



Non-alcoholic Beverages - Canada - 2022

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

The pandemic ushered in a raft of changes in habits as Canadians adapted to a reality that was indeed unprecedented in everyone's lifetimes. As Canada appears to have mostly emerged beyond the disruptions caused by the pandemic (eg lockdowns), the question becomes, what now? What will be the lasting impacts of the pandemic when it comes to eating and drinking, and how should companies adapt? This Report offers a topline view of the Canadian beverage landscape from the consumer's perspective. The topics explored include what Canadians typically drink and what they claim to be drinking more (and/or less) of since before the start of the pandemic. This Report also examines what considerations matter most (and least) to consumers when purchasing beverages, what claims resonate more (and less) and what occasions drinkers are more (or less) likely to associate with different beverages to help guide relevant product development and messaging strategies. Furthermore, this Report includes a deeper look at attitudes related to specific issues. They include how Canadians say they are adapting to rising costs, what impacts have COVID-19 had on drinking habits, how important is innovation (vs familiarity) to consumers from a topline perspective, and is it important for beverages, as a whole, to focus on sustainability? As always, where applicable, findings are broken out across pertinent demographics.



"The immediate impact of the pandemic has waned, but its influence remains. For many, the health crisis has led many Canadians to demand more from what they drink in terms of the benefits they offer."

- Joel Gregoire, Associate Director Food & Drink

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- What you need to know
- Definition

EXECUTIVE SUMMARY

- Top takeaways
- Market overview

Figure 1: Category overview for non-alcoholic beverages, 2022-27
- Opportunities
- The pandemic has bolstered health's and variety's importance
- A wider range of innovation resonates with younger Canadians
- Being a sustainable option continues to evolve from being a 'nice to have' to 'a need to have'
- Challenges
- Water has been the winner of late, and this is a challenge for other beverage categories
- Higher prices at grocery stores are impacting shopping behaviours
- Familiarity trumps novelty, meaning getting consumers to try new offerings is a challenge

MARKET FACTORS

- Inflation looks to have crested, but its impact persists

Figure 2: Canadian year over year consumer price index (annualized inflation rate) for all items and food from retail, by month, 2019-22

Figure 3: Top concerns expressed by Canadians (any rank), 2022

Figure 4: Expected increase in household income vs household spending by quarter among Canadians, 2014 Q4-2022 Q2
- Supermarkets and foodservice have both grown their sales compared to before the pandemic

Figure 5: Retail trade sales for supermarkets and other grocery (except convenience) stores, 2019-22

Figure 6: Dollars spent at food services and drinking places in Canada, 2019-22
- Immigration continues to drive Canada's population growth...

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 7: Overall planned permanent resident admissions, 2021-23

- **...with Asia and India more specifically as the primary source**

Figure 8: Permanent residents admitted to Canada in 2019 by country (top 10), 2019

- **Canada is moving to drastically reduce plastic waste**

BREAKDOWN OF NON-ALCOHOLIC BEVERAGE CATEGORIES

- **Four categories account for 80% of non-alcoholic beverage sales in Canada at retail**

Figure 9: Percent share of retail value sales of non-alcoholic beverages by category in Canada, 2019

COMPETITIVE STRATEGIES AND MARKET OPPORTUNITIES

- **There is ample opportunity to capitalize on unique flavours and formats**

Figure 10: Del Monte Pineapple Crush Flavored Juice Drinks (US), 2022

Figure 11: Perrier Fusions Strawberry & Kiwi Naturally Flavored Sparkling Beverages (US), 2021

Figure 12: PurAqua Coffee + Caramel Flavored Sparkling Water (US), 2022

Figure 13: Starbucks Baya Energy Pineapple Passionfruit Sparkling Energy Drink (US), 2022

Figure 14: Coca-Cola Starlight Space Flavored Beverage (US), 2022

Figure 15: Copper Cow Coffee Vanilla Premium Vietnamese Coffee Pout Over Latte Set (US), 2022

Figure 16: Café Caps Mexican Mocha Premium Coffeehouse Creations (US), 2022

Figure 17: President's Choice Yuzu Citrus Flavour Sparkling Cold Brew Coffee (Canada), 2021

Figure 18: President's Choice Yuzu Citrus Sencha Match Green Tea (Canada), 2021

Figure 19: Coca-Cola Creations Sugar-Free Byte Flavored Cola-Cola Soft Drink (Brazil), 2022

- **Added functionality is an opportunity to differentiate**

Figure 20: Great Value Immunity Blend Juice Beverage (US), 2022

Figure 21: Zyn Immunity & Recovery Infused beverage (US), 2022

Figure 22: Poppi Raspberry Rose Prebiotic Soda (US), 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Figure 23: Pop & Bottle Mocha Oat Milk Latte + Adaptogens (US), 2022
- Figure 24: Daydream Cucumber Lime Sparkling Water Infused with Hemp Oil & Adaptogens (Canada), 2021
- Figure 25: Evian+ Sparkling Cucumber & Mint Flavoured Sparkling Water (US), 2021
- Figure 26: SkinTe Collagen Sparkling Tea Lemon Lime (US), 2022
- Figure 27: Rviita Rise + Revitalize Royal Elderberry Clean Energy Drink (Canada), 2022
- Figure 28: Liquid I.V. Hydration Multiplier Caramel Apple Flavored Electrolyte Mix (US), 2022
- Figure 29: Agropur Natrel Plus Chocolate Milk Protein Shake with 2% Milk Fat (Canada), 2022

