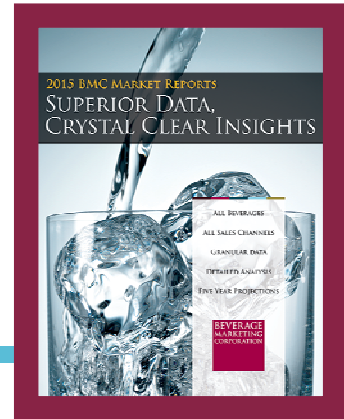


THE MULTIPLE BEVERAGE MARKETPLACE IN CANADA

2015 EDITION (Published October 2015. Data through 2014. Market projections through 2019.) More than 300 pages, with extensive text analysis, graphs, charts and tables.



The entire Canadian market. This report summarizes industry activity and contains current statistical data for eleven individual beverage categories in Canada, including volume, growth and per capita consumption figures. It profiles leading companies active in the Canadian marketplace and includes volume figures through 2014, plus Beverage Marketing's exclusive five-year projections for each category.

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INSIDE:

REPORT OVERVIEW

A brief discussion of this report's key features. 2

TABLE OF CONTENTS

A detailed outline of this report's contents and data tables. 5

SAMPLE TEXT AND INFOGRAPHICS

Examples of report text, data content, layout and style. 12

? HAVE QUESTIONS?

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MARKETING
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THE ANSWERS YOU NEED

- Which beverage categories grew in the Canadian market in 2014, and which did not?
- What's the fastest growing distilled spirits segment in Canada?
- Which province consumes the most beer per capita?
- How many liters of bottled water did Canadian residents consume during 2014, and how did that compare to previous years?
- How did sports beverages and energy drinks perform?
- What are future growth prospects for the major beverage categories in the Canadian market?

THIS REPORT FEATURES

The Multiple Beverage Marketplace in Canada provides a comprehensive overview of the entire Canadian beverage marketplace, providing a total market view of eleven beverage categories. Coverage includes:

- A summary of developments in the major categories and gives a bird's eye view of the industry as a whole. It breaks the industry down by volume by beverage category and includes per capita consumption figures. The report also discusses current industry trends.
- Concise descriptions and key trends in eleven beverage types including beer, bottled water, carbonated soft drinks, coffee, distilled spirits, energy drinks, fruit beverages, milk, sports beverages, tea and wine.
- Quantification of Canadian beer market volume by province. Historical and current data breaking out Canadian beer volume by package type (bottles, cans, draught and imported beer)
- Discussion of trends in the coffee market and discussion of trends and activities of key companies and brands including Van Houtte, Tim Hortons, and others
- Historical and current Canadian fluid milk trends, a break-out of volume, share and growth by milk segments including 2%, 1%, 3.25%, Skim, chocolate, buttermilk and eggnog, plus fluid milk consumption for select provinces
- A break-out of the domestic vs. imported distilled spirits market by segment and a look at distilled spirits volume, share and growth by province
- Domestic vs. imported wine volume, wine by segment and as well as a break-out of wine sales by Canadian province
- A discussion of several major Canadian beverage companies including Molson Coors Brewing Company, Labatt Brewing Company, Sleeman Breweries and Cott Corporation; their corporate histories and strategic acquisitions, as well as an in-depth look at their many brands, not just in Canada but around the world
- **Beverage Marketing's** volume, per capita consumption and compound annual growth projections for each beverage group and analysis of the forces determining each category's future through 2019

The Multiple Beverage Marketplace in Canada

October 2015

BEVERAGE
MARKETING
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RESEARCH • DATA • CONSULTING

NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

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Contents

Table of Contents

TABLE OF CONTENTS

TABLE OF CONTENTS-----	i
DEFINITIONS USED IN THIS REPORT-----	viii
INTRODUCTION-----	xxi

Chapter

1. THE CANADIAN BEVERAGE MARKET

The National Beverage Market-----	1
• Overview-----	1
• Beer-----	4
• Bottled Water-----	5
• Carbonated Soft Drinks-----	6
• Coffee-----	7
• Distilled Spirits-----	8
• Energy Drinks-----	9
• Fruit Beverages-----	10
• Milk-----	10
• Sports Beverages-----	11
• Tea-----	11
• Wine-----	12

