

Foodservice FACTS



ANNUAL CANADIAN RESTAURANT MARKET REVIEW & FORECAST

INTO THE BEYOND

Future-ready your business today
to seize the opportunities of tomorrow.



Size and Scope of the Foodservice Industry

A vital part of everyday life and the Canadian economy.



Canadians make **23.7 million visits** to a restaurant every day.



More than **100,000** foodservice locations across Canada.



The restaurant industry employs **1.2 million** workers.



80% of Canadians agree that they **enjoy going out to restaurants to connect** with their friends and family.



75% of Canadians agree that restaurants are a **great place to have a memorable experience.**



From daily visits to jobs and community connections, **the foodservice industry is essential to Canada.**



Annual total foodservice sales in Canada in 2025



**\$125
billion**

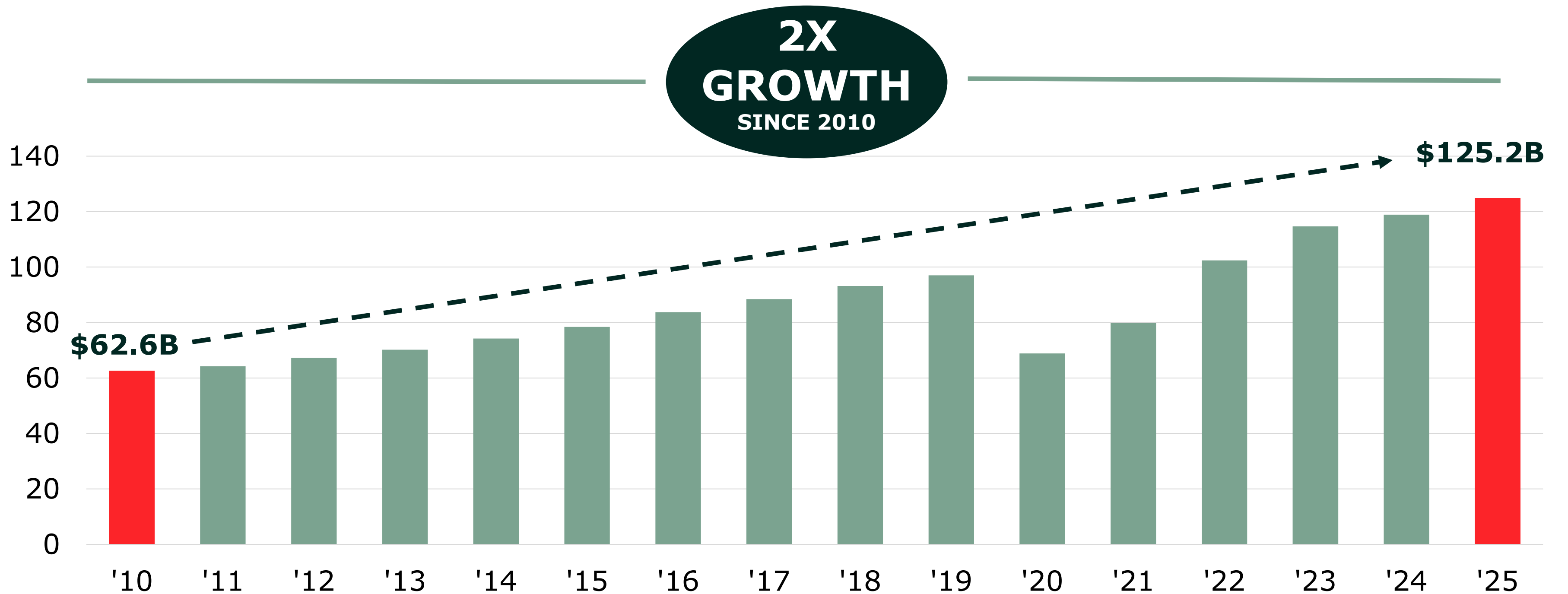
Canada's foodservice industry continues to expand and remains a significant contributor to the overall economy.



A driving force in communities across the country.



Canada's foodservice industry has doubled in size



Foodservice is a growing sector of the Canadian economy.



