



Restaurants
Canada
Research

MONTHLY INFOSTATS

Reference Period: May 2019

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Highlights

Canada's commercial foodservice industry posted a 4.5% gain in May on the heels of a 4.7% increase in April. Adjusted for menu inflation of 2.5%, real sales grew by 2.0%.

Full-service restaurant sales grew by 4.7% in May with solid gains across most of the country. Newfoundland and Labrador was an exception, as a pullback in consumer spending reduced full-service restaurant sales by 7.4%.

Although **quick-service restaurants** led all segments with a 4.8% gain in sales, menu inflation of 3.4% accounted for most of the increase. Once adjusted for menu inflation and population growth, sales at quick-service restaurants were virtually flat versus May 2018.

Caterer revenues advanced by 4.2% in May, but it was a mixed performance at the provincial level. Despite solid gains in Quebec and New Brunswick, revenues fell in several provinces. Even with a strong rebound in Alberta, caterer revenues remain below 2017 levels.

A decline in spending in Western Canada reduced total **drinking place** sales by 1.3% in May. This represents the segment's first decline since September 2018.

Commercial foodservice sales in **Newfoundland and Labrador** grew by a tepid 2.1% in May. Despite improved sales at quick-service restaurants, total spending was restrained by a 7.4% drop in full-service restaurant sales. A decline in overall employment has led to lower sales at full-service restaurants in the past three months.

Rising consumer confidence and robust economic activity boosted total foodservice sales in **Prince Edward Island** by 13.1% in May. Since May 2017, spending at full-service restaurants has soared by 37% compared to a 13% increase at quick-service restaurants.

Nova Scotia's foodservice industry rebounded with a 5.7% increase in sales in May compared to 3.4% growth in April. Quick-service restaurants led all segments with an 8.2% jump in sales.

Despite double-digit gains at drinking places and caterers, lacklustre sales at quick-service restaurants restrained total foodservice spending in **New Brunswick** to 3.2% growth in May.

Strong economic growth and healthy job creation lifted total foodservice sales in **Quebec** by 7.4% in May. While all segments posted solid gains on a year-to-date basis, drinking place sales have soared by 20.4% compared to the first five months of 2018.

