



Soft Drinks in Canada

November 2025

Table of Contents

EXECUTIVE SUMMARY

Soft drinks adjust to shifting health priorities, economic caution and changing consumption behaviour

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

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

CHANNELS

Store-based retail remains dominant as shoppers shift toward value-oriented purchasing

E-commerce strengthens as infrastructure and shopper confidence mature

Foodservice recovery remains weaker than anticipated

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 36 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales stabilise alongside foodservice recovery but remain constrained by economic pressures

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Bottled Water in Canada](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Stable demand but elevated prices continue to shape consumer behaviour

INDUSTRY PERFORMANCE

High price levels limit volume expansion despite bottled water's health halo

Functional and sparkling flavoured water outperform within the category

WHAT'S NEXT?

Gradual volume growth supported by health positioning and flavour innovation

Rising focus on flavour experimentation and cross-category innovation

Sugar aversion and new labelling rules will shape reformulation and product mix

COMPETITIVE LANDSCAPE

Market leadership shaped by portfolio breadth and structural consolidation

Premium and sustainability-focused brands gain momentum

CHANNELS

Discounters remain important as consumers seek value and buy in bulk

Online penetration expands as click-and-collect becomes more entrenched

CATEGORY DATA

Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025

Table 38 - Off-trade Sales of Bottled Water by Category: Value 2020-2025

Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025

Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025

Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025

Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025

Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025

Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025

Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030

Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030

Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030

Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Carbonates in Canada

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

CHANNELS

Store-based channels dominate as shoppers increasingly plan purchases
E-commerce penetration rises, led by click-and-collect and omni-channel models

CATEGORY DATA

Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025
Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025
Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025
Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025
Table 53 - Off-trade Sales of Carbonates by Category: Volume 2020-2025
Table 54 - Off-trade Sales of Carbonates by Category: Value 2020-2025
Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025
Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025
Table 57 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025
Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025
Table 59 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025
Table 60 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025
Table 61 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025
Table 62 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025
Table 63 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030
Table 64 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030
Table 65 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030
Table 66 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030
Table 67 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030
Table 68 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Concentrates in Canada

KEY DATA FINDINGS

2025 DEVELOPMENTS

Budget-conscious consumers and home drink making drive growth in concentrates

INDUSTRY PERFORMANCE

Diverging trends for liquid and powder concentrates

Home beverage making emerges as a structural growth driver

WHAT'S NEXT?

Budget focus and customisation are expected to support further volume growth

Sustainability and environmental benefits strengthen the case for concentrates

Sugar aversion, sweetener choices and front-of-pack labelling create uncertainty

COMPETITIVE LANDSCAPE

Established leaders expand portfolios as appliance-based systems gain scale

Smaller brands and functional propositions add dynamism

CHANNELS

Offline retail remains dominant as e-commerce gains strategic importance

Omni-channel models and direct-to-consumer strategies support category growth

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

CATEGORY DATA

Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 71 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Juice in Canada](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Ongoing pressure on volume as high prices and sugar concerns limit demand

INDUSTRY PERFORMANCE

Volume contraction continues as elevated prices limit recovery

Wellness-aligned niches outperform despite broader declines

WHAT'S NEXT?

Gradual volume decline expected alongside modest value growth

Functional benefits and sustainability set to shape medium-term innovation
Sugar aversion and new labelling rules expected to constrain growth

COMPETITIVE LANDSCAPE

Leading players face pressure as portfolio repositioning proves challenging
Smaller innovators gain traction through sustainability and cold-pressed formats

CHANNELS

Supermarkets and discounters remain central as shoppers seek value
Online growth persists as digital shopping becomes habitual

CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2020-2025
Table 85 - Off-trade Sales of Juice by Category: Value 2020-2025
Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025
Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025
Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025
Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025
Table 90 - NBO Company Shares of Off-trade Juice: % Value 2021-2025
Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025
Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030
Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030
Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030
Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[RTD Coffee in Canada](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Inflation pressure weighs on RTD coffee volumes despite resilient coffee culture

INDUSTRY PERFORMANCE

RTD coffee struggles to maintain momentum after the inflation shock
Cold coffee trends and younger consumers provide some support

WHAT'S NEXT?

Healthy growth expected, supported by strong coffee culture and innovation
Functional benefits and sustainability emerge as key areas of differentiation
Sugar reduction, labelling changes and health perceptions influence future demand

COMPETITIVE LANDSCAPE

Coffee shop brands dominate RTD coffee through strategic partnerships
Premium cold brew and niche players add breadth to the category

CHANNELS

Brick-and-mortar channels remain central to RTD coffee distribution
E-commerce gains traction as part of broader online grocery growth

CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2020-2025
Table 97 - Off-trade Sales of RTD Coffee: Value 2020-2025
Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025

Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025

Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025

Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025

Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025

Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025

Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030

Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[RTD Tea in Canada](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health positioning and premium innovation support a levelling RTD tea market

INDUSTRY PERFORMANCE

RTD tea growth slows as inflation and category maturity weigh on demand

Growth pockets in carbonated RTD tea, kombucha and reduced sugar formats

WHAT'S NEXT?

Moderate growth outlook driven by health trends but constrained by demographics and competition

Functional benefits and cross-category innovation gain prominence

Sugar reduction, sweeteners and labelling changes shape future dynamics

COMPETITIVE LANDSCAPE

Nestea transition reshapes leadership while Fuze enters the market

Smaller brands and kombucha specialists diversify the competitive set

CHANNELS

Brick-and-mortar remains the primary sales channel for RTD tea

E-commerce and omni-channel models continue to gain importance

CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 109 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2020-2025

Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Energy Drinks in Canada](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Strong growth fuelled by busier lifestyles and demand for affordable indulgence

INDUSTRY PERFORMANCE

Energy drinks benefit from functional positioning and affordable luxury

Reduced sugar variants gain momentum as sugar scrutiny returns

WHAT'S NEXT?

Continued growth expected, but at a more measured pace

Flavour innovation and cross-category inspiration to sustain consumer interest

Sugar aversion, labelling changes and regulatory limits shape future growth

COMPETITIVE LANDSCAPE

US entrants and adjacent-category players intensify competition

Clean energy and plant-based positioning create fast-growing niches

CHANNELS

Offline and omni-channel retail remain central to category reach

E-commerce gains importance, especially for younger and brand-focused consumers

CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 122 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Sports Drinks in Canada](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sports drinks stabilise after inflation shock but demand remains constrained

INDUSTRY PERFORMANCE

Sports drinks return to flat volume as high prices cap recovery

Reduced sugar and performance-positioned products prove more resilient

WHAT'S NEXT?

Moderate volume growth outlook supported by active lifestyles but tempered by headwinds

Flavour innovation and cross-category concepts expected to drive engagement

Sugar aversion and new labelling rules likely to reshape formulations

COMPETITIVE LANDSCAPE

Category leadership remains concentrated while new players target performance niches
Emerging brands emphasise clean, all-day hydration and selective distribution

CHANNELS

Forecourt retailers and discounters remain key to category reach
E-commerce gains traction as click-and-collect becomes routine

CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2020-2025
Table 134 - Off-trade Sales of Sports Drinks: Value 2020-2025
Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025
Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025
Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025
Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025
Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025
Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025
Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030
Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030
Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030
Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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/soft-drinks-in-canada/report.