



# Carbonates in Canada

November 2025

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## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Carbonates pressured by elevated prices and health concerns

### INDUSTRY PERFORMANCE

Volume resumes decline as category remains mature and price anchored

Non-cola, reduced sugar and mixers outperform a soft baseline

### WHAT'S NEXT?

Marginal volume contraction but modest value growth expected

Functional and prebiotic sodas to build from a niche base

Sugar aversion and FOP labels to shape reformulation and portfolio choices

### COMPETITIVE LANDSCAPE

Global cola majors remain dominant as KDP gains ground in non-cola

Premium and craft soda brands drive niche growth

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Store-based channels dominate as shoppers increasingly plan purchases

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## Soft Drinks in Canada - Industry Overview

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### KEY DATA FINDINGS

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Health and wellness expectations reshape category dynamics

Premiumisation and affordable indulgence gain relevance in a cautious economic climate

Customisation and home beverage making expand, challenging ready-to-drink formats

## WHAT'S NEXT?

Soft drinks forecast to maintain modest value growth amid constrained volume gains

Health priorities and functional positioning to intensify across categories

Regulatory shifts and ingredient pressures to influence product strategy

## COMPETITIVE LANDSCAPE

Category leaders diversify portfolios while adjusting to shifting distribution agreements

Agile challengers and specialised players gain traction through innovation

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