

MONTHLY INFOSTATS

Reference Period: October 2018



**Restaurants
Canada**

The voice of foodservice | La voix des services alimentaires

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Highlights

Commercial foodservice sales across Canada moderated to 3.7% year-over-year growth in October, following a 4.4% increase in September. The slowdown in overall sales reflects a moderation in spending at full-service restaurants.

Adjusted for menu inflation of 4.2%, **real sales** dipped by 0.4%.

Canada-wide sales at **full-service restaurants** slowed to 2.2% growth in October due to a sharp moderation in sales in Ontario. In contrast, growth at full-service restaurants remains strong on Prince Edward Island and in Nova Scotia.

Sales at **quick-service restaurants** rose by a solid 5.2% in October, on par with the 5.1% increase reported in September.

Caterer revenues rose by 5.6% as gains in British Columbia and Ontario offset declines in Alberta and Saskatchewan.

Drinking place sales were relatively flat (-0.1%) in October, compared to a 6.0% decline in September. While demand was strong in New Brunswick and Quebec, spending fell in five provinces.

Lower economic activity and limited job creation restrained total foodservice sales growth in **Newfoundland and Labrador** to 0.9% in October. Although full-service restaurants rebounded with a 5.0% increase in sales, spending at quick-service restaurants remained subdued (+0.4%).

With the strongest job growth in the country, **Prince Edward Island** led all provinces with a robust 9.6% increase in foodservice sales. Overall growth was propelled by a 14.5% surge in full-service restaurant sales. Quick-service restaurant sales also advanced by a solid 6.0%, following several months of subpar gains.

Total foodservice sales in **Nova Scotia** jumped by 6.7% as strong gains at full- and quick-service restaurants offset lower revenues at caterers and drinking places.

Commercial foodservice spending in **New Brunswick** rose by a mediocre 2.6% in October. Some of the weakness was due to modest economic growth and sluggish job creation. In addition, sales at full-service restaurants dipped by 2.2%, compared to robust gains in October 2017.

As a result of strong consumer demand at quick-service restaurants and drinking places, total foodservice sales in **Quebec** advanced by a solid 5.4%. Full-service restaurant sales, however, moderated to 3.6% growth compared to an 8.4% increase in October 2017.

