



Sports Drinks in Canada

November 2025

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Sports Drinks in Canada - Category analysis

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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

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E-commerce gains traction as click-and-collect becomes routine

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

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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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