

Industry Insights

A roundup of noteworthy Canadian foodservice findings
for the week of Aug. 25, 2025



Image Source: Shutterstock

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Morning daypart boosts Tim Hortons in Q2

Tim Hortons comparable sales hit 3.6% in Q2 2025, matching levels last seen in Q2 2024.

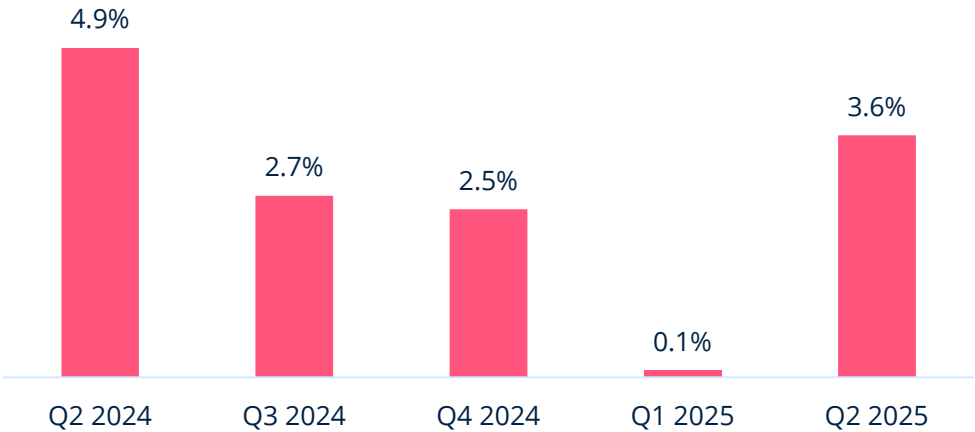
The coffee brand attributed this increase in comparable sales to successes in the morning daypart. Breakfast sales grew 10% for the quarter, coinciding with the releases of its summer cold beverage lineup and scrambled egg breakfast boxes, which were launched in April with promotional support from actor Ryan Reynolds.

Overall systemwide sales growth sat at 3.8% year over year in Q2, while the number of stores continued to decrease. Tim Hortons currently operates 3,865 restaurants across Canada, a decrease of more than 20 total stores since the end of 2024.

[Ignite Company clients: Click here for more](#)

Source: Technomic Ignite Company

TIM HORTONS
YEAR-OVER-YEAR COMPARABLE SALES GROWTH



Fastest-growing sauces at Canadian pizza chains

Canadian pizza chains are getting increasingly creative with what they are putting on pizzas and how they are using sauces as an upgrade.

Hot honey is on the rise on pizza menus, often being used as a dip or drizzle on top of pizzas. It pairs well with a variety of toppings, including vegetable-based, such as basil or peppers, and meat-based, such as pepperoni. Pizza joints can also use it as a dip for handhelds, such as chicken or cauliflower bites.

Honey mustard takes the second slot and is frequently menued as a dipping sauce for chicken wings and cauliflower bites.

Cheese sauce is also growing on pizza menus as a base sauce, drizzle on top of pizzas and dipping option for wings, breadsticks and other handhelds. Blue cheese sauce is appearing mostly as a dipping sauce for chicken wings, but it is also often paired with garlic knots. Offering a variety of sauce add-ons such as honey mustard, cheese sauce and blue cheese sauce can also help boost checks.

Thai sauce takes the last spot on this top five list. This umami option is showing up as a drizzle on pizzas, often Thai chicken pizzas, as well as a dipping sauce for a variety of handhelds.

FASTEST-GROWING SAUCES AT CANADIAN PIZZA CHAINS Q2 2024-Q2 2025

HOT HONEY
+22.6%

HONEY MUSTARD
+13.0%

CHEESE SAUCE
+11.5%

BLUE CHEESE SAUCE
+9.1%

THAI SAUCE
8.1%



Ignite Menu clients: [Click here for more](#)

Source: Technomic Ignite Menu, Q2 2024-Q2 2025
Image Source: Shutterstock

First-time guests more than twice as likely to order restaurant LTOs

Limited-time offers (LTOs) represent a significant opportunity for restaurant operators looking to drive incremental traffic and boost sales. These items can create brand excitement, generate new social media buzz and help attract new customers while also giving existing guests a reason to come back.

