

Industry Insights

A roundup of noteworthy Canadian foodservice findings
for the week of Sept. 18, 2023

Image Source: Shutterstock



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Who are Canada's largest pizza players?

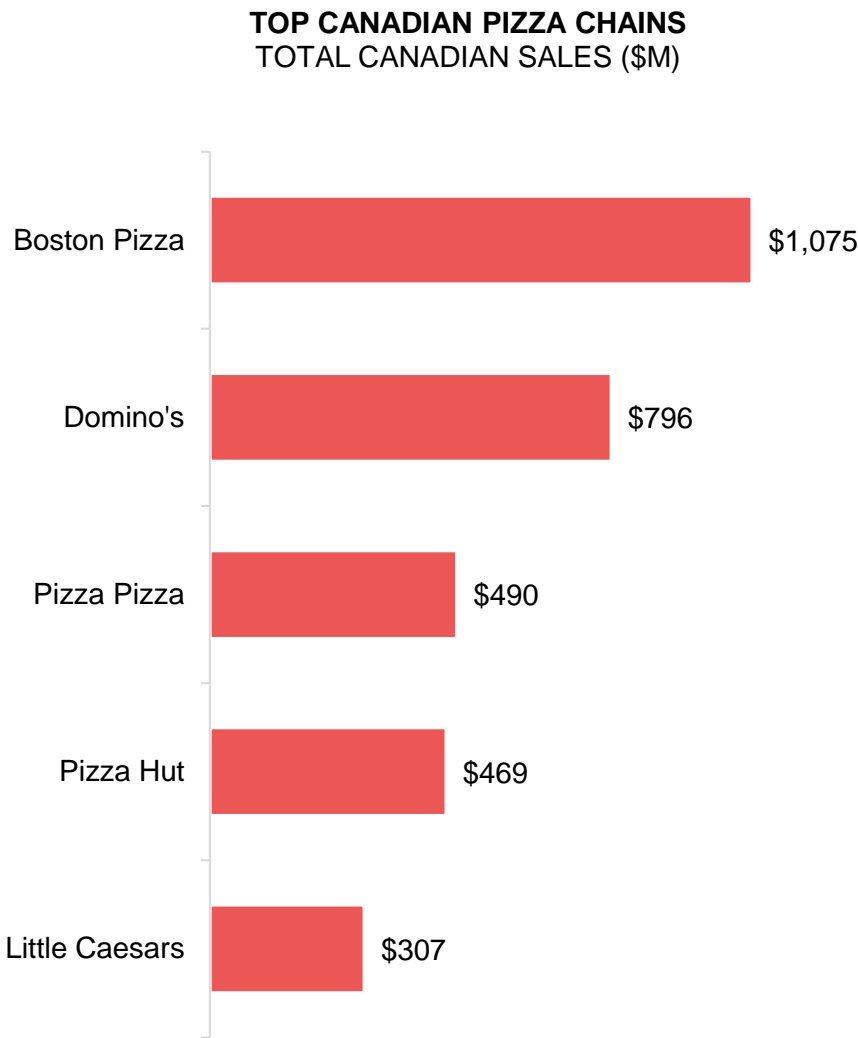
With annual systemwide sales of nearly \$1.1 billion, Boston Pizza stands out as Canada's largest pizza player. The homegrown full-service chain finished 2022 with a total of 377 restaurants across Canada.

Pizza Pizza, another Canadian-based chain, registered as the third-largest pizza player after posting total sales of \$490 million in 2022. With more than 640 locations, Pizza Pizza has the largest footprint of any Canadian pizza chain, followed by Domino's with 585 locations.

Additional insights and analysis of the industry's largest chain players can be accessed in Technomic's *2023 Top 200 Canadian Chain Restaurant Report*.

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

Source: Technomic Ignite Company



IGNITE MENU

Value meals increasing on menus

As prices rise, Canadian operators are increasingly turning to value meals to entice cost-conscious consumers.

As of Q2 2023, 20.6% of operators have a value meal on their menu, compared to 19.8% in Q2 2022. Further, not only are more operators offering value meals, but the number of value meals on menus has increased as well, up 22.8% over the last year.

