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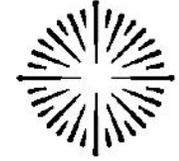
Industry Insights

A roundup of noteworthy Canadian foodservice findings for the week of June 13, 2022

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An Uneven Recovery for Canada's Largest Chains

Despite total sales growing nearly 15% in 2021, cumulative sales for the Top 200 Canadian chains failed to reach pre-pandemic levels.

The recovery proved to be uneven, with limited-service chains growing close to 2019 totals, while full-service sales still have significant ground to make up.

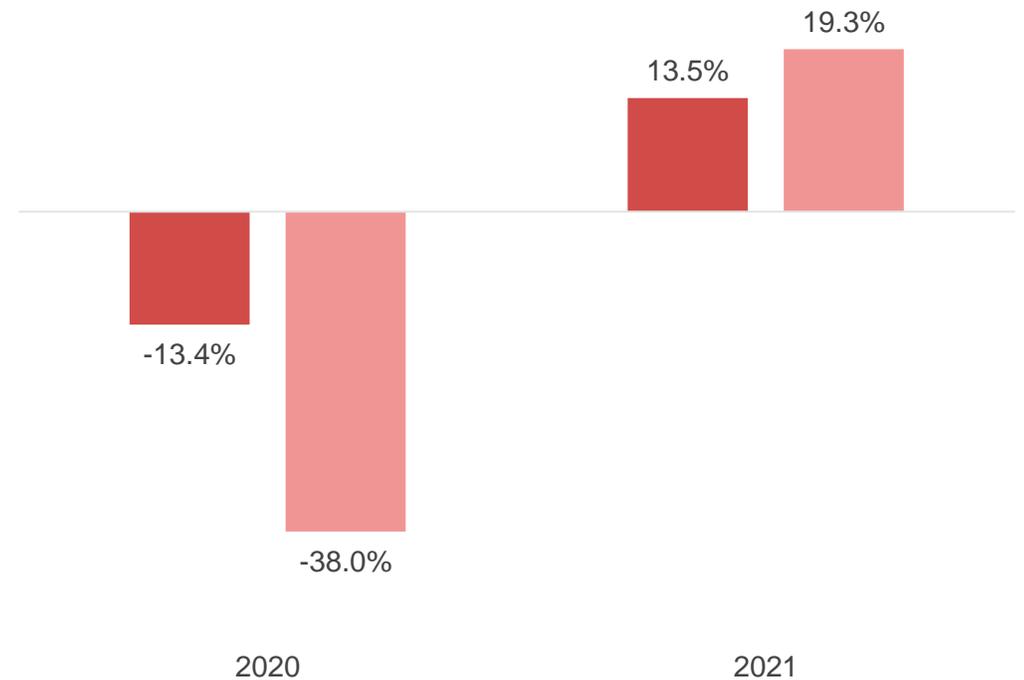
Limited-service chain sales rose by 13.5% in 2021 to a total of \$27.9 billion, as the segment fell just 2% short of recapturing its pre-pandemic sales volume.

Limited-service performance was bolstered by strong recoveries from pizza chains such as Domino's, Pizza Hut and Papa Johns.

The road to recovery remains much longer for full-service chains. Despite sales improving by more than 19% in 2021 compared to the prior year, total sales volume remained down 26% relative to 2019.

TOP 200 CANADIAN CHAINS
ANNUAL SALES CHANGE (%)

■ Limited Service ■ Full Service



What's Trending in Breakfast Entrees

Overall, breakfast items have grown on menus by 4% in the past year, a marked improvement from the 8% decline in breakfast items from pre-pandemic (Q4 2019) to today. As the breakfast daypart starts to show signs of recovery, we're seeing some creative breakfast entrees alongside tried-and-true classics find momentum.

Breakfast pizza tops the list of fastest-growing breakfast entrees, with these pizzas often featuring classic breakfast ingredients such as eggs, bacon and hollandaise sauce. This item reflects a larger trend of daypart mashups, something operators are gravitating more toward as a way to cross-utilize ingredients and maximize SKUs while providing innovative new offerings.

The fish sandwiches showing growth as breakfast entrees are most often bagel sandwiches with smoked salmon. This sandwich pulls double duty as both a portable and protein-packed breakfast, making it a more convenient and health-focused option.

Classic comfort food offerings Belgian waffle/waffles and eggs Benedict/Florentine are also rising on breakfast menus. These items fall in line with the greater trend of classic comfort food favourites finding notable momentum during the pandemic.

Breakfast value meals are also increasing on menus as consumers continue to seek out value-driven offers amid price hikes.

Source: Technomic Ignite Menu, Q1 2021-Q1 2022

FASTEST-GROWING BREAKFAST ENTREES

Breakfast Pizza **+175%**

Fish Sandwich **+53%**

Breakfast Value Meals **+10%**

Eggs Benedict/Florentine **+6%**

**BELGIAN
WAFFLE/
WAFFLE
+26%**

Image Source:
Shutterstock



Sandwich Consumers Prioritize Ingredient Quality

Ingredients perceived as fresh and natural continue to be the highest deciding factors for sandwich purchases.

This factor is consistent with 2020. However, the 100% Canadian callout has become more of a priority for consumers, surpassing made-from-scratch and high-in-protein sandwiches.

