

Industry Insights

A roundup of noteworthy Canadian foodservice findings for the week of Dec. 15, 2025



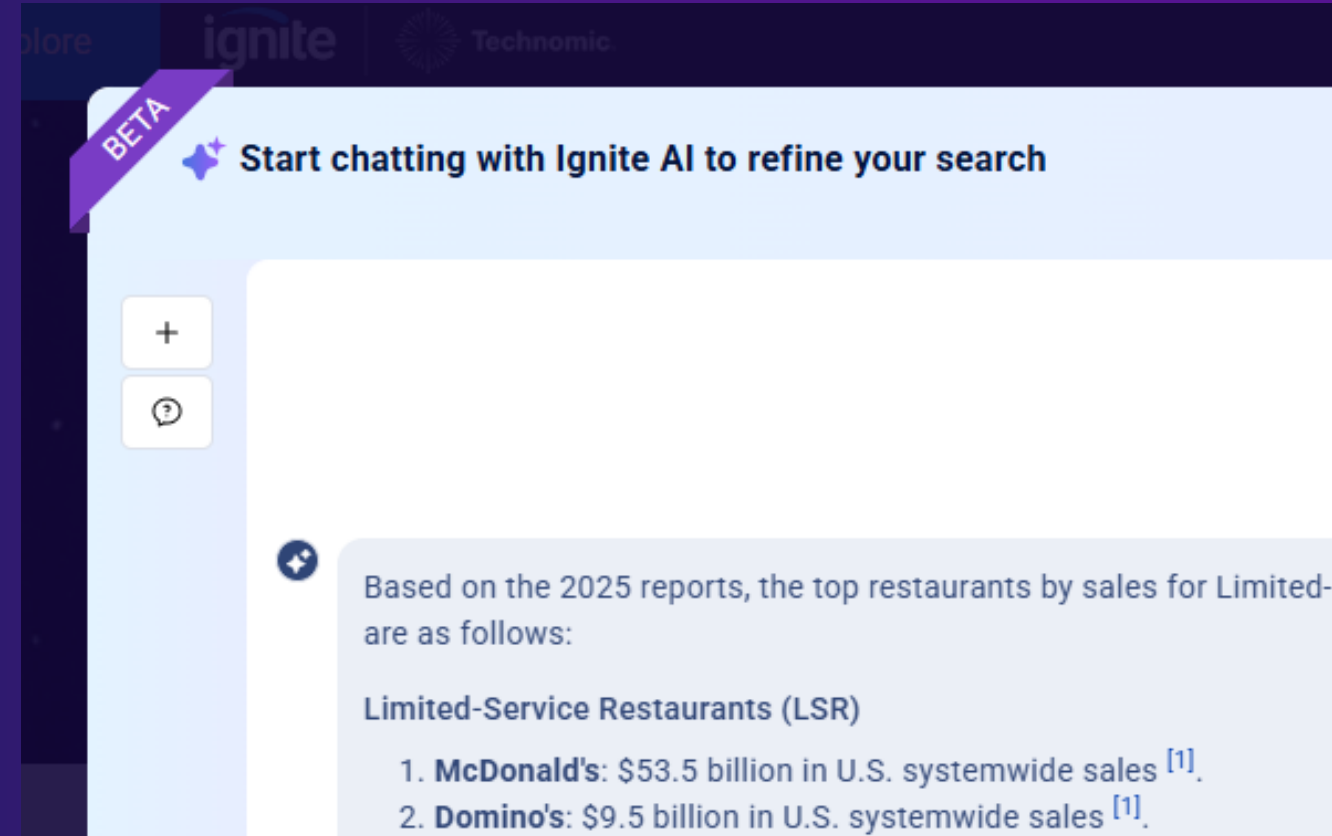
Image Source: Shutterstock

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How have chain restaurants performed in 2025?

Technomic's latest performance projections for the industry's top 250 Canadian chain restaurants indicates that cumulative chain sales will expand by 2.5% in 2025, a slight deceleration from the prior year's 2.9% increase.

Stagnant results for limited-service players like A&W and Pizza Pizza through the first three quarters of the year will result in slower segment sales growth in 2025 relative to performance trends from prior years.