- **Opportunity exists to address needs not often met**

- Figure 30: Moontime Tea Organic Fertility Tea (Canada), 2021
- Figure 31: Gogo SqueeZ Morning SmoothieZ Strawberry Blend of Yogurt Fruit & Oats (US), 2022
- Figure 32: Smooth Meals Energizer Meal and Cold Brew Coffee & Maca (Canada), 2021
- Figure 33: PC Chocolate Hot Chocolate Bombs (Canada), 2021

- **Sustainability’s growing importance influences product innovation**

- Figure 34: Loop Mission Magic Sip Upcycled Cold-Pressed Juice (Canada), 2022
- Figure 35: Neutral Carbon Neutral Organic Whole Milk (US), 2021

- **Responsible packaging solutions will see a quantum leap during the 2020s**

- Figure 36: PlasticRoad – A revolution in building road, 2016

THE NON-ALCOHOLIC BEVERAGE CONSUMER – FAST FACTS
NON-ALCOHOLIC BEVERAGE USAGE

- **Beyond water, Canadians state they are most likely to drink coffee**

Figure 37: Beverages Canadians typically drink, 2022

- **Beverage preferences vary by age**

- Figure 38: Beverages Canadians typically drink, by age, 2022
- Figure 39: Beverages Canadians typically drink, Chinese Canadians vs South Asians vs overall population, 2022

What's included

- Executive Summary

- Full Report PDF

- Infographic Overview

- Powerpoint Presentation

- Interactive Databook

- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 40: Beverages Canadians typically drink, by region, 2022

CHANGE IN NON-ALCOHOLIC BEVERAGE USAGE

- The pandemic has brought opportunity for non-alcoholic beverages**

Figure 41: Change in non-alcoholic beverage consumption versus before the pandemic by category, 2022

- Young adults represent the best opportunity for growth across categories**

Figure 42: Drinking more non-alcoholic beverages versus before the pandemic by category, by age, 2022

Figure 43: Repertoire analysis – Number of beverage types typically drunk by age, 2022

Figure 44: Drinking more hybrid/fusion drinks vs before the pandemic, by work location, 2022

IMPORTANT CONSIDERATIONS WHEN PURCHASING NON-ALCOHOLIC BEVERAGES

- Taste and price matter most when purchasing beverages**

Figure 45: Important factors when purchasing non-alcoholic beverages, 2022

Figure 46: Dairy Farmers of Canada: I'm In – Full, 2022

- Age and parental status impact what matters when buying beverages**

Figure 47: Important factors when purchasing non-alcoholic beverages, by age, 2022

Figure 48: Important factors when purchasing non-alcoholic beverages, by parental status, 2022

OCCASIONS ASSOCIATED WITH BEVERAGES

- Canadians associate different drinks with different occasions**

Figure 49: Correspondence analysis – Symmetrical map – Occasions associated with non-alcoholic beverages, 2022

- Different demographics are more likely to associate different beverages with different occasions**

Figure 50: Associating drinking coffee with waking up, by age, 2022

Figure 51: Occasions associated with dairy and non-dairy milk, South Asians vs overall, 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

IMPORTANT CLAIMS WHEN CHOOSING NON-ALCOHOLIC BEVERAGES

- Addressing sugar matters most when choosing beverages**
Figure 52: Claims that matter when choosing non-alcoholic beverages, 2022
- A wider variety of claims matter to younger adults**
Figure 53: Claims that matter when choosing non-alcoholic beverages, by age, 2022
Figure 54: Claims that matter when choosing non-alcoholic beverages, by student status, 2022
Figure 55: Claims that matter when choosing non-alcoholic beverages, by parental status, 2022
Figure 56: Claims that matter when choosing non-alcoholic beverages, South Asians vs Chinese Canadians vs overall, 2022

ATTITUDES TOWARD NON-ALCOHOLIC BEVERAGES

- The pandemic has led many to prioritize health and expand the variety of what they're drinking**
Figure 57: Impact of COVID-19 on non-alcoholic beverage drinking habits, 2022
Figure 58: Impact of COVID-19 on non-alcoholic beverage drinking habits (% agree), by work location, 2022
Figure 59: Impact of COVID-19 on non-alcoholic beverage drinking habits (% agree), by age, 2022
Figure 60: Impact of COVID-19 on non-alcoholic beverage drinking habits (% agree), South Asians vs Chinese Canadians vs overall population, 2022
- Familiarity trumps novelty when it comes to non-alcoholic beverages**
Figure 61: Openness to non-alcoholic beverage innovation, 2022
Figure 62: Openness to non-alcoholic beverage innovation (% agree), by age, 2022
Figure 63: Openness to non-alcoholic beverage innovation (% agree), by parental status, 2022
Figure 64: Openness to non-alcoholic beverage innovation (% agree), South Asians vs Chinese Canadians vs overall population, 2022
Figure 65: "I'm more likely to purchase beverages if they offer added benefits" (% agree), by work location, 2022
- Sustainability in beverages matters regardless of age**
Figure 66: Views around non-alcoholic beverages and sustainability, 2022

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 67: Views around non-alcoholic beverages and sustainability (% agree), 18-44s vs over-45s, 2022

- **Inflated prices are impacting perceived shopping behaviours**

Figure 68: Response to rising prices, 2022

Figure 69: "Grocery prices are getting so expensive that I'm increasingly buying beverages that are cheaper, but that I also perceive to be of lower quality" (% agree), by age, 2022

Figure 70: "Grocery prices are getting so expensive that I'm increasingly buying beverages that are cheaper, but that I also perceive to be of lower quality" (% agree), single parents vs overall, 2022

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Data sources**
- **Consumer survey data**
- **Correspondence Analysis**
- **Consumer qualitative research**
- **Abbreviations and terms**
- **Abbreviations**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.