Brands looking to improve health and/or quality perceptions can use this data to

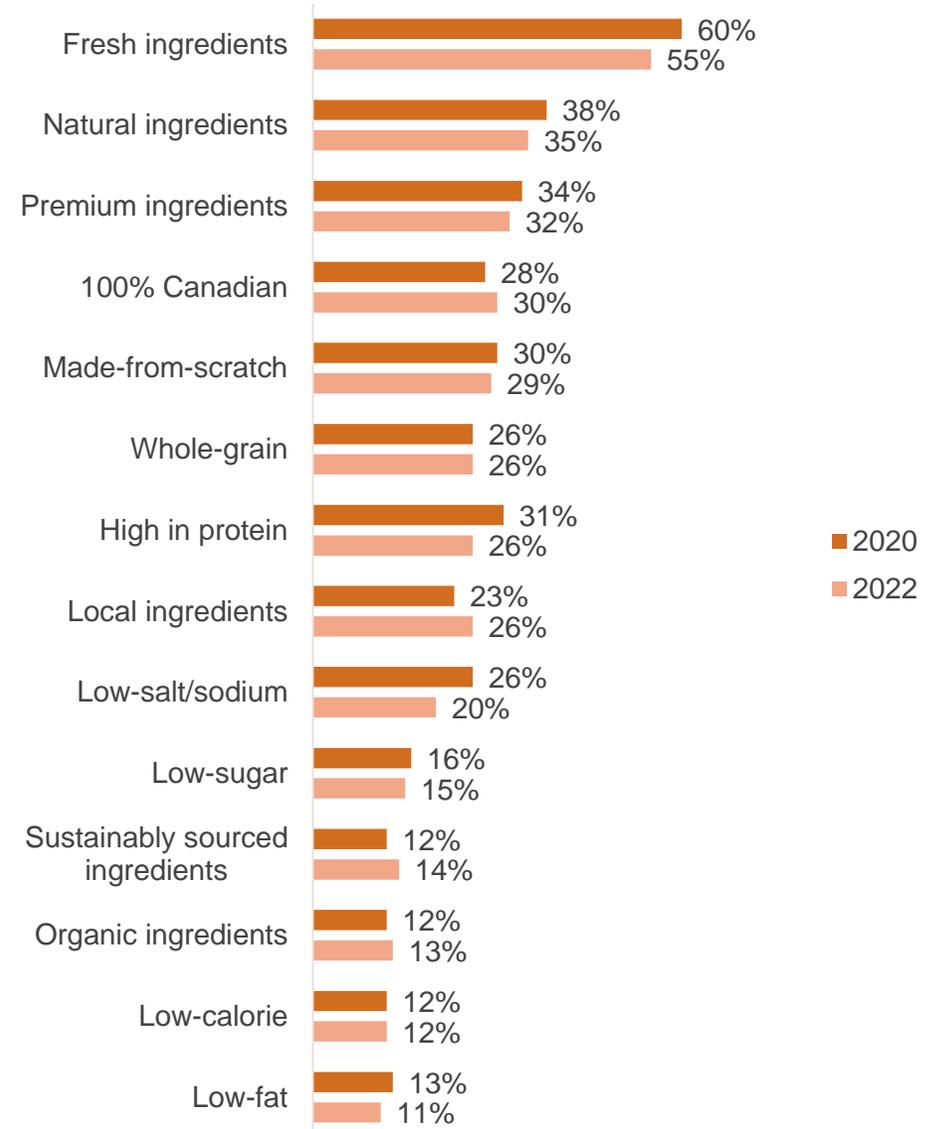
focus their strategy. Finding new ways to highlight freshness or calling out menu offerings that are sourced 100% in Canada may help improve perceptions.

Base: 1,008 consumers

Q: Which of the following are most important to you when deciding which sandwich to order? Please consider all elements of the sandwich, including breads, meats, cheeses, toppings and condiments.

Source: Technomic Ignite Consumer featuring the Technomic 2022 Canadian Sandwich Consumer Trend Report

WHICH OF THE FOLLOWING ARE MOST IMPORTANT TO YOU WHEN DECIDING WHICH SANDWICH TO ORDER?



Did Halloumi Just Get a Major Step Closer to American Menus?

Halloumi has been a popular burger protein and side option at major fast-food chains for years but has yet to break out in the U.S.

That may soon change.

Recent news that [McDonald's will be adding halloumi sticks](#) to its summer lineup in the U.K. for the first time should serve as a strong signal of this Cypriot cheese's large potential (as we have been [expecting for several years](#)).

Halloumi stands out as a handheld and side hero ingredient for its savory, creamy and toothsome attributes; its indulgent vegetarian status; and for standing up to grilling and frying, which enhances flavours and textures.

Despite its popularity on chain menus in overseas markets such as the U.K., the UAE and Australia, halloumi has not yet found solid footing in the U.S.

Technomic's Ignite Menu data for the U.S. has halloumi at just 0.4% operator penetration and 0% growth over the last year. But there were large jumps for both veggie sandwiches and cheese sandwiches over this period, which is in line with current operator use abroad.

Here's how some major chains menu halloumi in ways that may appeal to Americans:

- Starbucks added a Grilled Halloumi Toastie in Saudi Arabia with mint, roasted zucchini, pesto and harissa.

- Burger King added a King Halloumi Cheese Muffin Sandwich as part of its breakfast launch in the UAE.
- Nando's added a Fino Pita in the U.K. with grilled halloumi and chicken thigh.
- Fridays included a side of halloumi fries on its refreshed kids menu in the U.K.

Only Technomic tracks global and local restaurant chain LTOs each month and news and trends daily across 25 countries to keep clients informed and ahead of their competition. [Learn more now.](#)



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