

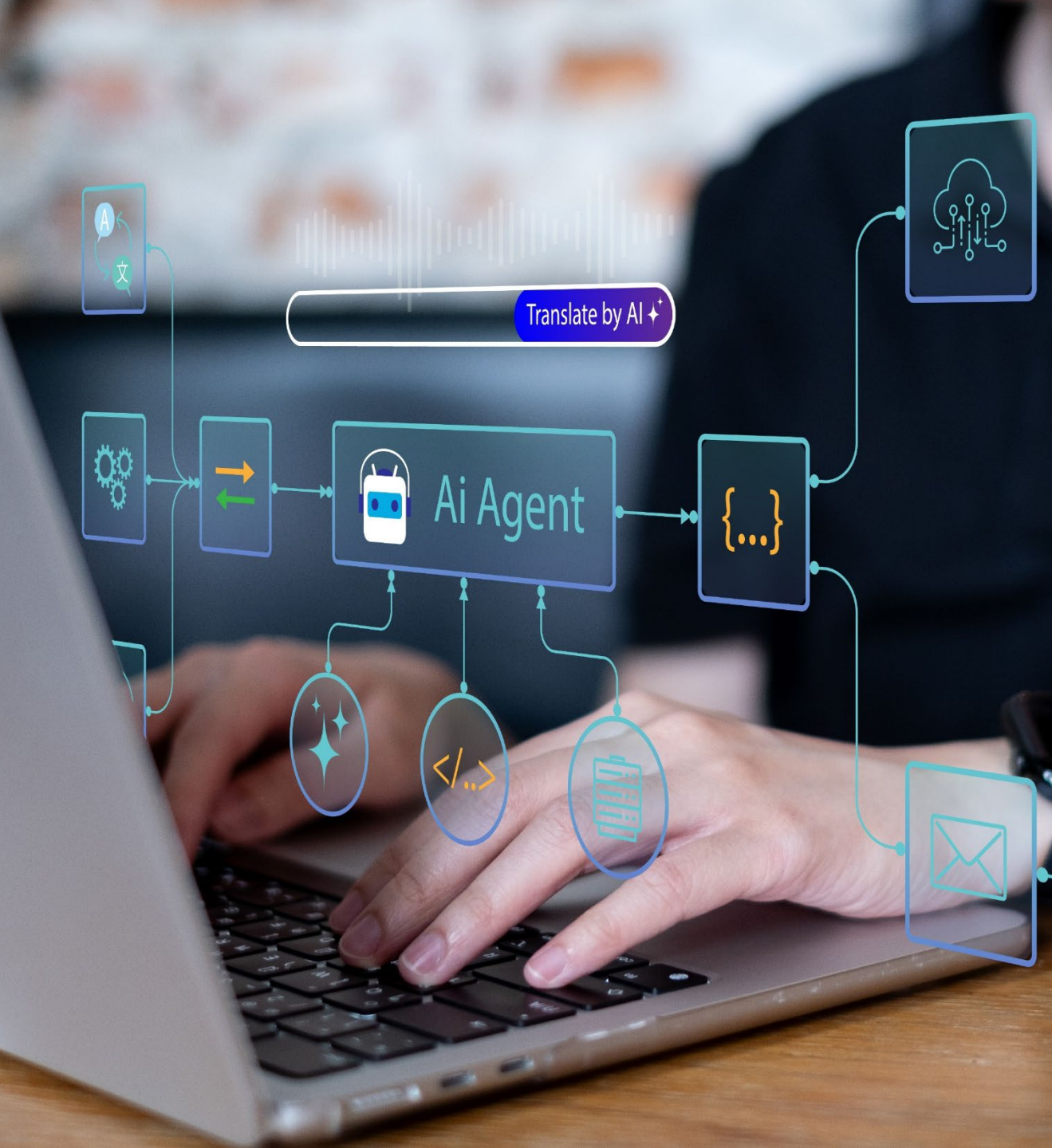
Industry Insights

A roundup of noteworthy Canadian foodservice findings
for the week of October 5, 2026



Image Source: Shutterstock

This report is authorized for use solely by the parties noted in the written contract. No part of the publication may be reprinted, redistributed or put into an electronic or information retrieval system without the prior permission of Technomic, Inc.



