This report looks at the following areas:

- Which coffee formats Canadians turn to
- Change in perceived coffee consumption since the start of the pandemic
- At which foodservice operators Canadians claim to get their coffee and what has changed since the start of the pandemic
- What considerations are more (and less) important when choosing which coffees to drink and which coffee shops to visit
- Which areas of innovation Canadians express more (and less) interest in
- The perceived impact of rising prices on coffee drinking habits
- How coffee-related habits vary across select demographic breaks

Canadians love coffee. Most Canadian adults drink coffee at some point whether it’s at home or at foodservice. Drinking coffee is also among the most habitual of drinking behaviours. For brands, this means that winning share in this category can be exceedingly lucrative, but also exceedingly difficult. Three-quarters (73%) of coffee drinkers agree that they “drink the same coffee every day”, which means getting most consumers to make a switch can be a monumental challenge. Foodservice faces other challenges as half (53%) of those who get coffee from coffee shops agree that they are “getting less of the coffee [they] drink from coffee shops compared to before the start of the pandemic”. All categories are also contending with the dramatic rise in food and drink prices, particularly foods and drinks sold at retail. In an environment in which traditional behaviours are being affected, and the cost of living is skyrocketing, gaining share in what is a deeply habitual category can prove to be even more of a challenge.

There is opportunity to win share in this market with consumer-focused strategies. This Report looks at how views toward coffee vary across different demographic breaks, such as age, gender, where one works and whether one is newer to Canada. This Report also examines areas of innovation that matter to consumers, places the importance of sustainability when buying coffee in context, offers perspective around what coffee-focused foodservice chains

“Coffee is deeply rooted in habit. However, this doesn’t mean there isn’t opportunity for innovation. Added benefits, flavours and formats are ways coffees can differentiate themselves from one another. In the eyes of Canadians, coffee has many uses, including as a pick-me-up, for moments to connect and even to take time for oneself.”

– Joel Gregoire, Associate Director for Food & Drink, Canada

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are doing better (or worse) since the end of the pandemic and also looks at which coffee formats Canadians prefer. The aim of this study is to provide readers with an overview of Canada’s coffee landscape from the consumer’s point of view, identify challenges in this space and examine potential forward-looking opportunities using (quantitative) consumer feedback, examining select product launches in Canada and elsewhere, and also turning to other resources.
What you need to know

This Report looks at the following areas

Definition

Top Takeaways

Consumer trends

Winning share is difficult with coffee drinking habits so deeply rooted

Brands can capitalize on coffee’s versatility

Canadians respond to bolder flavours

Competitive strategies

Coffee’s value can be bolstered by added benefits

Adapting to the post-pandemic work environment is crucial to the growth of coffee shops

Coffee brands must offer budget-friendly solutions

Market predictions

Coffee needs to balance familiarity with newness

Despite economic uncertainty, coffee shops remain crucial to Canada’s foodservice culture

Figure 1: Category outlook for coffee and coffee shops, 2023-28

Opportunities

Beyond supplying a boost of energy, coffee can also support balance

It’s important to ‘chill out’ when communicating with younger adults

Climate change’s impact will amplify sustainability’s importance as it relates to coffee

The Quebec coffee consumer

Newer Canadians and coffee

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Figure 5: Dollars spent at limited-services eating places in Canada by month, 2019–23
• Climate change is likely to impact coffee production, yet Canadians are not overly-concerned
    Figure 6: Global annual mean surface air temperature change, 1880–22
    Figure 7: Important considerations when choosing coffee, by select countries, 2023
    Figure 8: This is Atomo!, August 2021

COMPETITIVE STRATEGIES AND MARKET OPPORTUNITIES
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    Figure 9: Four Sigmatic Balance Adaptogen Ground Coffee with Ashwagandha (Canada), April 2023
    Figure 10: Four Sigmatic Perform Ground Coffee with L-Theanine & Cordyceps Mushrooms (US), November 2022
    Figure 11: Rokit Pods Immunity Boost Nespresso Compatible Pods (UK), March 2023
    Figure 12: Laird Superfood Functional Focus Medium Roast Ground Peruvian Coffee (US), September 2021
    Figure 13: Chamberlain Coffee Sleepy Sloth Decaf Blend Coffee (US), July 2022
    Figure 14: Vital Proteins Unflavored Crystallized Coffee (US), February 2022
    Figure 15: Innerbloom Elixir Cold Brew Coffee (New Zealand), March 2023
• Less caffeine doesn’t have to mean no caffeine
    Figure 16: Lost Sheep Coffee Fifty Fifty Half Caffeine Compostable Capsules (UK), March 2022
    Figure 17: Kicking Horse Coffee Half Ass Decaffeinated Organic Whole Bean Coffee (Canada), February 2022
• Sustainability and coffee pair well together in different ways
    Figure 18: Café Royal CoffeeB Espresso Balls (France), March 2023
    Figure 19: Segelwerk Lazy Organic Roast (Germany), April 2023
    Figure 20: Kalamazoo Coffee Co Moonlight Maple Walnut Flavored Whole Bean Coffee (US), September 2022
    Figure 21: PC President’s Choice Espresso Forte Coffee (Canada), March 2023

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• Less tangible experiences and unique formats can be a differentiator for coffee brands

• Coffee makes a great base for a range of flavours

• Technology enables more automation at foodservice, but will this cheapen the experience?

• The at home barista movement enables more opportunity for smarter coffee machines
Nearly all Canadian adults drink coffee

Younger adults are as likely to drink coffee out-of-home as they are in-home

Ground coffee is the coffee of choice for Canadians when at home

Instant and RTD coffees hold particular appeal with younger adults

Claimed usage of single-cup pods has jumped versus before the pandemic

Younger consumers are driving coffee’s growth at home

Price and brand are foundational considerations

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Figure 55: What’s important when choosing which coffee to purchase (select), by age, 2023
Figure 56: What’s important when choosing which coffee to purchase (select), newer Canadians vs overall, 2023
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Figure 68: Visiting “more often” to get coffee versus the start of the pandemic among those who visit each operator (select), newer Canadians vs overall, 2023

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The pandemic has had a greater impact on younger consumers’ coffee-related behaviours
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Nearly all consumers agree brewing coffee at home is an effective way to save
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Abbreviations

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