Exhibits

1.1 Canadian Beverage Market Volume by Category 2009 – 2014-----	13
1.2 Canadian Beverage Market Share of Volume by Category 2009 – 2014-----	14
1.3 Canadian Beverage Market Change in Volume by Category 2010 – 2014-----	15
1.4 Canadian Beverage Market Per Capita Consumption by Category 2009 – 2014-----	16

2. THE CANADIAN BEER MARKET

The National Beer Market-----	17
• Overview-----	17
• Volume-----	19
• Per Capita Consumption-----	19
• Volume by Province-----	20
• Per Capita Consumption by Province-----	21
• Volume by Package Type-----	22
• Pricing-----	23

Exhibits

2.5 Canadian Beer Market Volume and Change 1999 – 2014-----	24
2.6 Canadian Beer Market Per Capita Consumption 1999 – 2014-----	25
2.7 Canadian Beer Market Volume by Province 2009 – 2014-----	26
2.8 Canadian Beer Market Share of Volume by Province 2009 – 2014-----	27

TABLE OF CONTENTS

Chapter

2. THE CANADIAN BEER MARKET (cont'd)	
<i>Exhibits (cont'd)</i>	
2.9 Canadian Beer Market Change in Volume by Province 2010 – 2014 -----	28
2.10 Canadian Beer Market Per Capita Consumption by Province 2009 – 2014-----	29
2.11 Canadian Beer Market Volume by Package Type 1999 – 2014 -----	30
2.12 Canadian Beer Market Share of Volume by Package Type 1999 – 2014 -----	31
2.13 Canadian Beer Market Change in Volume by Package Type 2000 – 2014 -----	32
2.14 Change in Consumer Price Index: Beer, Alcoholic Beverages and All Items 2003 – 2014 -----	33
2.15 Change in Industrial Product Price Index: Alcoholic Beverages and All Commodities 2003 – 2014 -----	34
3. THE CANADIAN BOTTLED WATER MARKET	
The National Bottled Water Market-----	35
• Overview-----	35
• Volume-----	45
• Per Capita Consumption -----	46
• Pricing-----	47
<i>Exhibits</i>	
3.16 Canadian Bottled Water Market Volume and Change 1998 – 2014-----	48
3.17 Canadian Bottled Water Market Per Capita Consumption 1998 – 2014 -----	49
3.18 Change in Industrial Product Price Index: Bottled Water, Carbonated Soft Drinks and All Commodities 2003 – 2014 -----	50
4. THE CANADIAN CARBONATED SOFT DRINK MARKET	
The National Carbonated Soft Drink Market -----	51
• Overview-----	51
• Volume-----	63
• Per Capita Consumption -----	63
• Pricing-----	64
<i>Exhibits</i>	
4.19 Canadian Carbonated Soft Drink Market Volume and Change 1998 – 2014 -----	66
4.20 Canadian Carbonated Soft Drink Market Per Capita Consumption 1998 – 2014-----	67
4.21 Change in Industrial Product Price Index: Carbonated Soft Drinks, Bottled Water and All Commodities 2003 – 2014 -----	68
5. THE CANADIAN COFFEE MARKET	
The National Coffee Market -----	69
• Overview-----	69
• Volume-----	77
• Per Capita Consumption -----	78
• Pricing-----	79

TABLE OF CONTENTS

Chapter

5. THE CANADIAN COFFEE MARKET (cont'd)

Exhibits

5.22	Canadian Coffee Market Volume and Change 1999 – 2014 -----	83
5.23	Canadian Coffee Market Per Capita Consumption 1999 – 2014 -----	84
5.24	Change in Consumer Price Index: Coffee and Other Items 2003 – 2014 -----	85
5.25	Change in Industrial Product Price Index: Coffee and All Commodities 2003 – 2014 -----	86

