Industry Insights

A roundup of noteworthy Canadian foodservice findings for the week of Nov. 10, 2025




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Ignite Company

Pizza Pizza growth slows in Q3 despite positive streak

Same-store sales at Pizza Pizza decelerated in Q3 2025, growing by 0.3% compared to 2.1% in the previous quarter. Despite this deceleration, the results mark the third consecutive quarter of positive same-store sales for the brand, following three consecutive quarters of same-store sales decline dating back to Q1 2024.

Year to date, same-store sales have grown 1.0% en route to more than $400 million in total system sales.

The brand continued its expansion during the quarter, adding four traditional and 10 nontraditional Pizza Pizza restaurants, while closing four other locations.

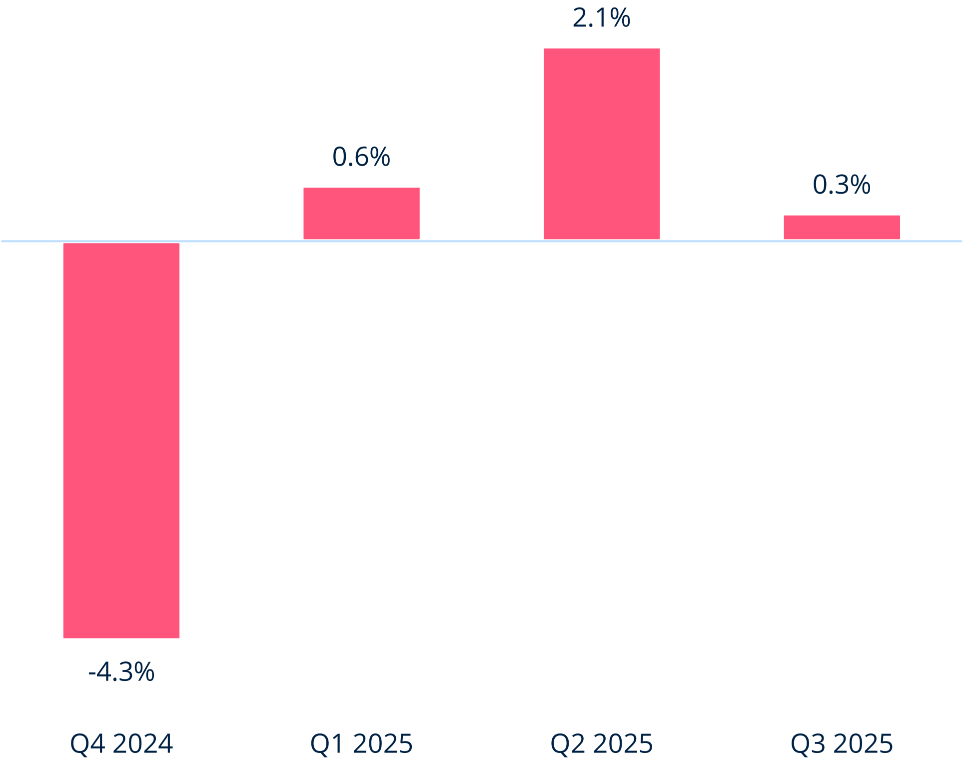
Pizza 73, the brand's sister company, reported a same-store sales decline of 1.1%, compared to 2.0% growth in the prior quarter.

Ignite Company clients: Click here for more

Source: Technomic Ignite Company and Pizza Pizza Investor Relations

PIZZA PIZZA

YEAR-OVER-YEAR SAME-STORE SALES GROWTH



Ignite Menu

Fastest-growing proteins at breakfast

Operators are turning to both classic breakfast protein options, such as pork and beef sausages, as well as nontraditional ones, including pea protein and fried chicken, to add excitement in the morning and boost cheques.

Pork and beef sausages are among the top five fastest-growing proteins at breakfast. Operators traditionally menu these sausages as a side for standard breakfast starches and egg dishes or atop egg sandwiches. As consumers grow increasingly interested in protein more broadly, operators are upping their menuing of these familiar options.

Fried chicken is increasingly popping up in a variety of breakfast dishes, including chicken and waffles, and chicken wraps, sometimes paired with other proteins, such as sausage and bacon. Operators are riding the chicken wave that has been so popular at lunch and dinner, and incorporating it more in breakfast dishes.

Operators are menuing pea protein for a plant-based option, primarily in smoothies and juices. This protein powder draws in customers who prefer plant-based or dairy-free choices.

Steak rounds out the top-five fastest-growers as a more premium option, raising the price of breakfast dishes by $1.09 on average. With a $4.26 uptick in average price when added to egg dishes, steak is—no surprise—popping up in omelets, egg Benedicts and breakfast burritos, and even atop breakfast pizzas for a nontraditional option.

