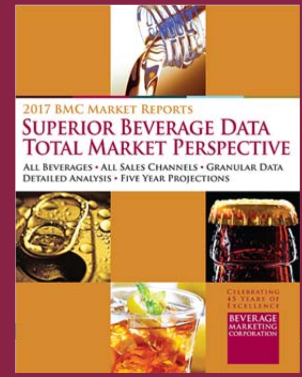
THE MULTIPLE BEVERAGE MARKETPLACE IN CANADA

2017 EDITION (Published November 2017. Data through 2016. Market projections through 2021.) More than 300 pages, with extensive text analysis, graphs, charts and tables.



This report from Beverage Marketing Corporation 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 and projections for each category.

FOR A FULL CATALOG OF REPORTS AND DATABASES, GO TO bmcreports.com

INSIDE:

AVAILABLE FORMAT & PRICING

Direct Download

$4,995

To learn more, to place an advance order or to inquire about additional user licenses ***call****: Charlene Harvey +1 212.688.7640 ext. 1962 charvey@beveragemarketing.com*

HAVE QUESTIONS? Contact Charlene Harvey: 212-688-7640 x 1962
charvey@beveragemarketing.com

BEVERAGE MARKETING CORPORATION
850 Third Avenue, 13th Floor, New York, NY 10022
Tel: 212-688-7640 Fax: 212-826-1255

The answers you need

This study of Canadian beverage trends provides a summary of developments in the major categories and gives a bird's eye view of the industry as a whole. Questions answered include:

- Which beverage categories grew in the Canadian market in 2016, and which did not?
- What is 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 2016, 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 snapshot of the share of stomach held by each beverage category in the Canadian market. It breaks down volume and market share held by each beverage category including growth statistics and per capita consumption figures. The report also discusses current industry trends and forecast for the future.
- 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, draft and imported beer).
- Discussion of trends in the coffee market and discussion of trends and activities of key companies and brands.
- 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 with coverage of their corporate histories, market share and strategic acquisitions, as well as an in-depth look at their many brands.
- 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 2021.

The Multiple Beverage Marketplace in Canada

November 2017

BEVERAGE MARKETING CORPORATION

R E S E A R C H ● D A T A ● C O N S U L T I N G

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

Table of Contents

TABLE OF CONTENTS

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

TABLE OF CONTENTS

Chapter

Pepsi, which made its first foray into Canada in 1934, revamped its Canadian operations in October 2008, creating two separate entities, PepsiCo Beverages Canada and PepsiCo Foods Canada. (Two years earlier, in September 2006, PepsiCo reorganized its worldwide operations into two entities, a new North American division and the existing PepsiCo International division.)

- In 2010, PepsiCo Canada merged its beverage bottling business operations into PepsiCo Beverages Canada, thereby creating a single, unified Canadian beverage operation.
- The Canadian beverage division contains the full Pepsi lineup plus Gatorade and Tropicana products.
- Pepsi also markets the 7UP brand, which it owns worldwide (save the United States, where the rights are held by the Dr Pepper Snapple Group).
- Other CSD brands available in Canada include Mountain Dew and Mug root beer. The company also has deals to distribute SoBe, Lipton, Amp and Starbucks beverages.
- In February 2007, Pepsi entered into an agreement with Hansen Natural Corporation to become the exclusive distributor of Monster Energy, Lost Energy, Joker Mad Energy and Hansen's energy products throughout Canada.
- Long available in the United States, Pepsi Throwback entered the Canada market in 2011. The "throwback" refers to the fact that Pepsi uses real sugar as a sweetener, just like in days past, rather than high-fructose corn syrup.
- Like many things Canadian, a French-language version was also made available: Pepsi Rétro.
- In March 2014, the company launched Pepsi Next into the Canadian market. The stevia- and sugar-sweetened Pepsi Next contained 30% less sugar than regular Pepsi. It launched the reduced-calorie soda during the 2014 Tim Hortons NHL Heritage Classic, which the company sponsored.
- In mid-2016, it made Crystal Pepsi available (again) for a limited time in the United States and Canada. The clear cola had previously been (briefly) available in the early 1990s.
- In mid-2017, it launched 7UP Lemon Lemon sparkling lemonade.

