



Tea in Canada

November 2025

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Tea in Canada - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Mixed performance as tea continues to mature in Canada
Black tea continues to drive retail volume declines due to lack of innovation
Health and wellness trend continues to support dynamic fruit/herbal tea

WHAT'S NEXT?

Retail volumes to resume growth but challenges remain
Functional benefits and sustainability to be stronger growth areas
Addressing demand for customised experience and premiumisation can provide fuel for growth over the long term

COMPETITIVE LANDSCAPE

Tata Global Beverages retains leadership of highly fragmented landscape
Tea players venture out of category for new growth areas

CHANNELS

Tea specialists remain popular destination for premium options
E-commerce's penetration of tea continues to rise

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Hot Drinks in Canada - Industry Overview

EXECUTIVE SUMMARY

Mixed performance for hot drinks in Canada

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Further volume declines driven by rising prices due to elevated input costs
Health and wellness trend influences purchasing decisions
Indulgence and luxury offer comfort in an unstable period
Canadians invest in at-home preparation for customisation and cost savings

WHAT'S NEXT?

Despite positive outlook, challenges will remain
Health and sustainability trends to support value growth

COMPETITIVE LANDSCAPE

Coffee players retain overall lead of competitive landscape

Pockets of dynamic growth as players focus on health and premium options

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Grocery retailers offer consumers convenience when purchasing hot drinks

E-commerce gains complement omnichannel strategies

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