



Overview of Granola bars

available in Québec in 2018 and 2023

The Observatory conducted a follow-up study on the granola bar market, five years after the initial report in 2018. A broader selection was observed, with a total of 369 products listed, accounting for 74% of the market (compared to 310 products in 2018, which accounted for 75% of the market at that time).



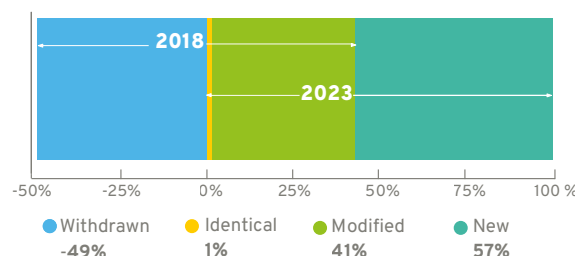
1 Granola bars listed in 2023

The greatest variety¹ was still found among bars with sweet ingredients (34% of the product lineup). They remained the best-selling items (39% of sales) with an increase of +9 pp².

Fully coated bars have seen a decline in variety (-13 pp) and sales (-17 pp) since 2018, while partially coated bars have seen increases in both variety and sales (+15 pp and +12 pp, respectively).

Regarding the status³:

- Most of the products were new (n=212/369; 57%) or modified (n=152/369; 41%).
- Bars with sweet ingredients accounted for the largest share of both new products and modified products



Bars modified since 2018 contained **more sugar and less fiber** than those with another status (identical, new, or withdrawn since 2018).



As in 2018, **fully coated bars contained more saturated fat and sugars** than uncoated bars.

¹ Variety : number of different products.

² Percentage points: These represent the difference in market share percentages within the same category between 2018 and 2023.

³ Product status: New, identical, modified or withdrawn since 2018.

For more information : observatoire.inaf.ulaval.ca/en/

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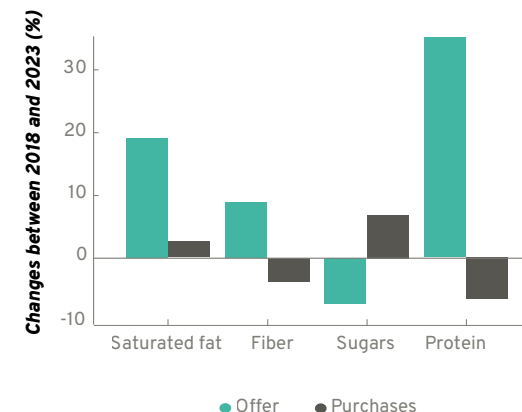




2 Evolution of nutritional composition

Granola bars **offered** in 2023 contained more protein (+35%) than in 2018. This may be partially attributable to the increase in bars marketed to athletes (+9 pp), which tend to be higher in protein. Granola bars in 2023 also contained more saturated fat (+19%) than before, but this increase was not significant.

The nutritional composition of **purchased** granola bars (**weighted by sales**) has not changed significantly since 2018. This means that, despite changes in product offerings, consumers did not significantly alter their purchasing behavior.

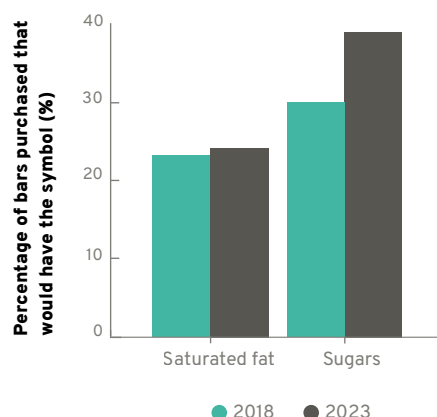


3 Front-of-package Nutrition Symbol

To determine whether a product must bear the symbol indicating a high content in saturated fat, sugars and/or sodium, the threshold of 15% of the daily value (DV) is generally used for granola bars⁴.

Among the purchased bars in 2023, 39% would have had the **symbol** on the front of their packaging due to high sugar content, and 24% due to high saturated fat content. This represents an increase of +9 pp and +1 pp, respectively, compared to 2018. It should be noted that 14% of the purchased bars in 2023 would have had to bear the symbol for both of these nutrients.

Although no symbol is associated with **fiber** content, this nutrient remains a public health concern. More bars available in 2023 (+6 pp) met the threshold of 15% of the DV (i.e., 4 g per serving⁵) for fiber.



4 Conclusion

The most notable change among granola bars in 2023 was an increase in **protein** content, attributable – at least in part – to a greater number of bars marketed to athletes.

Like in 2018, **saturated fat** and **sugar** content remain key issues for this category :

- Nearly 40% of the purchased bars would have had to bear the symbol indicating a high sugar content, and nearly a quarter would have had to do so for a high saturated fat content.
- Granola bars that were modified since 2018 contained more sugar and less fiber than products with another (identical, new, or withdrawn since 2018).

⁴ 15 % daily value threshold : a threshold established by Health Canada that represents a high amount of a nutrient relative to a reference amount. If the reference amount for the bar is less than 30 g, the 10% DV threshold is used.

⁵ 4 g fiber threshold : equivalent to the claim "high source of" fiber.

Data from this overview of granola bars comes from :



Nutritional information



Consumer purchases

Market coverage

63 % of supply
74% of sales

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