Most Restaurant Purchasing Is Already Local

Restaurants Canada research shows domestic sourcing remains the foundation of the industry.



68%

of all food and beverage purchases

by restaurants are sourced domestically



Domestic sourcing is deeply embedded in the industry.



EVEN HIGHER
IN DAIRY



89%

for dairy and cheese



Dairy Purchases Made by the Restaurant Industry

In billions, 2025 (estimated)



\$4.6B

in total dairy purchases



Second-highest

purchase category
after beef (\$5B)



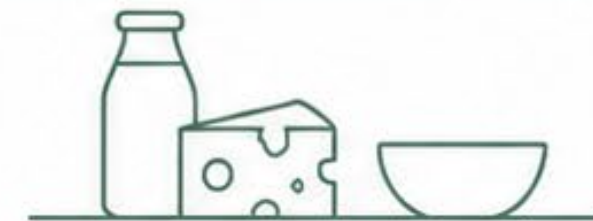
Represents

15%

of all food/beverage
purchases made
by restaurants













Dairy is a critical part of restaurant kitchens—
and a major driver of foodservice spending.



On the Menu: Top 10 Food Trends

(% of orders)

Share of orders that included a particular menu item

RANKING	MENU ITEM	2024	2025	DIFFERENCE
1	 French Fries / potatoes / sweet potatoes / onion rings	15.6%	14.9%	▼ -0.7%
2	 Breakfast (includes breakfast sandwiches)	11.0%	11.6%	▲ +0.6%
3	 Burgers	9.7%	9.5%	▼ -0.2%
4	 Chicken entrées	8.1%	8.0%	▼ -0.1%
5	 Sandwich / subs	7.4%	7.6%	▲ +0.2%
6	 Pizza / panzerottis / calzones	4.4%	4.6%	▲ +0.2%
7	 Breads	4.2%	4.2%	— 0.0%
8	 Cakes / squares / muffins	3.8%	4.1%	▲ +0.2%
9	 Donuts / beignets	3.7%	4.0%	▲ +0.3%
10	 Wraps / burritos / tacos / nachos	3.5%	3.5%	— 0.0%

KEY TAKEAWAYS



French fries remain the **most-ordered menu item**, though slightly down vs. 2024.



Pizza moves up in share, continuing its upward trend.



Breakfast, sandwiches, and baked goods see **gains** in 2025.



Source: Ipsos Foodservice Monitor

Percentage refers to “percentage of items” or “percent of orders” that included a particular food or beverage item.

