



# RTD Coffee in Canada

November 2025

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## RTD Coffee in Canada - Category analysis

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#### 2025 DEVELOPMENTS

Inflation pressure weighs on RTD coffee volumes despite resilient coffee culture

#### INDUSTRY PERFORMANCE

RTD coffee struggles to maintain momentum after the inflation shock

Cold coffee trends and younger consumers provide some support

#### WHAT'S NEXT?

Healthy growth expected, supported by strong coffee culture and innovation

Functional benefits and sustainability emerge as key areas of differentiation

Sugar reduction, labelling changes and health perceptions influence future demand

#### COMPETITIVE LANDSCAPE

Coffee shop brands dominate RTD coffee through strategic partnerships

Premium cold brew and niche players add breadth to the category

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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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