

Common Grounds

Coffee Association of Canada Conference
Wednesday, November 5, 2025
Toronto, ON



Coffee Association of Canada 2025 Conference

Foodservice Industry Coffee Trends

Presented by:



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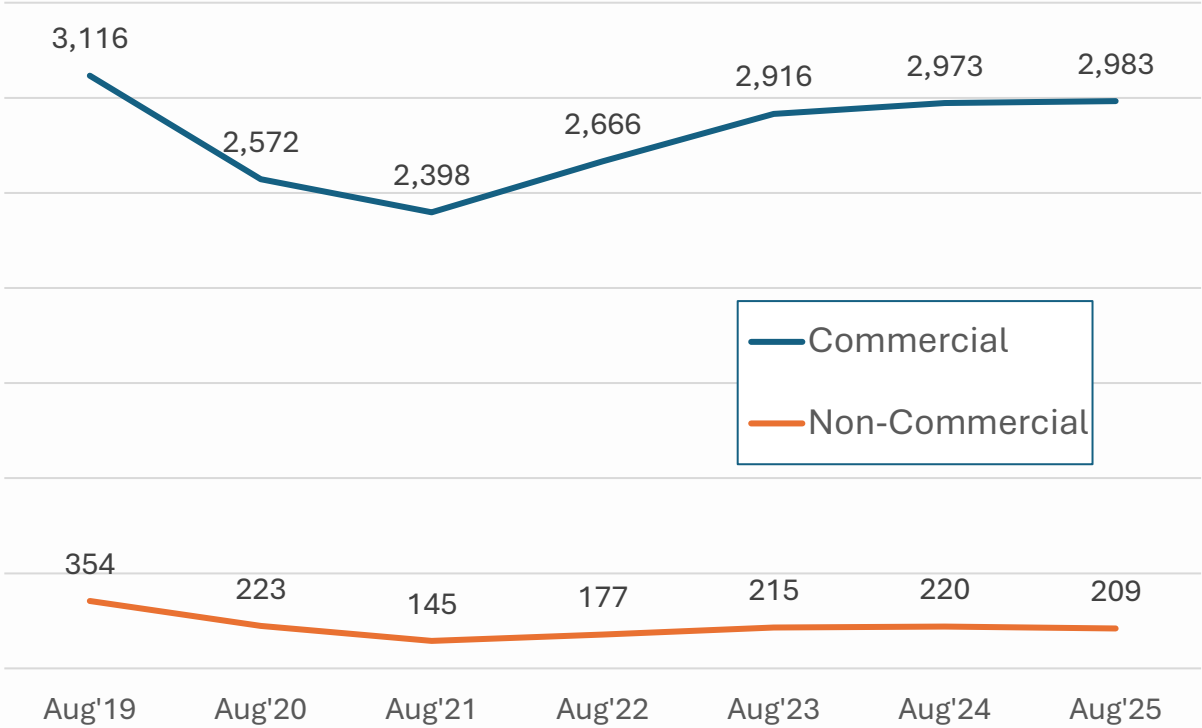
#CommonGrounds

