



ANACAFÉ
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The Coffee Association of Canada

COFFEE
ASSOCIATION
OF CANADA



ASSOCIATION
DU CAFÉ
DU CANADA



CAC President - Robert Carter



Robert Carter
President
Coffee Association of Canada
RobertC@coffeeassoc.com

Robert is the President of the Coffee Association of Canada (CAC), a national not-for-profit trade association representing the majority of the coffee industry in Canada.

Robert works with the CAC Board and Members to continue to advance the association's vision to be the industry expert and **advocate for the Canadian coffee community, ensuring a prosperous future for the coffee industry.**

Robert Carter is Canada's leading foodservice expert with over 20 years of unique industry experience spanning executive leadership, strategy, sales, marketing and research.



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Core Purpose

The CAC supports Canada's
coffee industry through
advocacy, education and
connection

CAC Members

49TH
PARALLEL
COFFEE ROASTERS
EST. 2004



BALZAC'S
4TH COFFEE ROASTERS



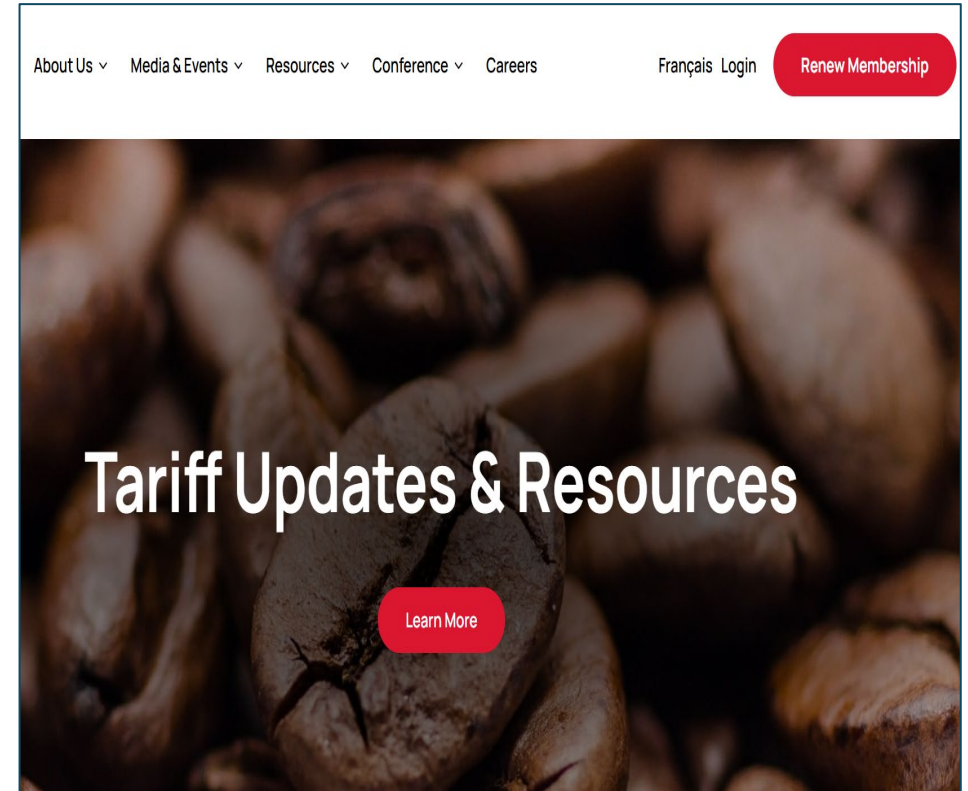
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ADVOCACY

Government Relations & Engagement



RESEARCH

Proprietary Drinking Trends Study

CANADIAN COFFEE CONSUMPTION 2024

All data is presented from the Coffee Association of Canada's proprietary Coffee Data Trends study

Coffee consumption in Canada remained robust in 2024, with some Canadians reporting a better personal financial outlook compared to 2023.

While many continue to grapple with the rising cost of living, there is a growing interest in coffee innovations and in the country's most popular beverage.

Canadians love their coffee!

74%

of Canadians drank a coffee yesterday, more than any other beverage including



71%

Tap water



46%

Bottled water



43%

Tea

30%

had at least one espresso-based beverage yesterday (24% in 2023)



8%

Latte



8%

Espresso



6%

Caffe Americano



6%

Cappuccino



4%

Cafe Mocha

Cold coffee beverages have grown this year, including the number of cold coffees drunk in the winter



21%

had at least one cold brew, nitro, or frozen blended coffee in the past week



8%

had at least one cold traditional coffee in the past week



17%

of past-day coffee cups were consumed cold in Dec 2024 (10% in Dec 2023)

Younger coffee drinkers seem drawn to new coffees with health benefits, but there is not broad awareness of these innovations – yet.