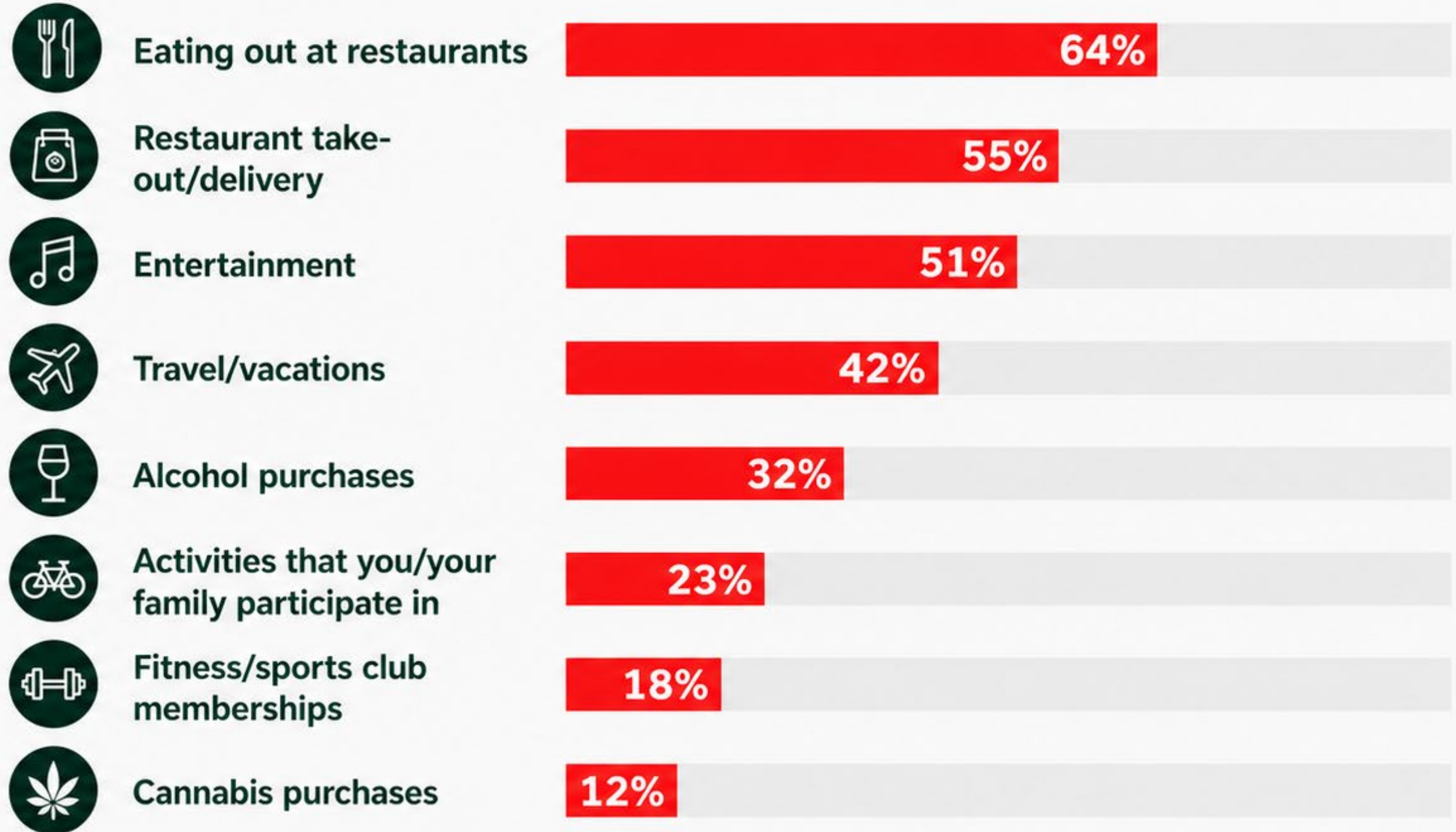


Decrease in discretionary spending by Canadians

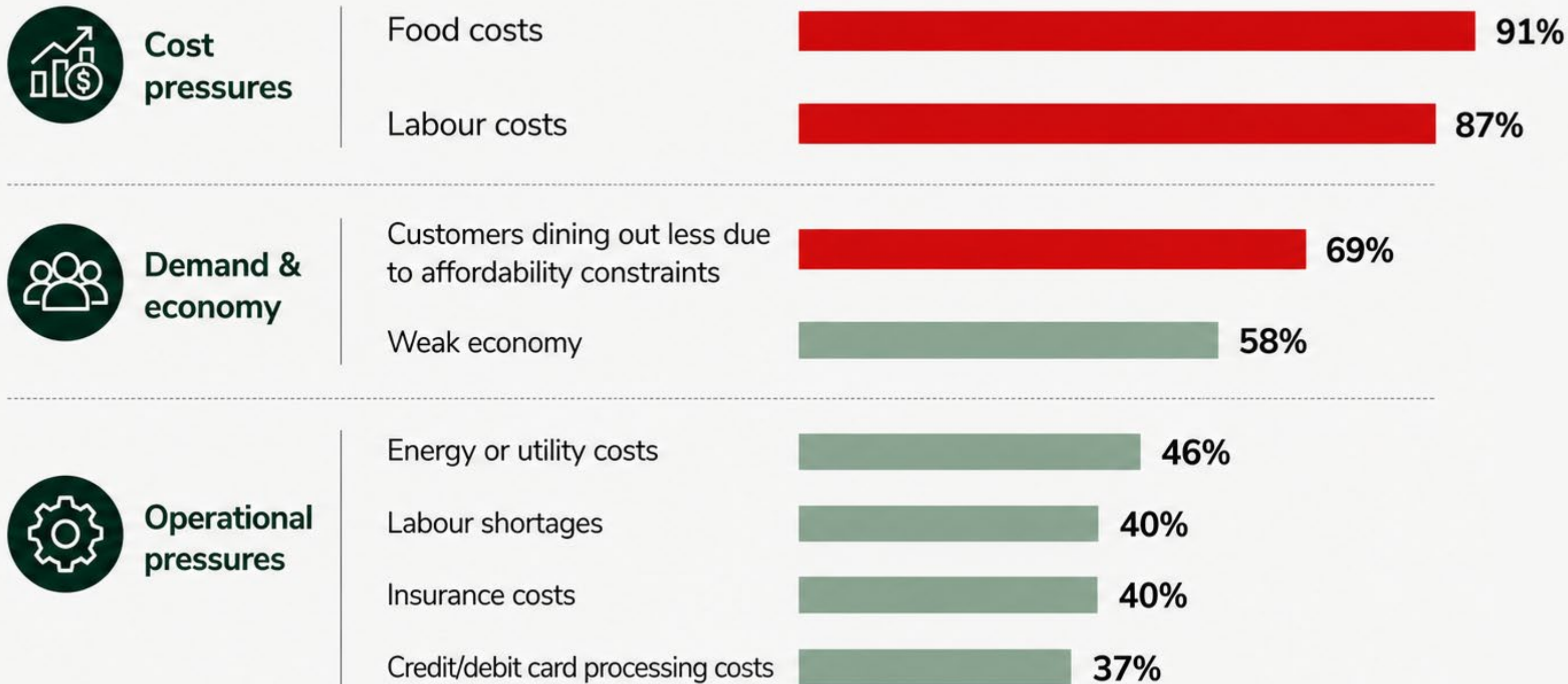


78%

