A Decade of Calorie Reduction

An Analysis of the Non-Alcoholic Beverage Sector's Balance Calories Initiative

DATA BRIEFING | May 26, 2026

Contents

Key findings

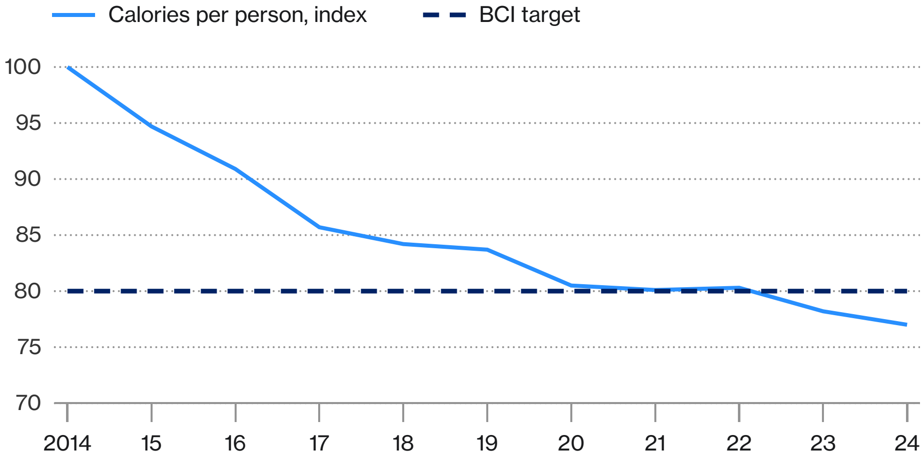
- Canadians' daily per person calories from non-alcoholic beverages fell 23.0 per cent between 2014 and 2024, surpassing the reduction target of 20 per cent two years ahead of schedule. The decline is driven by decreases in both average calories per serving (–20.3 per cent) and per person beverage volumes purchased (–3.3 per cent).
- The steepest calorie decline, down an average of 5.0 per cent per year, occurred between 2014 and 2017, followed by a more moderate 1.5 per cent annual decline from 2017 through 2024.
- Lower-sugar formulations and reduced consumer purchases of juices and carbonates contributed over two-thirds of total calorie reduction.
- Increased calorie contributions from higher per person purchases of functional beverages, specifically energy drinks and sports drinks, offset some of the overall reduction.
- Over the past decade, demand for convenience and performance-oriented hydration has increased markedly. Since 2014, purchase volumes of ready-to-drink coffee were up 624.0 per cent, and enhanced and flavoured waters volumes increased roughly 146 per cent.
- Plain packaged water is now the dominant segment (approximately 36 per cent of total volumes purchased in 2024), surpassing carbonated drinks as Canadians' top hydration choice.
- The shift in caloric density has been uneven across categories. Sports drinks and enhanced waters saw the largest reductions, while the average caloric density of still drinks increased.
- Juices remain high in calories due to natural sugars, while ready-to-drink coffee reflects consumer expectations for added calorie-dense ingredients to balance flavour.
- Low-calorie beverages now dominate the market. Between 2014 and 2024, the share of low-calorie offerings rose from between 43 to 53 per cent of total beverage volumes, expanding roughly 38 per cent in volume since 2014, while high-calorie beverages declined about 6 per cent.

Target surpassed two years ahead of schedule

What is the Balance Calories Initiative?

Launched in 2015 by the Canadian Beverage Association (CBA), the Balance Calories Initiative is a voluntary, industry-wide commitment to reduce the calories Canadians consume from beverages by 20 per cent by 2025.

Chart 1
BCI calorie reduction milestone reached early
(index, 2014 = 100)



Sources: Signal49 Research; GlobalData; Statistics Canada.

Between 2014 and 2024, Canadians reduced the calories in the beverages they purchased by 23.0 per cent, surpassing the Balance Calories Initiative's (BCI's) goal of a 20 per cent reduction two years ahead of schedule. By 2024, Canadians were purchasing beverages with one-quarter fewer calories than they had a decade earlier. (See Chart 1.)

