



Technomic®

Industry Insights

A roundup of noteworthy Canadian foodservice findings for the week of Aug. 15, 2022

DRIVEN MENU INNOVATION

Uncover flavour and ingredient trends,
track limited-time offers and uncover
menu gap opportunities with **Ignite Menu**

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Tim Hortons Reaches Sales Recovery

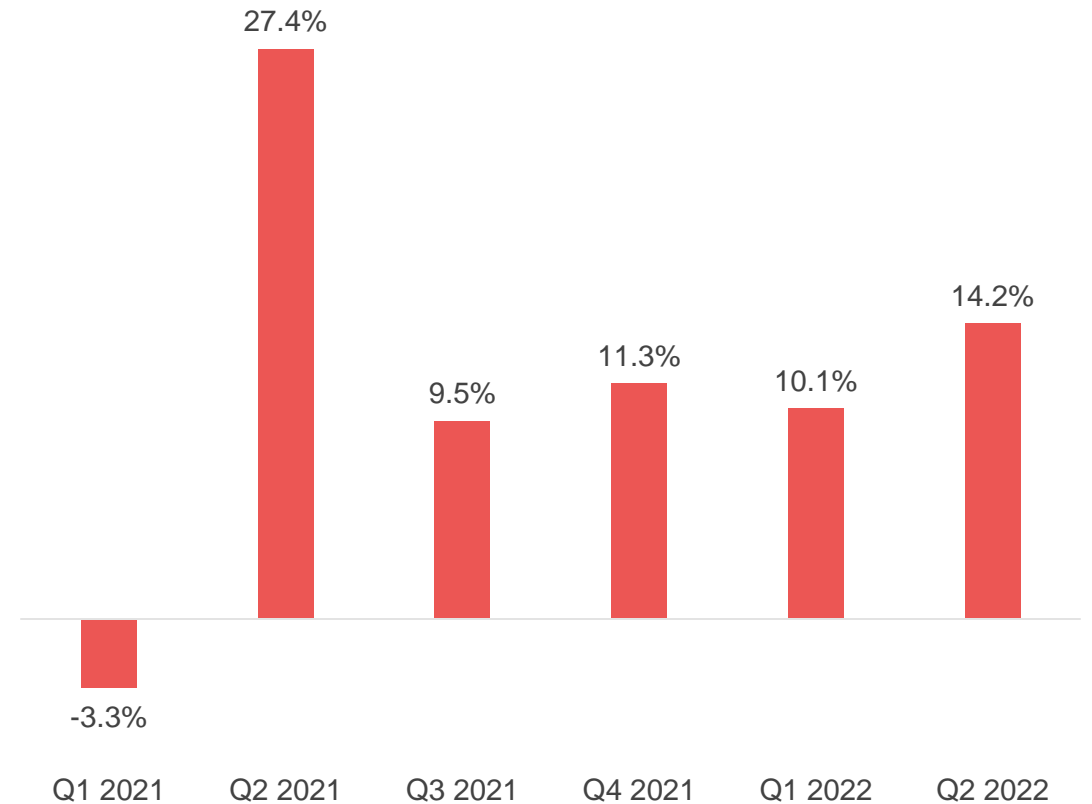
Canadian quarterly sales volume at Tim Hortons has surpassed 2019 levels for the first time since the onset of the COVID-19 pandemic. Total Canadian systemwide sales for Canada's largest chain are 5% higher than they were in Q2 2019.

This comes on the heels of five straight quarters of positive same-store sales for the coffee giant, growing more than 14% compared to the same period the year prior.

Despite closing some locations domestically, the brand has been

ramping up its international development. Overseas locations have grown by 27% compared to the same period a year prior.

QUARTERLY CANADIAN SAME-STORE SALES
YEAR-OVER-YEAR CHANGE



Q2 Menu Data Highlights

With the launch of Technomic Ignite Menu's Q2 2022 menu data, here are some highlights to know.

- Menu item counts have declined 8% since pre-pandemic (Q4 2019) and continue to decline, down 2% in the last year.
- Nonalcohol beverages (+5%) and desserts (+3%) are seeing the greatest growth year over year, while add-ons have seen the highest increase since pre-pandemic (+2%).
- Kids menus (-17%), senior menus (-11%) and entrees (-10%) have seen the greatest declines in menu counts since pre-pandemic; they also continue to decline year over year.

- Hearts of palm, oat milk, plant-based poultry and maitake are on the lists of fastest-growing ingredients (both from pre-pandemic to today as well as year over year).
- While value-oriented items such as other retail/grocery items (+3,450%) and build-your-own value meals (+1,000%) continue to lead among the dishes showing the greatest growth since pre-pandemic, the fastest-growing dishes over the past year include more premium options, such as arctic char (+200%), iced espresso (+175%) and lemon cake (+175%).

Source: Technomic Ignite Menu, Q4 2019-Q2 2022 and Q2 2021-Q2 2022
Image: Shutterstock

Fastest-Growing Ingredients (Year Over Year)

- Hearts of Palm +110%
- Agua Fresca +75%
- Waffle Fries +69%
- Oat Milk +52%
- Alfalfa +51%
- Plant-Based Poultry +43%
- Melon +42%
- Maitake +41%
- Ghee +39%
- Texas Toast +36%



Fastest-Growing Ingredients (Pre-Pandemic to Today)

- Oat Milk +650%
- Hearts of Palm +105%
- Plant-Based Beef +92%
- Rhubarb +77%
- Maitake +77%
- Plant-Based Poultry +72%
- Nashville Hot +65%
- Crinkle-Cut Fries +62%
- Butter Chicken Sauce +58%
- Garlic Mayonnaise +56%



Adult Beverage Occasions at CDR

Technomic's Ignite Consumer survey is much more than a brand tracker. As a core component of the survey, respondents are asked to profile their most recent visit to or order from a single restaurant chain. This includes asking about adult beverage purchases made during that specific occasion.