Pizza, sandwich, breakfast, chicken and value meals dominate as the most popular value entrees on menus, but we continue to see growth in other categories. For example, three of the top five fastest-growing dishes overall in the past year are value meals, with

burrito (+250%), quesadilla (+188%) and bowl (+120%) value meals on the rise. Pasta/noodle value meals are also showing growth, up 32.3% on menus over the last year.

But even these value meals aren't exempt from price hikes, with an average price growth of 8.7% for value meals year over year.

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

Source: Technomic Ignite Menu, Q2 2022-Q2 2023
Image Source: Shutterstock

FASTEST-GROWING DISHES OVER THE LAST YEAR (Q2 2022-Q2 2023)

Quesadilla Value Meals +188%

Fish Cake Appetizer +140%

Other Kids Sandwich +125%

Bowl Value Meals +120%

**Burrito
Value
Meals
+250%**



Effective advertising impacts Gen Z’s restaurant occasions

When asked how important “effective advertising (e.g., makes me hungry, is memorable, etc.)” is when selecting a restaurant for an occasion, 57% of Gen Zers said that it is important or very important in the decision-making process. This figure is 6 percentage-points higher than the Canadian guest average (51%).

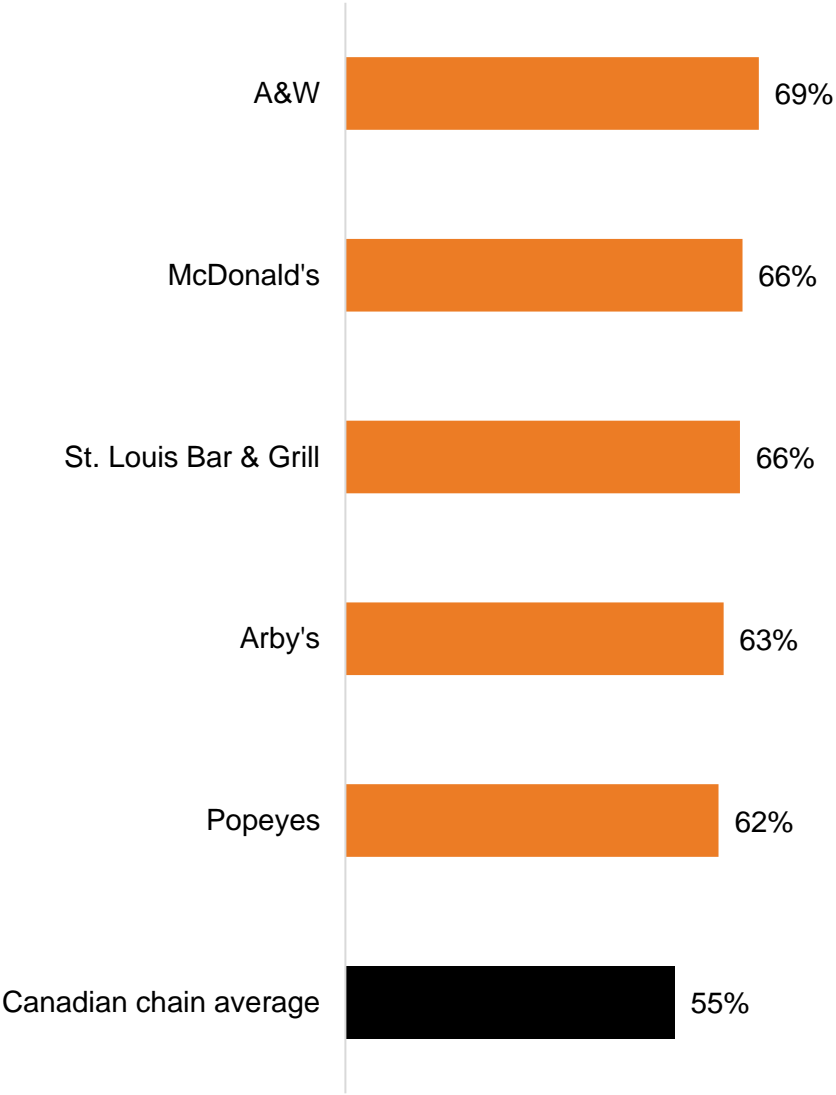
Using a composite of advertising measures tracked by Technomic, the

top-rated brands all have a common youthful focus in their messaging and campaigns. Social media for these brands leverages contemporary colloquial terminology and absurdist humor for posts that are relatable for Gen Zers.