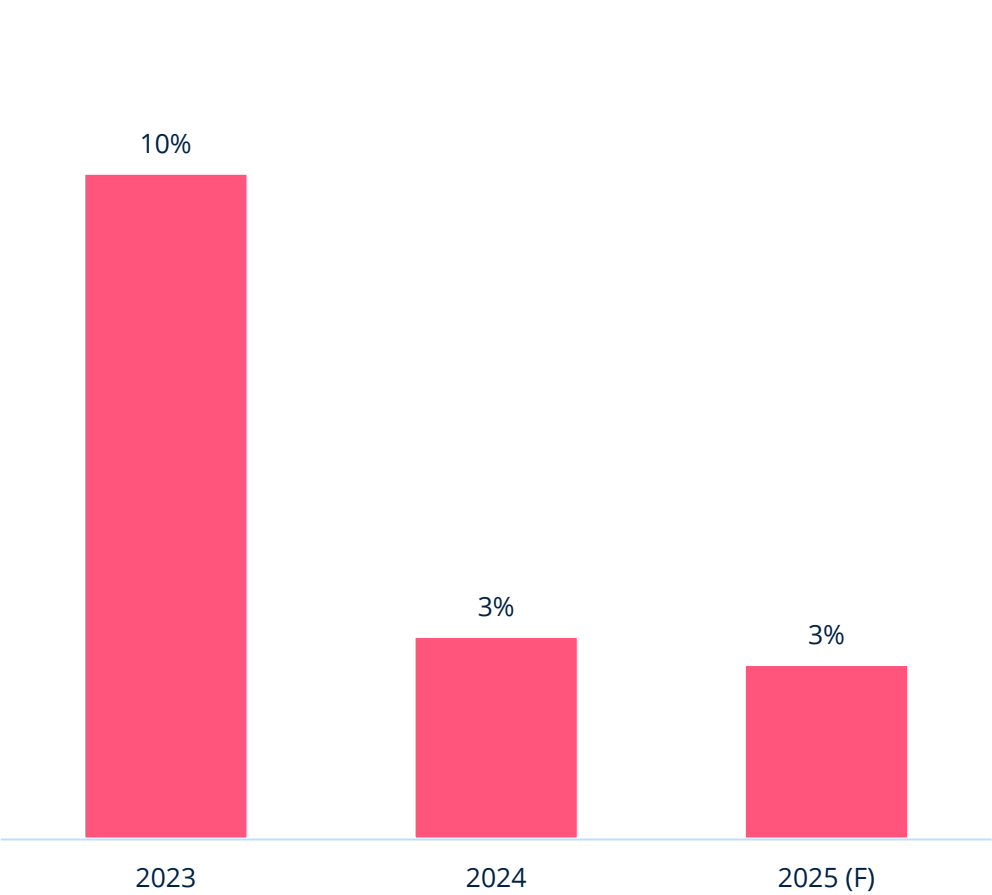
Full-service segment growth is projected to see moderate acceleration in 2025, driven in part by an uptick in comparable sales performance by chains like Boston Pizza and The Keg.

Access deeper segment and cuisine category performance forecasts in the newly-released *Canadian Chain Restaurant Performance Outlook*.

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Source: Technomic Ignite Company
Note: (F)=forecast; All forecasts are preliminary and subject to revision

TOP 250 CANADIAN CHAIN RESTAURANTS
ANNUAL SALES CHANGE



Menu growth moderates

Here are some takeaways from Canadian menus in Q3 2025.

Overall, menu item counts continue to grow year over year, with average item counts showing an increase of 1.9%. Following the trend from prior quarters, year-over-year growth is more moderate than both Q2 2025 (+2.7%) and Q1 2025 (+7.8%), due to economic pressures and operational challenges faced by operators.

Kids menus (+6.8%) and add-ons (+5.3%) remain on top, with kids sides (+26.9%) and add-on sides (+7.3%) in the lead. Kids sides on the rise include kids bread sides (+80.0%) and kids protein sides (+57.1%). For add-ons, operators can use combo meal add-ons (+41.7%) to boost cheques.

Add-ons also take the lead when it comes to pricing upticks. This is largely driven by the 7.2% uptick in the price of add-on sides, such as protein add-on sides (+19.4%).

Dessert item counts expounded this quarter (+4.5%), with specialty desserts (+10.5%), including dessert waffles (+39.8%) and profiteroles (+23.3%), at the top.

Sweet flavours are proliferating on menus, such as creme brulee (+55.3%), dragon fruit (+44.0%), white chocolate-macadamia (+37.5%) and vanilla creme (+31.6%) as the fastest-growing options. These flavours often have positive impacts on price as a benefit to the operator, such as the addition of creme brulee flavours on average increasing price by 56 cents.

