



Consumer Foodservice in Canada

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Consumer Foodservice in Canada

EXECUTIVE SUMMARY

Industry remains resilient amid continuing cost-of-living pressures

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Tourism and tax relief support growth amid cautious consumer spending

Delivery is core to foodservice

Loyalty programmes serve to strengthen customer retention

WHAT'S NEXT?

Tourism, loyalty programmes and digital engagement to drive value growth

Fulfilment will continue to evolve

Smart packaging and circular waste systems will drive foodservice sustainability

COMPETITIVE LANDSCAPE

Tim Hortons leads Canadian foodservice

Ikea leads growth

Major brands expand across untapped areas

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Chained operators increase their dominance

Tailored innovations meet the needs of standalone and non-standalone foodservice models

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Cafés/bars adapt to health, convenience and digital trends

INDUSTRY PERFORMANCE

Cafés/bars seek to reinvent themselves with expanded menus and extended opening hours

Specialist coffee and tea shops lead growth

WHAT'S NEXT?

Slow growth amid rising costs

Proposed extended alcohol service hours could boost sales in major cities

Healthier, more sustainable choices will shape the industry

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Full-service restaurants navigate cost pressures

INDUSTRY PERFORMANCE

Positive growth amid lower profit margins

Latin American and North American chains drive growth

Takeaway and delivery reduce costs for consumers

WHAT'S NEXT?

FIFA World Cup expected to provide temporary boost to sales

Labour and regulatory changes will impact the industry

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INDUSTRY PERFORMANCE

- Limited-service restaurants thrive on back of value, convenience, and health trends
- Chained pizza restaurants lead growth
- Ghost kitchens gain traction

WHAT'S NEXT?

- Modest growth projected amid rising costs and competition
- Delivery and takeaway will outpace eat-in with integrated services
- AI integration to revolutionise operations

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Self-service cafeterias drive growth with high-volume, value-driven models

INDUSTRY PERFORMANCE

Players maintain profitability through menu and layout optimisation

Chains lead growth

Increased automation plays transformative role

WHAT'S NEXT?

Self-service cafeterias could benefit from snacking trend

Plant-based and allergen-friendly options to drive innovation

Technology-driven innovation will be key differentiator

COMPETITIVE LANDSCAPE

Ikea drives growth through high-volume, value-oriented cafeterias

Chained operators dominate self-service cafeterias

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Kiosks evolve from snack stops to meal destinations

INDUSTRY PERFORMANCE

Street stalls/kiosks capitalise on on-the-go snacking trends

The kiosk model magnifies the advantages of scale

Street stalls/kiosks increasingly partner with third party delivery companies

WHAT'S NEXT?

FIFA World Cup to boost sales

Food innovation to drive growth

Rising demand for locally-sourced, transparent ingredients

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Tourism boosts travel locations while standalone locations benefited from improved economy

INDUSTRY PERFORMANCE

Travel locations benefit from rising domestic and inbound tourism

Standalone growth is driven mainly by rising prices

Airport operators elevate dining experiences to meet customer expectations

WHAT'S NEXT?

Retail locations to lead non-standalone growth

Standalone sales will continue to grow, despite ongoing challenges

Drive-through still offers strong growth potential

Ageing population, cultural diversity and urbanisation will impact operator decisions

COMPETITIVE LANDSCAPE

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Large casual-dining operators lead stand-alone landscape

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