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

Source: Technomic Ignite Consumer

TOP-RATED CHAINS: ADVERTISING ATTRIBUTE ROLLUP
% OF GEN Z CONSUMERS RATING CHAIN AS GOOD/VERY GOOD



Mealpart and daypart breakdowns in Latin America

Technomic tracks menu development activity in five key markets in Latin America as part of its Global Foodservice Navigator Program, including dayparts and mealparts. Below are a few highlights from how these indices have evolved in this region over the past two years.

The four critical mealparts in this region across both years are entrees, desserts, nonalcohol beverages and

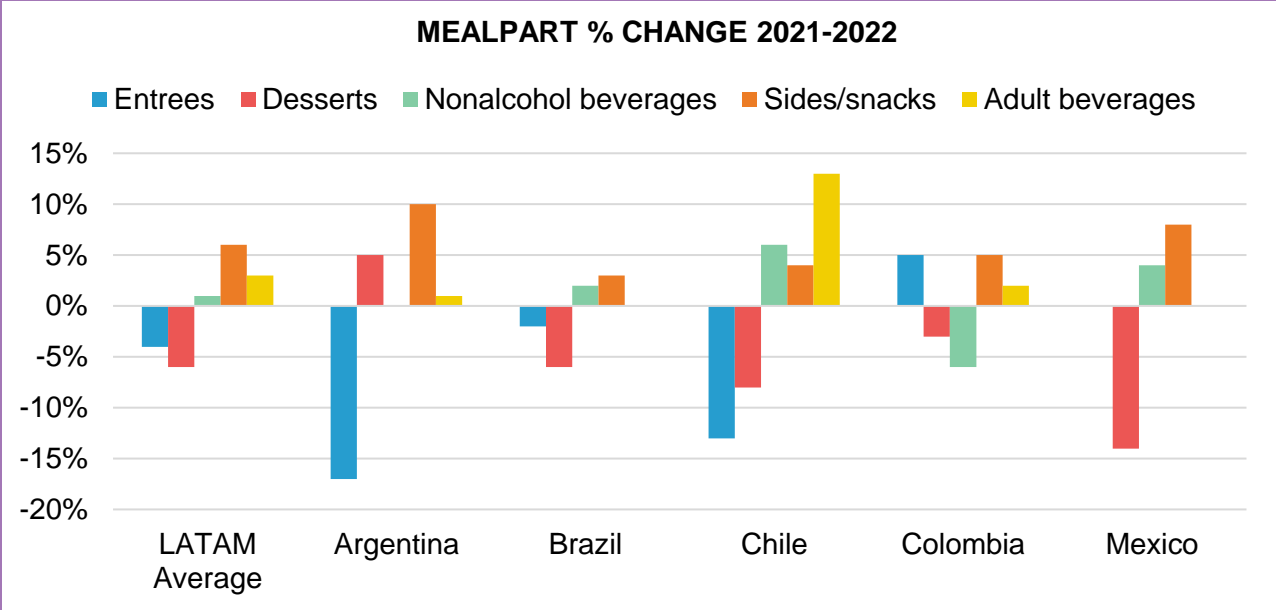
sides/snacks. Entrees and desserts saw dramatic decreases in several markets, including Argentina’s 17% drop in entrees and Mexico’s 14% decrease in dessert items. Colombia and Mexico, conversely, were the only tracked markets in the region to see entrees grow or remain stable. Other notable points include the broad growth of sides/snacks in Argentina and Mexico, and Chile’s global standout

13% growth in adult beverage menu development.

On average, dayparts have remained stable in this region over the last few years. In both 2021 and 2022, lunch/dinner items made up about 60% of all items tracked in a given year, all-day items about 38% and breakfast the remaining 1%-2%. Colombia across both years and Mexico in 2022 were outliers, seeing a closer split between

all-day and lunch/dinner items (about 42% to 56%). Brazil overindexed in 2022 with 72% of new items consisting of lunch/dinner releases—an 11% increase over the previous year.

Take a deeper dive into these markets and items with Technomic’s [Country Reports](#).



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