November 5, 2025 | Toronto, ON

Total Coffee Servings Trend

Coffee servings are trending below historic levels across comm and non-comm

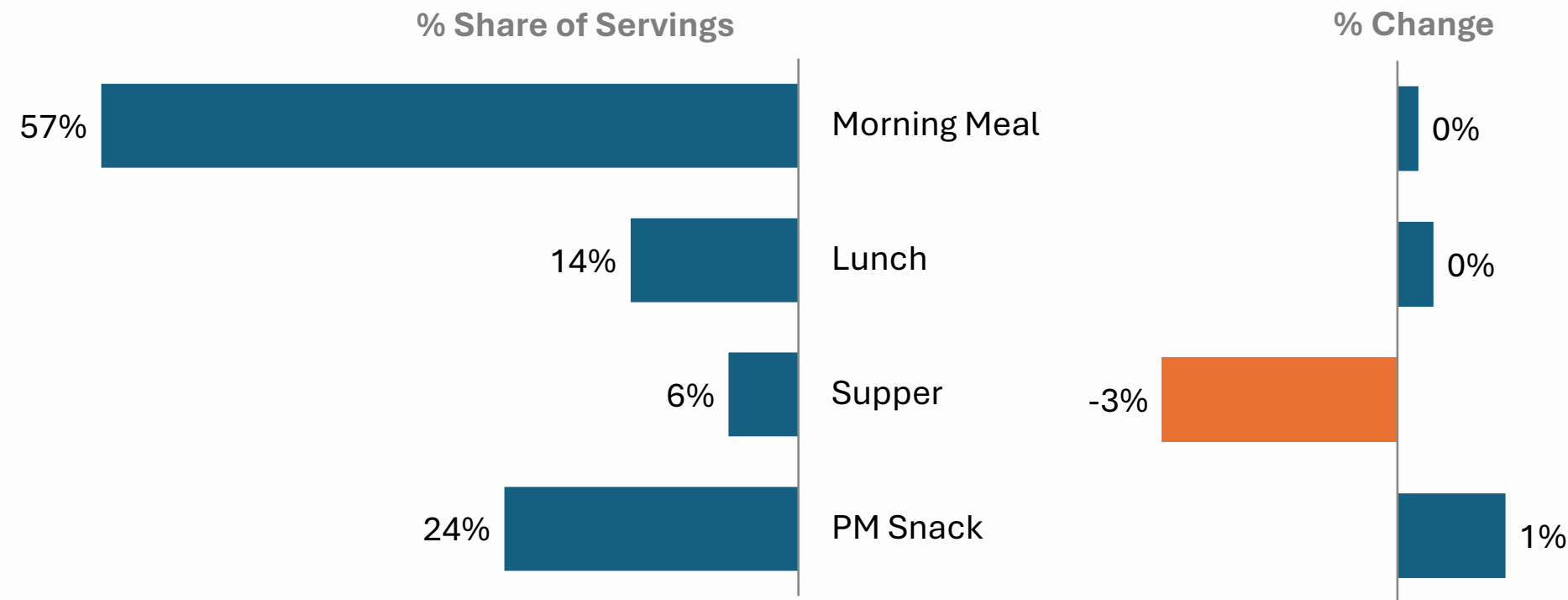
Total Coffee Servings (millions), 12me



Source: Circana, Canada, CREST®, 12me Aug '25

Coffee Servings by Daypart