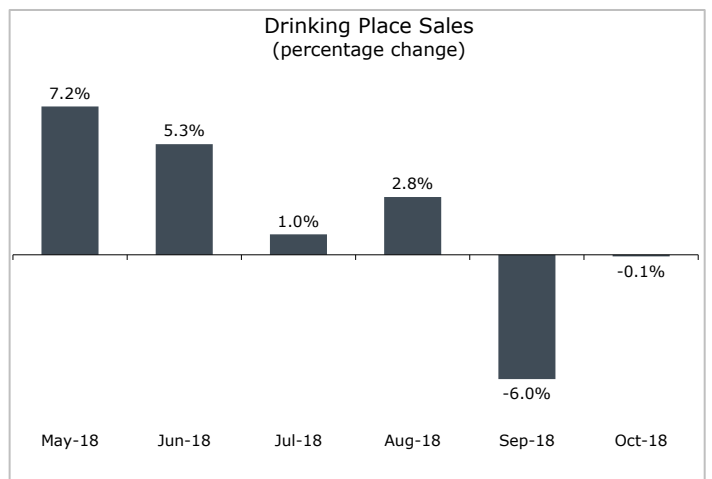
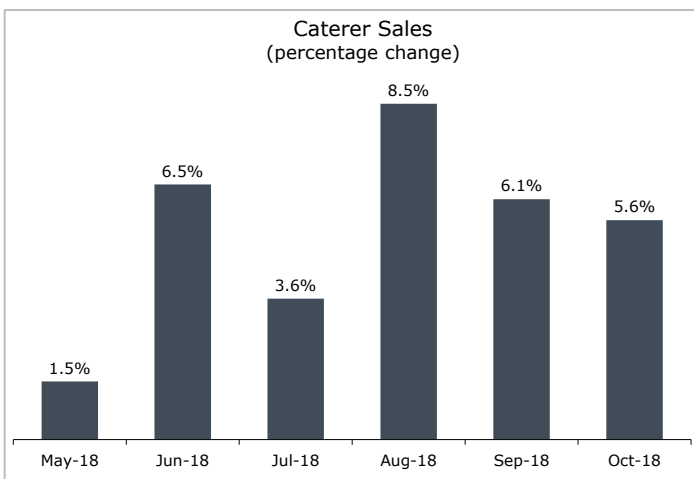
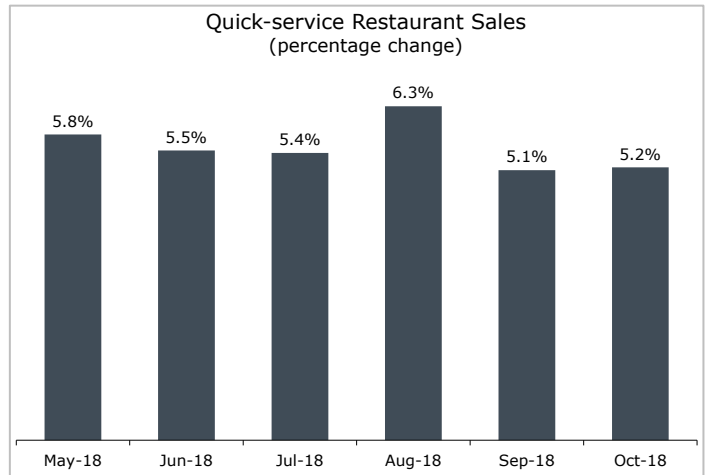
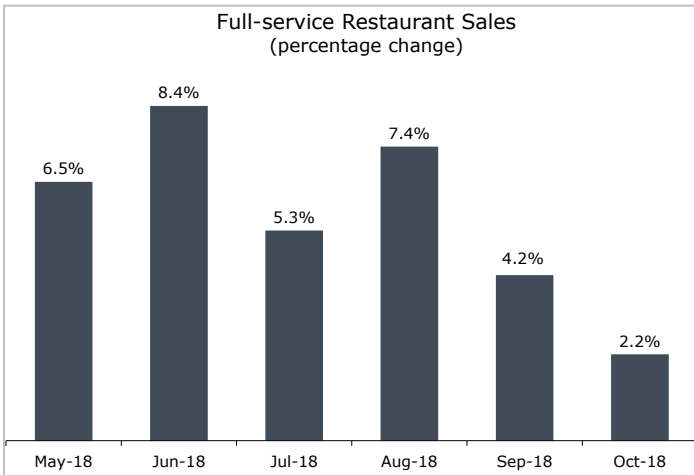
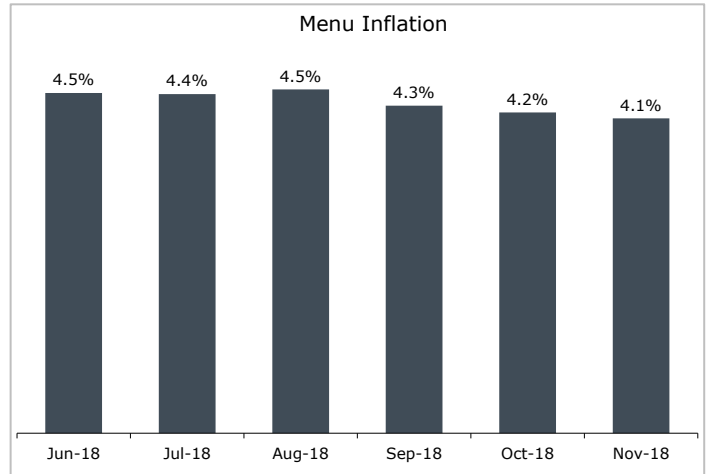
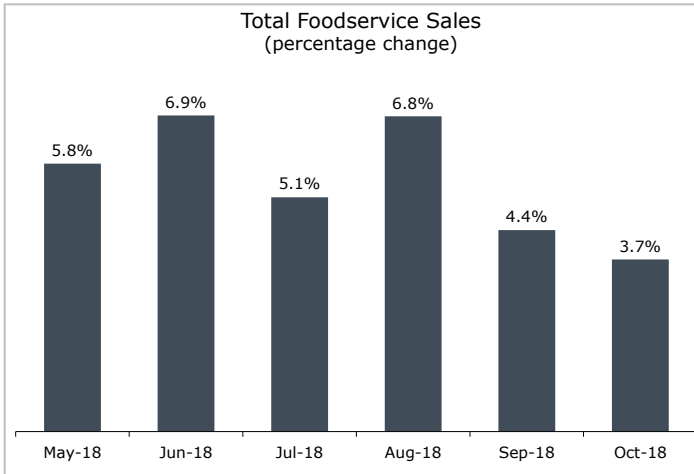
Commercial foodservice sales in **Ontario** rose by 3.1% in October. This represents the province's slowest growth since January 2014. While caterers and quick-service restaurants reported solid gains, full-service restaurant sales rose by just 1.1%. Adjusted for menu inflation of 6.0%, real commercial sales fell by 2.7%.

Foodservice sales in **Manitoba** decelerated for a third consecutive month (+1.5%) due to lower caterer revenues and a sharp decline in drinking place sales. Full-service restaurants were the lone bright spot as sales rose by 5.8%.

Saskatchewan's foodservice industry continued to struggle as sales were relatively flat in October (+0.2%). While quick-service restaurants posted modest gains, sales declined at full-service restaurants, caterers and drinking places.

Alberta's foodservice industry eked out a 1.4% increase in sales in October. While sales at quick-service restaurants advanced by 5.6%, overall growth was restrained by lower revenues at full-service restaurants and caterers.

Solid gains by caterers and restaurants boosted total foodservice sales in **British Columbia** by a strong 6.1%. British Columbia is on pace to lead the country in foodservice sales growth in 2018 with year-to-date growth of 7.5%.



Note: All growth rates are year-over-year and based on preliminary data from Statistics Canada.

Highlights

Canada's economy rebounded in October, but the outlook for real GDP in 2019 has been reduced due to a collapse in Canadian heavy oil prices, a moderation in consumer spending and weaker housing prices. As a result, Canada's economy is forecast to grow by 1.8% in 2019 compared to the previous forecast of 2.2% growth.

Equity market volatility, rising interest rates and weak wage growth led to an 11-point drop in Canada's **consumer confidence index** in December.

Year-over-year **retail sales** rose by a 2.3% in October, marking the second-consecutive month of lacklustre growth.

Net employment in Canada improved by 9,300 new jobs in December, following the creation of 94,100 jobs in November.

Despite rising employment and a low unemployment rate, **average weekly earnings** (for all industries) rose by a disappointing 1.5% in December.

Net employment growth in the United States rebounded with 312,000 new jobs in December.

On a month-over-month basis, **Canada's economy** rebounded by 0.3% in October, following a 0.1% contraction in September. Most industries reported stronger economic activity, led by wholesale trade (+1.0%) and finance and insurance (+0.9%).