ITEM COUNT GROWTH % IN THE LAST YEAR Q3 2024-Q3 2025

+6.8%
KIDS MENU

+5.3%
ADD-ON

+4.9%
SIDE

+4.5%
DESSERT

+3.7%
NONALCOHOL
BEVERAGE

+0.8%
ENTREE

-0.1%
APPETIZER

OVERALL
+1.9%



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

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

Top rated LSRs for craveable items

Across more than 30 Canadian limited-service chains tracked in Ignite Consumer, Edo Japan tops the list for “craveable items I can only get here.”

More than half of recent Edo Japan guests (51%) provided a top-box rating for this guest experience measure, significantly outperforming the limited-service average (42%).

Recent guests cited the brand’s sauce/condiments (29%), beef (20%) and sushi (16%) as its most craveable items.

These craveable items also contributed to overall satisfaction, as noted by one recent guest:

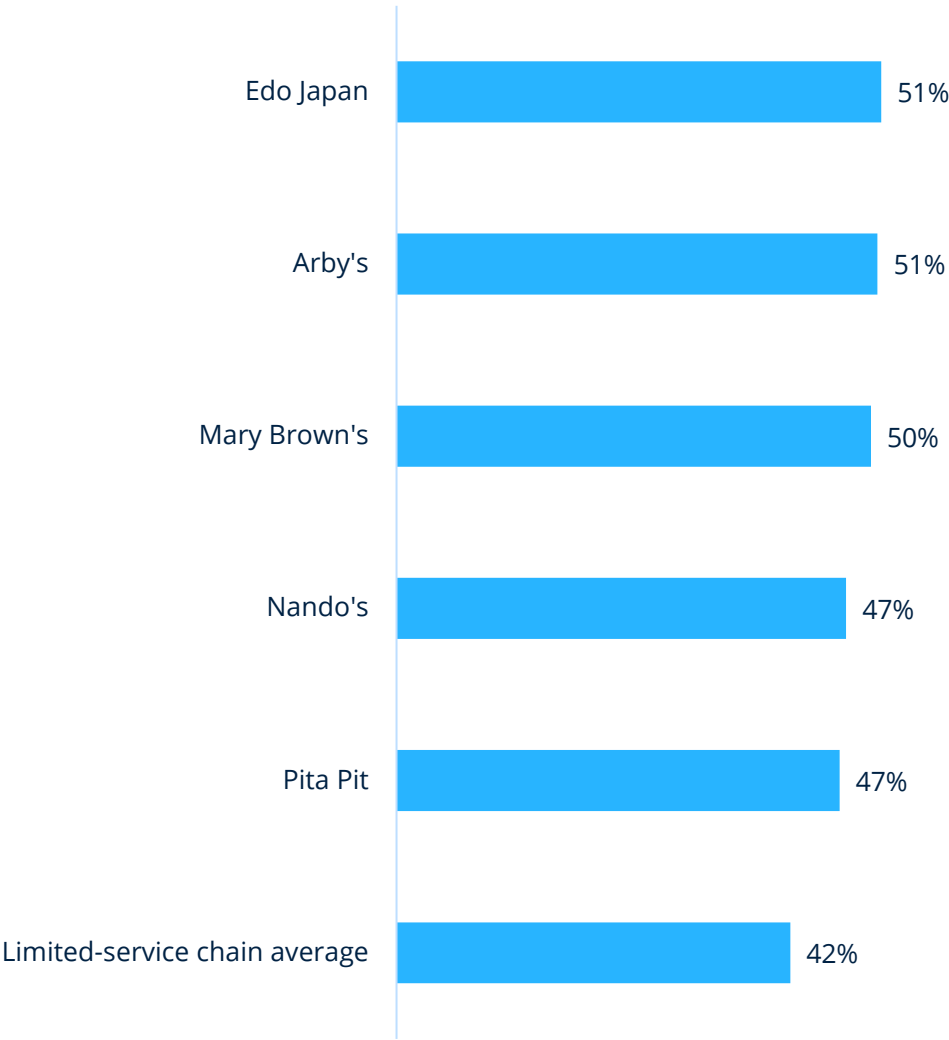
“I love the bento boxes, their teriyaki chicken and sushi selection.”