6. THE CANADIAN DISTILLED SPIRITS MARKET

The National Distilled Spirits Market -----		87
•	Overview-----	87
•	Volume-----	92
•	Per Capita Consumption -----	92
•	Volume by Segment -----	93
•	Volume by Province -----	95
•	Per Capita Consumption by Province-----	96
•	Pricing-----	97

Exhibits

6.26	Canadian Distilled Spirits Market Volume and Change 1998 – 2014 -----	98
6.27	Canadian Distilled Spirits Market Per Capita Consumption 1986 – 2014 -----	99
6.28	Canadian Distilled Spirits Market Volume by Segment 2009 – 2014 -----	100
6.29	Canadian Distilled Spirits Market Share of Volume by Segment 2009 – 2014 -----	101
6.30	Canadian Distilled Spirits Market Change in Volume by Segment 2010 – 2014 -----	102
6.31	Canadian Distilled Spirits Market Volume by Province 2009 – 2014-----	103
6.32	Canadian Distilled Spirits Market Share of Volume by Province 2009 – 2014 -----	104
6.33	Canadian Distilled Spirits Market Change in Volume by Province 2010 – 2014-----	105
6.34	Canadian Distilled Spirits Market Per Capita Consumption by Province 2009 – 2014	106
6.35	Change in Consumer Price Index: Liquor, Alcoholic Beverages and All Items 2003 – 2014 -----	107
6.36	Change in Industrial Product Price Index: Distilled Liquor, Whiskey, Alcoholic Beverages and All Commodities 2003 – 2014 -----	108

7. THE CANADIAN ENERGY DRINK MARKET

The National Energy Drink Market -----		109
•	Overview-----	109
•	Volume-----	118
•	Per Capita Consumption -----	119

Exhibits

7.37	Canadian Energy Drink Market Volume and Change 2000 – 2014 -----	121
7.38	Canadian Energy Drink Market Per Capita Consumption 2000 – 2014 -----	122

TABLE OF CONTENTS

Chapter

8. THE CANADIAN FRUIT BEVERAGE MARKET	
The National Fruit Beverage Market-----	123
• Overview-----	123
• Volume-----	126
• Per Capita Consumption -----	127
• Pricing-----	128
Exhibits	
8.39 Canadian Fruit Beverage Market Volume and Change 1998 – 2014-----	129
8.40 Canadian Fruit Beverage Market Per Capita Consumption 1998 – 2014 -----	130
8.41 Change in Consumer Price Index: Fruit Juices and Other Items 2003 – 2014-----	131
8.42 Change in Industrial Product Price Index: Fruit and Vegetable Juices and All Commodities 2003 – 2014 -----	132
9. THE CANADIAN MILK MARKET	
The National Milk Market-----	133
• Overview-----	133
• Volume-----	134
• Per Capita Consumption -----	135
• Volume by Segment -----	135
• Volume by Province -----	138
• Pricing-----	138
Exhibits	
9.43 Canadian Fluid Milk Market Volume and Change 1998 – 2014 -----	139
9.44 Canadian Fluid Milk Market Per Capita Consumption 1980 – 2014 -----	140
9.45 Canadian Fluid Milk Market Volume by Segment 2009 – 2014 -----	141
9.46 Canadian Fluid Milk Market Share of Volume by Segment 2009 – 2014 -----	142
9.47 Canadian Fluid Milk Market Change in Volume by Segment 2010 – 2014 -----	143
9.48 Canadian Fluid Milk Market Volume by Province 2009 – 2014 -----	144
9.49 Canadian Fluid Milk Market Share of Volume by Province 2009 – 2014-----	145
9.50 Canadian Fluid Milk Market Change in Volume by Province 2010 – 2014 -----	146
9.51 Change in Consumer Price Index: Fresh Milk and Other Items 2003 – 2014 -----	147
9.52 Change in Industrial Product Price Index: Fluid Milk and All Commodities 2003 – 2014 -----	148
10. THE CANADIAN SPORTS BEVERAGE MARKET	
The National Sports Beverage Market-----	149
• Overview-----	149
• Volume-----	159
• Per Capita Consumption -----	160
Exhibits	
10.53 Canadian Sports Beverage Market Volume and Change 2000 – 2014 -----	161
10.54 Canadian Sports Beverage Market Per Capita Consumption 2000 – 2014 -----	162