What if you could ask your data anything?

Which chains are growing fastest?

What menu trends are gaining momentum?

Where are my best opportunities for growth?

Ignite AI Edge delivers instant answers, powered by Technomic's industry-leading intelligence and advanced AI.

REQUEST A DEMO

Breaking down Ontario's chain restaurants

Ontario is home to nearly 14,000 chain restaurant locations, with the coffee category commanding roughly 20% of units – the largest share of any menu segment.

Tim Hortons dominates the province with 1,822 stores, while Starbucks, Country Style and Second Cup Cafe round out the category's presence.

Pizza chains represent the next largest footprint among Ontario's chain restaurants, accounting for 16% of units. Pizza Pizza, Domino's and Pizza Hut lead the market in this segment.

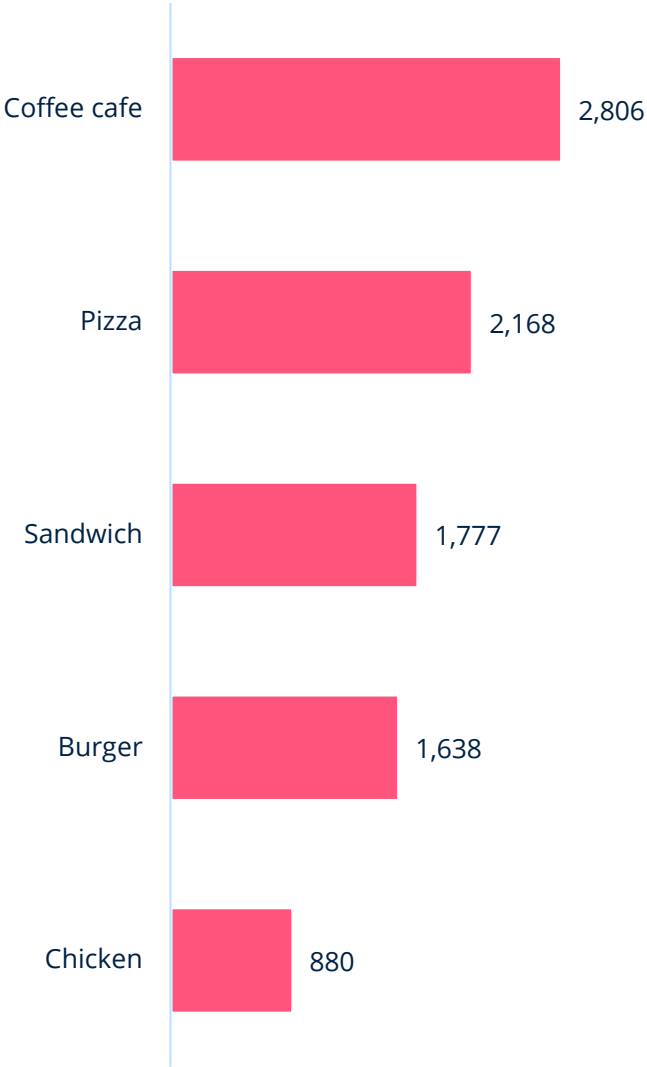
The sandwich category ranks third, driven largely by Subway's substantial presence of 1,131 stores across the province. MR.SUB follows as the next highest-density sandwich chain in Ontario with 167 locations.

For more chain location insights, check out Technomic's *Province-Level Location Intelligence* report on Ignite.

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

Source: Technomic Ignite Company
Note: Totals capture all chains among the top 250 chain restaurants

ONTARIO CHAIN LOCATIONS
TOTAL LOCATIONS BY MENU CATEGORY AS OF 2025 YEAR-END



Three emerging menu trends to watch

Technomic's recently launched *Canadian Emerging Eats* report highlights trends from independent restaurant menus in Canada with potential to become more mainstream in the coming years. Here are two menu trends to watch from the most recent installment.

