



Euromonitor
International

Full-Service Restaurants in Canada

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KEY DATA FINDINGS

2025 DEVELOPMENTS

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
Sustainability is a growing expectation

COMPETITIVE LANDSCAPE

Recipe Unlimited Corp leads sales
Mr Greek leads growth
Independents maintain lead amid growing competition from large chains

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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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