Recent data from Ignite Consumer reveals an interesting distinction between first-time and repeat visitors as it relates to LTOs. First-time guests demonstrate a much higher propensity to order LTOs (43%) compared to returning customers (17%). Restaurant operators can leverage these insights

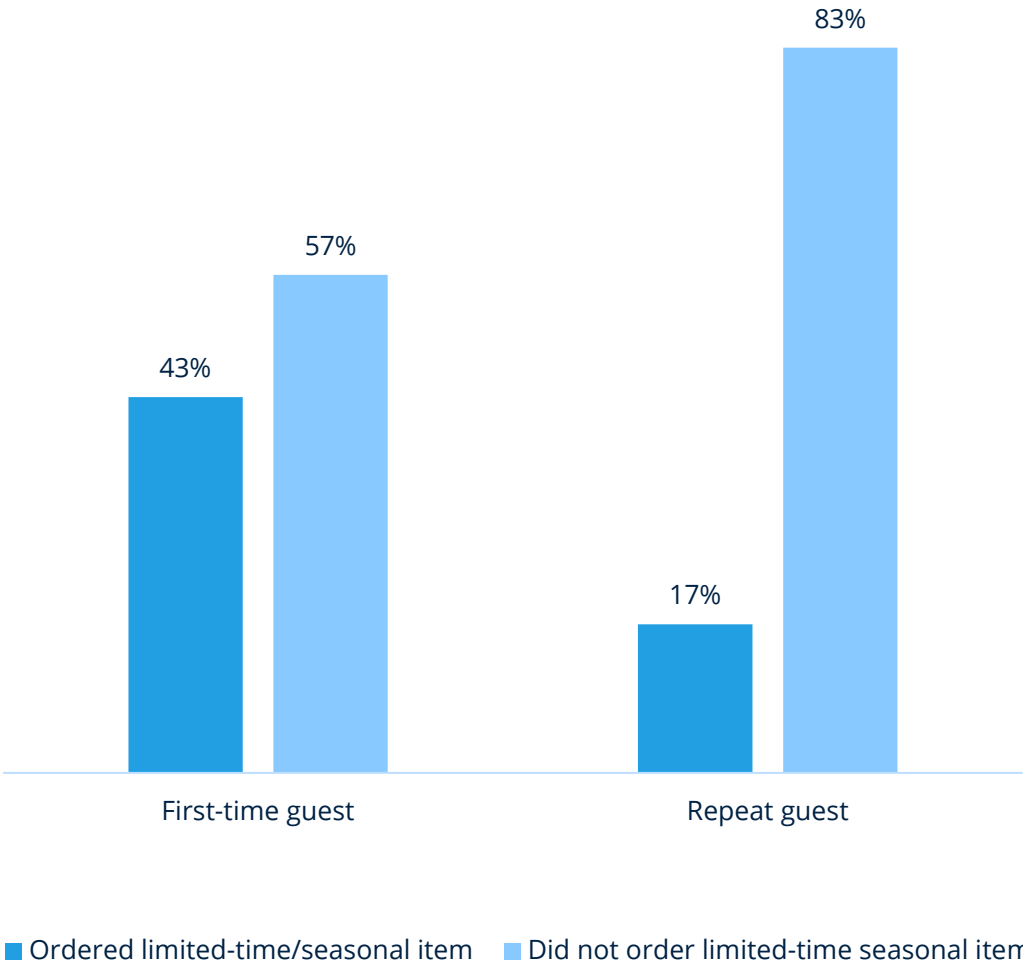
to develop targeted strategies that acknowledge the different motivations and ordering behaviours of new vs. returning visitors. For example, for first-time guests, prominently featuring current LTOs in window displays, entrance signage and digital marketing content can intrigue and encourage willingness to try a new place with appealing new menu items.

Meanwhile, returning guests might respond better to loyalty programs that highlight their favourite core menu items, with LTOs presented as complementary additions rather than replacements to tried-and-true options.