8-in-10

of Canadians have never heard of "proffee" (protein coffee)



However,

39%

of Canadians aged 18-34 are likely to buy a ready-to-drink "proffee" (vs. 9% among 50+)

While Canadians remain engaged with their favourite coffee beverages (and show interest in new ones!), there is also a frugal mindset amid ongoing financial pressures.

64%

agree they are cutting back on eating out/ getting take-out at restaurants

54%

agree they are cutting back on coffee purchased at cafes/coffee shops



Prepared By

 Dig Insights

Note: All data shown here is among adult Canadians aged 18+. Unless otherwise stated, data shown represents Total 2024 (Aggregate of summer & winter).

 COFFEE ASSOCIATION OF CANADA



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CONNECTION

CAC Conference – November 5 (Toronto)



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EDUCATION

Monthly Webinars



Navigating Coffee Pricing Market Volatility

Thursday, January 16, 2025
Noon-1pm (EST)

**Free!
Webinar**



Ana Wilks
Global Head of Research
Neumann Kaffee Gruppe
(NKG)



Tyler Baks
Director, Marketing &
Customer Insights
Mother Parkers Tea & Coffee



Fabian Calderon
Coffee Trader
Coope Tarrazu





Brewing Concerns: Tariff Effects on Canadian Business

Thursday, February 20, 2025
Noon-1pm (EST)

**Free!
Webinar**



Karl Littler
SVP, Public Affairs
Retail Council of Canada



Sabrina Bandali
Partner
Bennett Jones



Nick Gibson
Client Business Partner
SMB Team
Nielsen IQ





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The Canadian Coffee Market

Canadian Coffee Market \$30 Billion Annually

Average Number of Cups
Drunk Per Day

2.6



Past-Day Share of Cups

Out Of Home Annual
Consumption

3.2B



Cups Consumed Annually
Out Of Home

Volume Pounds of Green
Coffee Imported Annually

225k



Metric Tons Imported
Annually

Significantly higher ▲ / ▼ lower than the previous period

Base: Total Sample, June 2025 (n=1,502)
Q6. What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

