Industry Insights

A roundup of noteworthy Canadian foodservice findings for the week of July 28, 2025






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Answer your most pressing questions on consumer visit behaviour

Explore demographics, preferences and behaviours to understand who is visiting chain brands, why they're going and how brands are performing with Ignite Consumer

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Ignite Company

Chain performance is forecasted to slow in 2025

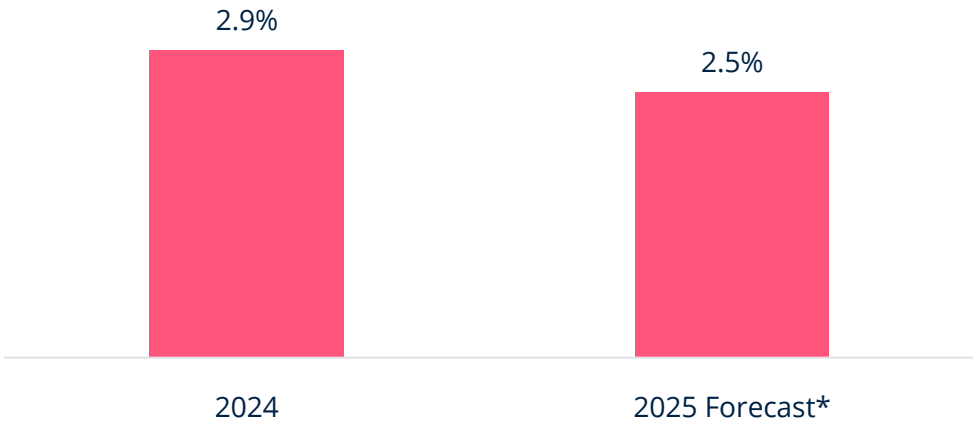
After a slow beginning to the year among the industry's largest players, cumulative sales growth for Canada's largest 250 chains is forecasted to grow by 2.5% on an annual basis, a notable slowdown compared to the year prior.

Continuous location development among Canada's largest chains will continue to buoy chain sales volume as consumers are anticipated to pull back amid broader economic uncertainty.

Forecasts for 250 of Canada's largest chain restaurants are now available in the *Top 250 Canadian Chain Forecasting Insights* report.

Ignite Company clients: Click here for more

TOP 250 CHAIN RESTAURANTS
ANNUAL CANADIAN SALES CHANGE



Source: Technomic Ignite Company
*Note: Forecast as of July 2025; All data is preliminary and subject to change

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Ignite Menu

Fastest-growing ingredients in nonalcohol beverages

When it comes to nonalcohol beverages, operators are turning to versatile ingredients that can be used in a variety of interesting applications. Tapioca is the fastest-growing ingredient in these beverages. These small boba pearls made from South American cassava root are popping up in matcha, milk teas, smoothies and coffees.

Egg is also growing on menus in nonalcohol beverages. Egg whites are appearing in zero-proof cocktails, including mojitos and sours. Egg is also being menued in Vietnamese egg coffee varietals, which feature an egg yolk and sweetened condensed milk mixture.

Lavender is showing up in a variety of nonalcohol drinks, including lattes and cold brews with lavender syrup. The floral flavour is also being infused into lemonades and teas. And, like egg, lavender is also appearing in mocktails.

Brown sugar is also experiencing growth, typically showing up in coffees and milk teas, often alongside tapioca. It is also being utilized as a flavoured pearl option in fruity drinks, such as mango slushes and orange juice.

Dragon fruit takes the last spot on this list, appearing mostly in smoothies and fruity mocktails. It's also often being utilized in lemonades for a tropical twist.

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Source: Technomic Ignite Menu, Q1 2024-Q1 2025
Image Source: Shutterstock

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FASTEST-GROWING INGREDIENTS IN NONALCOHOL BEVERAGES
Q1 2024-Q1 2025



TAPIOCA
+53.2%

EGGS
+46.7%

LAVENDER
+43.3%

BROWN SUGAR
+41.7%

DRAGON FRUIT
41.2%

Ignite Consumer

Better-for-you takes on a new meaning

Just under one-quarter of consumers (24%) selected a better-for-you need state as their primary reason for a recent restaurant occasion, according to newly released Ignite Consumer data.

This number remains stable quarter over quarter but is higher than it was two years ago (21%), suggesting that more consumers are prioritizing healthy items at restaurants.

While more consumers turn to restaurants for better-for-you options, the way consumers are defining it is changing.

As seen in the chart to the right, the better-for-you need state aggregates responses for restaurant guests who selected "need it healthy (e.g., light, nutrient-rich, guilt-free, etc.)" or "need it real (e.g., real/wholesome ingredients)" as their primary reason for visiting.

