasta

COMPETITIVE STRATEGIES

Launch activity and innovation

- Cassava is cool
- Sorghum and millet soar in India
- Italian made easy

Marketing and advertising

- Social media (food) trends are nothing to scoff at
- T&T's Instagram offers approachable meal ideas

Opportunities

- Increased education in the kitchen is essential
- Convenience is key
- Internationally-inspired
- Recognizing that rice cookers are rad

THE MARKET

Market context

- 'Inflation' continues to plague Canadians
 - Graph 43: top concerns over next six months (any rank), 2023
- Though a rise in debt servicing costs has eaten into disposable income...
 - Graph 44: percent of household income used to service debt, 2013-23
- ...foodservice sales have recovered from the depths of the pandemic
 - Graph 45: monthly survey of food services and drinking places, 2019-23

Market drivers

- Big grocers are not in consumers' good books
 - Graph 46: where consumers get their groceries from, 2023
- Diversity defines the nation
 - Graph 47: distribution of foreign-born population, by region of birth, 1871 to 2036
- Asian immigration impacts Canadian (food) culture
 - Graph 48: top birthplaces of recent immigrants, 2021
- A third of South Asian consumers don't eat meat
 - Graph 49: consumes a vegetarian or vegan diet, by race, 2023
- Nutritious North Canada
- Appealing to Indigenous consumers with consideration and care
- Unprecedented wildfires, climate change, agricultural production and conflict
- The Bear inspires a generation of aspiring cooks (and chefs)
- Grocery delivery is only getting easier

APPENDIX

- Consumer research methodology
- Generations
- Household financial situation
- Abbreviations and Terms

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This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by Kantar Profiles ([See Research Methodology for more information](#)).

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