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Source: Technomic Ignite Menu, Q3 2024-Q3 2025
Image Source: Shutterstock

FASTEST-GROWING PROTEINS AT BREAKFAST
Q3 2024-Q3 2025

PORK SAUSAGE
+25%

FRIED CHICKEN
+12%

PEA PROTEIN
+10%

BEEF SAUSAGE
+10%

STEAK
+9%

Ignite Consumer

Gen Zers shifting to lunch at full service

Notoriously known as the "snacking generation," Gen Zers are most likely to visit or order from restaurants during off-peak mealtimes for what we like to call snacking occasions.

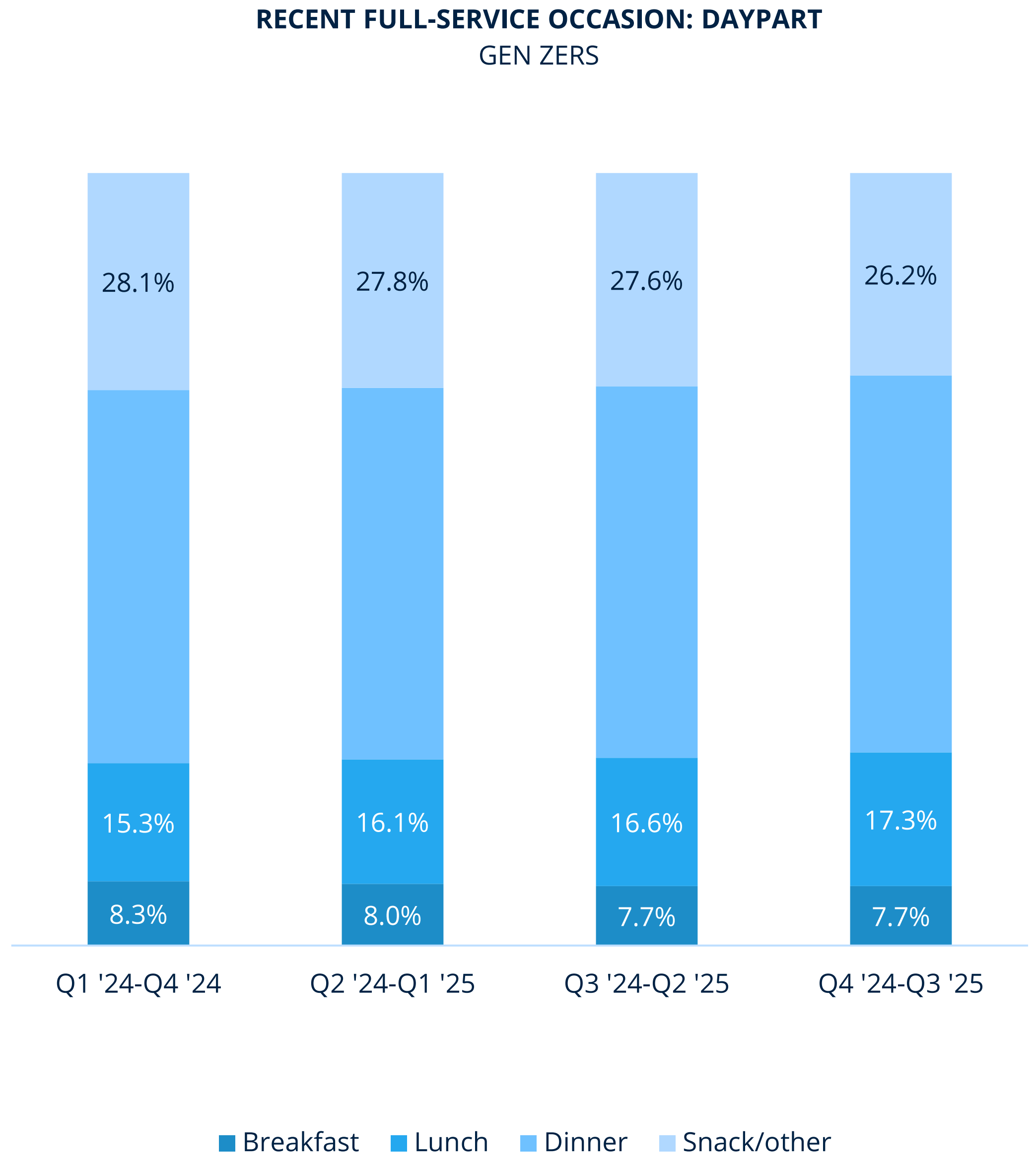
Recent data, however, shows that a shift is happening with this generation at full-service restaurants that moves away from snacks toward a more traditional daypart: lunch.

Compared to the year-ending Q4 2024 period, the share of full-service lunch occasions has increased by 2 percentage points, while snacking occasions have decreased by that same amount. The numbers may seem small, but they do represent a significant change as the data comes from over 2,700 actual Gen Z restaurant occasions annually.

The increase in lunchtime traffic can be attributed to return-to-office mandates or perhaps reflect consumer value perceptions. Consumers can get a higher-quality meal compared to QSR, and visiting for lunch tends to be more affordable than visiting for dinner.