TABLE OF CONTENTS

Chapter

11. THE CANADIAN TEA MARKET

The National Tea Market ----- 163

- Overview----- 163
- Volume----- 168
- Per Capita Consumption ----- 169
- Pricing----- 170

Exhibits

11.55 Canadian Tea Market Volume and Change 1999 – 2014 ----- 171

11.56 Canadian Tea Market Per Capita Consumption 1999 – 2014 ----- 172

11.57 Change in Consumer Price Index: Tea and Other Items 2003 – 2014 ----- 173

11.58 Change in Industrial Product Price Index: Tea and All Commodities 2003 – 2014 --- 174

12. THE CANADIAN WINE MARKET

The National Wine Market ----- 175

- Overview----- 175
- Volume----- 180
- Per Capita Consumption ----- 180
- Volume by Province ----- 181
- Per Capita Consumption by Province----- 182
- Domestic and Imported Volume----- 183
- Volume by Segment ----- 184
- Pricing----- 184

Exhibits

12.59 Canadian Wine Market Volume and Change 1999 – 2014 ----- 185

12.60 Canadian Wine Market Per Capita Consumption 1999 – 2014 ----- 186

12.61 Canadian Wine Market Volume by Province 2009 – 2014----- 187

12.62 Canadian Wine Market Share of Volume by Province 2009 – 2014----- 188

12.63 Canadian Wine Market Change in Volume by Province 2010 – 2014 ----- 189

12.64 Canadian Wine Market Per Capita Consumption by Province 2009 – 2014 ----- 190

12.65 Canadian Wine Market Domestic and Imported Volume 1999 – 2014 ----- 191

12.66 Canadian Wine Market Share of Domestic and Imported Volume 1999 – 2014 ----- 192

12.67 Canadian Wine Market Change in Domestic and Imported Volume 2000 – 2014 ---- 193

12.68 Canadian Wine Market Volume by Segment 1999 – 2014 ----- 194

12.69 Canadian Wine Market Share of Volume by Segment 1999 – 2014 ----- 195

12.70 Canadian Wine Market Change in Volume by Segment 2000 – 2014 ----- 196

12.71 Change in Consumer Price Index: Wine, Alcoholic Beverages and All Items
2003 – 2014 ----- 197

12.72 Change in Industrial Product Price Index: Wine, Alcoholic Beverages and All
Commodities 2003 – 2014 ----- 198

TABLE OF CONTENTS

Chapter

13. THE LEADING CANADIAN BEVERAGE COMPANIES AND THEIR BRANDS	
The Leading Companies-----	199
• Overview-----	199
Labatt Brewing Company	
• Overview-----	201
• Marketing-----	206
Molson Coors Brewing Company	
• Overview-----	215
• Marketing-----	231
Sleeman Breweries Ltd.	
• Overview-----	241
• Marketing-----	244
Cott Corporation	
• Overview-----	251
• Marketing-----	260
Constellation Brands	
• Overview-----	269
• Marketing-----	284
• Financial-----	290
• Management-----	291
14. THE PROJECTED CANADIAN BEVERAGE MARKET	
The Projected National Beverage Market by Category-----	293
• Overview-----	293
• Beer-----	295
• Bottled Water-----	296
• Carbonated Soft Drinks-----	297
• Coffee-----	298
• Distilled Spirits-----	299
• Energy Drinks-----	300
• Fruit Beverages-----	301
• Milk-----	302
• Sports Beverages-----	303
• Tea-----	304
• Wine-----	305
Exhibits	
14.73 Projected Canadian Beverage Market Volume by Category 2014 – 2019-----	306
14.74 Projected Canadian Beverage Market Share of Volume by Category 2014 – 2019---	307