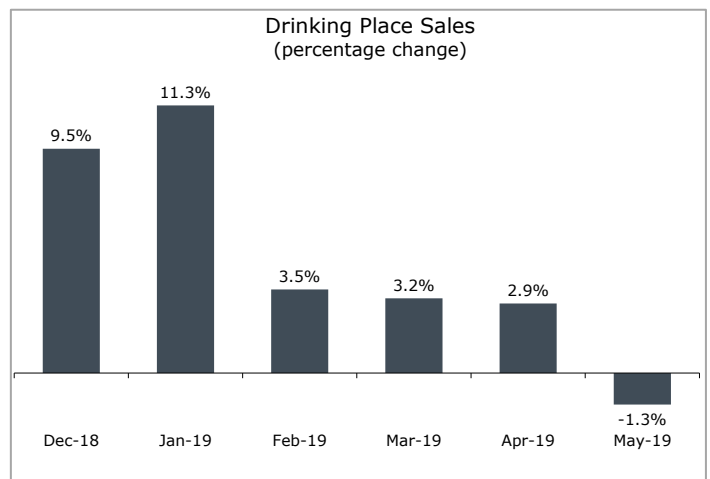
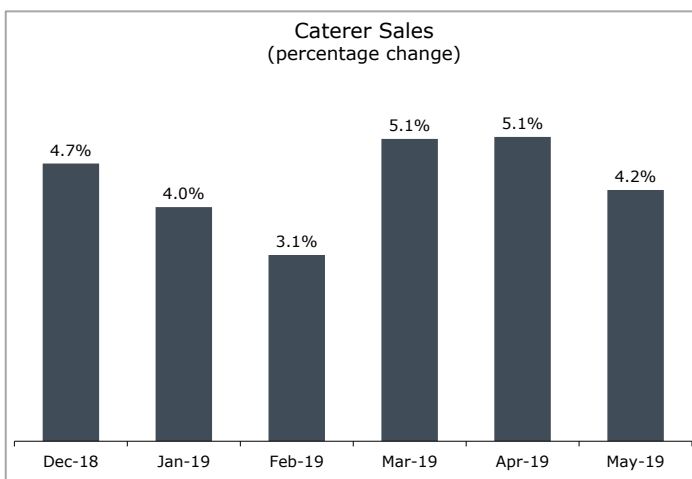
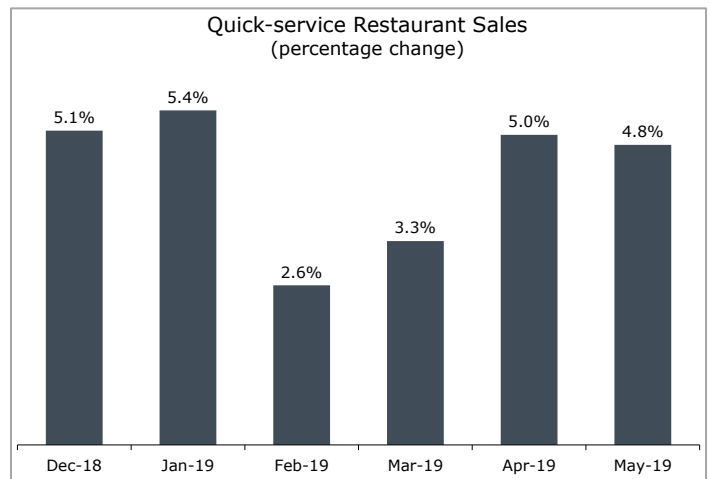
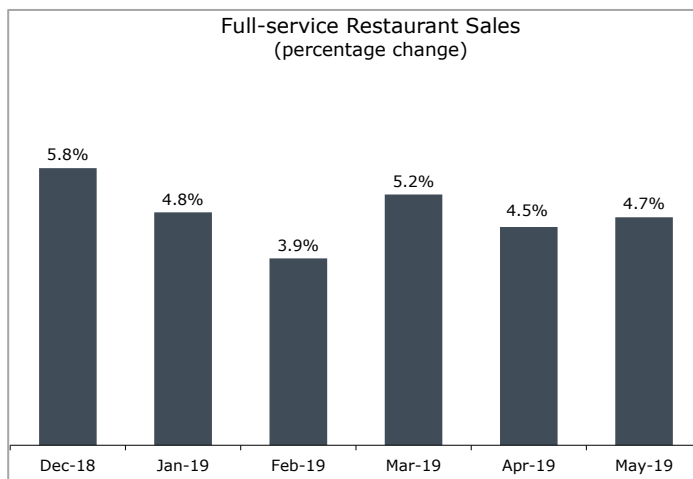
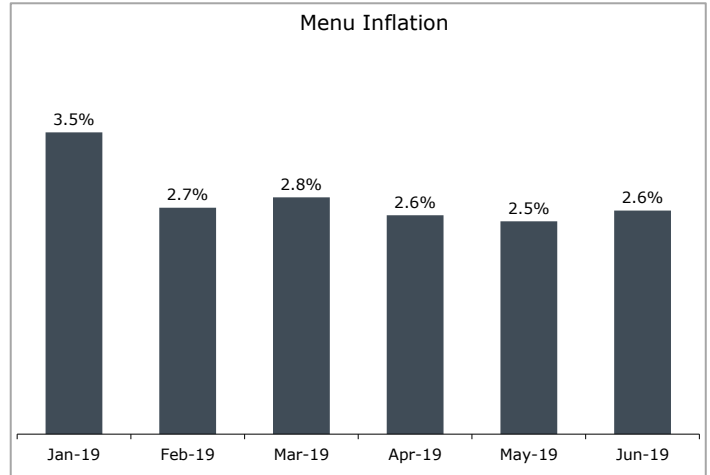
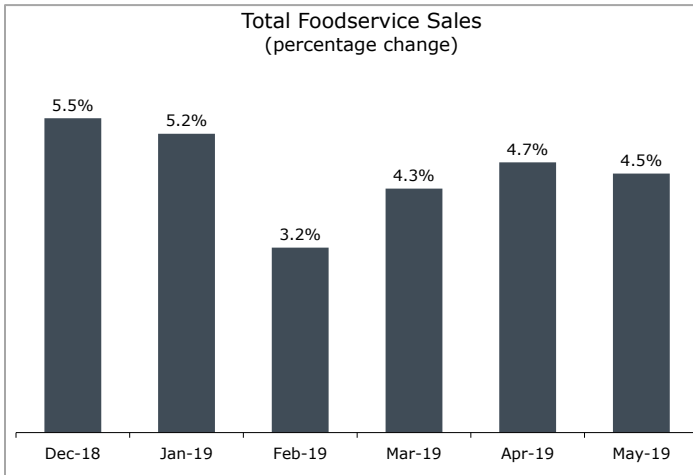
Foodservice sales in **Ontario** grew by 4.4% in May due to a 5.4% increase in quick-service restaurant sales. In contrast, full-service restaurant sales and caterer revenues moderated in May following solid gains in May 2018.

Manitoba's foodservice industry grew by 4.6% as healthy consumer spending at restaurants was partially offset by declining revenues at caterers and drinking places.

Commercial foodservice sales in **Saskatchewan** rose by a modest 3.0% in May compared to a sluggish 1.8% increase in May 2018. Quick-service restaurants led all segments with a 4.4% increase in sales. In contrast, drinking places and caterer revenues tumbled for the seventh consecutive month.

Alberta's foodservice industry continued to struggle as sales rose by a tepid 2.7% in May. Adjusted for menu inflation, Alberta was the only province to post lower real sales (-0.3%).

Following robust gains in recent years, foodservice sales in **British Columbia** moderated to 3.2% growth. While sales at full-service restaurants increased by 5.1%, revenues declined at caterers and drinking places following double-digit gains in May 2018.



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

Highlights

Canada's economy has averaged 0.4% growth over the past three months, representing the strongest real GDP growth in two years.

TD Economics has upgraded its forecast for **Canada's economy**, with real GDP expected to grow by 3.0% (annualized) in Q2 compared to its previous forecast of 2.5% growth.

In July, **Canada's consumer confidence index** rose to its highest level since January 2018 as more Canadians are feeling upbeat about their household finances and job security.

Year-over-year **retail sales** rose by a disappointing 1.0% in May compared to a 4.9% increase in April.

Net employment in Canada slipped for the second consecutive month (-24,200 jobs) in July. More people entering the workforce and the drop in employment raised the unemployment rate to 5.7%.

Although employment was relatively unchanged between April and July, **average weekly earnings** jumped by 4.6%. This is the strongest monthly increase since early 2008.

After anemic real GDP growth in Q4 2018 and Q1 2019, **Canada's economy** is showing signs of improvement. On a month-over-month basis, real GDP expanded by 0.2% in May. In the past three months, real GDP has averaged 0.4% growth — the strongest three-month period in about two years.

In May, **economic activity** was led by a rebound in manufacturing (+1.2%) and construction (+0.9%). In contrast, there were declines in wholesale trade (-1.4%) and retail trade (-0.4%).