Spirits Infused With Aromatics

Operators are elevating classic cocktails by infusing spirits with aromatic ingredients, such as herbs, spices and botanicals, that add complex, fragrant sensory experiences. This technique appeals to adventurous drinkers seeking innovative flavour profiles with a wellness-forward edge.

On the Menu

Ginseng Old Fashioned—**ginseng-infused bourbon**, brown sugar and bitters (The Five Fishermen in Halifax, Nova Scotia)

GOGO #8—**chile- and fennel-infused Ketel One vodka**, Cointreau, guava, rose and lime (Calcutta Cricket Club in Calgary, Alberta)

How's Business?—**coriander-infused El Tequileno Blanco**, Sons of Vancouver Quadruple Sec, yellow Chartreuse, fresh lime, fermented strawberry tops and cherry cordial (The Acorn in Vancouver, British Columbia)

White Soy Sauce

Operators are embracing white soy sauce—a wheat-forward Japanese

condiment prized for its delicate umami profile—as an elevated alternative to traditional soy sauce. Its lighter colour adds subtle depth and salinity without overpowering the dish. This refined condiment brings a sophisticated, nuanced umami element that complements citrus notes and herbs in contemporary Japanese-inspired cuisine.

On the Menu

Scallop Crudo—cucumber, lemon verbena, **white soy** and tomato water (Monarque in Montreal)

Hamachi Sashimi—**shiro dashi**, citrus, togarashi and shiso (Sara in Toronto)

Cucumber—**white soy vinaigrette** and pickled radish (Heritage Asian Eatery in Vancouver, British Columbia)

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

Source: *Emerging Eats: 10 Canadian Menu Trends to Watch*
Image Source: Shutterstock



Gender-driven insights shaping Canadian dining

Canadian dining habits reveal distinct gender-driven differences, offering valuable insights for operators.

Men dominate the bar, grill and burger space, favouring sports-bar-style full-service concepts including La Cage, Canadian Brewhouse and Boston Pizza, as well as legacy QSR brands such as Burger King (60% male), KFC (60% male) and A&W Canada (58% male). These venues thrive on comfort food, group sports viewing and indulgent, high-calorie offerings. Men are also more likely to dine solo, with 38% of their visits being solo occasions—11 percentage points higher than women—and over-index on quick bites

and late-night snacks. Women, by contrast, lead in coffee, health and comfort-driven dining. Starbucks is the most female-skewed brand in Canada, with 59% of its visitors being women. Second Cup Cafe and Tim Hortons also appeal strongly to women for beverage-led occasions. Health-focused brands like Freshii (62% female) and Booster Juice resonate, while Swiss Chalet and Cactus Club cater to women seeking comfort and ambiance. Tailored strategies can drive growth: men value indulgence and convenience, while women prioritize wellness and social connection.

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

Base: Varies per brand
Source: Technomic Ignite Consumer, Q3 2025-Q2 2026

BRAND AFFINITY BY GENDER AMONG FREQUENT GUESTS

Male-skewed Brands	Female-skewed Brands
La Cage Brasserie Sportive	Starbucks
Burger King	Freshii
Canadian Brewhouse	Second Cup Cafe
Baton Rouge Grillhouse & Bar	Tim Hortons
Montana's BBQ & Bar	Booster Juice
Arby's	Edo Japan
Boston Pizza	Pita Pit
KFC	Little Caesars
Moxies	Swiss Chalet
A&W Canada	Cactus Club Cafe

Pizza around the world

City 1+1 Pizza plans to reach 500 units by 2030. Founded in 2008, the [China-based pizza QSR](#) currently has about 170 locations.

Papa Johns is set to enter Brazil. The [U.S.-based pizza QSR](#) is currently seeking a development partner for the market.