Top Countries of Import Coffee into Canada

Colombia

Brazil

Guatemala

Honduras

Peru

Nicaragua

Mexico

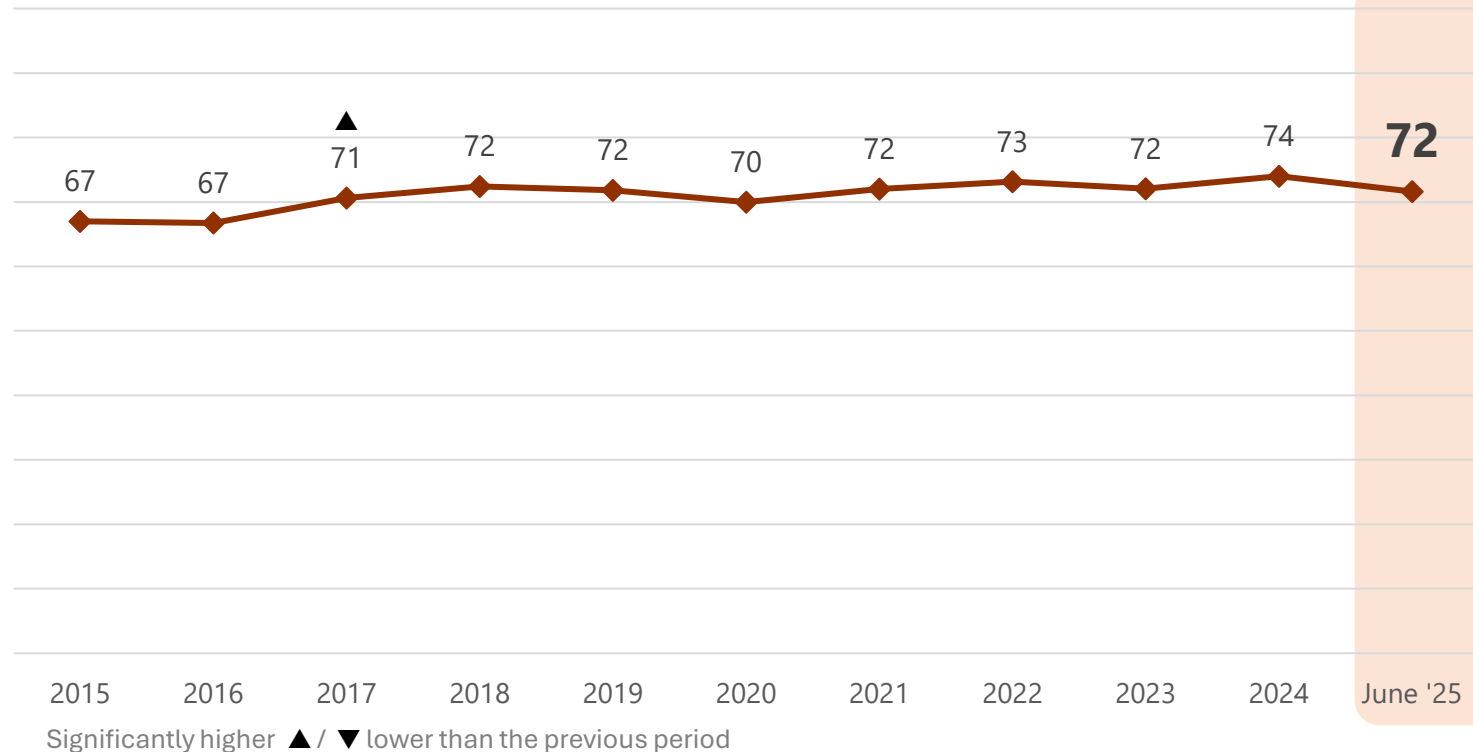
Ethiopia

Vietnam

Indonesia

Strong past-day coffee penetration continues in Canada

Past-Day Coffee Penetration (%)

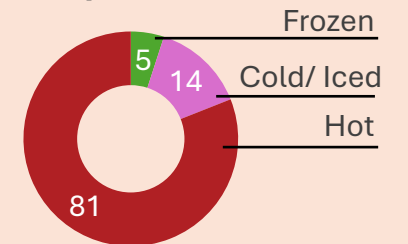


Average Number of Cups Drunk Per Day

2.6



Past-Day Share of Cups Temperature



Base: Total Sample, June 2025 (n=1,502)

Q6. What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

Coffee plays an important role in bringing Canadians together

Agree Completely / Agree Somewhat With Coffee Equity Statements (%)	2024	June 2025
I enjoy socializing with friends/family over coffee	70	69
It is important to limit my caffeine intake	68	62
I tend to buy brands of coffee that are on sale	63	61
I'm willing to spend more money on better quality coffee	62	60
I feel less guilty when I use my own coffee mug / tumbler	52	51
I'm willing to pay a little more for coffee brands that are env. friendly	51	50
I'm more likely to buy coffee OOH if they used recyclable paper cups	48	46
I have heard information about the health benefits of drinking coffee	45	42
Most coffee is grown in an environmentally sustainable way	40	38
I have heard information about the health risks of drinking coffee	38	34
I usually bring my own coffee mug / tumbler when I buy coffee from OOH	33	29
I've heard bad things about coffee in the news	26	24
My doctor has advised me to limit the amount of coffee I drink	23	19

Significantly higher ▲ / ▼ lower than the previous period

Base: Total Sample, 2019, (n=2,628), 2022(n=1,516), 2023 (n=1,510), 2024 (n= 1,530), 2025 (n=1,502)

Q83. Here is a list of statements about coffee and other beverages. For each one, please indicate if you agree completely, agree somewhat, disagree somewhat or disagree completely with the statement.