- Recent Edo Japan guest, reason for “excellent” satisfaction

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

Base: 6,500 Canada consumers ages 18+
Source: Technomic Ignite Consumer, Q4 2024-Q3 2025

TOP RATED LSR BRANDS FOR “CRAVEABLE ITEMS”
% RANKING “VERY GOOD”



The importance of sustainability globally

In its newly released *Sustainability Grab & Go Report*, Technomic took a deep dive into how consumers around the world respond to socially and environmentally responsible initiatives like sustainable sourcing, recycling programs and more. With global operators stepping up these programs and global consumers broadly responding positively, understanding this relationship is of key importance.

Broadly, consumers in Asia—particularly Southeast Asia—and in Latin America strongly overindex the global average in ranking participation in responsible initiatives as somewhat or very important when choosing which LSRs and FSRs to visit, many doing so by double digits.

Notably, restaurant patrons in India and Indonesia rank these initiatives as more important to them than low prices, doing so by a respective 8% and 3%, respectively, with consumers in many other markets rating the importance of these two attributes within less than 10 percentage points from each other.

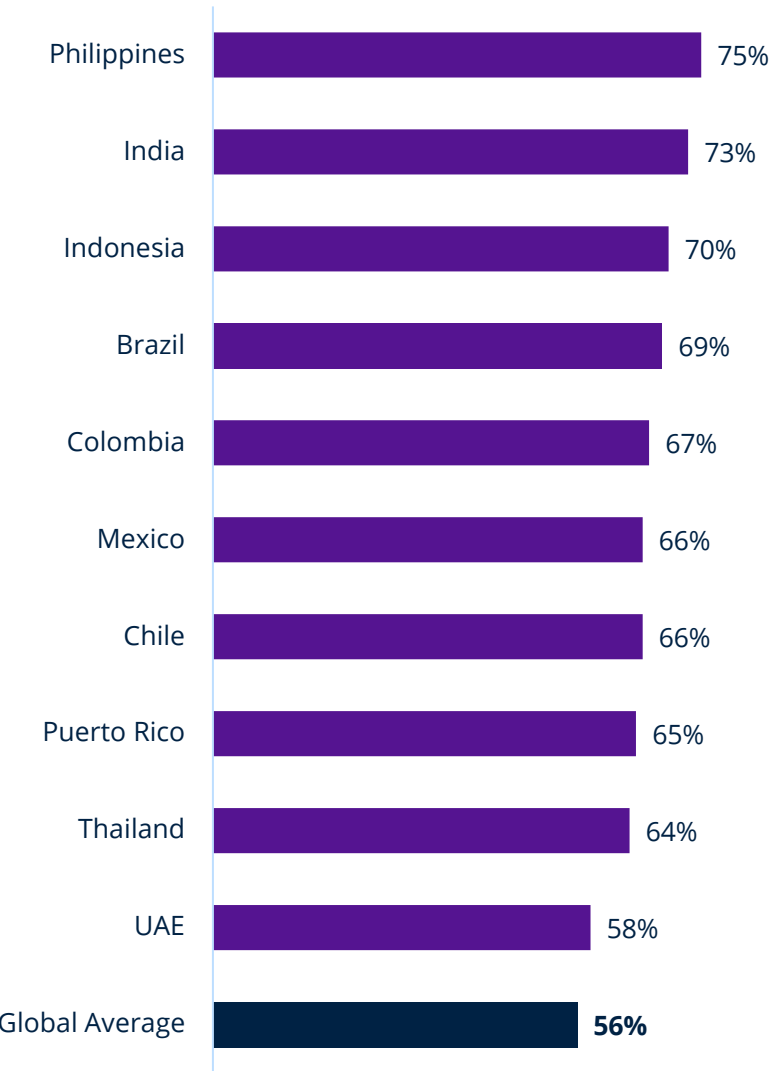
Additionally, More than half of all surveyed consumers indicated they are more likely to order from restaurants that provide sustainable packaging.

Likewise, whereas only about a third of consumers have participated in reusable cup or food container programs, 54% note that they would if these options were available to them.

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Source: Technomic Global Foodservice Navigator Program

% CONSUMERS WHO FIND SOCIALLY RESPONSIBLE INITIATIVES SOMEWHAT/VERY IMPORTANT WHEN CHOOSING AN LSR TO VISIT



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We provide insights into consumer, industry and menu trends in the U.S., Canada and 23 markets 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?

Reach out to us today.

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