



# Bottled Water in Canada

November 2025

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## Bottled Water in Canada - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Stable demand but elevated prices continue to shape consumer behaviour

#### INDUSTRY PERFORMANCE

High price levels limit volume expansion despite bottled water's health halo

Functional and sparkling flavoured water outperform within the category

#### WHAT'S NEXT?

Gradual volume growth supported by health positioning and flavour innovation

Rising focus on flavour experimentation and cross-category innovation

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

#### COMPETITIVE LANDSCAPE

Market leadership shaped by portfolio breadth and structural consolidation

Premium and sustainability-focused brands gain momentum

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Discounters remain important as consumers seek value and buy in bulk

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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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