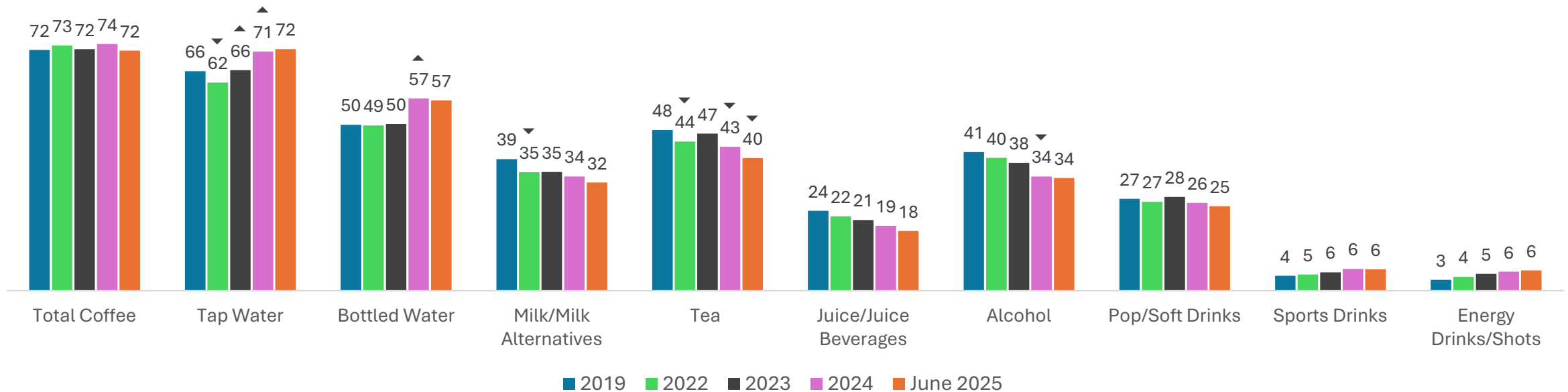
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Coffee remains Canada's top beverage in evolving beverage landscape

Past-Day Beverage Consumption (%)

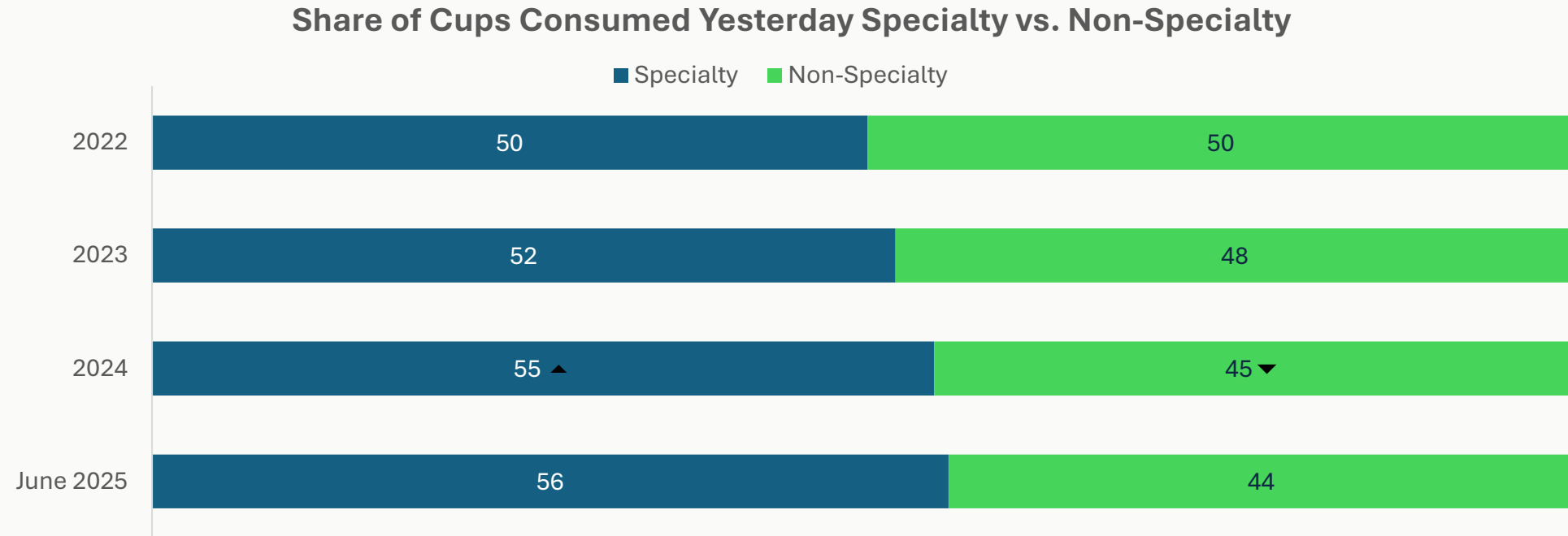


Note: 2019 is retained in the charts to provide context for pre-covid comparison. 2020 and 2021 are removed from the charts as the years had special tracking method due to pandemic.

Base: Total Sample, 2019 (n= 2,628), 2022 (n=3,041), 2023 (n=3,013), 2024 (n=3,043), June 2025 (n=1,502)

Q6. What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle. Note: 2019 is retained in the charts to provide context for pre-covid comparison. 2020 and 2021 are removed from the charts as the years had special tracking method due to pandemic.