of Canadians have decreased their discretionary spending

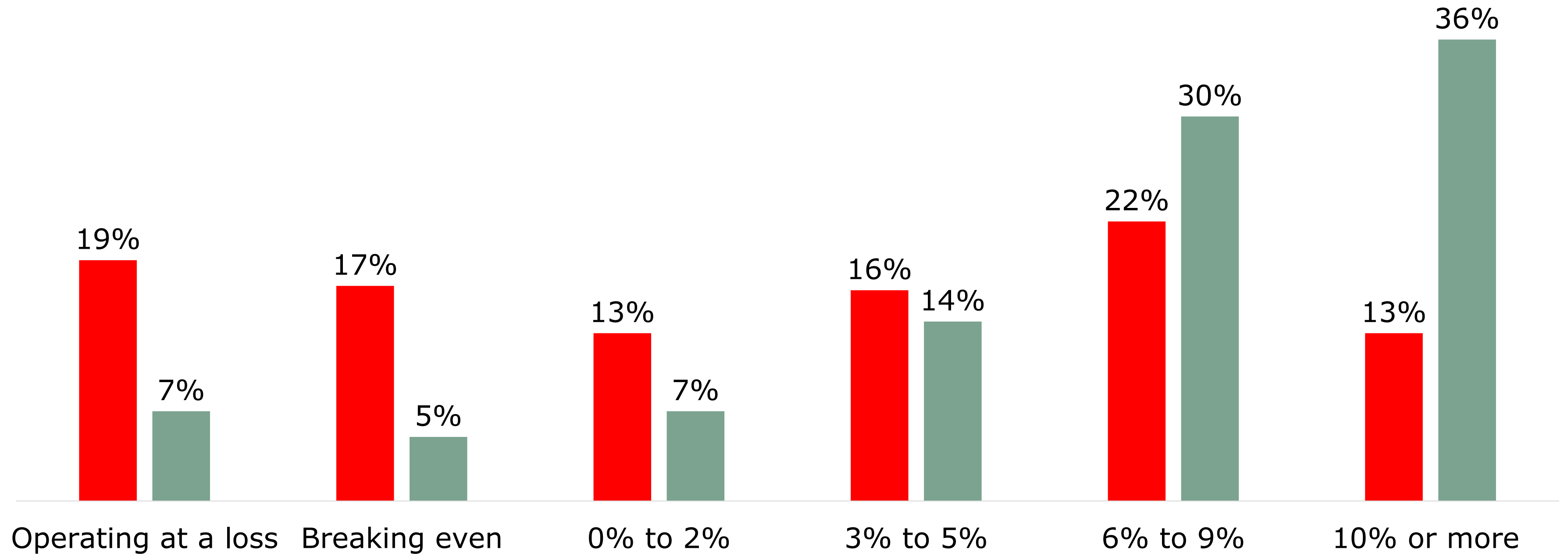


Top challenges facing restaurants (share of respondents)



