

Soft Drinks in Canada

December 2023

Table of Contents

EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2018-2023

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2022

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2022

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2022

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2022

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2018-2023

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023

Table 15 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023

Table 16 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023

Table 17 - NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023

Table 18 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023

Table 19 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023

Table 20 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023

Table 21 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023

Table 22 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023

Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028

Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028

Table 25 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028

Table 26 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028

Table 27 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028

Table 28 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028

Table 29 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028

Table 30 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

Table 31 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028

Table 32 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

APPENDIX

Fountain sales in Canada

DISCLAIMER

SOURCES

Summary 1 - Research Sources

KEY DATA FINDINGS

2023 DEVELOPMENTS

With consumers more mobile in 2023, demand for smaller formats has risen

BlueTriton Brands Inc continues to lead in 2023

Sparkling flavoured bottled water sees dynamic growth in 2023

PROSPECTS AND OPPORTUNITIES

Bottled water poised for healthy growth over the forecast period

Functional benefits expected in bottled water as the health and wellness trend gathers pace

Sugar tax is on the way to the detriment of flavoured bottled water

CATEGORY DATA

Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2018-2023

Table 34 - Off-trade Sales of Bottled Water by Category: Value 2018-2023

Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2018-2023

Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2018-2023

Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2019-2023

Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2020-2023

Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2019-2023

Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2020-2023

Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2023-2028

Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2023-2028

Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028

Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2023-2028

Carbonates in Canada

KEY DATA FINDINGS

2023 DEVELOPMENTS

Carbonates sees off-trade volume decline in 2023

New product development focuses on functional benefits with reduced or zero sugar

Giants Coca-Cola and PepsiCo Beverages Canada discontinue less popular brands

PROSPECTS AND OPPORTUNITIES

Non-cola carbonates set to benefit from popularity tonic water/mixers/other bitters

Healthy variants are likely to emerge as players seek to differentiate in a crowded arena

Growing health consciousness impact category performance in the years ahead

CATEGORY DATA

Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023

Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2018-2023

Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023

Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023

Table 49 - Off-trade Sales of Carbonates by Category: Volume 2018-2023

Table 50 - Off-trade Sales of Carbonates by Category: Value 2018-2023

Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023

Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023

Table 53 - Total Sales of Carbonates by Fountain On-trade: Volume 2018-2023

Table 54 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2018-2023

Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023

Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023

Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2019-2023

Table 58 - LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023

Table 59 - Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028

Table 60 - Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028

Table 61 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028

Table 62 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028

Table 63 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2023-2028

Table 64 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2023-2028

Concentrates in Canada

KEY DATA FINDINGS

2023 DEVELOPMENTS

Concentrates sees modest volume growth in 2023

Kraft Canada leads concentrates once again in 2023

Category faces ongoing pressure from other soft drinks categories

PROSPECTS AND OPPORTUNITIES

Natural ingredients and functional benefits will influence innovations over the forecast period

Potential implementation of front-of-package nutrition labelling

Sugar tax is on the way and set to apply pressure to the competitive landscape

CATEGORY DATA

Concentrates Conversions

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

Table 65 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2018-2023

Table 66 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2018-2023

Table 67 - Off-trade Sales of Concentrates by Category: Value 2018-2023

Table 68 - Off-trade Sales of Concentrates by Category: % Value Growth 2018-2023

Table 69 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2020-2023

Table 70 - NBO Company Shares of Off-trade Concentrates: % Value 2019-2023

Table 71 - LBN Brand Shares of Off-trade Concentrates: % Value 2020-2023

Table 72 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2023

Table 73 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2023

Table 74 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2019-2023

Table 75 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2023

Table 76 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2023-2028

Table 77 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2023-2028

Table 78 - Forecast Off-trade Sales of Concentrates by Category: Value 2023-2028

Table 79 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2023-2028

Juice in Canada

KEY DATA FINDINGS

2023 DEVELOPMENTS

Juice witnesses improved volume growth throughout the year

Not from concentrate (NFC) 100% juice continues to gather momentum

A Lassonde continues to lead thanks to its popular brand Oasis

PROSPECTS AND OPPORTUNITIES

Bumpy road ahead for juice as consumers spend less time in their homes

Interesting innovations in packaging and ingredients are likely to emerge

Coconut and other plant waters offer strong growth potential

CATEGORY DATA

Table 80 - Off-trade Sales of Juice by Category: Volume 2018-2023

Table 81 - Off-trade Sales of Juice by Category: Value 2018-2023

Table 82 - Off-trade Sales of Juice by Category: % Volume Growth 2018-2023

Table 83 - Off-trade Sales of Juice by Category: % Value Growth 2018-2023

Table 84 - NBO Company Shares of Off-trade Juice: % Volume 2019-2023

Table 85 - LBN Brand Shares of Off-trade Juice: % Volume 2020-2023

Table 86 - NBO Company Shares of Off-trade Juice: % Value 2019-2023

Table 87 - LBN Brand Shares of Off-trade Juice: % Value 2020-2023

Table 88 - Forecast Off-trade Sales of Juice by Category: Volume 2023-2028

Table 89 - Forecast Off-trade Sales of Juice by Category: Value 2023-2028

Table 90 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2023-2028

Table 91 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2023-2028

RTD Coffee in Canada

KEY DATA FINDINGS

2023 DEVELOPMENTS

Innovations focus on health and wellness and sustainability in 2023

Innovations focus on health and wellness and sustainability drive category interest