The steepest calorie reduction occurred between 2014 and 2017. (See Chart 1.) This early progress was driven by calorie reductions in carbonated beverages, at the time the most consumed category. Through the BCI pledge, beverage producers advanced reformulation efforts, expanded product offerings with smaller sizes, and increased the availability of lower-calorie options.

These actions responded to changing consumer preferences and were supported by greater transparency around calorie content on drink packaging, reinforced by the industry's voluntary front-of-package labelling initiatives[1] and Health Canada's nutrition labelling amendments.[2]

From 2018 onward, the pace of calorie decline slowed, in part due to increased consumer demand for some higher-calorie categories (ready-to-drink coffees and energy drinks) and fewer opportunities to further reduce sugars after many carbonated beverages had already reformulated to low-calorie versions.

What's considered to be a non-alcoholic beverage?

In this report, "non-alcoholic beverages" refers to the following packaged drink categories:

Carbonates: Sweetened, non-alcoholic drinks containing carbon dioxide.

Juice: 100% pure fruit juice or vegetable juice with no added ingredients, except permitted minerals and vitamins for the purpose of fortification and permitted additives. Includes frozen concentrated juice.

Juice/fruit drinks (or still drinks): Flavoured ready-to-drink, non-carbonated products, which may be fruit or non-fruit flavoured and have a juice content of 0% to 24.9%. Sugar, artificial flavouring, and colouring may be added.

Nectars: Diluted fruit/vegetable juice and pulp, to which sweetening agents (e.g., sugar, honey, syrups, and/or sweeteners) need to be added for the purposes of production; permitted minerals and vitamins for the purpose of fortification and permitted additives may be added. Juice content is required to be 25% to 99% by volume.

Packaged water, plain: Unflavoured packaged water, carbonated or still.

Enhanced and flavoured water: Packaged water that has been flavoured by the addition of essences and/or aromatic substances but that may or may not contain sweetening agents.

Energy drinks: Beverages promoted to increase energy and enhance mental alertness and physical performance. Typically carbonated and containing stimulants such as caffeine, taurine, guarana (the guarana seed has a higher caffeine content than coffee), glucuronolactone, and yerba mate along with glucose syrup (corn syrup) and maltodextrin. Includes B complex group vitamin combinations.

Sports drinks: Beverages designed to enhance athletic performance by replenishing glucose, fluids, and electrolytes (sodium, potassium, magnesium) lost during physical activity. Some products contain B complex group vitamins.

Ready-to-drink tea: Carbonated and non-carbonated ready-to-drink packaged tea-based drinks.

Ready-to-drink coffee: Ready-to-drink coffee-based drinks.

