

a new sub-category was created to recognize Non-Espresso-Based Beverages (N-EBB) within the specialty coffee category. N-EBB consists of frozen blended coffee, cold brew and nitro coffee.

Percent Canadians Aged 18-79 Who Drank N-EBB Yesterday 2017:



Percent of Canadians Aged 18-79 Who Drank Coffee Yesterday



METHOD OF PREPARATION AMONG CANADIAN PAST-DAY COFFEE **DRINKERS AGED 18-79**

Among past-day coffee drinkers, Caucasians are most likely to use a drip coffee maker, while instant and RTD

skew towards South Asians. Caucasian:

South Asian:

30%

26% 9% 22% 12%

2% 12%

East/SoutheastAsian:

27% 10%

4%





CANADIANS AGED 18-79 WHO DRANK COFFEE YESTERDAY

Total Coffee

Caucasian: 71%

South Asian: 67% East/Southeast Asian: 70%



Espresso-Based Beverages Growing

2015

Percent Canadians Aged 18-79 Who Drank EBB Yesterday

Traditional Coffee

Caucasian: 56%

South Asian: 39%

East/SoutheastAsian: 41%



Caucasian: 7% South Asian: 20%

East/Southeast Asian: 7%

2014



Espresso-Based Beverages

Caucasian: 21%

South Asian: 30%

East/Southeast Asian: 31%

SINGLE-CUP BREW!

PENETRATION STAGNATES

Percent Canadians Aged 18-79 Who Own A Single-Cup System



IONG PAST-DAY CANADIAN

AGED 18-79

In-home

Out-of-home

Caucasian: 82%

South Asian: 63%

Asian:

Strong in-home preparation is driven by Caucasians

37%

ast/Southeast Asian:



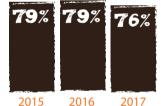
ACE OF CONSUM

East/Southeast

AMONG PAST-DAY CANADIAN **COFFEE DRINKERS AGED 18-79**

Coffee consumption shifts in favour of out-of-home

In-home



Out-of-home

39 2015 2016

Percent Canadians Aged 18-79

Who Drank Espresso-Based Beverages Yesterday

18-24 25% 24% 25-34 27% 35-49 50-64 21%

Percent Canadians Aged 18-79 Who Drank Non-Espresso-**Based Beverages Yesterday**



COFFEE AND TAP WATER ARE THE MOST COMMONLY CONSUMED BEVERAGES

Percent Canadians Aged 18-79 Drinking Yesterday

2017



2013



Tea

2016







18%









Coffee

Tap Water

Bottled Water

Alcohol

Milk/Milk Beverages

Juice

Pop

Sports

Drinks

Energy **Drinks**

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Prepared by DIG Insights