



Carbonates in Canada

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Carbonates pressured by elevated prices and health concerns

INDUSTRY PERFORMANCE

Volume resumes decline as category remains mature and price anchored

Non-cola, reduced sugar and mixers outperform a soft baseline

WHAT'S NEXT?

Marginal volume contraction but modest value growth expected

Functional and prebiotic sodas to build from a niche base

Sugar aversion and FOP labels to shape reformulation and portfolio choices

COMPETITIVE LANDSCAPE

Global cola majors remain dominant as KDP gains ground in non-cola

Premium and craft soda brands drive niche growth

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Store-based channels dominate as shoppers increasingly plan purchases

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Soft Drinks in Canada - Industry Overview

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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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