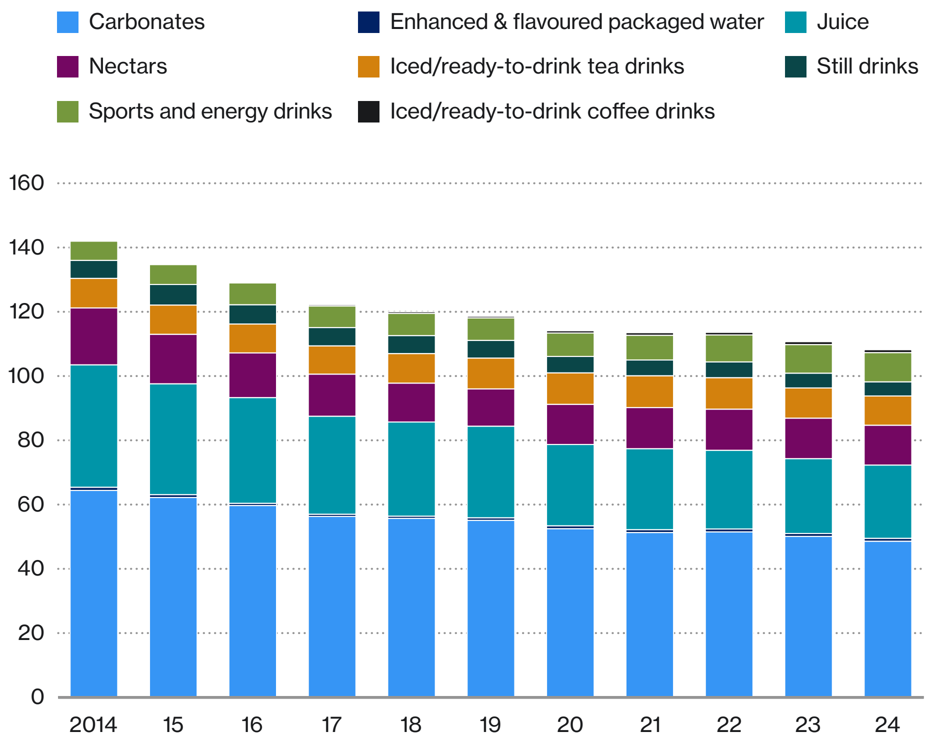
Source: GlobalData

1 In 2011, the industry launched "Clear on Calories," a voluntary front-of-pack labelling initiative aimed at communicating beverage calorie information more clearly and supporting more-informed purchasing and consumption decisions among Canadians.

2 In December 2016, Health Canada introduced a new "% Daily Value" for total sugars to the Nutrition Facts Table and required the grouping of sugars in ingredient lists through its *Amendments to the Food and Drug Regulations—Nutrition Labelling*, with full implementation effective January 1, 2022.

From 2014 to 2024, the largest declines in daily per person calories were in juices (down 40.2 per cent), followed by nectars (down 29.8 per cent), carbonates (down 24.6 per cent), and still drinks (down 21.4 per cent). (See Chart 2.)

Chart 2
Juices, nectars, and carbonates lead Canada's shift to lower-calorie beverages, 2014–24
(daily Calories per person)



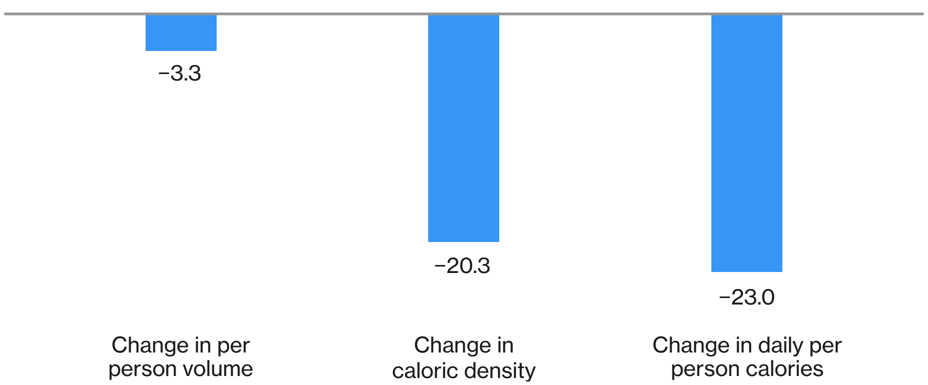
Sources: Signal49 Research; GlobalData; Statistics Canada.

Lower caloric density drives the decline

Over the past decade, calories from non-alcoholic beverage purchases declined by 23.0 per cent, driven by declining caloric density and supported by modest reductions in per person beverage volumes. (See Chart 3.)

Canadians have been choosing lower-calorie products, reflecting rising health consciousness and growing availability of low- and no-sugar alternatives. Between 2014 and 2024, average calories per serving in purchased beverages fell by 20.3 per cent, while average beverage volume purchased per person declined by just 3.3 per cent.

Chart 3
Falling caloric density drives reduction in daily calories purchased, 2014–24
(calorie reduction, percentage change)



Sources: Signal49 Research; GlobalData; Statistics Canada.

Beverages with lower caloric density are now more broadly available

Over the past decade, calorie density has fallen across most non-alcoholic beverage categories, but progress remains uneven. (See Chart 4.)