36% of restaurant companies are NOT earning a profit

■ Current (March 2026) ■ 2019



Source: Restaurants Canada's Restaurant Outlook Survey
Q: What best describes the current profitability of your overall operations?



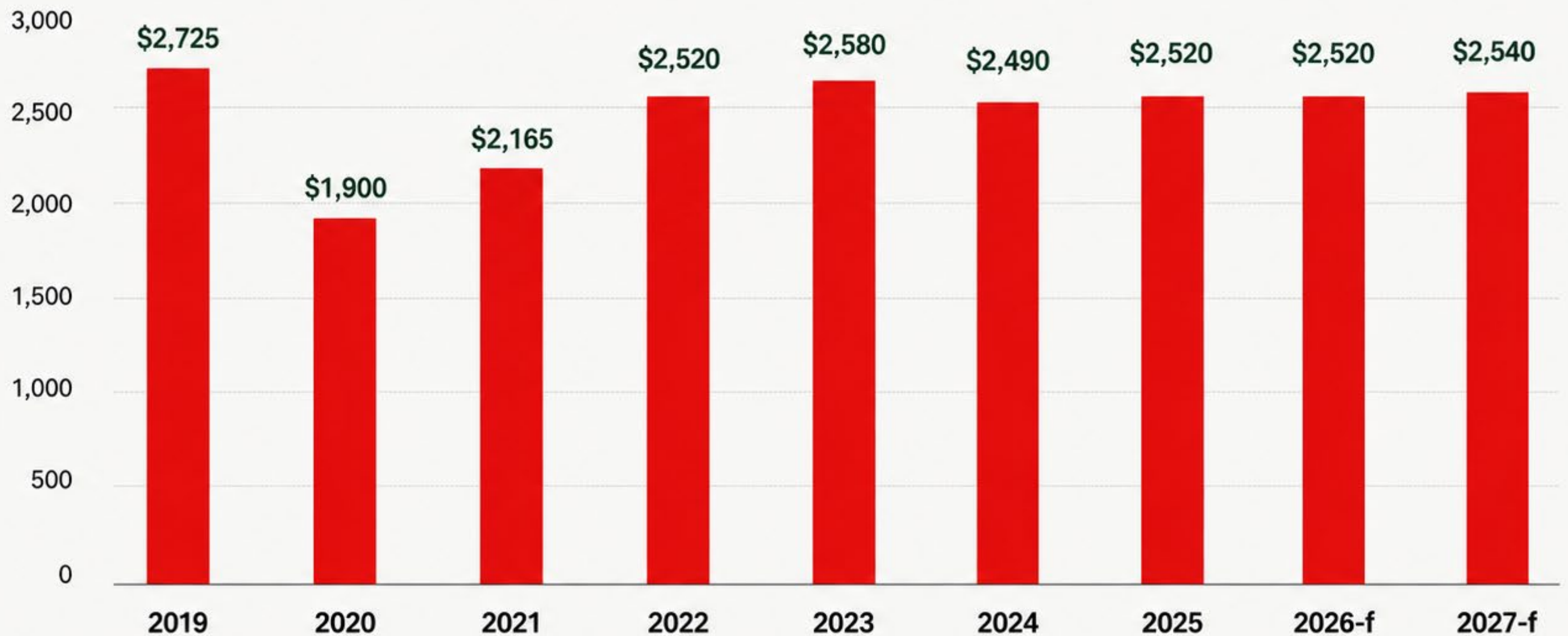
Per capita commercial foodservice sales – Canada

(in 2026\$)