After expanding by 2.0% (annualized) in Q3, **Canada's economy** faces a number of headwinds in Q4 and in early 2019. The collapse in Canadian heavy oil prices and mandatory production cuts will restrain Canada's economy in the coming quarters. In addition, recent equity market volatility could sap consumer and business confidence, which would impact future consumer spending and business investment intentions. As a result, Canada's economy is projected to moderate to 1.7% growth in Q4.

The latest forecast from TD Economics calls for **real GDP growth** in Canada of 1.8% in 2019. This is a downward revision from their previous forecast of 2.2% growth. The following are some notable changes in the economic outlook:

2019 Economic Outlook		
	Date of forecast	
	Dec-18	Sep-18
Consumer Spending	1.8%	2.2%
Business Investment	2.0%	3.3%
Residential Investment	0.4%	2.9%
Government Expenditure	1.6%	1.9%
Exports	2.8%	3.1%
Imports	0.8%	2.3%
Real GDP	1.8%	2.2%

Source: TD Economics

Consumer confidence in Canada fell by a dramatic 11.2 points in December to 103.0 (2014 = 100). The recent decline in the stock market, combined with rising interest rates, slower wage growth and weaker housing prices all contributed to the drop in confidence. The consumer confidence index is now at its lowest level since January 2017.

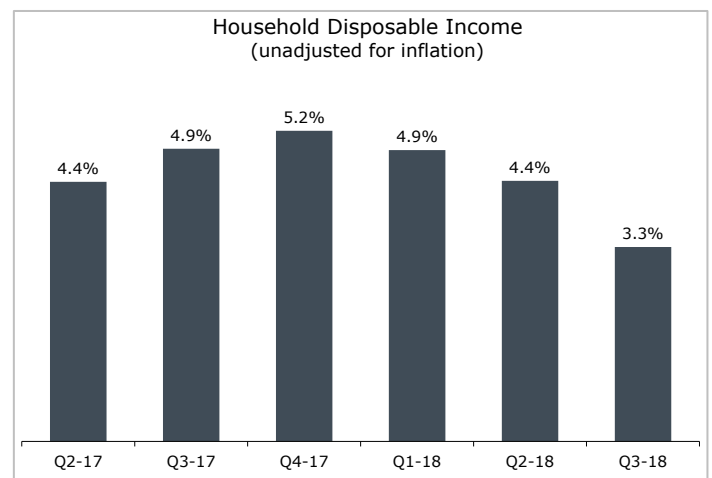
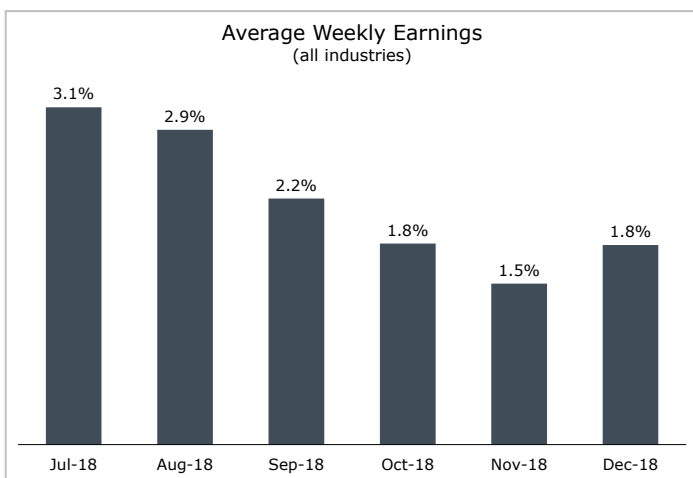
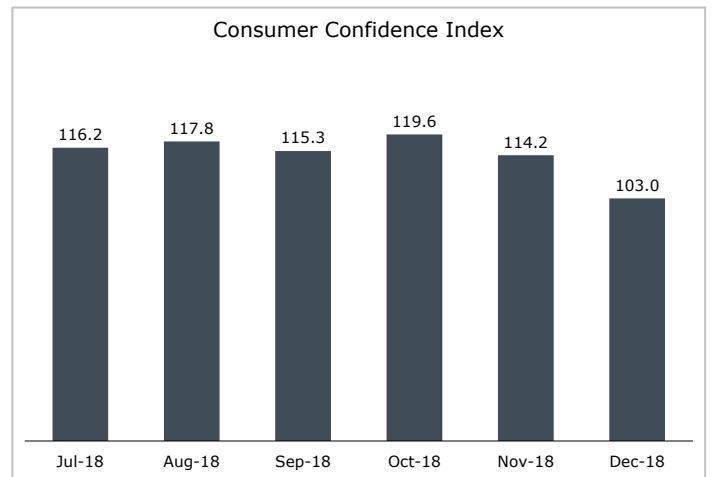
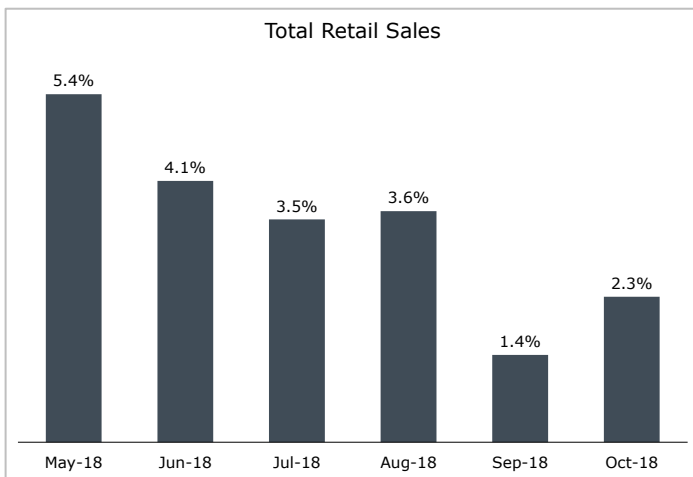
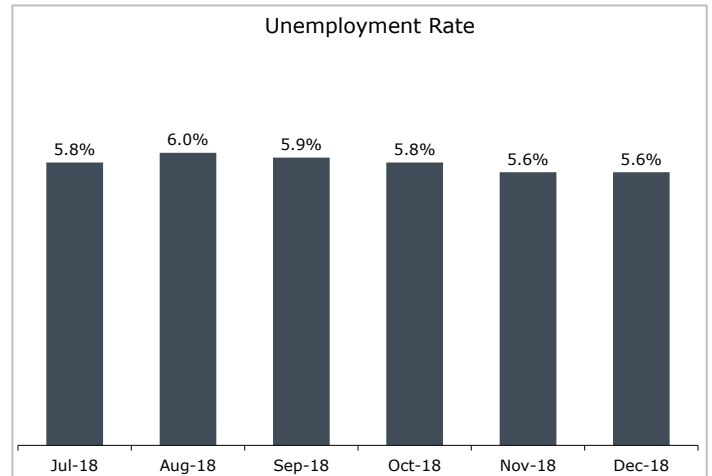
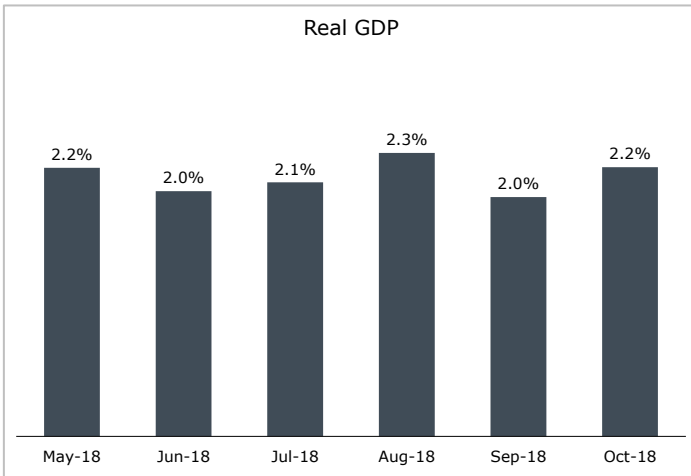
On a year-over-year basis, **retail sales** in Canada grew by 2.3% in October, compared to a 1.4% increase in September. While Ontario led the country with a 5.6% increase, sales fell in British Columbia, Alberta, Saskatchewan and Newfoundland and Labrador.

Following a surge of 94,100 new jobs in November, **net employment in Canada** moderated to 9,300 new jobs in December.

Despite higher employment, Canada's **unemployment rate** held steady at a historical low of 5.6%.

Average weekly earnings (for all industries) continues to disappoint, rising by 1.5% in December on a year-over-year basis.

Net employment growth in the **United States** rebounded with 312,000 new jobs created in December. More people entering the labour market raised the unemployment rate 0.2 percentage points to 3.9%.



Source: Statistics Canada and Conference Board of Canada

Note: GDP, disposable income and retail sales are year-over-year changes. The unemployment rate is the actual value.

COMMERCIAL FOODSERVICE SALES

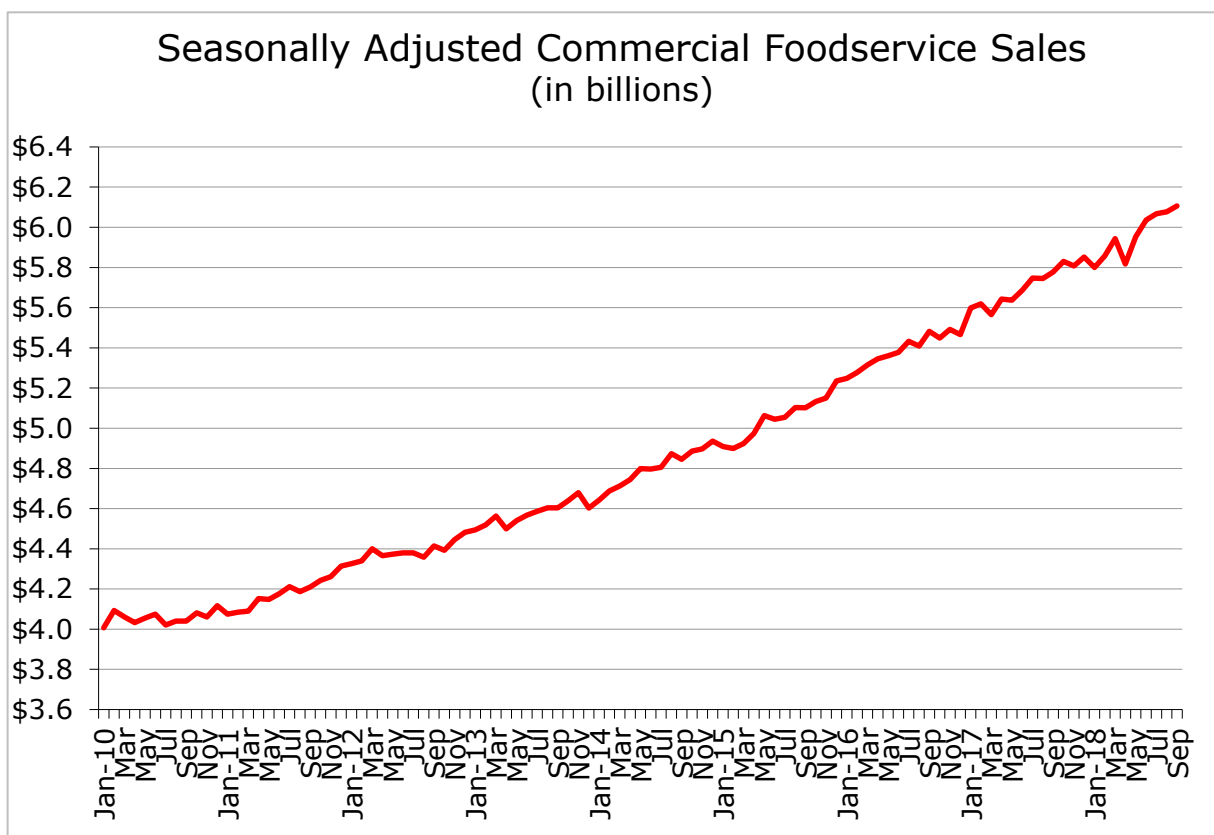
	Period	Amount	This period over year ago (%)	Year-to- date (%)	2017 over 2016(%)	2016 over 2015(%)
NOMINAL GROWTH						
Sales (in \$millions)						
Total	October	\$6,131.2	3.7%	5.1%	6.0%	6.7%
Sales by Sector (in \$millions)						
Full-service Restaurants	October	\$2,579.2	2.2%	5.3%	6.9%	7.3%
Quick-service Restaurants	October	\$2,828.1	5.2%	5.2%	5.6%	7.0%
Social & Contract Caterers	October	\$517.7	5.6%	4.5%	4.8%	3.3%
Drinking Places	October	\$206.1	-0.1%	1.3%	1.6%	3.6%
Sales by Province (in \$millions)						
Newfoundland and Labrador	October	\$74.2	0.9%	-0.1%	0.6%	-0.2%
Prince Edward Island	October	\$22.7	9.6%	6.9%	6.0%	7.0%
Nova Scotia	October	\$151.0	6.7%	5.8%	3.5%	7.6%
New Brunswick	October	\$105.6	2.6%	2.9%	2.4%	6.8%
Quebec	October	\$1,173.0	5.4%	5.3%	7.1%	8.4%
Ontario	October	\$2,433.2	3.1%	5.7%	5.9%	7.6%
Manitoba	October	\$178.8	1.5%	2.3%	5.0%	8.0%
Saskatchewan	October	\$165.9	0.2%	1.7%	2.2%	1.5%
Alberta	October	\$803.4	1.4%	1.8%	4.0%	0.1%
British Columbia	October	\$1,007.1	6.1%	7.5%	8.4%	9.9%
REAL GROWTH						
Sales (in 2002 \$ millions)						
Total	October	\$3,986.5	-0.4%	0.7%	3.3%	4.0%
Sales by Sector (in \$millions)						
Full-service Restaurants	October	\$1,667.3	-1.3%	1.4%	4.1%	4.4%
Quick-service Restaurants	October	\$1,864.3	-0.5%	-0.1%	3.3%	4.7%
Social & Contract Caterers	October	\$336.6	1.3%	0.2%	2.1%	0.7%
Drinking Places	October	\$134.0	-4.1%	-2.9%	-1.0%	1.0%
Sales by Province (in \$millions)						
Newfoundland and Labrador	October	\$46.1	-0.8%	-3.1%	-2.5%	-3.5%
Prince Edward Island	October	\$15.3	7.8%	4.7%	3.1%	4.3%
Nova Scotia	October	\$95.8	4.5%	3.6%	1.2%	4.6%
New Brunswick	October	\$68.1	0.7%	0.1%	-0.5%	3.7%
Quebec	October	\$757.8	2.7%	2.5%	4.5%	6.2%
Ontario	October	\$1,576.9	-2.7%	-0.7%	3.2%	4.8%
Manitoba	October	\$115.6	-0.6%	0.5%	3.9%	5.3%
Saskatchewan	October	\$101.8	-2.4%	-0.8%	0.6%	-0.2%
Alberta	October	\$517.3	-2.5%	-1.7%	1.5%	-3.1%
British Columbia	October	\$692.1	2.4%	3.9%	5.7%	7.1%

Source: Statistics Canada

SEASONALLY ADJUSTED FOODSERVICE SALES

	Period	Amount	Month-over-month change			
			October	September	August	July
NOMINAL GROWTH						
Sales (in \$millions)						
Total	October	\$6,058.4	-0.3%	0.0%	0.2%	0.4%
Sales by Sector (in \$millions)						
Full-service Restaurants	October	\$2,656.7	-0.8%	-0.2%	0.1%	-0.2%
Quick-service Restaurants	October	\$2,722.4	0.4%	0.4%	0.6%	0.9%
Social & Contract Caterers	October	\$474.2	-1.8%	-0.5%	-0.1%	1.3%
Drinking Places	October	\$205.2	1.5%	-1.6%	-2.0%	0.3%
Sales by Province (in \$millions)						
Newfoundland and Labrador	October	\$71.9	0.6%	-0.4%	-2.8%	1.3%
Prince Edward Island	October	\$23.6	0.2%	0.9%	-0.4%	2.0%
Nova Scotia	October	\$144.5	-0.4%	0.9%	0.1%	2.7%
New Brunswick	October	\$102.4	-0.2%	-0.9%	0.1%	2.7%
Quebec	October	\$1,152.8	0.5%	0.2%	-0.3%	2.3%
Ontario	October	\$2,389.1	-0.6%	-0.2%	0.7%	-1.0%
Manitoba	October	\$172.5	-0.9%	-0.9%	-1.5%	2.5%
Saskatchewan	October	\$160.1	-1.0%	0.4%	1.9%	-0.8%
Alberta	October	\$790.1	-0.4%	0.0%	-1.1%	1.0%
British Columbia	October	\$1,034.2	0.1%	0.4%	1.1%	0.4%

Source: Statistics Canada



MENU INFLATION (2002=100)

	Period	Amount	This period over year ago (%)	Year-to- date (%)	2017 over 2016(%)	2016 over 2015(%)
By Sector						
Menu Inflation – Total	October	153.8	4.2%	4.3%	2.6%	2.6%
Menu Inflation – Full Service	October	154.7	3.5%	3.9%	2.7%	2.7%
Menu Inflation – Quick Service	October	151.7	5.6%	5.3%	2.2%	2.3%
Menu Inflation – Cafeterias	October	153.8	4.1%	4.2%	2.6%	2.6%
By Province						
Newfoundland	October	160.9	1.7%	3.0%	3.1%	3.3%
Prince Edward Island	October	148.5	1.6%	2.0%	2.9%	2.6%
Nova Scotia	October	157.6	2.1%	2.2%	2.3%	3.0%
New Brunswick	October	155.0	1.9%	2.8%	2.9%	3.0%
Quebec	October	154.8	2.7%	2.7%	2.5%	2.0%
Ontario	October	154.3	6.0%	6.5%	2.6%	2.7%
Manitoba	October	154.6	2.0%	1.8%	1.0%	2.6%
Saskatchewan	October	162.9	2.6%	4.0%	1.7%	1.7%
Alberta	October	155.3	4.0%	3.5%	2.5%	3.3%
British Columbia	October	145.5	3.6%	3.4%	2.5%	2.6%

THE ECONOMY (seasonally adjusted)

	Period	Amount	This period over year ago (%)	Year-to- date (%)	2017 over 2016(%)	2016 over 2015(%)
General Indicators						
Real GDP (2002 \$billion)	October	\$1,945.9	2.2%	2.3%	3.2%	1.1%
Consumer Price Index (2002=100)	October	134.1	2.4%	2.4%	1.6%	1.4%
Number of Employed ('000's)	October	18,705.0	1.1%	1.3%	1.9%	0.7%
Unemployment Rate ¹	October	5.8%	6.2%	5.9%	6.3%	7.0%
Prime Rate ¹	October	3.95%	3.20%	3.58%	2.90%	2.70%
Disposable Income (\$billion)	Q3'18	\$1,230.9	3.3%	4.2%	4.6%	0.3%
Other (in \$ millions)						
Supermarkets and Grocery Stores	October	\$7,775.3	3.6%	0.7%	3.1%	2.0%
Total Retail Sales	October	\$51,774.6	2.3%	3.3%	7.1%	5.2%
Commercial Foodservice Employment²						
Number of Employed ('000's)	October	1,128.7	0.8%	1.4%	2.6%	3.2%
Average Weekly Hours	October	21.4	-1.8%	-1.3%	0.4%	-1.8%
Average Weekly Wage	October	\$378.77	5.7%	5.3%	3.1%	-0.6%

Source: Statistics Canada

¹ Refers to actual values

² Unadjusted for seasonal variation

Commercial Foodservice Sales Trends

year-over-year nominal change

	2017 Oct	2017 Nov	2017 Dec	2018 Jan	2018 Feb	2018 Mar	2018 Apr	2018 May	2018 Jun	2018 Jul	2018 Aug	2018 Sep	2018 Oct	2018 Year-to-date
Canada	6.7%	6.4%	7.2%	4.0%	4.6%	6.5%	2.5%	5.8%	6.9%	5.1%	6.8%	4.4%	3.7%	5.1%
Full-service Restaurants	7.5%	7.7%	8.7%	3.7%	6.1%	7.1%	1.7%	6.5%	8.4%	5.3%	7.4%	4.2%	2.2%	5.3%
Quick-service Restaurants	7.3%	5.7%	6.1%	5.1%	4.1%	7.0%	2.5%	5.8%	5.5%	5.4%	6.3%	5.1%	5.2%	5.2%
Caterers	2.4%	3.9%	6.2%	3.1%	1.1%	1.0%	7.6%	1.5%	6.5%	3.6%	8.5%	6.1%	5.6%	4.5%
Drinking Places	0.6%	4.7%	2.6%	-5.2%	0.6%	6.4%	0.4%	7.2%	5.3%	1.0%	2.8%	-6.0%	-0.1%	1.3%
Newfoundland and Labrador	1.1%	0.8%	-1.6%	-2.0%	0.0%	-0.3%	-3.8%	1.3%	2.5%	1.9%	0.5%	-3.2%	0.9%	-0.1%
Full-service Restaurants	1.2%	1.4%	0.2%	3.4%	2.4%	2.3%	-6.1%	6.6%	6.8%	5.7%	1.2%	-2.8%	5.0%	2.5%
Quick-service Restaurants	3.8%	3.6%	2.6%	2.8%	4.2%	3.5%	0.7%	0.8%	1.4%	2.6%	2.7%	0.5%	0.4%	1.9%
Caterers	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Drinking Places	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Prince Edward Island	7.8%	3.3%	9.9%	0.5%	10.9%	7.4%	6.6%	6.2%	6.9%	9.0%	6.7%	4.8%	9.6%	6.9%
Full-service Restaurants	12.5%	3.6%	19.0%	1.8%	19.7%	10.0%	9.0%	12.0%	14.2%	15.7%	11.2%	8.6%	14.5%	12.0%
Quick-service Restaurants	4.6%	2.9%	4.1%	0.0%	5.1%	6.8%	5.2%	3.6%	1.0%	0.8%	-0.9%	0.8%	6.0%	2.6%
Caterers	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Drinking Places	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Nova Scotia	2.6%	3.8%	6.1%	1.0%	5.6%	3.5%	7.3%	6.1%	4.3%	7.8%	7.5%	7.3%	6.7%	5.8%
Full-service Restaurants	1.9%	2.7%	5.2%	-3.1%	2.2%	-3.7%	10.4%	2.0%	1.2%	9.7%	9.9%	10.3%	9.7%	5.4%
Quick-service Restaurants	3.0%	4.8%	7.0%	5.4%	8.4%	9.9%	7.0%	10.9%	8.2%	10.0%	6.5%	6.4%	7.3%	8.0%
Caterers	3.1%	2.9%	8.5%	-4.6%	4.1%	-3.0%	-1.9%	0.4%	-7.3%	-19.7%	4.6%	2.2%	-5.3%	-2.8%
Drinking Places	3.4%	1.9%	1.0%	-5.7%	5.2%	5.1%	-0.3%	-7.1%	3.0%	-9.6%	-2.1%	-4.8%	-3.3%	-2.2%
New Brunswick	2.6%	4.1%	4.5%	-0.9%	2.2%	1.9%	-0.2%	6.6%	2.6%	5.2%	5.2%	1.9%	2.6%	2.9%
Full-service Restaurants	8.3%	4.5%	5.4%	-6.0%	4.3%	-0.7%	-3.4%	9.8%	-1.0%	-4.1%	-4.0%	-5.4%	-2.2%	-1.5%
Quick-service Restaurants	1.1%	4.6%	4.9%	3.5%	2.2%	3.7%	0.9%	4.6%	3.8%	11.1%	9.3%	6.1%	4.8%	5.2%
Caterers	-7.6%	-6.5%	-9.3%	-15.5%	-15.7%	-13.7%	5.9%	-7.4%	-5.8%	-11.9%	-5.1%	-10.0%	-5.6%	-8.8%
Drinking Places	-5.1%	12.1%	9.3%	-2.9%	13.4%	24.4%	6.0%	32.2%	31.4%	28.4%	55.5%	18.0%	27.1%	23.8%

	2017 Oct	2017 Nov	2017 Dec	2018 Jan	2018 Feb	2018 Mar	2018 Apr	2018 May	2018 Jun	2018 Jul	2018 Aug	2018 Sep	2018 Oct	2018 Year-to-date
Quebec	8.3%	8.3%	7.6%	3.1%	4.6%	6.9%	1.2%	6.0%	6.4%	6.3%	7.2%	4.8%	5.4%	5.3%
Full-service Restaurants	8.4%	8.0%	9.5%	4.9%	6.2%	7.7%	-1.3%	5.4%	6.2%	5.5%	5.6%	1.9%	3.6%	4.6%
Quick-service Restaurants	8.9%	7.6%	5.1%	2.7%	3.8%	6.9%	3.3%	6.6%	5.0%	7.2%	7.3%	7.2%	7.5%	5.9%
Caterers	9.8%	12.4%	8.2%	3.0%	3.9%	3.7%	7.4%	1.3%	12.1%	7.1%	13.0%	13.2%	4.8%	7.1%
Drinking Places	0.8%	9.2%	5.9%	-11.6%	-4.1%	3.5%	1.7%	14.9%	10.3%	6.3%	16.0%	0.8%	7.5%	5.1%
Ontario	6.3%	7.1%	7.6%	5.0%	4.9%	7.6%	3.7%	7.0%	8.7%	5.0%	7.3%	4.7%	3.1%	5.7%
Full-service Restaurants	8.1%	9.8%	9.6%	4.1%	5.1%	7.0%	3.5%	8.4%	11.3%	4.0%	8.0%	3.8%	1.1%	5.7%
Quick-service Restaurants	6.4%	5.9%	5.7%	5.6%	4.6%	8.3%	1.7%	6.2%	6.6%	5.4%	6.3%	5.4%	4.3%	5.5%
Caterers	0.3%	3.1%	9.7%	7.4%	5.7%	5.0%	16.3%	5.7%	10.4%	9.1%	11.4%	7.8%	6.7%	8.6%
Drinking Places	-6.1%	-1.5%	-3.9%	0.1%	0.2%	16.4%	4.0%	4.4%	-3.8%	-4.0%	-0.7%	-8.1%	-1.8%	0.7%
Manitoba	1.0%	2.9%	3.5%	1.7%	-1.5%	1.9%	1.1%	3.9%	3.6%	5.7%	2.9%	1.9%	1.5%	2.3%
Full-service Restaurants	0.6%	5.3%	6.0%	3.6%	-0.2%	5.7%	0.8%	2.4%	7.9%	11.8%	8.9%	9.3%	5.8%	5.7%
Quick-service Restaurants	3.1%	0.7%	2.1%	-1.4%	-3.0%	0.3%	1.6%	1.7%	0.0%	2.6%	0.9%	-1.3%	0.8%	0.3%
Caterers	-7.2%	2.1%	-2.4%	10.0%	-0.4%	-6.2%	-1.9%	21.2%	4.6%	-4.9%	-12.5%	-9.8%	-8.5%	-1.6%
Drinking Places	13.1%	8.2%	13.2%	-2.9%	2.6%	6.6%	12.7%	15.6%	-2.3%	-3.8%	-5.4%	-9.6%	-10.4%	0.3%
Saskatchewan	4.0%	0.4%	2.7%	0.4%	0.6%	1.1%	2.9%	3.7%	2.0%	1.1%	3.1%	1.6%	0.2%	1.7%
Full-service Restaurants	3.5%	0.9%	1.3%	-1.2%	4.0%	3.3%	7.5%	7.0%	2.8%	3.2%	5.9%	0.2%	-1.9%	3.1%
Quick-service Restaurants	7.2%	1.4%	4.7%	3.8%	-0.9%	3.5%	1.9%	4.5%	1.4%	2.1%	2.8%	3.3%	2.4%	2.5%
Caterers	-21.5%	-19.8%	-12.1%	-15.2%	-13.5%	-23.6%	-14.3%	-14.5%	-1.4%	-10.3%	-9.6%	-7.5%	-0.9%	-11.4%
Drinking Places	8.5%	11.4%	12.9%	-2.6%	4.5%	-7.5%	-1.6%	-7.3%	4.5%	-12.4%	-2.2%	4.4%	-4.2%	-2.6%
Alberta	4.8%	2.6%	4.7%	2.5%	-0.6%	4.0%	-0.6%	0.5%	3.7%	2.9%	3.5%	0.3%	1.4%	1.8%
Full-service Restaurants	4.1%	4.5%	5.5%	1.4%	0.1%	3.3%	-2.8%	1.1%	5.6%	4.0%	4.9%	0.1%	-2.4%	1.6%
Quick-service Restaurants	5.7%	1.9%	4.6%	4.8%	0.5%	5.8%	3.6%	4.3%	4.1%	3.2%	3.8%	1.4%	5.6%	3.7%
Caterers	4.2%	-6.7%	2.4%	-1.9%	-10.6%	-3.1%	-10.3%	-24.0%	-13.4%	-8.0%	-7.0%	4.3%	-3.7%	-8.0%
Drinking Places	1.6%	6.5%	1.9%	-3.9%	-2.9%	1.5%	-6.5%	-4.2%	6.1%	4.6%	-1.0%	-14.6%	1.2%	-2.1%
British Columbia	10.8%	8.7%	10.1%	6.1%	10.8%	8.8%	3.7%	8.0%	8.2%	5.9%	9.7%	7.5%	6.1%	7.5%
Full-service Restaurants	10.5%	8.3%	10.6%	5.7%	15.5%	12.3%	4.4%	9.3%	10.3%	8.0%	11.3%	10.8%	5.7%	9.3%
Quick-service Restaurants	13.0%	9.5%	11.6%	8.7%	8.5%	7.2%	2.8%	6.0%	6.5%	5.5%	9.4%	7.1%	6.2%	6.7%
Caterers	6.0%	11.0%	4.1%	3.0%	-1.6%	-1.5%	7.7%	8.5%	5.1%	-2.3%	12.8%	2.3%	17.8%	5.3%
Drinking Places	4.0%	2.4%	2.7%	-5.6%	5.2%	5.3%	-0.3%	11.7%	6.8%	0.2%	-6.2%	-9.7%	-7.6%	-0.1%

Menu Inflation

	2017 Nov	2017 Dec	2018 Jan	2018 Feb	2018 Mar	2018 Apr	2018 May	2018 Jun	2018 Jul	2018 Aug	2018 Sep	2018 Oct	2018 Nov	2018 Year-to-date
Canada	2.9%	2.9%	3.7%	4.0%	4.4%	4.5%	4.5%	4.5%	4.4%	4.5%	4.3%	4.2%	4.1%	4.3%
Full-service Restaurants	3.0%	3.0%	3.4%	4.1%	4.3%	4.0%	4.1%	4.0%	3.8%	3.9%	3.8%	3.5%	3.5%	3.9%
Quick-service Restaurants	2.6%	2.6%	4.4%	4.0%	4.7%	5.5%	5.7%	5.6%	6.0%	5.9%	5.5%	5.6%	5.5%	5.3%
Cafeterias	2.9%	2.9%	3.7%	4.0%	4.3%	4.4%	4.5%	4.3%	4.4%	4.4%	4.1%	4.1%	4.1%	4.2%
Newfoundland and Labrador	2.3%	2.3%	3.0%	2.4%	3.1%	3.3%	3.9%	4.2%	3.6%	2.8%	2.3%	1.7%	1.6%	2.9%
Prince Edward Island	3.7%	3.6%	3.5%	1.6%	2.6%	0.6%	0.9%	0.9%	2.2%	4.3%	2.2%	1.6%	1.7%	2.0%
Nova Scotia	2.0%	1.6%	2.2%	1.8%	2.0%	1.7%	2.4%	2.5%	2.1%	2.9%	2.0%	2.1%	1.7%	2.1%
New Brunswick	2.9%	3.0%	3.2%	2.8%	3.0%	3.1%	2.9%	2.8%	3.2%	2.7%	2.2%	1.9%	1.9%	2.7%
Quebec	2.6%	2.5%	2.7%	2.2%	2.2%	2.5%	2.7%	2.8%	2.9%	3.0%	2.9%	2.7%	2.6%	2.7%
Ontario	3.1%	3.0%	4.9%	6.6%	7.0%	7.1%	7.1%	6.8%	6.7%	6.5%	6.3%	6.0%	6.1%	6.5%
Manitoba	1.7%	1.5%	1.0%	0.9%	1.2%	2.1%	2.3%	2.3%	2.3%	2.1%	1.8%	2.0%	1.6%	1.8%
Saskatchewan	8.5%	8.4%	8.1%	8.1%	8.1%	3.0%	2.9%	2.0%	2.1%	2.1%	2.1%	2.6%	2.7%	3.9%
Alberta	2.6%	2.9%	3.2%	2.9%	3.3%	3.3%	3.5%	3.6%	3.6%	3.8%	3.7%	4.0%	3.7%	3.5%
British Columbia	2.8%	2.8%	3.1%	2.8%	3.0%	3.4%	3.5%	3.4%	3.6%	3.9%	3.6%	3.6%	3.6%	3.4%

Source: Statistics Canada