Given the strong gains in May, TD Economics now expects

Canada's real GDP to grow by 3.0% (annualized) in Q2. This is an upward revision from their previous forecast of 2.5% growth. A stronger economy will boost consumer confidence, increase employment and raise wages. All of this will help support healthy foodservice sales growth in the coming quarters.

Consumer confidence in Canada rose by 1.7 points in July to 121.0 (2014=100). This represents the highest level since January 2018.

On a year-over-year basis, **retail spending** decelerated to 1.0% growth in May compared to a 4.9% increase in April.

At the provincial level, **retail spending** in April was strongest in Ontario with a 3.2% gain. In contrast, retail sales fell in Newfoundland (-4.3%), Alberta (-3.6%), Prince Edward Island (-0.9%) and Nova Scotia (-0.2%).

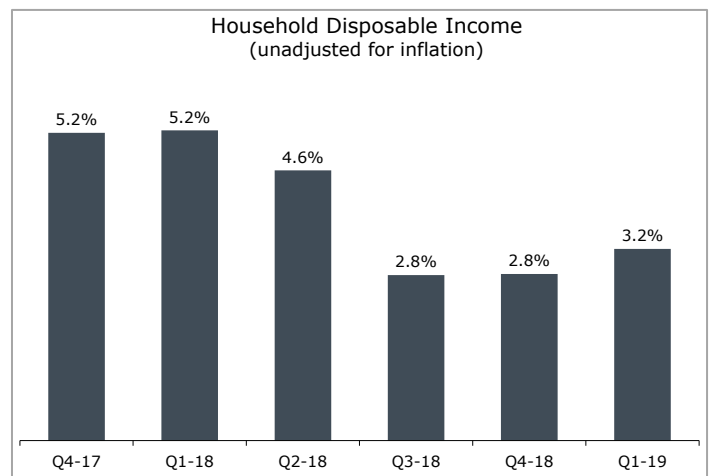
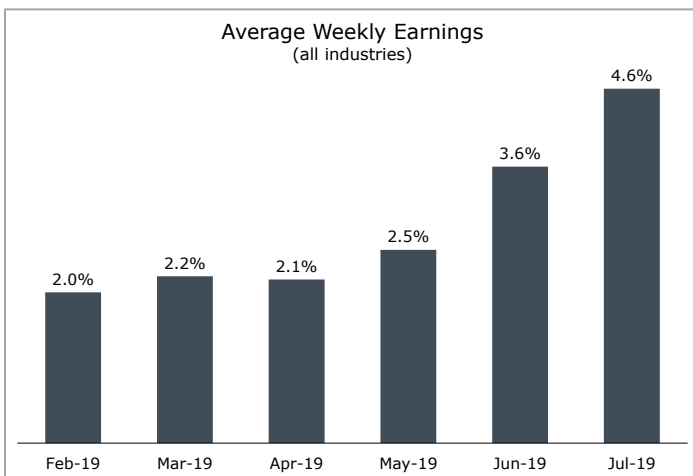
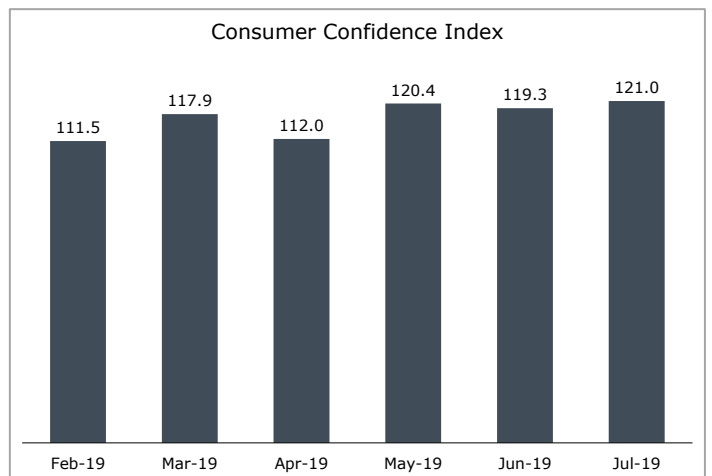
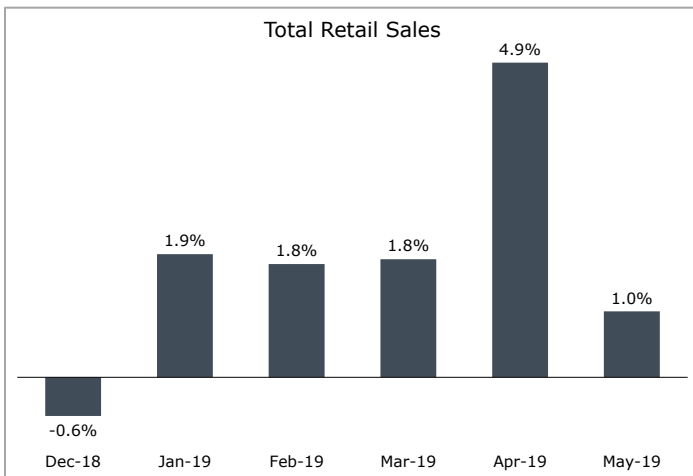
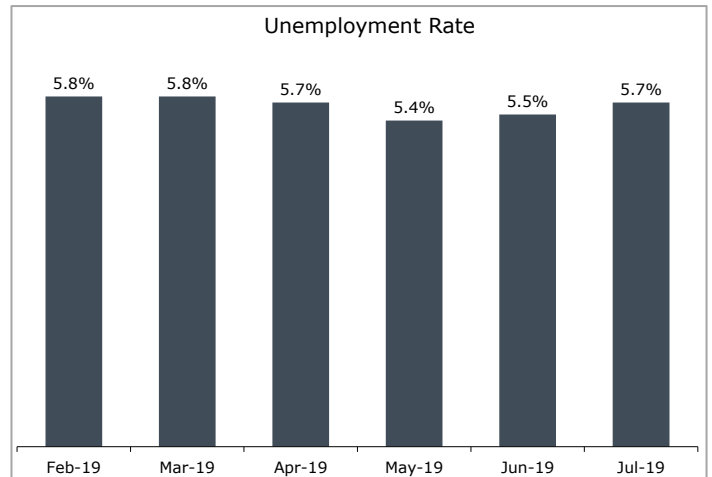
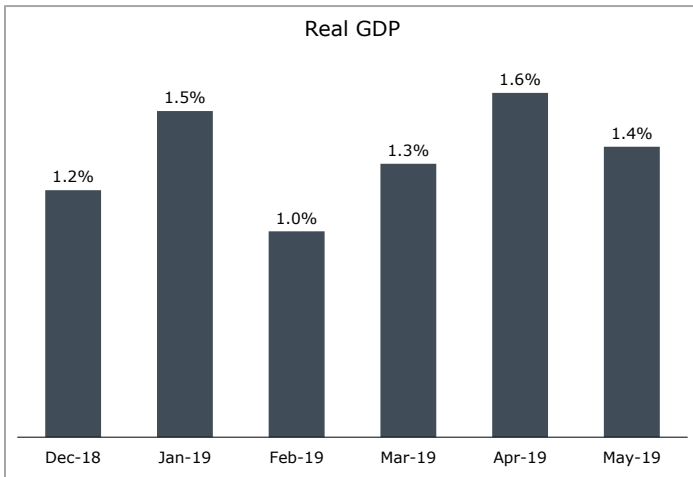
On a year-over-year basis, prices for **food at grocery stores** increased by 3.9% in June compared to June 2018. Fresh vegetable prices jumped by 17.3% in June due to higher prices for potatoes (+19.0%), lettuce (+13.1%) and other fresh vegetables (+19.7%).