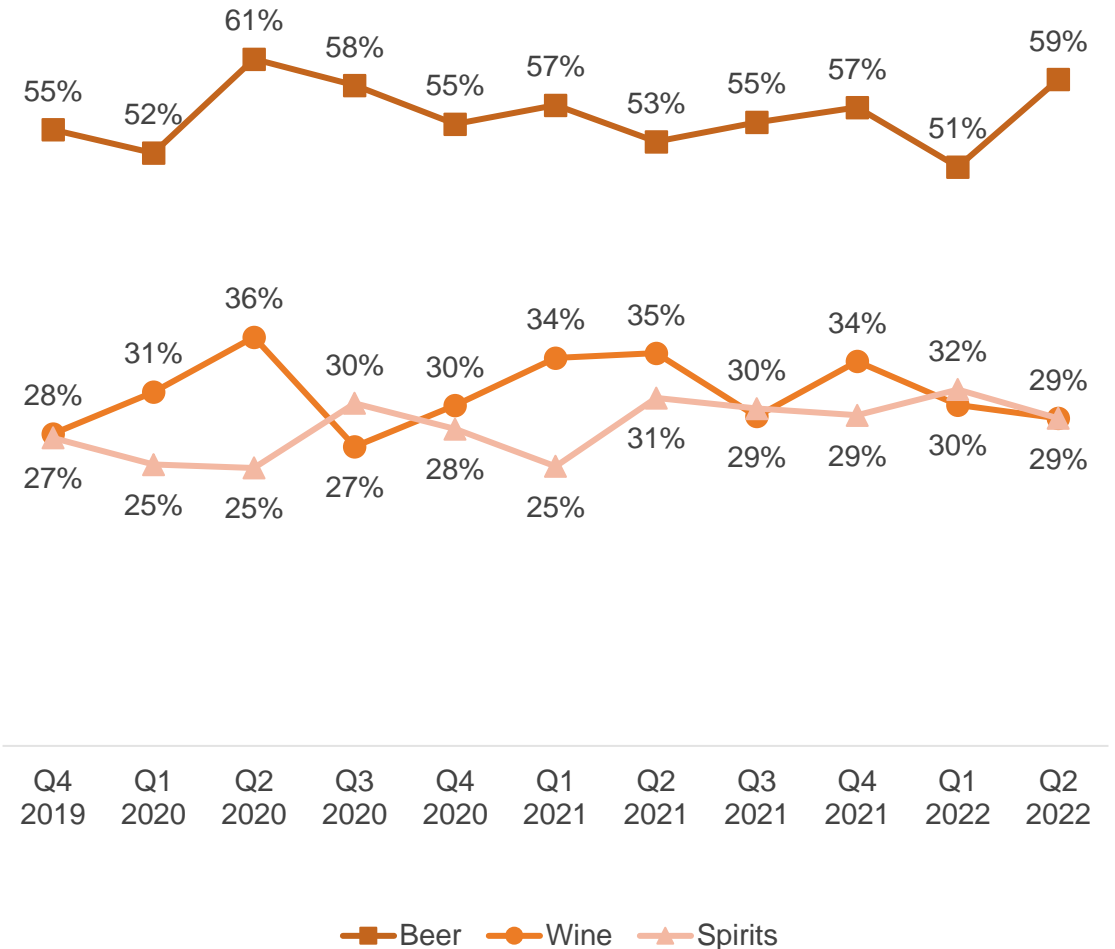
With rich historical data, Ignite Consumer can easily recognize consumer trends and changes in behaviours.

With respect to adult beverage occasions at casual-dining chains, the long-term trend pointed to increased spirits and wine orders. Meanwhile,

beer orders have slipped over these past two years.

However, in the most recent quarter, more casual-dining restaurant (CDR) consumers report ordering a beer. Conversely, a fewer number of recent diners report ordering wine or spirits.

PERCENT OF CONSUMERS ORDERING ADULT BEVERAGE CATEGORIES DURING THEIR MOST RECENT CDR OCCASION



Base: Varies; Approx. 900 recent Canadian casual-dining chain guests 21+ per quarter ordering an adult beverage
Source: Technomic Ignite Consumer

Four Eye-Opening Breakfast Findings From Around the World

Recent performance reports from industry giants such as [McDonald's](#) and [Starbucks](#) indicate that the breakfast daypart is back and stronger than ever—particularly for chain operators.

To better understand opportunities within the morning daypart from an international perspective, Technomic recently surveyed consumers across 25 countries about their attitudes, preferences and behavior when purchasing prepared breakfast away from home.

Here are a few eye-opening—and, in some cases, surprising—findings.

Oatmeal and noodles shine

Globally, 21% of consumers purchase oatmeal for breakfast away from home on occasion—the same exact percentage as those who purchase noodle dishes.

Plant-based beef is big...in Brazil

In Brazil, 20% of consumers order plant-based beef alternatives with their morning meals, well above the global average of 9%.

Snack bars get love too

About a third (29%) of consumers in India, Mexico and South Africa enjoy morning snacks such as granola bars,

cereal bars and powers bars.

Drink and a pastry for the win

Globally, 37% of consumers primarily define breakfast as the pairing of a beverage and a pastry, with Argentina (71%), Spain (67%) and France (60%) overindexing the most.

Technomic's new *Breakfast Global Menu Category Report* is the only source of actionable insights for breakfast opportunities across global markets using data-driven analysis into market sizing, consumer usage and preferences, along with leading operators, product innovation, seasonal influence and menu trends.



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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 countries 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 about this report?
Reach out to us today.

312-876-0004
info@technomic.com
technomic.com