



Concentrates in Canada

November 2025

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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

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EXECUTIVE SUMMARY

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

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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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