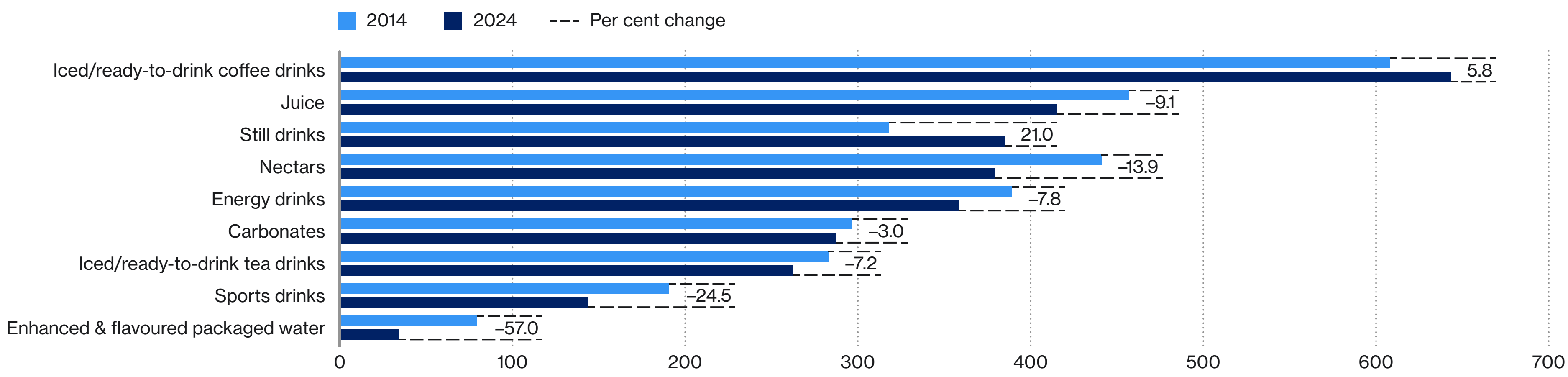
- Sports drinks and enhanced waters recorded the largest density declines, supported by reformulation and the introduction of low- and no-calorie variants.
- Carbonates also continued a gradual downward trend in calories as manufacturers expanded diet and zero-sugar portfolios.
- Still drinks have seen an increase in caloric density by 21.0 per cent, driven by a 21.4 per cent increase in 2015. Caloric density has remained broadly stable since 2015, likely reflecting the introduction of specific higher-calorie products rather than a gradual change in consumer behaviour.

Juices remain high calorie due to their intrinsic composition, while ready-to-drink coffee beverages tend to remain higher calorie due to consumer taste expectations around bitterness (often requiring sugar, milk, or cream to balance it). Ready-to-drink coffees led all categories at 643 Calories per litre (kcal/L) and have been consistently above 600 kcal/L throughout the decade.[3] Juices follow at 415 kcal/L and have shown only a modest decline since 2014.

Despite these constraints, innovation opportunities exist through blended formulations, portion control, and alternative ingredients. As technology and preferences evolve, these segments represent the next frontier of calorie reduction.

Chart 4

Iced/ready-to-drink coffee drinks, juices, and still drinks the most calorie dense
(calorie density, Calories per litre; change in 2014–24, per cent)



Sources: Signal49 Research; GlobalData.

3 Consistent with common nutrition labeling, “Calories” refers to kilocalories (kcal). The report uses “Calories” for readability.

Canadians’ beverage purchases shifting toward hydration and functionality

By 2024, plain packaged water overtook carbonates to become the largest beverage segment by volume (roughly 36 per cent of total non-alcoholic beverage volumes). (See Chart 5.)

Between 2014 and 2024, Canadians’ beverage choices shifted toward functional and hydration-focused categories, while traditional sugary drinks continued to decline. (See Chart 5.)

