



Euromonitor
International

Hot Drinks in Canada

November 2025

Table of Contents

EXECUTIVE SUMMARY

Mixed performance for hot drinks in Canada

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Further volume declines driven by rising prices due to elevated input costs
Health and wellness trend influences purchasing decisions
Indulgence and luxury offer comfort in an unstable period
Canadians invest in at-home preparation for customisation and cost savings

WHAT'S NEXT?

Despite positive outlook, challenges will remain
Health and sustainability trends to support value growth

COMPETITIVE LANDSCAPE

Coffee players retain overall lead of competitive landscape
Pockets of dynamic growth as players focus on health and premium options

CHANNELS

Grocery retailers offer consumers convenience when purchasing hot drinks
E-commerce gains complement omnichannel strategies
Foodservice vs retail split

MARKET DATA

Table 1 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025
Table 2 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025
Table 3 - Retail Sales of Hot Drinks by Category: Volume 2020-2025
Table 4 - Retail Sales of Hot Drinks by Category: Value 2020-2025
Table 5 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 6 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025
Table 7 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025
Table 8 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 9 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025
Table 10 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025
Table 11 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025
Table 12 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025
Table 13 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025
Table 14 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025
Table 15 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025
Table 16 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030
Table 17 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030
Table 18 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030
Table 19 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030
Table 20 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 21 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030
Table 22 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030
Table 23 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 24 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030
Table 25 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Coffee in Canada](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Mixed performance for coffee due to various challenges

INDUSTRY PERFORMANCE

Further rise in unit price drives up value while dampening retail volumes

Extending the use of coffee machines at home with iced preparations

Canada's strong coffee culture continues to support overall demand

WHAT'S NEXT?

Positive outlook for coffee but challenges will remain

Replicating café experience at home to remain a key trend in Canada

Sustainability trend to encourage responsible sourcing

COMPETITIVE LANDSCAPE

Coffee's competitive landscape remains fairly consolidated in 2025

Nestlé Canada continues to focus on offering consumers convenience

Premium segment driven by sourcing and smaller players with flavour variety

Rising health-consciousness encourages new product development

CHANNELS

Grocery retailers dominate distribution, offering convenience for regular shoppers

E-commerce continues to make gains to align with omnichannel models

CATEGORY DATA

Table 26 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 27 - Retail Sales of Coffee by Category: Value 2020-2025

Table 28 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 29 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 30 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025

Table 31 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 32 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 33 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 34 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 35 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 36 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Tea in Canada](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Mixed performance as tea continues to mature in Canada

Black tea continues to drive retail volume declines due to lack of innovation

Health and wellness trend continues to support dynamic fruit/herbal tea

WHAT'S NEXT?

Retail volumes to resume growth but challenges remain
Functional benefits and sustainability to be stronger growth areas
Addressing demand for customised experience and premiumisation can provide fuel for growth over the long term

COMPETITIVE LANDSCAPE

Tata Global Beverages retains leadership of highly fragmented landscape
Tea players venture out of category for new growth areas

CHANNELS

Tea specialists remain popular destination for premium options
E-commerce's penetration of tea continues to rise

CATEGORY DATA

Table 37 - Retail Sales of Tea by Category: Volume 2020-2025
Table 38 - Retail Sales of Tea by Category: Value 2020-2025
Table 39 - Retail Sales of Tea by Category: % Volume Growth 2020-2025
Table 40 - Retail Sales of Tea by Category: % Value Growth 2020-2025
Table 41 - NBO Company Shares of Tea: % Retail Value 2021-2025
Table 42 - LBN Brand Shares of Tea: % Retail Value 2022-2025
Table 43 - Forecast Retail Sales of Tea by Category: Volume 2025-2030
Table 44 - Forecast Retail Sales of Tea by Category: Value 2025-2030
Table 45 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030
Table 46 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Other Hot Drinks in Canada](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Other hot drinks struggles with long-term challenges to growth

INDUSTRY PERFORMANCE

Other hot drinks experiences volume contraction while value growth moderates
Malt-based hot drinks attempt to appeal to health-conscious consumers

WHAT'S NEXT?

Other hot drinks to be further challenged by health trends and changing demands
Potential for expanding consumption occasions
Sugar aversion and front-of-label packaging requirements pose challenges

COMPETITIVE LANDSCAPE

Nestlé Canada continues to dominate competitive landscape
Smaller players focus on premium growth segments

CHANNELS

Supermarkets dominates distribution while discounters gains amid price concerns
Further share gain for convenient e-commerce

CATEGORY DATA

Table 47 - Retail Sales of Other Hot Drinks by Category: Volume 2020-2025
Table 48 - Retail Sales of Other Hot Drinks by Category: Value 2020-2025
Table 49 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2020-2025
Table 50 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2020-2025

Table 51 - NBO Company Shares of Other Hot Drinks: % Retail Value 2021-2025

Table 52 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2022-2025

Table 53 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2025-2030

Table 54 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2025-2030

Table 55 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2025-2030

Table 56 - Forecast Retail Sales of Other Hot Drinks by Category: % 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/hot-drinks-in-canada/report.