The share of Specialty Coffee is growing despite industry challenges



Significantly higher ▲ / ▼ lower than the previous period

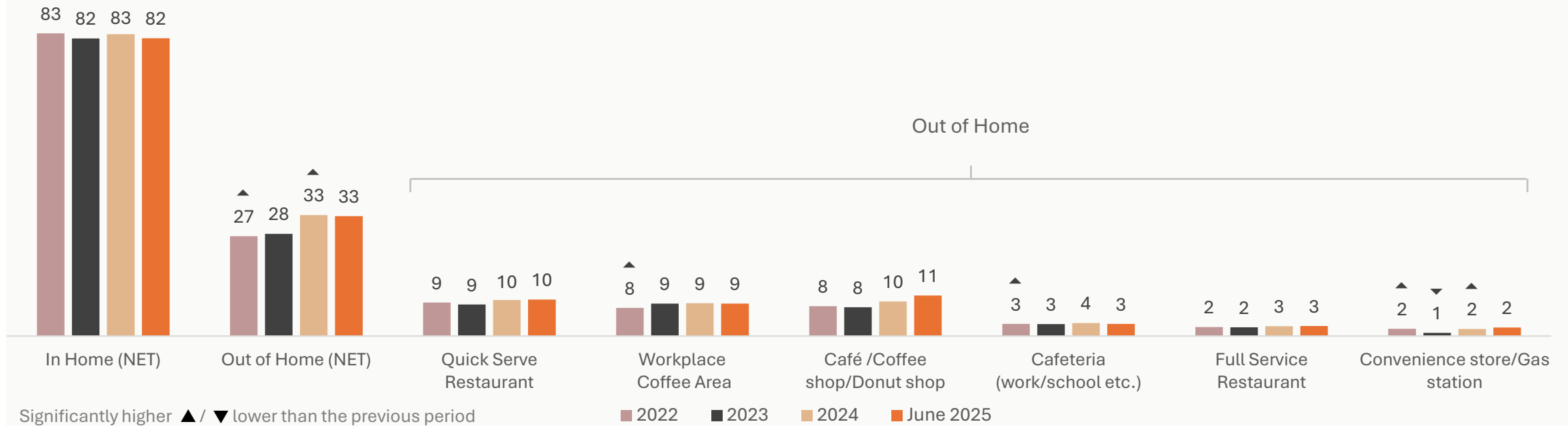
Base: Past-Day Coffee Drinkers (excl. "outliers), 2019 (n=1,881), 2022 (n=2,242), 2023 (n=2,170), 2024 (n=2,251), June 2025 (n=1,087)

Q11. Was the coffee you had yesterday during each of the following times specialty coffee - that is, brewed from premium whole bean or ground varieties?

Note: 2019 is retained in the charts to provide context for pre-covid comparison. 2020 and 2021 are removed from the charts as the years had special tracking method due to pandemic.

At-home coffee consumption remains strong, while OOH has stabilized

Past-Day Coffee Place of Preparation (%)



Note that in-home preparation and out-of-home preparation sum to more than 100% because a person can have more than one coffee per day, prepared in different locations.

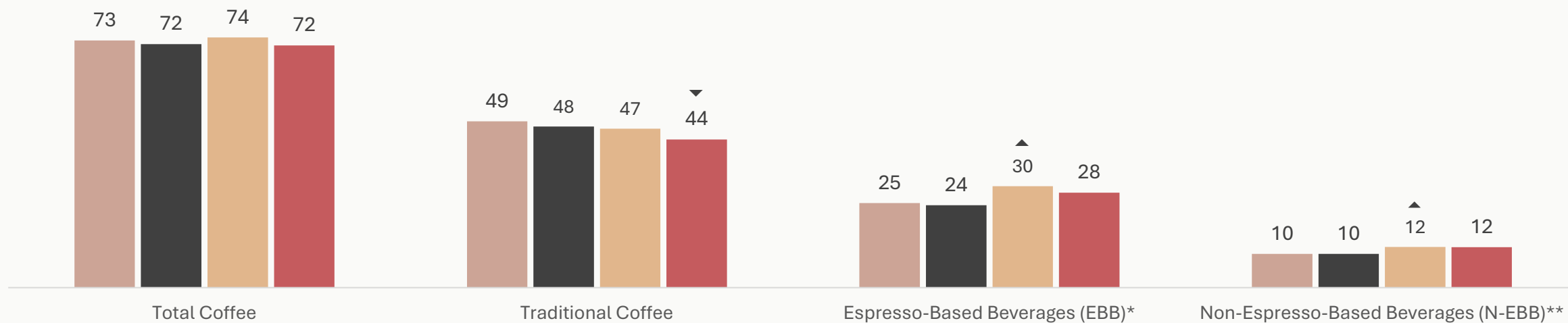
Base: Past-Day Coffee Drinkers, excluding RTD drinkers, 2019 (n=1,854), 2022 (n=2,201), 2023 (n=2,132), 2024 (n= 2,219), June 2025 (n=1,067)