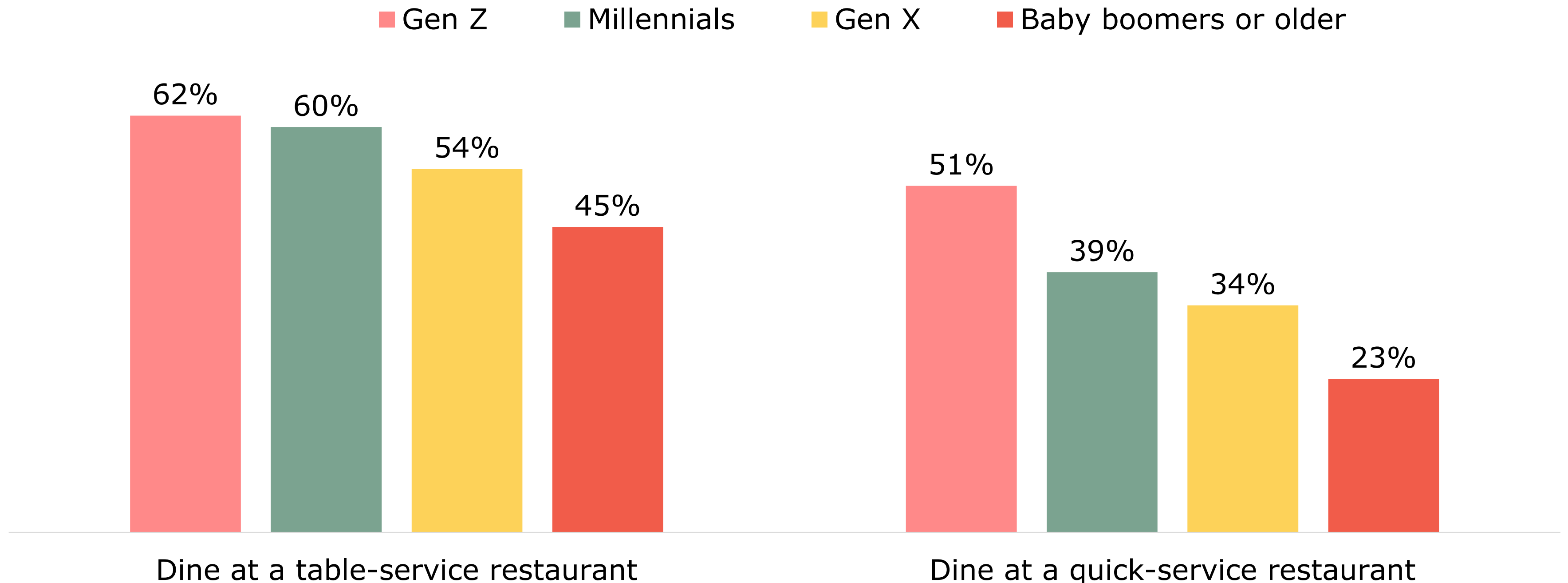
Per capita foodservice sales are forecast to remain flat over the next few years due to affordability challenges and weak consumer confidence.

PER CAPITA SALES (IN 2026\$)



Consumers still want to dine out — but they are more cautious about when and how they spend.

Share of Canadians that agree if they had more money they would spend on dining out



Source: Angus Reid



Restaurants: Supporting communities, facing challenges, and creating opportunity for Canadian dairy



1. Economic & Community Impact

- A major contributor to Canada's economy and local communities
- Supports jobs, local suppliers, and small businesses
- Plays a key role in social connection and community life



2. Industry Challenges

- Rising food and labour costs putting pressure on margins
- Consumers dining out less due to affordability concerns
- Ongoing challenges from a weak economic environment
- Many operators facing tight profitability or losses



3. Opportunity for Dairy

- Dairy is a core ingredient across menus (e.g., cheese, milk, butter)
- High domestic sourcing → strong alignment with Canadian supply
- Opportunity to drive traffic and satisfaction through dairy-based offerings
- Kelly will touch on a few advocacy priorities

Restaurants remain essential to Canada's economy — and dairy plays a key role in helping operators meet evolving consumer needs.