TABLE OF CONTENTS

Chapter

14. THE PROJECTED CANADIAN BEVERAGE MARKET (cont'd)

Exhibits (cont'd)

14.75 Projected Canadian Beverage Market Compound Annual Growth by Category	
2014 – 2019	308
14.76 Projected Canadian Beverage Market Per Capita Consumption by Category	
2014 – 2019	309

After years of planning, the Coca-Cola Company in September 2006 entered Canada's hot drinks arena with a new lineup of coffees, lattes and teas.

- Coke debuted its new premium beverage line, Far Coast, in a new "concept store" in Toronto, Ontario. The store was set up to function as a marketing lab for Coke's proprietary pod-based brewing technology, which it promises will provide "barista quality" brewed drinks to foodservice customers.
- The cola giant (which also opened similar stores in Oslo, Singapore and Atlanta) said the Far Coast line is "designed to be more experiential and relaxed," and will be sold in better hotels and restaurants.
- However, the Toronto operation closed down at the end of 2007, and the other stores have been shuttered as well. (The Toronto store reopened as the Pemberton Café in February 2010.)
- But the commercial brand lives on, and was featured as the "Official Brewed Beverage" at 2010 Winter Olympics in Vancouver, as Coke had a monopoly on all drinks, hot and cold, sold during the Olympics.
- In Canada, Far Coast is available nationwide at Cineplex Entertainment theatres, as well as some restaurants and sporting venues.
- Like many players in the coffee game, Coca-Cola partnered with Keurig Green Mountain to put its beverages in K-Cups. However, the deals it struck in 2014 focused on products other than coffee. In February 2014, they inked an arrangement to put Coca-Cola brands in the Keurig Cold at-home system starting in 2015. In September 2014, the companies expanded into hot beverages in Keurig Brew Over Ice hot brewing system. The first brand prepped for this system? Honest Tea.

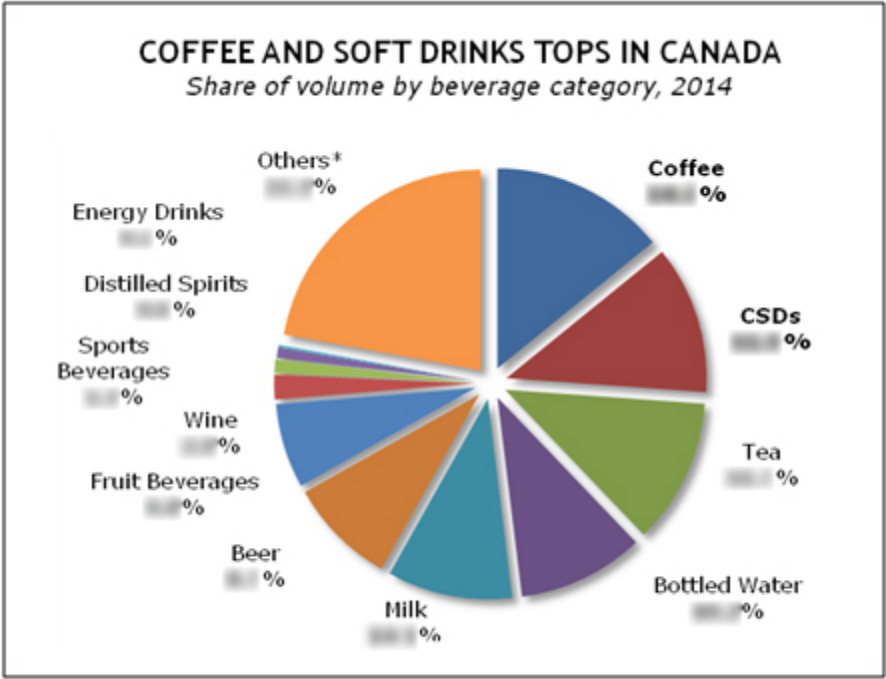
McDonald's, after some initial growing pains, reintroduced its McCafé concept into Canada in late 2011.