Strongest volume growth (per person):

- **Ready-to-drink coffee drinks** up 624.0 per cent (from 0.07 to 0.51 litres per person), reflecting surging demand for convenient caffeinated options. Despite rapid growth, this remains an emerging segment, accounting for 0.2 per cent of total non-alcoholic beverages purchased in Canada by 2024.
- **Enhanced and flavoured packaged water** up 145.6 per cent as consumers embraced functional hydration and flavoured water alternatives.
- **Sports drinks** up 65.2 per cent. Combined with enhanced and flavoured packaged water and other functional beverages, these functional categories accounted for 12.1 per cent of total non-alcoholic beverage volume purchased in 2024, positioning them as meaningful-scale growth engines within the market.

Moderate growth (per person):

- **Plain packaged water** up 17.7 per cent, reinforcing its role as a staple, core zero-calorie hydration choice.
- **Ready-to-drink tea drinks** up 7.5 per cent, showing a steady but mature segment.

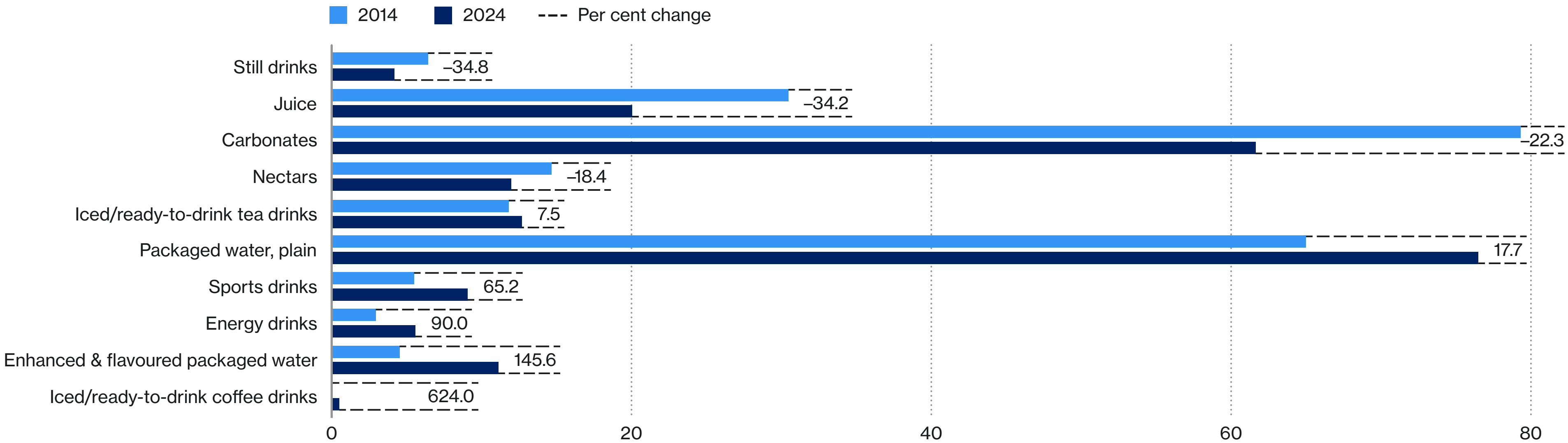
Largest declines (per person):

- **Still drinks** down 34.8 per cent, the steepest drop across all categories.
- **Juices** down 34.2 per cent, reflecting reduced sugar consumption among Canadians.
- **Carbonates** down 22.3 per cent, continuing a long-term downward trend. Despite this decline, carbonates remain a large legacy segment under pressure, accounting for 28.9 per cent of total non-alcoholic beverage volume purchased in Canada in 2024.
- **Nectars** down 18.4 per cent as consumers moved away from high-calorie fruit beverages.

Chart 5

Ready-to-drink coffee and flavoured water lead growth in popularity, 2014–24

(annual volume per person, litres; change in 2014–24, per cent)



Sources: Signal49 Research; GlobalData.