Ignite Consumer clients: [Click here for more](#)

Base: 25,474 recent chain restaurant guests ages 18+
Source: Technomic Ignite Consumer

% WHO ORDERED LTO OR SEASONAL ITEM DURING MOST RECENT OCCASION



Menu development activity in LatAm

As part of its regular monthly menu collection, Technomic’s Global Foodservice Navigator Program tracks changes in operator development activity on the market and regional levels. Below are a few highlights:

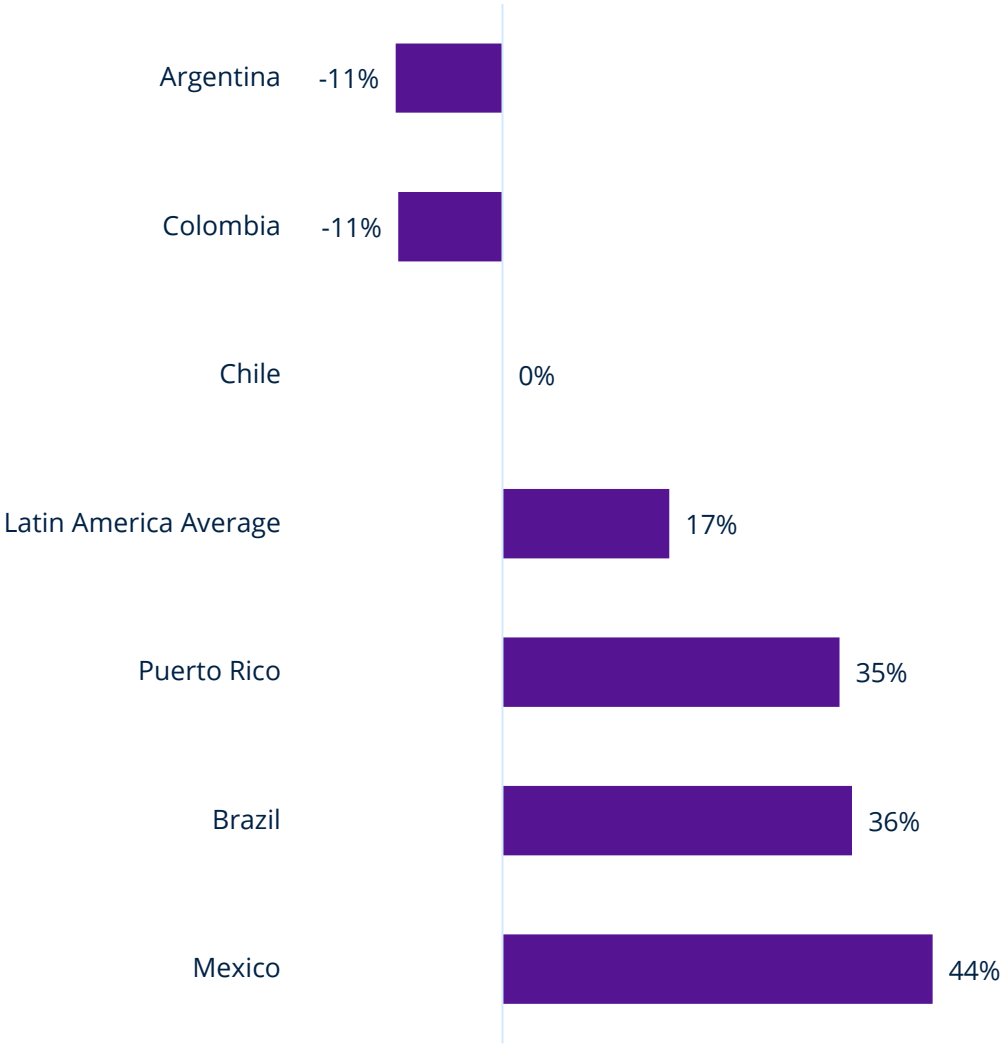
From 2023 to 2024, Latin America markets as a whole saw a 17.2% increase in items released per chain, the second largest regional increase in the world (after North America). This figure encompasses wide market differences, ranging from Argentina’s 11% decrease to Mexico’s global second-highest 44.4% increase.

Alongside those in Mexico, chains in Brazil and Puerto Rico also featured globally high increases in items released per chain, with these operators in these markets respectively

sixth and seventh of any tracked market at 36% and 35%. Unlike in other regions, menu development in these three markets was not concentrated in any particular mealpart; operators in 2024 added new entrees, desserts, nonalcohol beverages, sides/snacks and other mealparts in similar proportions to the previous year, just at higher overall rates.

Chains in Argentina, Chile and Colombia fared differently. While those in Chile saw no overall difference between 2023 and 2024, those in Argentina and Colombia released approximately 11% fewer items per chain year over year. These were the third- and fourth-sharpest declines of any tracked markets.

% CHANGE IN AVERAGE ITEMS ADDED PER CHAIN, 2023-2024



Global Navigator clients: [Click here for more](#)

Source: Technomic Global Foodservice Navigator Program

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