Exhibit 6.29

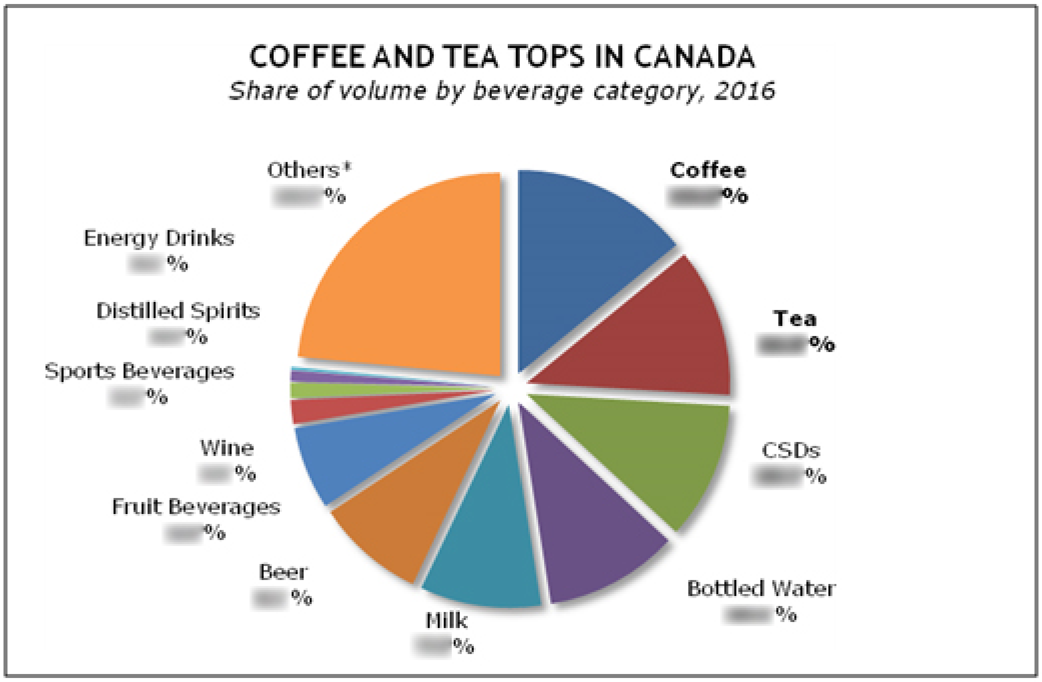
CANADIAN DISTILLED SPIRITS MARKET

SHARE OF VOLUME BY SEGMENT

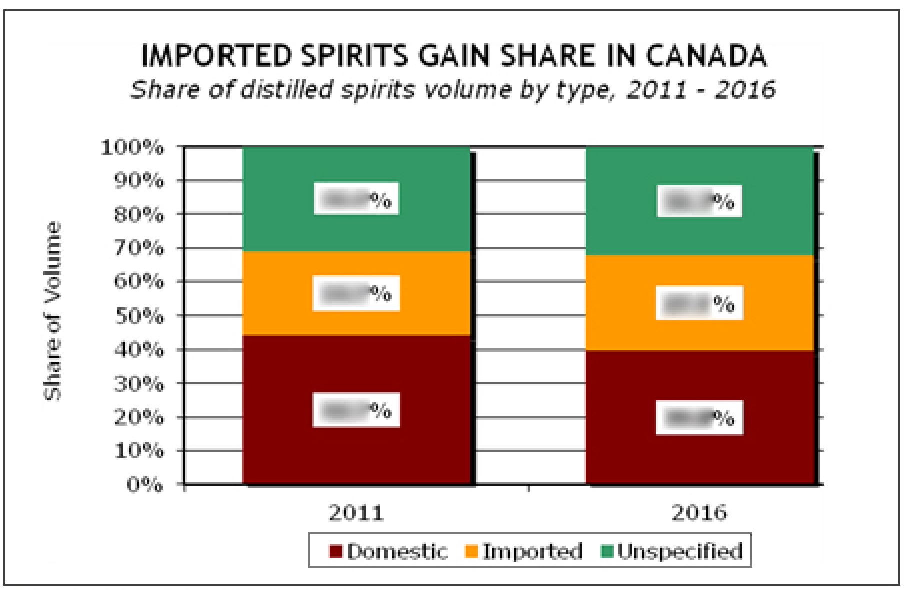
2011 – 2016

Segment	2011	2012	2013	2014	2015	2016
Canadian Whiskey	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Scotch Whisky	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal Whiskey	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Domestic Vodka	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Imported Vodka	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal Vodka	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Domestic Rum	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Imported Rum	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal Rum	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Domestic Liqueurs	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Imported Liqueurs	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal Liqueurs	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Domestic Gin	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Imported Gin	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal Gin	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Domestic Brandy	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Imported Brandy	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal Brandy	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
All Others	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%

Source: Beverage Marketing Corporation; Statistics Canada



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



Source: Beverage Marketing Corporation