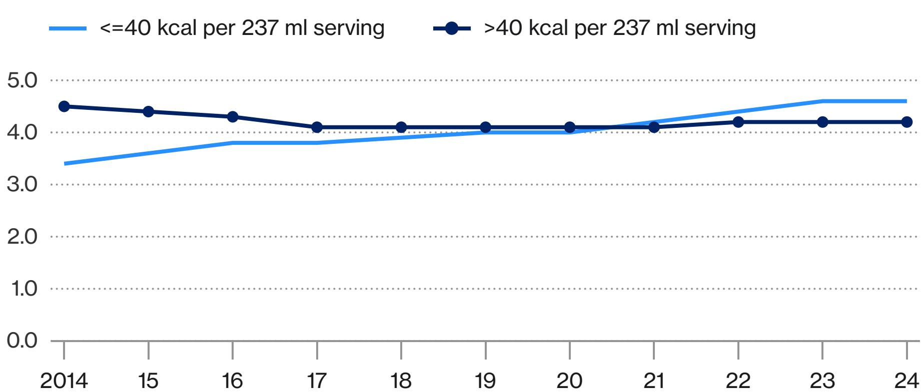
Lower-calorie beverages seize the market

Lower-calorie beverages are no longer a niche. By 2024, these products accounted for 52.5 per cent of total beverage volumes, up from 42.9 per cent in 2014.[4] This marks a pivotal shift in Canada's beverage landscape, as more than half the non-alcoholic beverages Canadians purchase are now low or no calorie.

Over the past decade, the volume of low-calorie beverages expanded about 38 per cent (from 3,354 million litres to 4,624 million litres), while high-calorie beverages[5] declined 6.3 per cent (from 4,466 million litres to 4,184 million litres). (See Chart 6.)

Chart 6

Growth of low-calorie beverage volumes outpaces higher-calorie servings, 2014–24
(total volume purchased, billions of litres)



Sources: Signal49 Research; GlobalData.

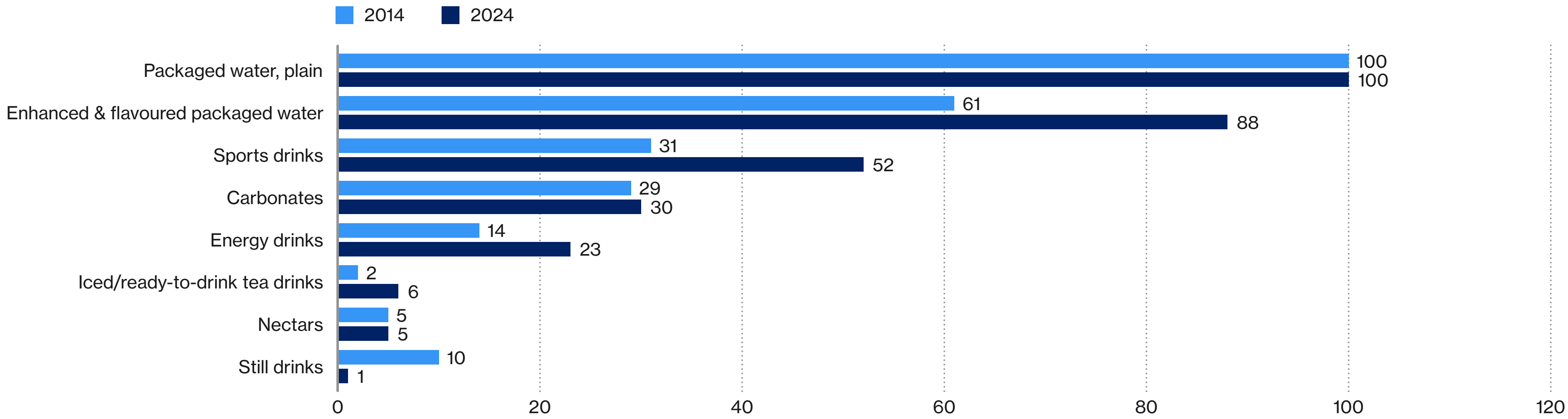
Lower-calorie options abound

The expansion of lower-calorie offerings reflects both consumer demand for "better-for-you" options and industry innovations across multiple beverage categories. (See Chart 7.)