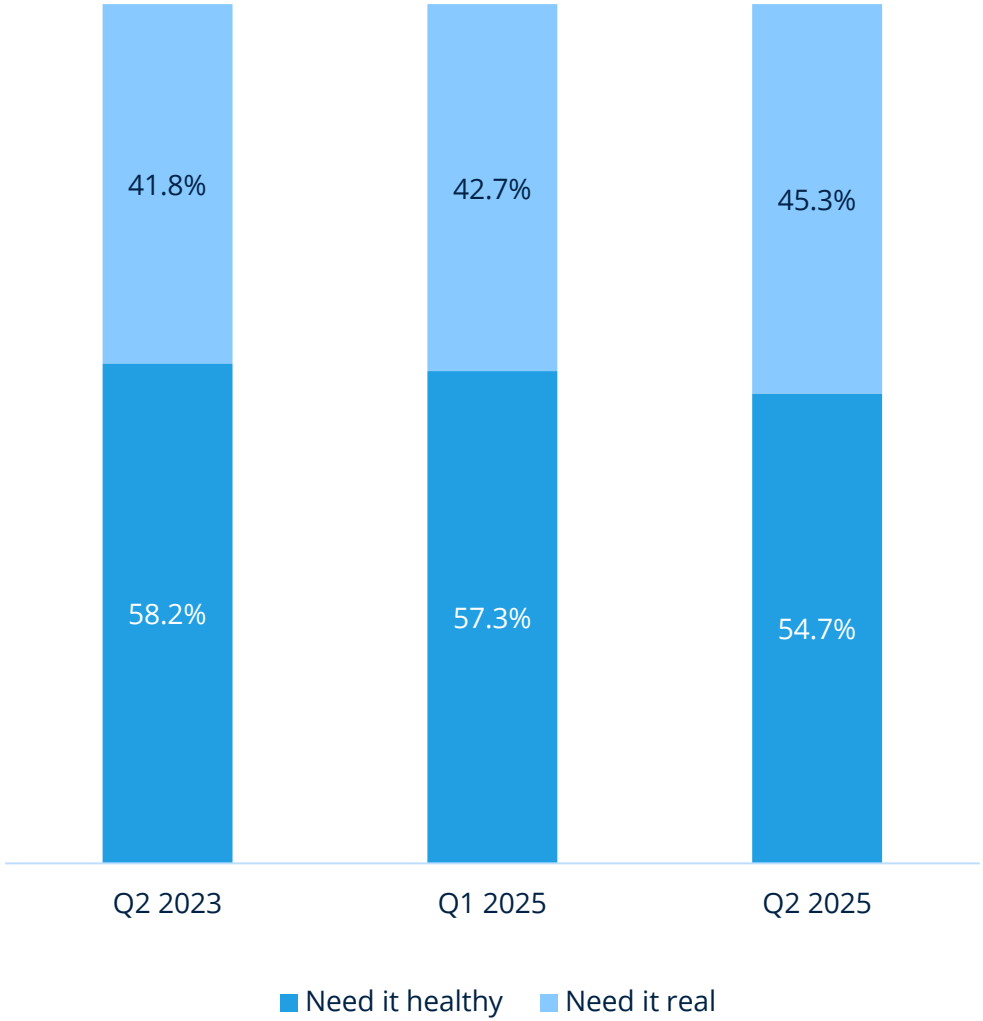
Data from Q2 2025 shows that there is a shift toward seeking a meal with real/wholesome ingredients, and a shift away from seeking health in a more traditional sense.

Ignite Consumer clients: Click here for more

Base: 24,500 Canada restaurant consumers ages 18+ per calendar year
Source: Technomic Ignite Consumer

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% OF CONSUMERS WHO SELECTED BETTER-FOR-YOU NEED STATES



Global Foodservice Navigator

What's new with global coffee chains?

Technomic's Global Foodservice Navigator Program tracks menu development activity for 90 global coffee chains and business developments for even more. Below are a few recent highlights.

Cotti Coffee is reportedly rolling out ice cream products at its shops in China. The homegrown coffee QSR is adding the new range of sweet treats at select locations as a complement to its signature beverages.

Half Million debuted a new spinoff concept in Saudi Arabia. The homegrown coffee QSR's new Half Million Ice Cream offers a selection of frozen treats alongside coffee drinks.

Dunkin' operator Inspire Brands expanded the brand into France. The U.S.-based multibrand operator partnered with QSRP (QSR Platform) on the market entry.

Starbucks updated its pricing for beverage mix-ins in the U.S. The homegrown coffee QSR will now charge a flat rate for each mix-in added to a drink that does not already contain it.

Tully's Coffee plans to reach the 1,000-unit mark in Japan by 2029. The local operator of the U.S.-based coffee QSR ended 2024 with about 815 locations in the market.

ZUS Coffee is now offering a range of tea drinks in addition to its signature coffees. The Malaysia-based coffee QSR's new ZUS Tea Series includes a range of flavored milk teas.

Ignite Navigator clients: Click here for more

Image Source: Inspire Brands website



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Since 1966, we have produced in-depth research focused on the foodservice industry.

We provide insights into consumer, industry and menu trends in the U.S., Canada and 23 markets around the world.

Our team of experts helps leaders in the industry make complex business decisions, set strategy and stay ahead of the curve.

Have questions?
Reach out to us today.

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