Q26. where was the [coffee/coffee beverage] you had yesterday [time of day] prepared?

Note: 2019 is retained in the charts to provide context for pre-covid comparison. 2020 and 2021 are removed from the charts as the years had special tracking method due to pandemic.

Which aligns with a shift away from Traditional coffee, towards EBB & N-EBBs

Past-Day Penetration of Coffee Types (%)



Significantly higher ▲ / ▼ lower than the previous period

■ 2022 ■ 2023 ■ 2024 ■ June 2025

* Espresso-based Beverages (EBB) is the NET of the following coffee types: Cappuccino, Café Latte, Espresso, Café Mocha, Caffè Americano, Macchiato and Flat White.

** Non-Espresso-Based Beverages (N-EBB) is the NET of frozen blended coffee, cold brew coffee and nitro coffee.

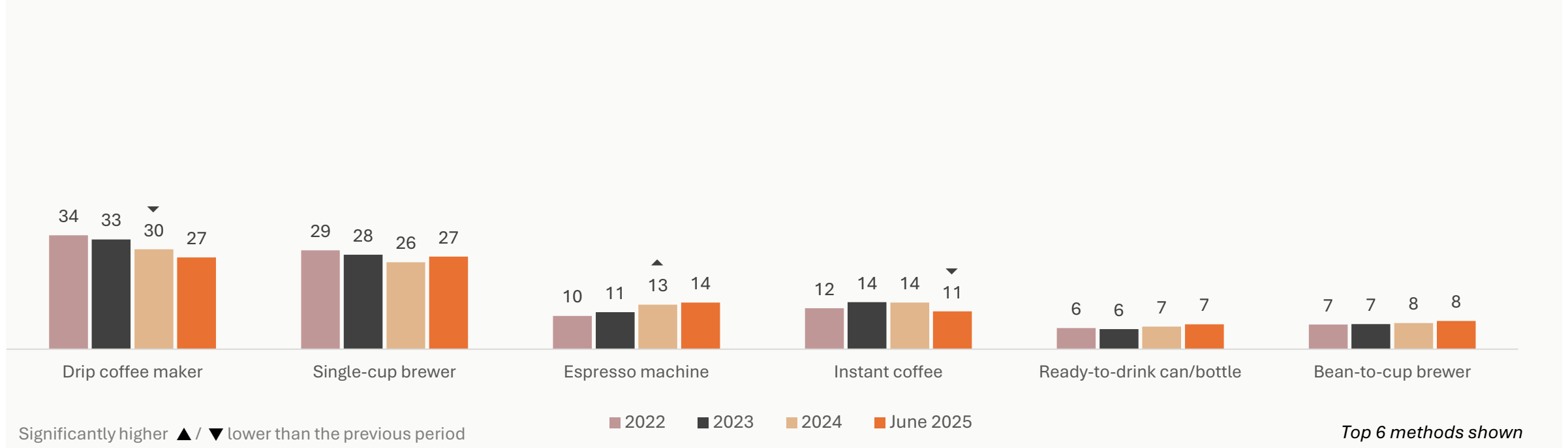
Base: Total Sample, 2019 (n= 2,628), 2022 (n=3,041), 2023 (n=3,013), 2024 (n=3,043), June 2025 (n=1,502)

Q6. What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

Note: 2019 is retained in the charts to provide context for pre-covid comparison. 2020 and 2021 are removed from the charts as the years had special tracking method due to pandemic.

Evidence of shifts towards premium brewing methods also align

Past-Day Usage of Brewed Preparation Methods (%)



Base: Past-Day Coffee Drinkers, excluding 'outliers', 2019 (n=1,890), 2022 (n=2,247), 2023 (n=2,175), 2024 (n=2,251), June 2025 (n=1,087)
Q7. Thinking of the [coffee/coffee beverage] you had yesterday [time of day], how was the [coffee/coffee beverage] prepared?