- Plain packaged water has solidified its role as the backbone of calorie-free hydration.
- Low-calorie variants of enhanced and flavoured waters have surged from about 61 per cent in 2014 to around 88 per cent of total volume in 2024, driven by innovation in lightly flavoured hydration options.
- Sports drinks have also noticeably shifted, with lower-calorie offerings now accounting for over half (about 52 per cent) of total volumes, up from about 31 per cent a decade ago.
- Juices and ready-to-drink coffee drinks remain higher in calories than other beverage categories. This is because of the intrinsic natural sugars in fruit juices and the sugars added to coffee to reduce its natural bitter flavour.

4 Low-calorie servings are defined as beverages containing 40 kcal or fewer per 237 ml serving, as per GlobalData.
5 High-calorie servings are defined as beverages containing greater than 40 kcal per 237 ml serving, as per GlobalData.

Chart 7
Expansion of low-calorie options across beverage categories, 2014–24
(shares of low-calorie servings purchased by segment, per cent)



Sources: Signal49 Research; GlobalData.

Redefining what “low-calorie” means

Between 2014 and 2024, most non-alcoholic beverage categories experienced an increase in low-calorie options, contributing to a broader decline in caloric density. Yet, intriguingly, the average calories per litre within the lower-calorie segment rose slightly, from 2.0 kcal in 2014 to 3.8 kcal in 2024. This modest increase reflects the growing popularity of mildly sweetened or flavoured water alternatives that deliver taste and refreshment while staying well below traditional calorie levels.

Despite this slight uptick, these new lower-calorie drinks remain substantially less calorie dense than traditional segments such as juices, carbonates, and ready-to-drink coffees. Together, these shifts are giving consumers new options as they increasingly seek to balance taste, functionality, and calories in their beverage choices.

Looking forward

Over the past decade, Canada's non-alcoholic beverage industry has made notable progress in reducing calories consumed through their product offerings, surpassing its 20 per cent calorie-reduction target two years ahead of schedule. This reduction has largely come from introducing lower-calorie options for consumers rather than declining consumption.

As drink-related health awareness continues to rise and the non-alcoholic beverage market becomes more fragmented, further calorie reduction will require additional innovation. Producers could target higher-calorie segments such as ready-to-drink coffees, juices, and still drinks, where natural sugars, dairy content, and flavouring ingredients make reformulating lower-calorie offerings more complex.

More recently, federally adopted nutrition labelling requirements—including Health Canada's regulations on a front-of-package nutrition symbol—are expected to further encourage calorie reductions in beverages. These measures are likely to further influence product development, marketing, and compliance approaches across the sector, reinforcing industry efforts to align offerings with consumer health expectations.

With easy wins from product reformulation and package resizing largely exhausted, the next phase of calorie reduction will require the continued development of new low- and no-calorie options that are health forward, functional, and aligned with evolving consumer preferences. Non-alcoholic beverage firms' competitive advantage—and profitability—will increasingly depend on differentiated portfolios and tailored messaging that resonate with distinct lifestyle segments.

Appendix A

Methodology

This analysis examines progress toward the non-alcoholic beverage sector's Balance Calories Initiative (BCI) target of reducing calories from non-alcoholic beverages by 20 per cent between 2014 and 2025. Sales volumes were sourced from GlobalData's Soft Drinks Market Data and combined with category-level caloric density estimates to calculate total annual beverage calories. Per person daily calories were derived by standardizing total calories to Statistics Canada population estimates.

This analysis reflects retail purchase data, not direct consumption data or manufacturer production data. Results therefore represent calories purchased per person rather than calories ingested. The dataset, produced by GlobalData and provided by the Canadian Beverage Association, covers all Canadian provinces and territories and captures both on-premise and off-premise channels, including e commerce.

To identify drivers of change, Signal49 Research decomposed total calorie reduction between 2014 and 2024 into two components: changes in caloric density (reflecting shifts in both calories per unit volume and product mix) and changes in per person beverage volumes (reflecting changes in total volume purchased per capita), with each further analyzed by non-alcoholic beverage category. Volume-weighted averages by calorie grade were used to evaluate changes in category composition and the expansion of low-calorie offerings over time.

Appendix B

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