



**Euromonitor
International**

Bottled Water in Canada

November 2025

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Bottled Water in Canada - Category analysis

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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

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Discounters remain important as consumers seek value and buy in bulk

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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

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