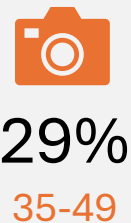
Who Is the Canadian Coffee Drinker?



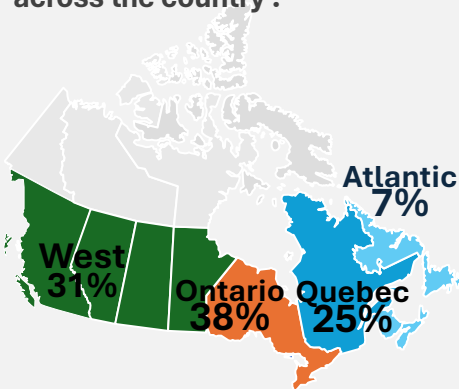
With 7-in-10 Canadians having drunk a coffee yesterday, coffee drinkers are diverse and can be found across the country!

In Canada, the older you are, the more likely you are to be a coffee drinker:

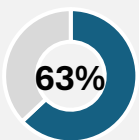
46.8
Average Age



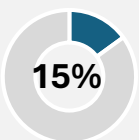
Coffee drinkers can be found across the country :



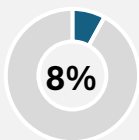
Canadian coffee drinkers are diverse:



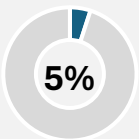
Caucasian-Canadian



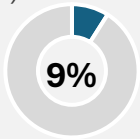
East or SouthEast Asian-Canadian (e.g., Chinese, Thai, Vietnamese)



South Asian-Canadian (e.g. Indian, Pakistani)



Black-Canadian, Afro-Caribbean



Others incl. Hispanic-Canadian or Multi-racial

Coffee is enjoyed equally among females and males:



49%
Female



51%
Male

Cost of living and rising coffee prices are putting pressure on wallets.

Canadians are divided when it comes to feeling better or worse about their personal financial situation:

24%
'feel better' about their personal financial situation vs 6 months ago

53%
'feel the same'

24%
'feel worse'

Canadians are paying attention when it comes to coffee prices:



72% have noticed the price of a package of coffee is more expensive compared to 2023

Data shown represents profiling of the Canadian Past Day Coffee Drinker

Base: Adult Canadians aged 18+, Canadian Coffee Tracking research year- 2024 (n=3,043)



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Doing Business in Canada

Importing Green Coffee Beans from Guatemala

Overview of Canadian Coffee Market

Canada is one of the top coffee-consuming countries globally.

Imports over 225,000 metric tones of green coffee beans annually.

High demand for Fairtrade, Organic, Single-origin coffees.

List Coffee Retailers and Grocery Stores



Stats on Coffee Stores

Number of Coffee Shops in Canada

Canada has ~8,400 coffee shops in Canada as of December 2024, flat vs. last year, and down ~100 vs. two years ago (chains + independents)

Number of Grocery Stores in Canada

There were **10,899 supermarket & grocery store businesses in Canada in 2024**, reflecting ~14% growth from 2023

Number of Coffee Roasters in Canada

Over a 500+ coffee roasters in Canada.

Overview of Canadian Coffee Market

Size and Scope: Canada is one of the top coffee-consuming countries per capita globally. Over 70% of Canadian adults drink coffee daily, representing a market of 15–20 million regular consumers.

Green Bean Demand: Canada imports over 225,000 metric tonnes of green coffee beans annually, mostly from Colombia, Brazil, Guatemala, Ethiopia, and Honduras.

Consumer Preferences:

- Growing demand for certified coffee (Fairtrade, Organic, Rainforest Alliance)
- Single-origin and specialty coffee gaining popularity
- Ethical sourcing and transparency are increasingly important

Import & Regulatory Requirements

CFIA Regulations:

- Importers must be licensed under the Safe Food for Canadians Regulations (SFCR)
- Products must be safe, properly labelled, and traceable

Labelling & Phytosanitary:

- Green coffee beans must be free from pests and contaminants
- Phytosanitary Certificate required from Guatemala's Ministry of Agriculture

Required Documentation:

- Commercial Invoice
- Bill of Lading
- Packing List
- Certificate of Origin
- Phytosanitary Certificate

Customs Process:

- Handled by the Canada Border Services Agency (CBSA)
- Most importers use customs brokers to manage entries and ensure compliance

Supply Chain Management

Import Process:

- Coffee typically arrives through major ports like Vancouver, Montreal, or Halifax
- Goods may be stored in bonded warehouses for inspection or clearance