Pizza Hut operator Yum China plans to accelerate unit expansion of the brand in China. The [multichain operator](#) plans to open about 800 locations of the CDR specializing in Italian fare per year, up from a previously planned 600 per year.

Pizza Hut operator PT Sarimelati Kencana launched a new spinoff concept. Called Fresh Batch, the new concept from the [Indonesia-based operator](#) specializes in sourdough pizzas in a contemporary QSR setting.

Pizza Pilgrims is set to enter Germany. The U.K.-based pizza CDR and its [local operating entity L'Osteria](#) are both owned by McWin.

[Global Navigator clients: Click here for more](#)

Image Source: [Fresh Batch Indonesia Instagram](#)

SO FRESH IT'S A FLEX



Ignite AI Prompt of the Week

In each Industry Insights, we ask Ignite AI a top-of-mind industry question and share the answer with you. Copy our prompt or write your own to answer your industry questions in our Ignite.

Using data from

Company & Industry

Ignite AI provides insights from Technomic's research data. While we strive for accuracy, validate critical insights against sources.

How are the top chain restaurants performing?

Clear

Key Performance Highlights

Scale Leaders — Tim Hortons vs. McDonald's

Tim Hortons leads the Canadian market with \$8.86B in sales across 3,903 units, nearly 2.6x McDonald's unit count. However, McDonald's commands a significantly higher average unit volume of \$4,725,000 — more than double Tim Hortons' \$2,275,000 — underscoring McDonald's superior per-location productivity.

Efficiency Standout — The Keg

With only 104 locations, The Keg generates \$746.1M in sales at a remarkable \$7,140,000 average unit volume — the highest in the top 25. This positions The Keg as a best-in-class operator for revenue intensity within Canada's full-service segment.

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

Segment Composition

Quick-service dominates the top 25, accounting for 18 of 25 chains. Full-service brands (Boston Pizza, The Keg, Swiss Chalet, St-Hubert, Earls, Browns Socialhouse, Montana's) all demonstrate strong average unit volumes, reflecting higher check averages despite smaller footprints.

Homegrown vs. International Chains

Several distinctly Canadian brands rank among the top performers — Tim Hortons (Rank 1), A&W Canada (Rank 4), Boston Pizza (Rank 6), Pizza Pizza (Rank 15), Harvey's (Rank 18), Mary Brown's (Rank 20), and BarBurrito (Rank 21) — illustrating the continued strength of domestically rooted concepts in the Canadian market.

TOP CHAIN RESTAURANT PERFORMANCE IN CANADA			
Rank	Chain	Segment	Sales (CAD)
1	Tim Hortons	Quick Service	\$8.86B
2	McDonald's	Quick Service	\$7.11B
3	Starbucks	Quick Service	\$2.44B
4	A&W Canada	Quick Service	\$1.92B
5	Subway	Quick Service	\$1.54B
6	Boston Pizza	Traditional CDR	\$1.22B
7	KFC	Quick Service	\$1.09B
8	Wendy's	Quick Service	\$1.06B

Source: Technomic Ignite AI



**Future of
Beverage**
by informa...

**BEVVY
AWARDS**

Sip Into the Future: Insights, Innovation, Impact.

The industry's destination for beverage trends,
big ideas, and the inaugural Bevvvy Awards.



Want more insights?



You can get this report delivered to you biweekly!

[Sign up here>>](#)

Ignite Company

See where restaurant chains are, how many units they have and how well they're doing.

[Explore>>](#)

Ignite Menu

Pinpoint the latest menu trends and see what's on the horizon.

[Explore>>](#)

Ignite Consumer

Get to know your customers' customers through 60+ attributes and visit occasion metrics. [Explore>>](#)

Global Foodservice Navigator

Understand the global industry, from menu trends to consumers, in 25 markets.

[Explore>>](#)

Since 1966, we have produced in-depth research focused on the foodservice industry.

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.

312-876-0004
info@technomic.com
[technomic.com](https://www.technomic.com)