



Euromonitor  
International

# Soft Drinks in Canada

November 2025

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### EXECUTIVE SUMMARY

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

### KEY DATA FINDINGS

### 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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Rising focus on flavour experimentation and cross-category innovation

Sugar aversion and new labelling rules will shape reformulation and product mix

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## INDUSTRY PERFORMANCE

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Home beverage making emerges as a structural growth driver

## WHAT'S NEXT?

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Sugar aversion, sweetener choices and front-of-pack labelling create uncertainty

## COMPETITIVE LANDSCAPE

Established leaders expand portfolios as appliance-based systems gain scale

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### WHAT'S NEXT?

Gradual volume decline expected alongside modest value growth

Functional benefits and sustainability set to shape medium-term innovation  
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## COMPETITIVE LANDSCAPE

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Cold coffee trends and younger consumers provide some support

## WHAT'S NEXT?

Healthy growth expected, supported by strong coffee culture and innovation  
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#### WHAT'S NEXT?

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Functional benefits and cross-category innovation gain prominence

Sugar reduction, sweeteners and labelling changes shape future dynamics

#### COMPETITIVE LANDSCAPE

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Energy drinks benefit from functional positioning and affordable luxury

Reduced sugar variants gain momentum as sugar scrutiny returns

### WHAT'S NEXT?

Continued growth expected, but at a more measured pace

Flavour innovation and cross-category inspiration to sustain consumer interest

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Moderate volume growth outlook supported by active lifestyles but tempered by headwinds

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Sugar aversion and new labelling rules likely to reshape formulations

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