Logistics:

- 3PL providers (e.g., Kuehne + Nagel, DSV, DHL Supply Chain) handle shipping, storage, and delivery

Key Players:

- Importers coordinate directly with growers or cooperatives
- Brokers help with customs and documentation
- Roasters and distributors take over post-import supply

Distribution Landscape in Canada

Buyers of Green Beans:

- Specialty roasters (small to mid-sized)
- Larger coffee brands (e.g., Lavazza, JJ Bean, Mother Parkers, Club Coffee)
- Green coffee traders (e.g., InterAmerican Coffee, ECOTIERRA, Royal Coffee)

Main Hubs:

- **Toronto (Ontario)** – major roaster concentration
- **Vancouver (BC)** – strong specialty coffee scene and Pacific shipping port
- **Montreal (Quebec)** – access to European and South American imports

B2B Connections:

- Done via agents, expos (like SIAL, the CAC Conference), or cold outreach
- Many buyers look for long-term relationships with reliable producers

Key Considerations for Growers

Positioning Your Coffee:

- Highlight origin, altitude, process, farmer story
- Obtain certifications like Fairtrade, Organic, or Rainforest Alliance
- SHB Strictly Hard Bean (European Prep)-majority procured for Canada
- Canadian quality is generally higher than US , more in line with European quality

Pricing & Contracts:

- Common models: FOB pricing and fixed annual contracts
- Buyers expect consistency in quality, volumes, and delivery timelines

Contacts and Potential Partners

Within CAC:

- Members include importers, roasters, distributors, and equipment providers
- The CAC can help connect growers with members looking to expand sourcing

Potential Importers to Contact:

- InterAmerican Coffee Canada
- Balzac's Coffee Roasters
- Bean North Coffee Roasting Co.
- Ethical Bean Coffee
- And many more – contact the CAC for the complete list

Resources for Guatemalan Growers

Government Support:

- **AGEXPORT** and the Guatemalan Ministry of Economy offer export support

Trade Fairs:

- **CAC Annual Conference** (Canada)
- **SIAL Canada** (food industry expo)
- **Specialty Coffee Association Expo (US)** – Canadian buyers attend

Valuable Certifications:

- **Fairtrade** (widely recognized in Canada)
- **Organic** (preferred in specialty retail)
- **Rainforest Alliance** (valued by large foodservice operators)



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Canadian Coffee Insights Market Trends, Innovation & Global Opportunities

Global & Canadian Coffee Market Overview

Global Coffee Trends & Canada's Role

- Despite global inflation and economic pressures, the coffee industry remains incredibly resilient, driven by both habit and culture.
- Growth is particularly strong in **emerging markets**, but premium segments in developed countries—like Canada—are fueling innovation and value.
- Canadian companies are well positioned to lead in specialty, ethically sourced, and sustainable coffee segments.

Consumer Behaviour Shifts

Evolving Coffee Consumers

- Consumers are seeking **premium experiences**, such as cold brew, nitro coffee, and the ambiance of boutique cafés.
- **Convenience** is critical—ready-to-drink coffees and subscription models have exploded in popularity, especially for at-home use.
- Growing focus on **health** (less sugar, functional ingredients) and **sustainability** (non-dairy options, ethical sourcing) is shaping product demand.

Canadian Market Landscape

Snapshot: Coffee in Canada

- Canada's coffee market is valued at over **\$30 billion**, making it one of the top beverage categories.
- Canadians rank among the **top 10 coffee consumers per capita** globally, with especially strong **at-home** consumption.
- Consumers are increasingly **sophisticated**, prioritizing ethically sourced beans and quality brewing methods.

Innovation & Emerging Formats

Product Innovation & Trends

- We're seeing rapid growth in **RTD coffee**—cans, sachets, and concentrates are now mainstream.
- Innovation is crossing into other categories—think **collagen coffee**, protein-enhanced coffee, and even coffee cocktails.
- Retailers are experimenting with **seasonal offerings**, limited-edition flavours, and **flash brews** to keep consumers engaged.

ESG Pressures & Gen Z Impact

Sustainability & Consumer Ethics

- **Gen Z** is driving a values-based approach to consumption—**70% consider brand ethics** before purchasing coffee.
- Retailers now demand greater **transparency and ESG compliance** from their suppliers and roasters.
- Certifications like **Fairtrade, Rainforest Alliance, and Organic** are becoming essential for credibility and trust.

Thank You All from The Coffee Association of Canada

Robert Carter, CAC President
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