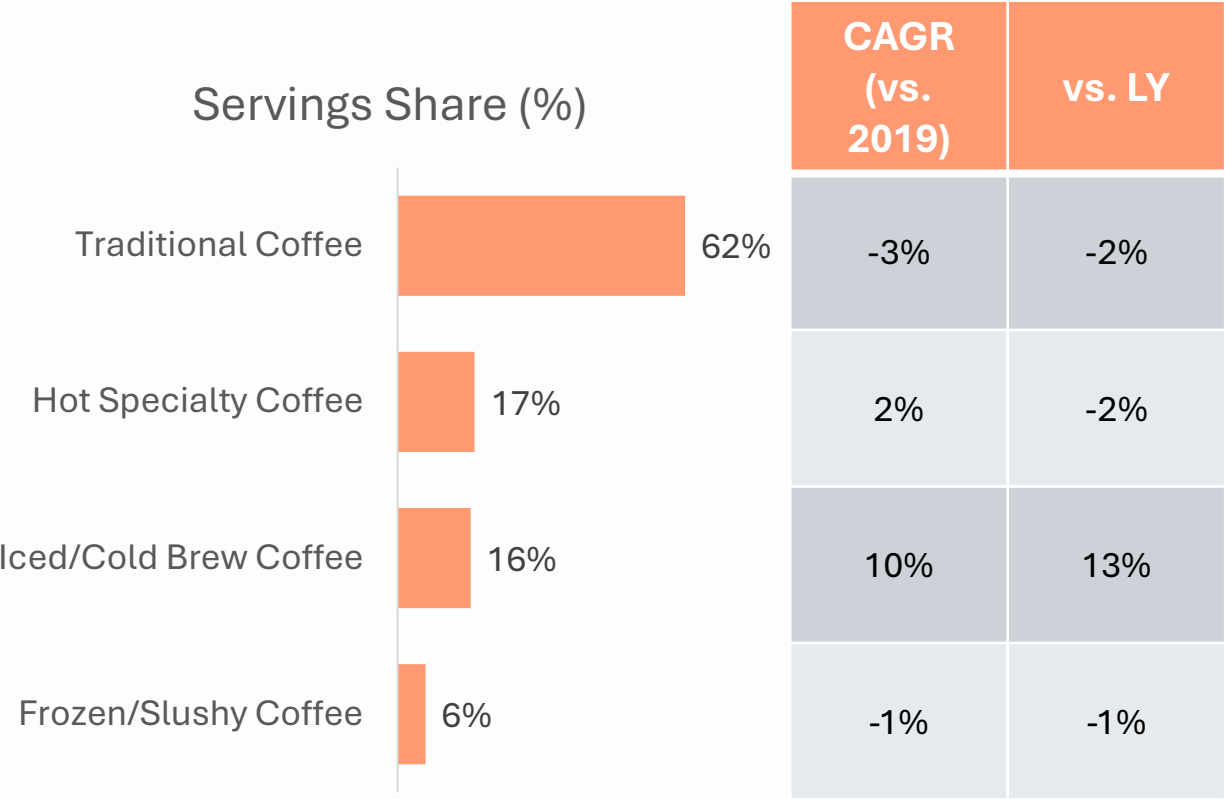
The morning daypart is responsible for more than half of all coffee servings. Declines in the past year are traced to the small supper daypart.



Source: Circana, Canada, CREST®, 12me Aug '25

Changing Coffee Dynamics

Coffee servings continue to shift towards iced and cold brew coffee.