Net employment in Canada declined by 24,200 jobs in July following the loss of 2,200 jobs in June. While employment rose in Quebec (+16,600), there were declines in Alberta (-14,300) and Ontario (-10,700).

The decline in employment and more people entering the labour force raised Canada's **unemployment rate** to 5.7% in July from 5.5% in June.

Average weekly earnings (for all industries) jumped to \$1,028.14 in July, a 4.6% increase over July 2018. This represents the strongest monthly increase since early 2008. Higher wages will help support stronger foodservice sales growth in the second half of 2019.

Net employment in the United States grew by 164,000 jobs in July. More people entering the workforce kept the unemployment rate unchanged at 3.7%.



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

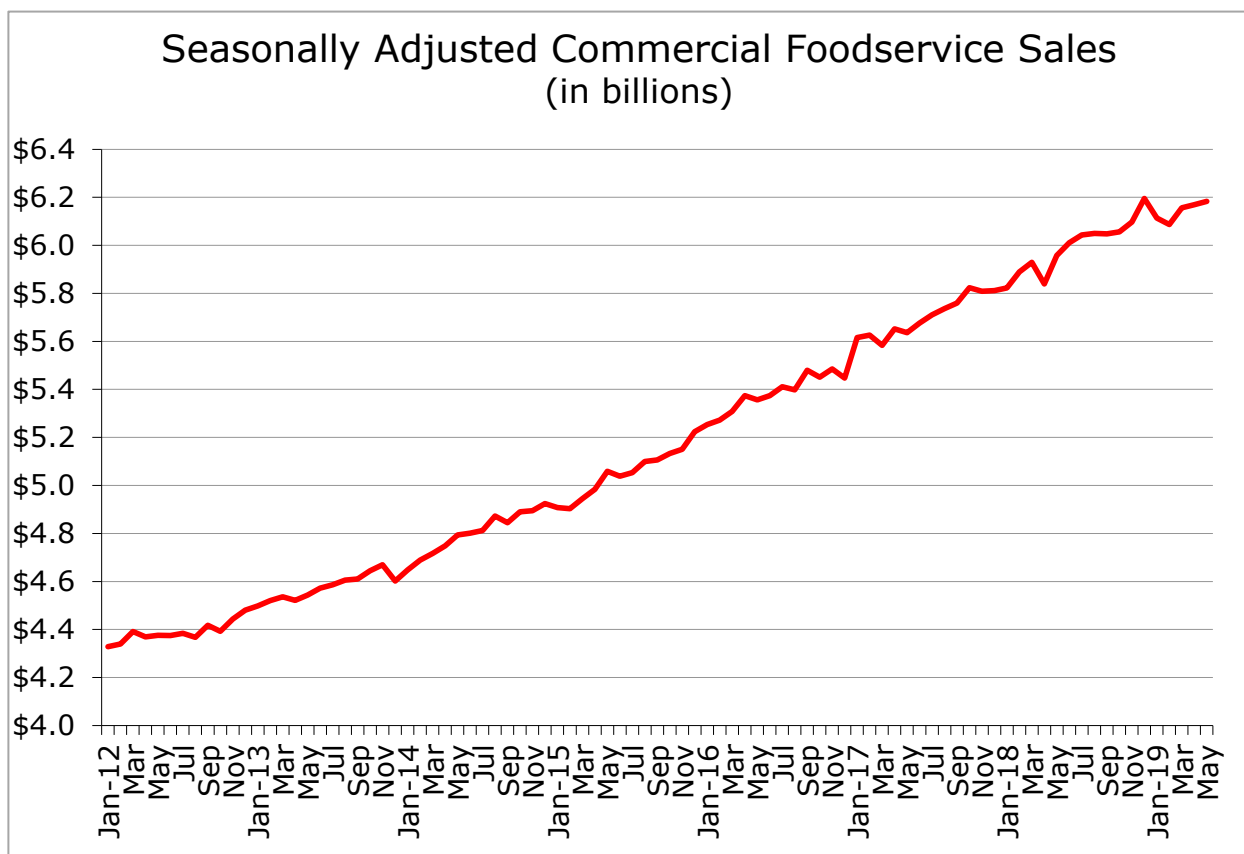
	Period	Amount	This period over year ago (%)	Year-to- date (%)	2018 over 2017(%)	2017 over 2016(%)
NOMINAL GROWTH						
Sales (in \$millions)						
Total	May	\$6,481.7	4.5%	4.4%	5.1%	5.9%
Sales by Sector (in \$millions)						
Full-service Restaurants	May	\$2,857.9	4.7%	4.7%	5.4%	6.9%
Quick-service Restaurants	May	\$2,927.8	4.8%	4.2%	4.9%	5.7%
Social & Contract Caterers	May	\$486.0	4.2%	4.3%	5.5%	4.3%
Drinking Places	May	\$210.1	-1.3%	3.6%	2.6%	0.8%
Sales by Province (in \$millions)						
Newfoundland and Labrador	May	\$71.9	2.1%	2.8%	-0.4%	0.3%
Prince Edward Island	May	\$23.8	13.1%	10.1%	6.2%	5.5%
Nova Scotia	May	\$145.9	5.7%	3.8%	2.6%	4.6%
New Brunswick	May	\$108.4	3.2%	5.8%	2.9%	2.6%
Quebec	May	\$1,276.1	7.4%	6.7%	5.8%	7.3%
Ontario	May	\$2,603.7	4.4%	3.9%	6.1%	5.9%
Manitoba	May	\$186.7	4.6%	5.3%	2.2%	5.1%
Saskatchewan	May	\$168.7	3.0%	3.3%	2.0%	0.8%
Alberta	May	\$815.3	2.7%	2.6%	1.5%	3.2%
British Columbia	May	\$1,066.7	3.2%	4.5%	7.0%	8.8%
REAL GROWTH						
Sales (in 2002 \$ millions)						
Total	May	\$4,157.6	2.0%	1.6%	0.8%	3.3%
Sales by Sector (in \$millions)						
Full-service Restaurants	May	\$1,825.0	2.7%	2.3%	1.5%	4.1%
Quick-service Restaurants	May	\$1,898.7	1.4%	0.3%	-0.4%	3.4%
Social & Contract Caterers	May	\$311.7	1.7%	1.5%	1.2%	1.6%
Drinking Places	May	\$134.7	-3.7%	0.8%	-1.6%	-1.7%
Sales by Province (in \$millions)						
Newfoundland and Labrador	May	\$44.3	1.8%	2.0%	-3.1%	-2.7%
Prince Edward Island	May	\$16.0	9.5%	7.3%	4.1%	2.6%
Nova Scotia	May	\$92.4	5.2%	3.0%	0.5%	2.2%
New Brunswick	May	\$69.5	1.1%	4.2%	0.3%	-0.3%
Quebec	May	\$806.7	4.0%	3.3%	3.1%	4.7%
Ontario	May	\$1,667.9	2.5%	1.3%	-0.3%	3.2%
Manitoba	May	\$119.8	3.1%	3.1%	0.5%	4.0%
Saskatchewan	May	\$101.5	-0.4%	0.1%	-0.5%	-0.8%
Alberta	May	\$518.6	-0.2%	-0.3%	-1.9%	0.8%
British Columbia	May	\$725.2	0.6%	1.5%	3.5%	6.2%

Source: Statistics Canada

SEASONALLY ADJUSTED FOODSERVICE SALES

	Period	Amount	Month-over-month change			
			May	April	March	February
NOMINAL GROWTH						
Sales (in \$millions)						
Total	May	\$6,183.3	0.2%	0.2%	1.1%	-0.4%
Sales by Sector (in \$millions)						
Full-service Restaurants	May	\$484.6	-2.2%	4.4%	0.5%	-1.1%
Quick-service Restaurants	May	\$203.3	-2.2%	-1.6%	1.3%	-2.4%
Social & Contract Caterers	May	\$2,732.3	0.3%	-0.3%	0.8%	0.6%
Drinking Places	May	\$2,763.1	0.8%	0.1%	1.6%	-1.2%
Sales by Province (in \$millions)						
Newfoundland and Labrador	May	\$71.6	0.3%	0.3%	-1.9%	-1.0%
Prince Edward Island	May	\$25.5	3.2%	-0.5%	3.3%	3.7%
Nova Scotia	May	\$144.8	0.4%	2.4%	0.0%	-0.3%
New Brunswick	May	\$105.3	-1.5%	-0.7%	2.7%	-1.2%
Quebec	May	\$1,186.8	0.8%	0.1%	0.3%	1.7%
Ontario	May	\$2,469.7	0.3%	0.6%	0.8%	-0.6%
Manitoba	May	\$181.8	0.5%	-1.1%	1.5%	1.3%
Saskatchewan	May	\$161.6	0.5%	-0.5%	2.8%	-3.1%
Alberta	May	\$788.3	-0.6%	0.7%	2.9%	-2.6%
British Columbia	May	\$1,033.7	0.1%	-0.7%	1.4%	-0.8%

