



# Juice in Canada

November 2025

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## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Ongoing pressure on volume as high prices and sugar concerns limit demand

### INDUSTRY PERFORMANCE

Volume contraction continues as elevated prices limit recovery

Wellness-aligned niches outperform despite broader declines

### WHAT'S NEXT?

Gradual volume decline expected alongside modest value growth

Functional benefits and sustainability set to shape medium-term innovation

Sugar aversion and new labelling rules expected to constrain growth

### COMPETITIVE LANDSCAPE

Leading players face pressure as portfolio repositioning proves challenging

Smaller innovators gain traction through sustainability and cold-pressed formats

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Supermarkets and discounters remain central as shoppers seek value

Online growth persists as digital shopping becomes habitual

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## Soft Drinks in Canada - Industry Overview

### 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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