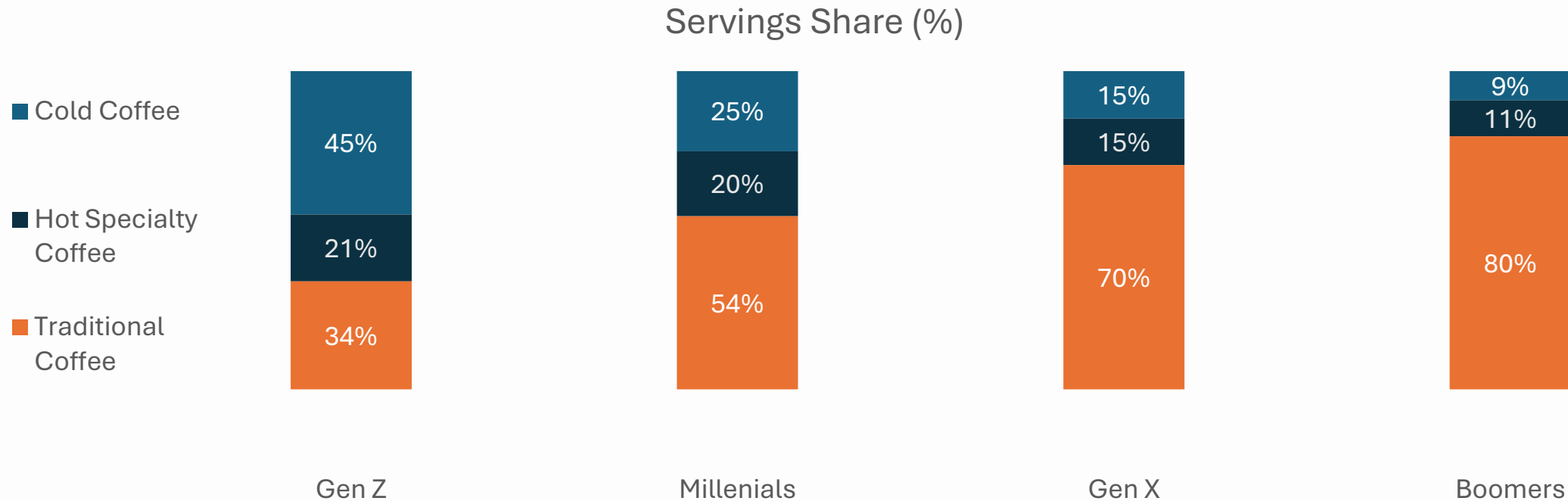


Source: Circana, Canada, CREST®, 12me Aug '25



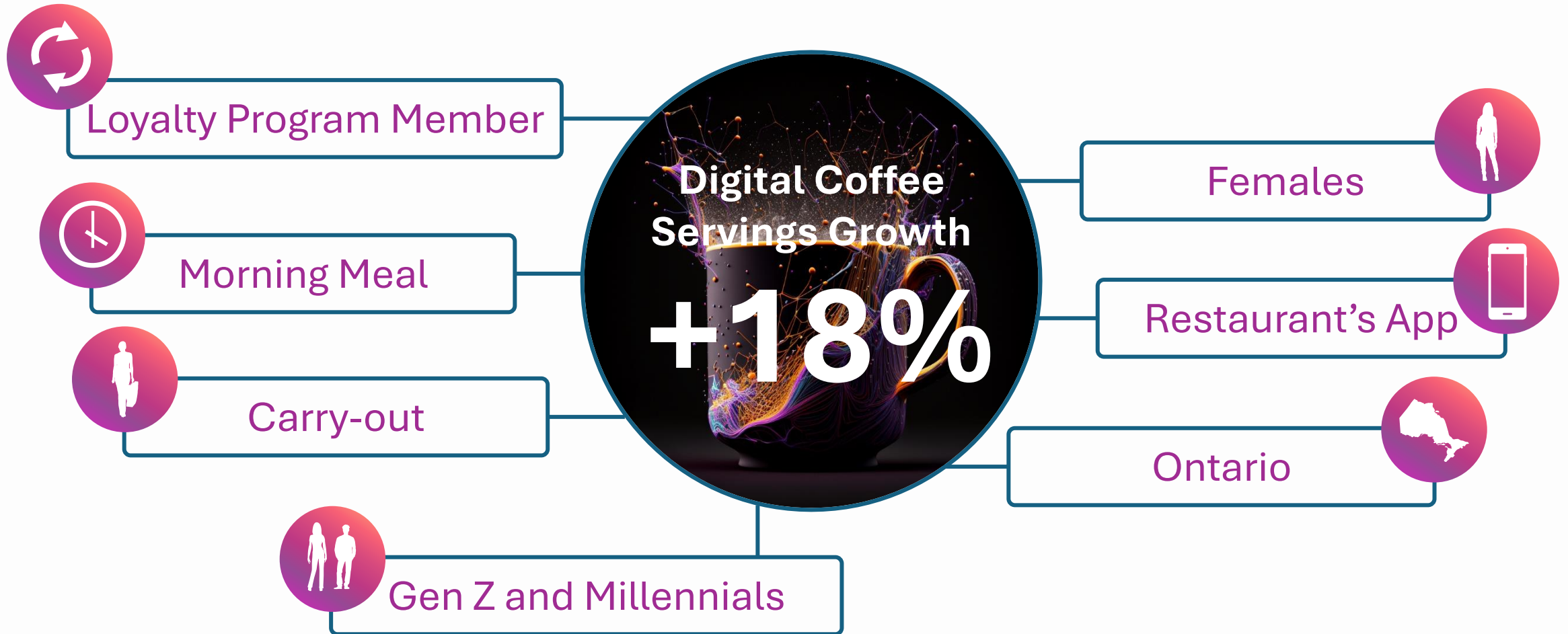
Coffee Type by Generation

Cold coffee is the main differentiator among generations, while the brewed coffee generations are aging out of their foodservice years.