Source: Statistics Canada



MENU INFLATION (2002=100)

	Period	Amount	This period over year ago (%)	Year-to-date (%)	2018 over 2017 (%)	2017 over 2016 (%)
By Sector						
Menu Inflation – Total	May	155.9	2.5%	2.8%	4.2%	2.6%
Menu Inflation – Full-service	May	156.6	2.0%	2.3%	3.8%	2.7%
Menu Inflation – Quick-service	May	154.2	3.4%	3.9%	5.3%	2.2%
Menu Inflation – Cafeterias	May	155.9	2.5%	2.8%	4.2%	2.6%
By Province						
Newfoundland	May	162.1	0.2%	0.8%	2.8%	3.1%
Prince Edward Island	May	149.4	3.3%	2.5%	1.9%	2.9%
Nova Scotia	May	157.9	0.4%	0.9%	2.1%	2.3%
New Brunswick	May	156.1	2.0%	1.5%	2.6%	2.9%
Quebec	May	158.2	3.3%	3.3%	2.7%	2.5%
Ontario	May	156.1	1.9%	2.6%	6.4%	2.6%
Manitoba	May	155.9	1.5%	2.1%	1.7%	1.0%
Saskatchewan	May	166.3	3.4%	3.2%	3.8%	6.7%
Alberta	May	157.2	2.9%	2.9%	3.4%	2.5%
British Columbia	May	147.1	2.7%	2.9%	3.4%	2.5%

THE ECONOMY (seasonally adjusted)

	Period	Amount	This period over year ago (%)	Year-to-date (%)	2018 over 2017 (%)	2017 over 2016 (%)
General Indicators						
Real GDP (2002 \$billion)	May	\$1,965.5	1.4%	1.4%	2.0%	3.2%
Consumer Price Index (2002=100)	May	136.6	2.4%	1.9%	2.3%	1.6%
Number of Employed ('000's)	May	19,056.8	2.4%	2.1%	1.3%	1.9%
Unemployment Rate ¹	May	5.4%	5.9%	5.7%	5.8%	6.3%
Prime Rate ¹	May	3.95%	3.45%	3.95%	3.64%	2.90%
Disposable Income (\$billion)	Q1'19	\$1,256.0	3.2%	3.2%	3.8%	4.5%
Other (in \$ millions)						
Supermarkets and Grocery Stores	May	\$8,363.8	2.7%	4.2%	0.8%	3.1%
Total Retail Sales	May	\$57,867.0	1.0%	2.3%	2.7%	7.1%
Commercial Foodservice Employment²						
Number of Employed ('000's)	May	1,135.9	1.3%	1.8%	1.4%	2.6%
Average Weekly Hours	May	21.9	-0.5%	-1.8%	-1.8%	0.4%
Average Weekly Wage	May	\$381.86	3.3%	3.1%	5.3%	3.1%

Source: Statistics Canada

¹ Refers to actual values

² Unadjusted for seasonal variation

Commercial Foodservice Sales Trends year-over-year nominal change

	2018 May	2018 Jun	2018 Jul	2018 Aug	2018 Sep	2018 Oct	2018 Nov	2018 Dec	2019 Jan	2019 Feb	2019 Mar	2019 Apr	2019 May	2019 Year-to-date
Canada	6.0%	6.5%	5.1%	6.5%	4.0%	4.0%	5.7%	5.5%	5.2%	3.2%	4.3%	4.7%	4.5%	4.4%
Full-service Restaurants	6.4%	7.6%	4.8%	8.1%	4.3%	2.9%	6.5%	5.8%	4.8%	3.9%	5.2%	4.5%	4.7%	4.7%
Quick-service Restaurants	5.9%	5.5%	5.7%	5.5%	4.1%	4.3%	4.2%	5.1%	5.4%	2.6%	3.3%	5.0%	4.8%	4.2%
Caterers	3.7%	7.2%	5.3%	4.2%	4.2%	8.8%	8.7%	4.7%	4.0%	3.1%	5.1%	5.1%	4.2%	4.3%
Drinking Places	6.4%	3.9%	2.2%	5.4%	-2.5%	2.7%	7.4%	9.5%	11.3%	3.5%	3.2%	2.9%	-1.3%	3.6%
Newfoundland and Labrador	-0.9%	-1.2%	1.9%	1.5%	-1.1%	-1.0%	0.7%	4.7%	6.6%	3.8%	0.5%	1.7%	2.1%	2.8%
Full-service Restaurants	2.6%	4.1%	6.5%	5.1%	2.9%	3.4%	5.7%	13.7%	9.3%	4.9%	-3.2%	-4.2%	-7.4%	-0.7%
Quick-service Restaurants	-0.4%	-0.3%	0.8%	2.3%	0.2%	-2.3%	-1.8%	1.2%	3.1%	-0.7%	-0.3%	2.3%	4.4%	1.8%
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	7.9%	5.8%	7.1%	8.2%	8.8%	5.3%	2.5%	4.2%	6.8%	8.6%	13.1%	8.2%	13.1%	10.1%
Full-service Restaurants	16.8%	12.7%	11.6%	10.6%	13.4%	6.0%	-0.4%	4.5%	6.5%	15.7%	17.8%	8.4%	17.0%	13.3%
Quick-service Restaurants	3.0%	-0.3%	0.3%	2.4%	3.3%	4.5%	4.0%	3.6%	6.6%	3.6%	9.6%	7.2%	10.2%	7.6%
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	3.8%	4.8%	4.7%	5.5%	2.5%	0.6%	-2.8%	0.6%	3.7%	1.4%	4.6%	3.4%	5.7%	3.8%
Full-service Restaurants	0.5%	7.7%	6.5%	6.8%	0.8%	-6.4%	-10.9%	-2.0%	2.7%	0.5%	7.8%	2.9%	3.6%	3.5%
Quick-service Restaurants	8.7%	4.4%	7.1%	5.3%	4.5%	6.7%	3.1%	4.6%	5.4%	2.7%	3.9%	4.8%	8.2%	5.1%
Caterers	-2.9%	-9.8%	-19.1%	5.5%	7.0%	-0.1%	1.7%	-4.6%	-4.2%	-1.9%	-3.7%	1.6%	-2.1%	-2.1%
Drinking Places	-15.1%	-4.3%	-20.0%	-7.2%	-11.0%	-8.3%	-16.5%	-16.9%	5.3%	-1.0%	4.0%	-8.2%	2.2%	0.4%
New Brunswick	6.4%	3.2%	0.4%	3.6%	1.3%	2.1%	4.8%	4.0%	7.7%	3.3%	9.2%	5.8%	3.2%	5.8%
Full-service Restaurants	7.8%	0.5%	-3.0%	1.7%	-0.6%	-1.4%	10.3%	4.1%	11.8%	3.3%	14.0%	7.0%	5.1%	8.1%
Quick-service Restaurants	5.3%	4.3%	2.2%	3.6%	2.3%	3.8%	2.2%	3.6%	6.1%	3.4%	7.2%	4.4%	0.9%	4.3%
Caterers	-9.4%	-10.2%	-12.5%	-9.2%	-9.6%	-11.6%	-11.9%	-11.4%	-7.4%	1.6%	4.0%	11.2%	15.9%	4.8%
Drinking Places	33.3%	27.3%	20.6%	39.5%	19.9%	30.7%	23.4%	29.0%	18.0%	5.7%	6.3%	9.0%	10.1%	9.4%