The North American Coffee Partnership continues to lead thanks to the popular brand, Starbucks Frappuccino

PROSPECTS AND OPPORTUNITIES

On-trade performance will improve and premiumisation may help drive current value growth

RTD coffee continues to be made up from the off-trade over the forecast period

Competition from RTD tea will continue to threaten category growth

CATEGORY DATA

Table 92 - Off-trade Sales of RTD Coffee: Volume 2018-2023

Table 93 - Off-trade Sales of RTD Coffee: Value 2018-2023

Table 94 - Off-trade Sales of RTD Coffee: % Volume Growth 2018-2023

Table 95 - Off-trade Sales of RTD Coffee: % Value Growth 2018-2023

Table 96 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2019-2023

Table 97 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2020-2023

Table 98 - NBO Company Shares of Off-trade RTD Coffee: % Value 2019-2023

Table 99 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2020-2023

Table 100 - Forecast Off-trade Sales of RTD Coffee: Volume 2023-2028

Table 101 - Forecast Off-trade Sales of RTD Coffee: Value 2023-2028

Table 102 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2023-2028

Table 103 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2023-2028

RTD Tea in Canada

KEY DATA FINDINGS

2023 DEVELOPMENTS

RTD Tea shows healthy performance in 2023 thanks to strong demand

Minute Maid Co Canada remains the leading player despite the growth of smaller brands

New product developments include those with functional benefits in line with the health and wellness trend

PROSPECTS AND OPPORTUNITIES

Kombucha will help drive growth in RTD tea in the years to come

Sustainability will re-emerge as a key focus area within the category

Sugar tax may negatively impact RTD tea sales

CATEGORY DATA

Table 104 - Off-trade Sales of RTD Tea by Category: Volume 2018-2023

Table 105 - Off-trade Sales of RTD Tea by Category: Value 2018-2023

Table 106 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2018-2023

Table 107 - Off-trade Sales of RTD Tea by Category: % Value Growth 2018-2023

Table 108 - Leading Flavours for Off-trade RTD Tea: % Volume 2018-2023

Table 109 - NBO Company Shares of Off-trade RTD Tea: % Volume 2019-2023

Table 110 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2020-2023

Table 111 - NBO Company Shares of Off-trade RTD Tea: % Value 2019-2023

Table 112 - LBN Brand Shares of Off-trade RTD Tea: % Value 2020-2023

Table 113 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2023-2028

Table 114 - Forecast Off-trade Sales of RTD Tea by Category: Value 2023-2028

Table 115 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2023-2028

Table 116 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2023-2028

Energy Drinks in Canada

KEY DATA FINDINGS

2023 DEVELOPMENTS

Canadian government recalls multiple brands for caffeine and labelling violations

Energy drinks continue to post decent off-trade volume growth, but on trade growth sees rapid slow down

Coca-Cola Ltd continues to lead energy drinks in 2023

PROSPECTS AND OPPORTUNITIES

Further restrictions are expected on distribution due to unhealthy image

Energy drinks to continue their positive growth over the forecast period despite recall

Healthier options to gain ground in energy drinks and improve their image

CATEGORY DATA

Table 117 - Off-trade Sales of Energy Drinks: Volume 2018-2023

Table 118 - Off-trade Sales of Energy Drinks: Value 2018-2023

Table 119 - Off-trade Sales of Energy Drinks: % Volume Growth 2018-2023

Table 120 - Off-trade Sales of Energy Drinks: % Value Growth 2018-2023

Table 121 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2019-2023

Table 122 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2020-2023

Table 123 - NBO Company Shares of Off-trade Energy Drinks: % Value 2019-2023

Table 124 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2020-2023

Table 125 - Forecast Off-trade Sales of Energy Drinks: Volume 2023-2028

Table 126 - Forecast Off-trade Sales of Energy Drinks: Value 2023-2028

Table 127 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2023-2028

Table 128 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2023-2028

Sports Drinks in Canada

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sports drinks continues to see momentum despite high prices

Millennials remain the target audience for sports drinks in Canada

PepsiCo Beverages continues to dominate with its leading brand Gatorade

PROSPECTS AND OPPORTUNITIES

Smaller players will continue to innovate in sports drinks over the forecast period

Positive outlook for sports drinks in the coming years

Sports sponsorships to remain a key focus of manufacturers

CATEGORY DATA

Table 129 - Off-trade Sales of Sports Drinks: Volume 2018-2023

Table 130 - Off-trade Sales of Sports Drinks: Value 2018-2023

Table 131 - Off-trade Sales of Sports Drinks: % Volume Growth 2018-2023

Table 132 - Off-trade Sales of Sports Drinks: % Value Growth 2018-2023

Table 133 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2019-2023

Table 134 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2020-2023

Table 135 - NBO Company Shares of Off-trade Sports Drinks: % Value 2019-2023

Table 136 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2020-2023

Table 137 - Forecast Off-trade Sales of Sports Drinks: Volume 2023-2028

Table 138 - Forecast Off-trade Sales of Sports Drinks: Value 2023-2028

Table 139 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2023-2028

Table 140 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2023-2028

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.