Ignite Consumer clients: Click here for more

Base: 6,500 Canada consumers ages 18+
Source: Technomic Ignite Consumer, Q3 2025



Global Foodservice Navigator

Beverages boom in Southeast Asia

Local, regional and global coffee cafe chains in Southeast Asia have seen markedly high menu development activity through 2025, with new and LTO items rolled out at a similar or faster pace than any other year on record.

On average, coffee cafe operators this year so far have introduced about 11 more items per chain in this region, with 43 items per chain rolled out compared to the average chain adding around 32.

Collectively, this pace amounts to about a quarter of all releases captured in this region. Nonalcohol beverages make up just under half of these chains' new/LTO items, as well as just over half of nonalcohol beverages introduced by any kind of chain in the region.

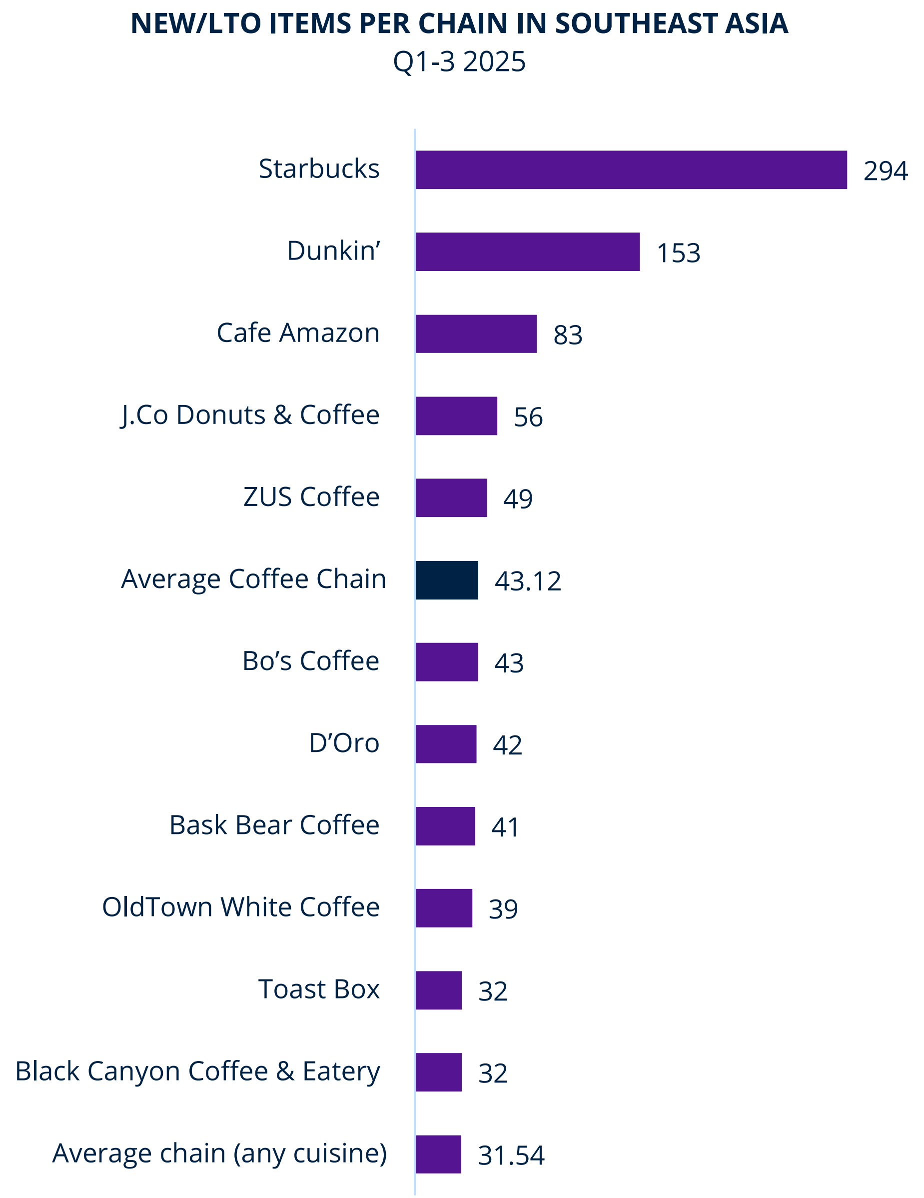
This quick cadence has not only formed a key part of these chains' traffic-driving strategies but coincided with unit milestones and expansion plans announcements.

For example, Malaysia-based ZUS Coffee reached 1,000 systemwide locations, Thailand-based Inthanin Coffee plans to reach 1,800 units (up approximately 500 from today) by EOY 2028, and Indonesia-based Kenangan Brands—Kopi Kenangan's operator—outlined plans to enter new global markets in 2026.

Brands from outside the region, like China's Luckin Coffee and U.S.-based Dunkin', have taken similar action to expand in Southeast Asia, with the former receiving halal certification in Malaysia and the latter signing a new franchisee to take over the coffee QSR's existing operations and develop new units.

Global Navigator clients: Click here for more

Source: Technomic Global Foodservice Navigator Program



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312-876-0004
info@technomic.com
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