	2018 May	2018 Jun	2018 Jul	2018 Aug	2018 Sep	2018 Oct	2018 Nov	2018 Dec	2019 Jan	2019 Feb	2019 Mar	2019 Apr	2019 May	2019 Year-to-date
Quebec	6.1%	7.4%	8.0%	8.2%	4.4%	5.4%	5.3%	6.4%	6.0%	6.8%	6.1%	7.0%	7.4%	6.7%
Full-service Restaurants	5.7%	7.4%	7.0%	7.9%	3.7%	5.4%	7.2%	7.6%	4.5%	4.3%	5.4%	5.9%	7.2%	5.5%
Quick-service Restaurants	6.1%	5.5%	9.2%	7.5%	5.0%	4.1%	2.3%	3.7%	4.8%	7.1%	5.4%	6.0%	7.5%	6.2%
Caterers	2.1%	14.9%	8.2%	9.2%	7.1%	9.8%	5.0%	0.7%	5.1%	8.9%	5.2%	10.3%	8.9%	7.8%
Drinking Places	16.1%	12.5%	9.1%	16.5%	2.6%	9.0%	9.3%	22.6%	37.3%	29.7%	18.1%	19.8%	6.5%	20.4%
Ontario	7.5%	7.4%	5.0%	7.0%	4.8%	4.3%	6.1%	6.7%	5.6%	2.3%	3.1%	4.1%	4.4%	3.9%
Full-service Restaurants	8.6%	8.7%	4.1%	9.0%	4.9%	1.9%	6.3%	7.2%	5.5%	3.1%	3.5%	2.9%	3.5%	3.7%
Quick-service Restaurants	6.6%	6.1%	5.9%	5.4%	5.2%	4.8%	4.2%	5.5%	5.8%	2.1%	2.3%	5.7%	5.4%	4.3%
Caterers	7.9%	9.8%	5.8%	6.1%	4.8%	12.5%	14.1%	8.6%	3.2%	-0.4%	5.8%	2.5%	3.9%	3.0%
Drinking Places	3.8%	-2.4%	0.7%	7.7%	-3.2%	1.2%	12.2%	16.0%	14.2%	3.9%	1.8%	0.7%	1.7%	4.1%
Manitoba	3.8%	5.4%	3.8%	0.5%	1.3%	2.5%	3.4%	1.6%	3.3%	6.1%	6.8%	5.5%	4.6%	5.3%
Full-service Restaurants	3.9%	9.9%	7.8%	5.2%	5.5%	6.1%	3.8%	1.8%	2.1%	7.6%	8.0%	5.2%	4.9%	5.5%
Quick-service Restaurants	2.2%	1.5%	2.4%	-1.2%	-2.0%	-0.3%	3.1%	3.0%	6.3%	5.1%	6.9%	5.4%	6.6%	6.1%
Caterers	9.1%	7.4%	-6.7%	-11.4%	0.7%	2.8%	3.6%	-4.8%	-2.8%	10.0%	4.4%	11.5%	-4.6%	3.6%
Drinking Places	19.4%	-0.9%	1.9%	3.1%	-1.6%	-5.5%	3.2%	-3.4%	-6.6%	-18.9%	-10.4%	-10.0%	-9.1%	-11.0%
Saskatchewan	1.8%	0.9%	3.9%	5.6%	3.9%	2.2%	4.8%	3.0%	4.8%	0.7%	5.4%	2.5%	3.0%	3.3%
Full-service Restaurants	4.3%	0.1%	4.5%	5.9%	2.0%	0.1%	6.0%	4.5%	7.9%	-1.8%	6.1%	3.9%	3.7%	4.0%
Quick-service Restaurants	4.0%	3.1%	5.7%	7.7%	6.8%	5.5%	6.4%	4.8%	5.4%	4.4%	8.0%	3.7%	4.4%	5.2%
Caterers	-19.5%	-3.3%	-4.6%	-8.0%	-6.1%	0.5%	-4.0%	-7.6%	-6.8%	-6.3%	-10.3%	-2.3%	-8.2%	-6.8%
Drinking Places	-14.5%	-8.3%	-9.6%	-4.3%	1.7%	-10.8%	-9.2%	-13.6%	-13.5%	-6.0%	-9.9%	-15.4%	-7.6%	-10.5%
Alberta	1.0%	3.5%	3.4%	3.8%	-1.0%	0.5%	3.8%	1.9%	2.8%	1.0%	2.5%	3.9%	2.7%	2.6%
Full-service Restaurants	0.1%	4.4%	2.3%	4.5%	-1.3%	0.2%	4.2%	3.9%	2.1%	3.4%	5.4%	4.1%	4.5%	4.0%
Quick-service Restaurants	4.6%	5.3%	4.0%	5.2%	-0.9%	1.1%	2.9%	-0.2%	2.2%	-2.2%	-0.3%	3.3%	1.3%	0.9%
Caterers	-15.6%	-15.8%	7.5%	-7.7%	4.2%	-1.5%	10.6%	1.2%	14.9%	12.1%	12.1%	15.6%	9.6%	12.9%
Drinking Places	-3.3%	2.4%	4.0%	-4.0%	-6.8%	-0.1%	-1.1%	3.0%	-2.5%	-8.2%	-9.2%	-8.6%	-11.3%	-8.1%
British Columbia	8.2%	8.2%	4.8%	7.7%	6.7%	6.2%	9.0%	6.6%	5.8%	3.3%	5.4%	4.8%	3.2%	4.5%
Full-service Restaurants	9.1%	9.6%	5.4%	10.4%	9.2%	5.3%	10.3%	3.5%	5.5%	5.6%	7.3%	7.1%	5.1%	6.1%
Quick-service Restaurants	6.3%	6.5%	4.6%	5.5%	6.3%	7.0%	8.7%	11.4%	7.6%	2.7%	4.9%	4.0%	3.2%	4.5%
Caterers	12.7%	13.2%	6.0%	7.1%	3.4%	11.0%	1.1%	4.8%	-0.1%	-0.5%	0.0%	-0.7%	-1.8%	-0.7%
Drinking Places	9.0%	3.0%	-2.0%	-0.8%	-6.7%	1.0%	12.1%	2.5%	0.3%	-9.2%	-0.3%	-2.1%	-6.6%	-3.6%