- McDonald's Canada launched its McCafé brand espresso bars on 7 November 2011 at some 870 locations throughout Canada, with the rest of the country's approximately 1,400 McDonald's stores expected to feature McCafés by the end of 2012.
- The McCafé expansion coincided with a push by Tim Hortons, which planned to put espresso machines in more than 3,000 outlets by the end of 2012.
- McDonald's assembled a selection of drinks including coffee, tea, cappuccino, espresso and a slew of iced drinks and smoothies – 14 varieties so far.
- According to the *International Business Times*, McDonald's doubled its sales of brewed coffee from 2009 to 2011, and sold nearly 200 million cups of coffee in Canada in 2011.
- In late 2012, McDonald's started selling bags of ground coffee at most of its 1,400 stores in Canada.
- In August 2013, the company issued McCafé Iced Frappés in two versions: Coffee Iced Frappé and Vanilla Chai Tea Iced Frappé.
- In September 2014, McDonald's launched McCafé Premium Roast ground coffee as well as on-demand single-serve formats compatible with both the TASSIMO and Keurig brewing systems. The McCafé offerings were made available in major grocery retailers across Canada.

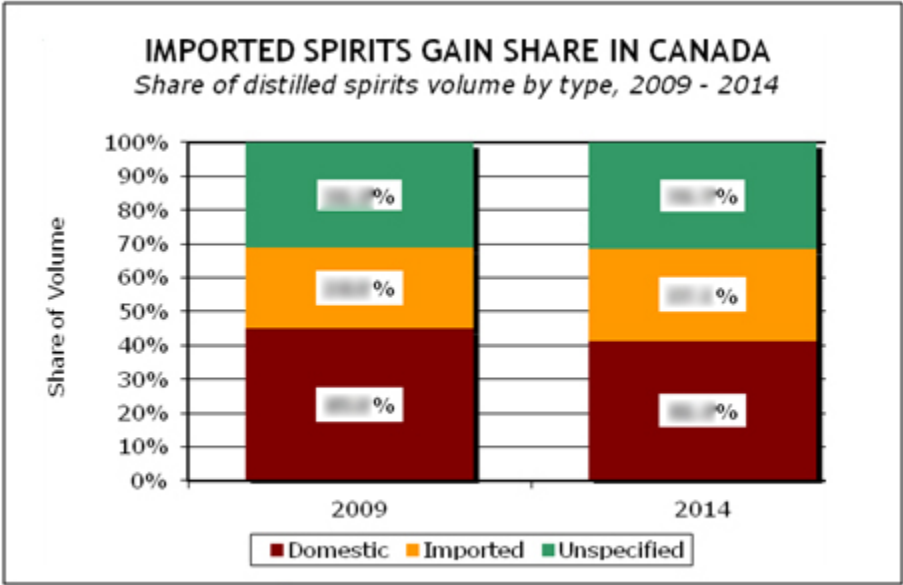
**CANADIAN DISTILLED SPIRITS MARKET
SHARE OF VOLUME BY SEGMENT
2009 – 2014**

Segment	2009	2010	2011	2012	2013	2014
Canadian Whiskey	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %
Scotch Whisky	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Subtotal Whiskey	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %
Domestic Rum	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Imported Rum	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Subtotal Rum	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Domestic Gin	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Imported Gin	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Subtotal Gin	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Domestic Vodka	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Imported Vodka	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Subtotal Vodka	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Domestic Liqueurs	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Imported Liqueurs	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Subtotal Liqueurs	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Domestic Brandy	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Imported Brandy	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Subtotal Brandy	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
All Others	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
TOTAL	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %

Source: Beverage Marketing Corporation; Statistics Canada



* Includes tap water, vegetable juices, powders and miscellaneous others.
 Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation