Industry Insights

A roundup of noteworthy Canadian foodservice findings for the week of Sept. 29, 2025






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Consumer confidence rebounds slightly but remains low

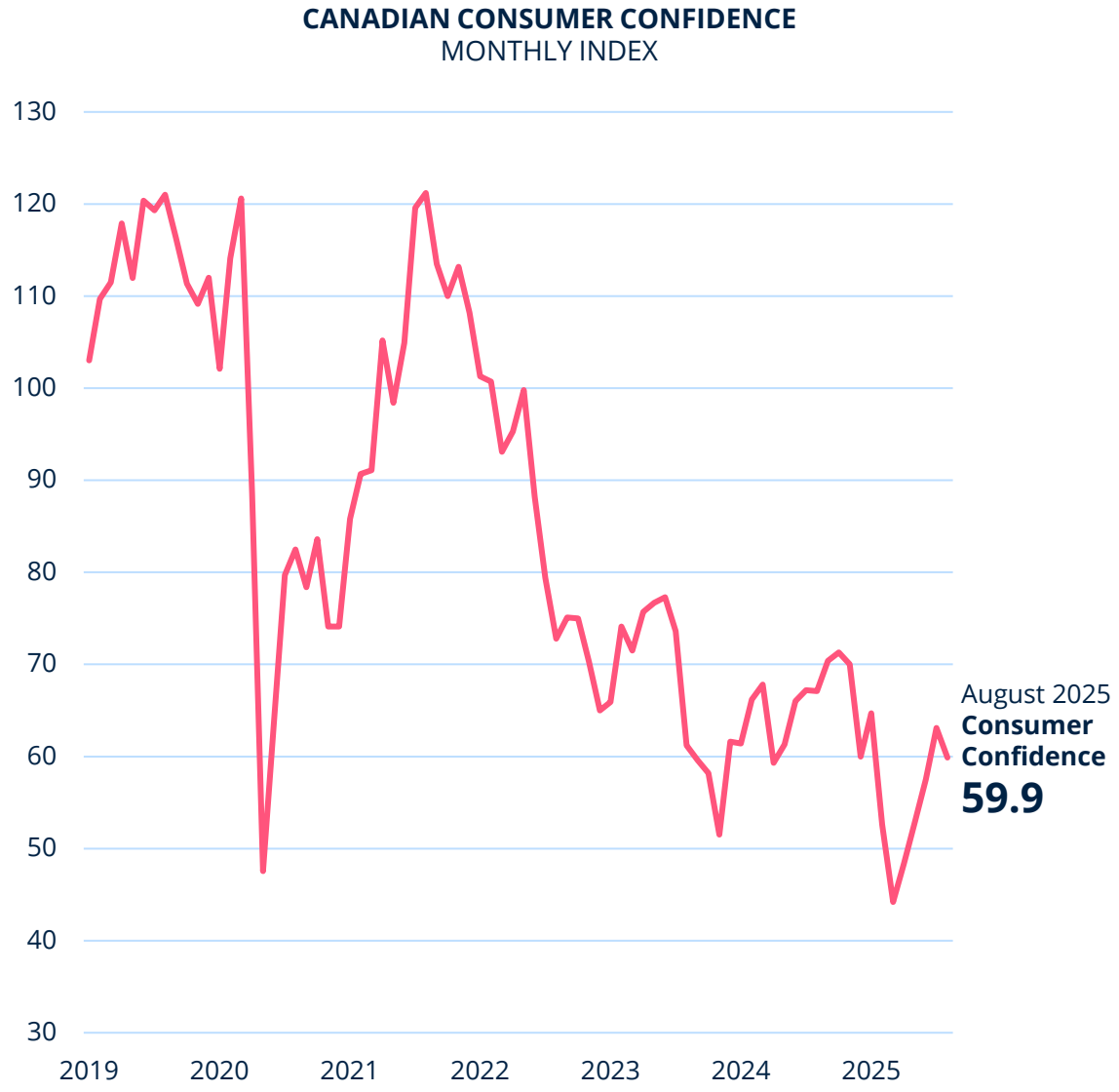
Consumer confidence hit 59.9 in August, a slight decline from the month prior but still markedly higher than the historically low levels seen earlier this year.

In March, consumer confidence plummeted to a six-year low in March 2025 amid tariff-fueled turbulence. The following months saw incremental increases to the metric as relative stability ensued.

General inflation has trended lower this year, reaching 1.9% growth in August, compared to a 2.6% mark in February earlier this year.

Track essential economic trends with Technomic's regularly-updated *Foodservice Industry Economic Indicators*.

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Source: Technomic Ignite Company

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Ignite Menu

Fastest-growing vegetables at full-service restaurants

Canadian FSRs are spotlighting a variety of veggies on menus, with a particular focus on distinct mushrooms; chanterelle, black truffle and porcini mushrooms are all proliferating on menus.

The somewhat fruity, meaty chanterelle mushrooms are being featured in noodle and risotto dishes, as well as being paired with a variety of meats, including chicken, elk and duck.

Black truffle mushrooms—a dark, woody fungi often considered a more premium option—are commonly being utilized by operators as an addition to entrees and appetizers. Menu examples include pizza, gnocchi, fish and dessert tarts.

Operators are spotlighting the earthy flavour and versatility of porcini mushrooms as a pizza topping, as well as in macaroni and cheese or risotto dishes.

Aside from mushrooms, another fast-growing vegetable on menus is the poblano pepper. This dark-green, mild pepper is often used in Mexican cuisine and showing up in quesadillas, tacos and birria dishes.

Rounding out this list of veggies is daikon. This Japanese radish, which is larger and milder compared to traditional radishes, is appearing with ahi tuna, as well as an ingredient in sushi rolls and seafood bowls.

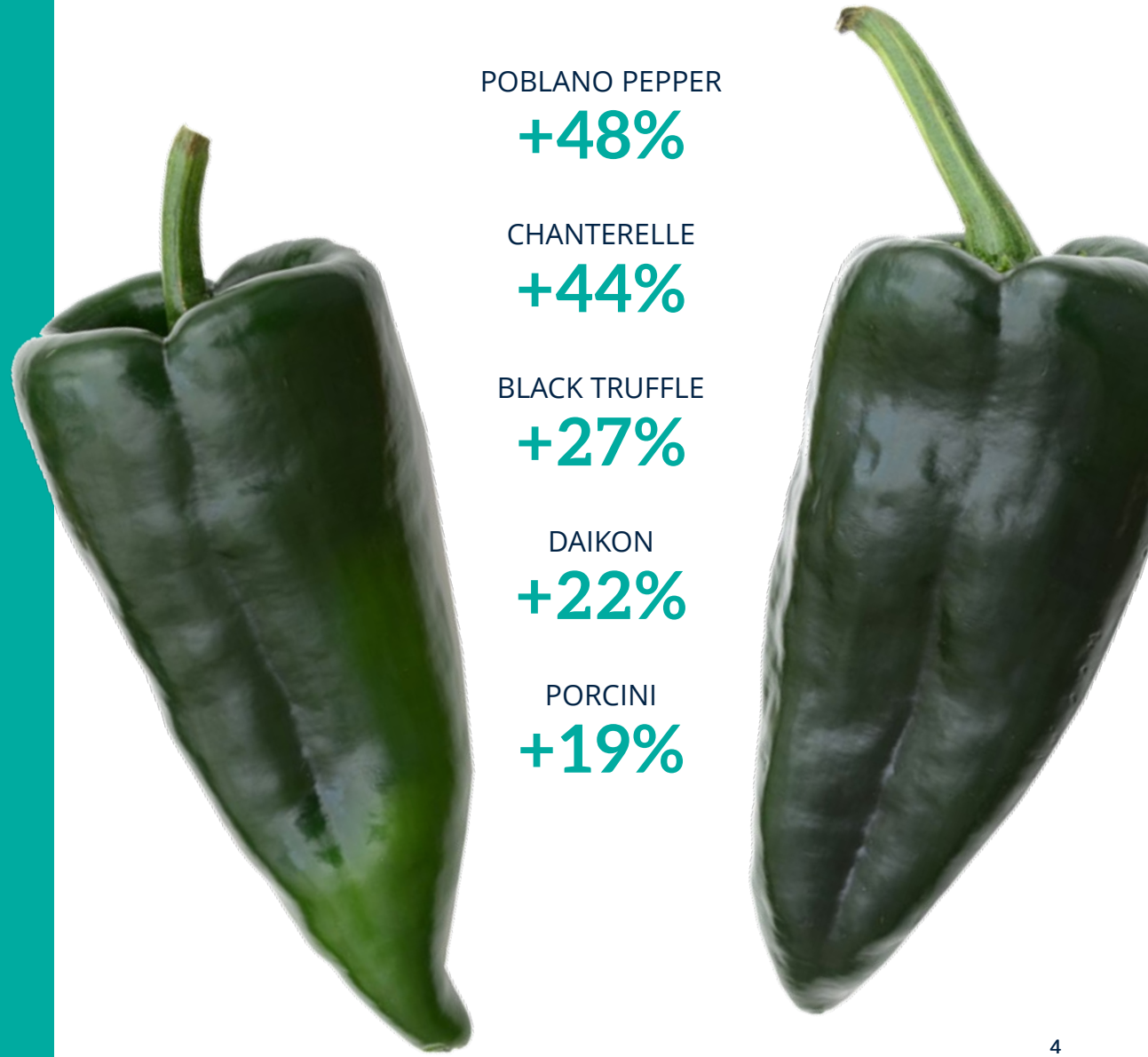
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Source: Technomic Ignite Menu, Q2 2024-Q2 2025
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FASTEST-GROWING VEGETABLES AT FULL-SERVICE RESTAURANTS

Q2 2024-Q2 2025



POBLANO PEPPER
+48%

CHANTERELLE
+44%

BLACK TRUFFLE
+27%

DAIKON
+22%

PORCINI
+19%

Ignite Consumer

The midday meal occasion: lunch

The lunch daypart remains a crucial opportunity for restaurant operators, with one-quarter of all restaurant occasions taking place during this time.

Lunch tends to be more of an in-unit experience, with 61% of lunch guests dining inside the restaurant. This daypart is also highly habitual, with 37% of guests describing their occasion as routine (compared to 31% overall).

Health plays a larger role, as noted by 28% of guests who cited better-for-you as their primary need state. This health-focused mindset helps explain why Freshii and Subway claim the top spots among chains visited for lunch.

To capitalize on lunch traffic, operators should:

- Create consistent experiences that foster weekday loyalty
- Feature health-forward menu options to meet elevated demand
- Optimize operation efficiency during peak hours

By addressing these lunch-specific behaviours, restaurants can convert occasional visitors into regular patrons while satisfying the distinct midday dining preferences.

Ignite Consumer clients: Click here for more

Base: 24,350 Canada consumers ages 18+
Source: Technomic Ignite Consumer, Q3 2024-Q2 2025
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Global Foodservice Navigator

Menu development activity in North America

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, tracked North America together saw about a 39.2% increase in items released per chain, with this growth by far the highest of any tracked region and nearly double that of the runner-up region (Latin America). Unlike in other regions, this difference was not driven by any single market, with both Canada and the U.S. seeing nearly 40% increases.

While menu development in the U.S. did not see substantial daypart change year over year, Canadian operators broadly shifted away from all-day items toward those rolled out for lunch and dinner, with the latter daypart seeing an 11% increase from 2023.

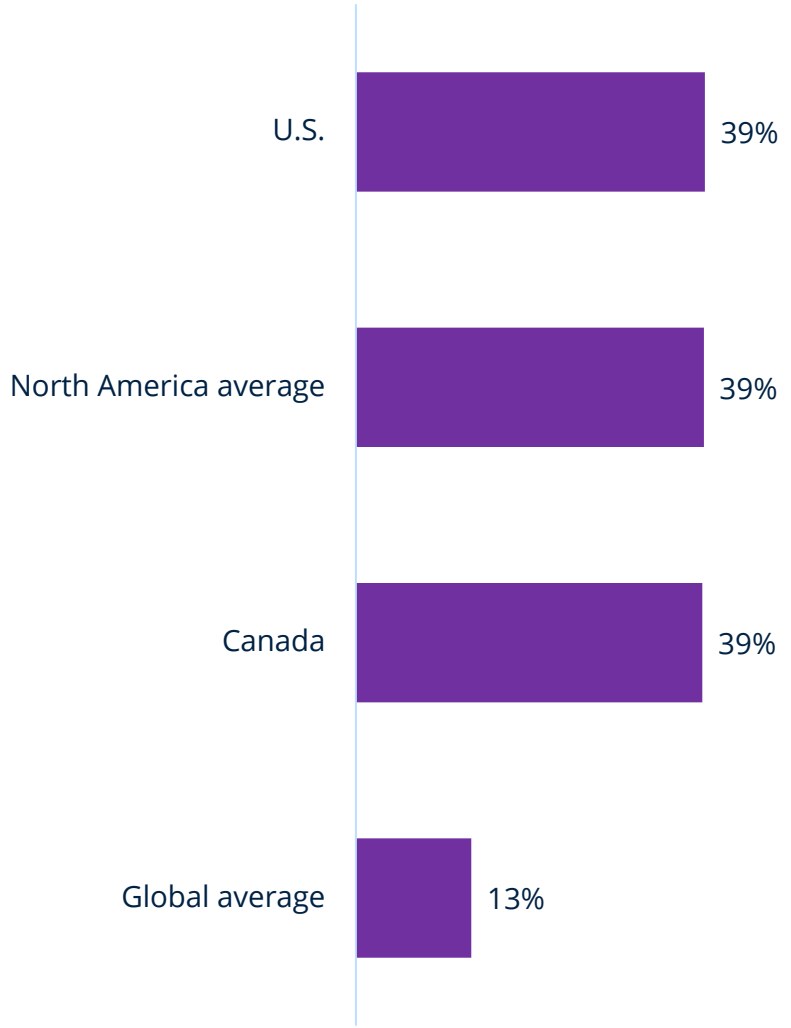
At the same time, this change saw a notable (approximately 5%) decrease in nonalcohol beverage and side/snack development in the market in favor of entrees and adult beverages (also approximately 5%). This mealpart shift was only partially reflected in the U.S., where chains introduced a similarly reduced number of nonalcohol beverages (-5%) but saw smaller growth in entrees (3%) and desserts (2%).

Global Navigator clients: Click here for more

Source: Technomic Global Foodservice Navigator Program

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



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