Menu Inflation

	2018 Jun	2018 Jul	2018 Aug	2018 Sep	2018 Oct	2018 Nov	2018 Dec	2019 Jan	2019 Feb	2019 Mar	2019 Apr	2019 May	2019 Jun	2019 Year-to-date
Canada	4.5%	4.4%	4.5%	4.3%	4.2%	4.1%	3.8%	3.5%	2.7%	2.8%	2.6%	2.5%	2.6%	2.8%
Full-service Restaurants	4.0%	3.8%	3.9%	3.8%	3.5%	3.5%	3.5%	3.1%	2.2%	2.1%	2.2%	2.0%	2.1%	2.3%
Quick-service Restaurants	5.6%	6.0%	5.9%	5.5%	5.6%	5.5%	4.7%	4.4%	3.7%	4.4%	3.6%	3.4%	3.9%	3.9%
Cafeterias	4.3%	4.4%	4.4%	4.1%	4.1%	4.1%	3.8%	3.5%	2.7%	2.8%	2.6%	2.5%	2.6%	2.8%
Newfoundland and Labrador	4.2%	3.6%	2.8%	2.3%	1.7%	1.6%	1.5%	0.9%	1.5%	0.7%	0.6%	0.2%	0.9%	0.8%
Prince Edward Island	0.9%	2.2%	4.3%	2.2%	1.6%	1.7%	0.3%	1.7%	1.9%	1.8%	3.9%	3.3%	3.7%	2.7%
Nova Scotia	2.5%	2.1%	2.9%	2.0%	2.1%	1.7%	1.4%	1.2%	1.0%	0.9%	0.8%	0.4%	1.0%	0.9%
New Brunswick	2.8%	3.2%	2.7%	2.2%	1.9%	1.9%	1.4%	1.6%	1.6%	1.8%	0.6%	2.0%	2.0%	1.6%
Quebec	2.8%	2.9%	3.0%	2.9%	2.7%	2.6%	2.8%	3.2%	3.3%	3.5%	3.3%	3.3%	3.4%	3.3%
Ontario	6.8%	6.7%	6.5%	6.3%	6.0%	6.1%	5.8%	4.5%	2.2%	2.4%	2.2%	1.9%	2.0%	2.5%
Manitoba	2.3%	2.3%	2.1%	1.8%	2.0%	1.6%	1.4%	2.3%	2.5%	2.6%	1.8%	1.5%	1.6%	2.0%
Saskatchewan	2.0%	2.1%	2.1%	2.1%	2.6%	2.7%	3.1%	3.1%	3.1%	3.3%	3.2%	3.4%	3.7%	3.3%
Alberta	3.6%	3.6%	3.8%	3.7%	4.0%	3.7%	2.7%	3.0%	2.8%	3.0%	2.9%	2.9%	3.3%	3.0%
British Columbia	3.4%	3.6%	3.9%	3.6%	3.6%	3.6%	3.0%	3.0%	3.0%	3.0%	2.9%	2.7%	3.1%	2.9%

Source: Statistics Canada