Source: Circana, Canada, CREST®, 12me Aug '25

Digital Coffee Order Drivers



Source: Circana, Canada, CREST®, 12me Aug '25

Coffee is something we all have in common.

Most consumed beverage

Across most ethnic cohorts

Across all adult age cohorts

50% ordered by itself

More locations than any other menu category



Beverage incidence is falling, as habits shift away from coffee and tea to cold beverages.

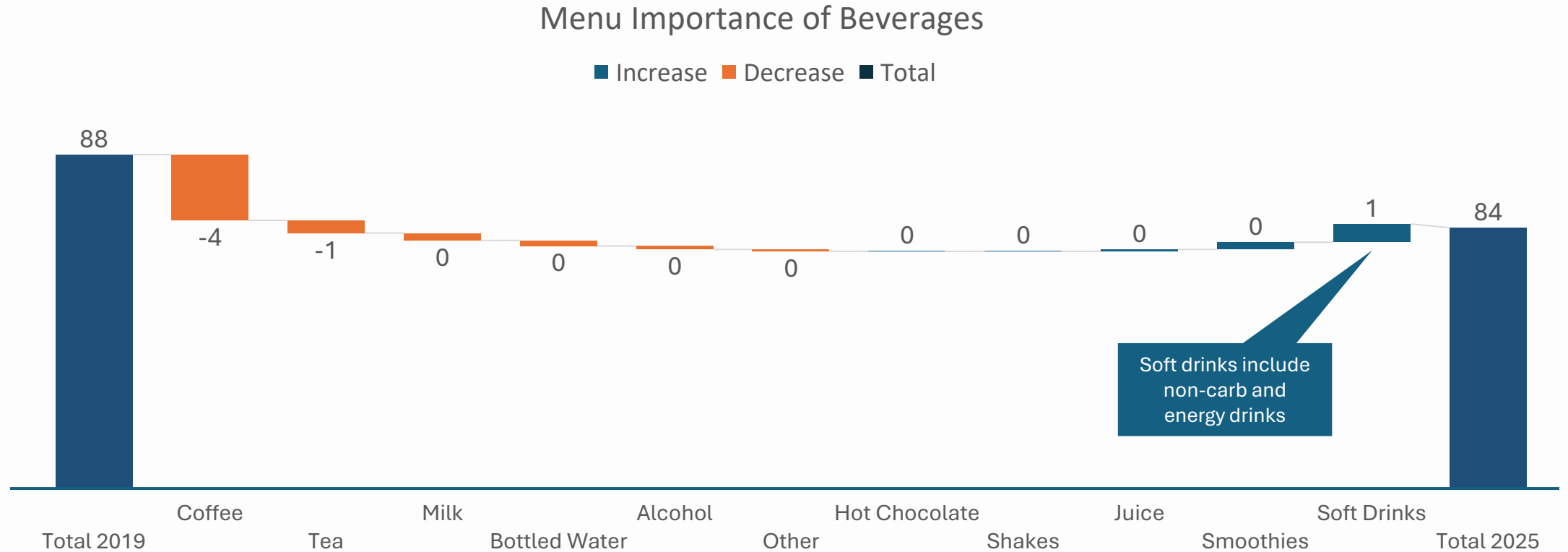


Chart not to scale
Menu Importance = Traffic / Servings
Source: Circana, Canada, CREST®, 12me Aug '25



At home **coffee**
& **espresso**
maker sales are
up 4% in units.

Source: Circana Retail Tracking, Home, 12me Sep '25 vs YA

In Summary...

01

Coffee **popularity continues**,
and continues to
evolve

02

Shifting behaviours and
economic pressure
is impacting coffee
habits

03

Younger cohorts
are redefining the
beverage
landscape

04

Coffee is the
denominator that
brings us all
together to find
common ground

Thank you

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