RCINTEL

RESEARCH

Monthly InfoStats

Reference period: October 2019

January 11, 2020

Monthly InfoStats – October 2019
Commercial Foodservice Industry (preliminary results)

Highlights

In October, **commercial foodservice sales** in Canada advanced by 3.5%, which is an improvement compared to a 2.5% increase in September.

Overall, adjusted for **menu inflation** of 2.7%, real sales increased by 0.7% in October.

With higher spending in all provinces, sales at **full-service restaurants** increased by 3.8% in October. Nova Scotia led the country with a 12.5% surge in sales.

Quick-service restaurant sales increased by 3.6% in October. Most of the growth, however, was due to a 3.4% jump in menu prices – the largest increase of all segments.

Caterers rebounded with a 3.0% increase in revenues in October, following a 1.8% growth in September. Nevertheless, caterer revenues in Saskatchewan, Alberta and British Columbia decelerated in October compared to September 2019.

Drinking place sales fell by 1.1% in October. The largest declines were reported in Western Canada, while spending in Ontario slipped by 1.8%.

Commercial foodservice sales in **Newfoundland and Labrador** grew by 2.5% in October, following a 4.8% increase in September. Although sales at quick-service restaurants outpaced full-service restaurants with a 3.4% increase, this represents the weakest growth since April 2019.

A rebound in sales at full- and quick-service restaurants boosted total foodservice sales on **Prince Edward Island** by 7.6% in October. Sales at full-service restaurants grew by 8.1%, following a 2.9% decline in September.

Nova Scotia's foodservice industry made a comeback with a 6.4% increase in total sales in October. Growth was led by a 12.5% surge in spending at full-service restaurants.

Due to strong demand across all segments, **New Brunswick's** foodservice industry improved with a 3.6% increase in sales in October.

After four consecutive months of moderate gains, **Quebec's** foodservice industry rebounded with a 6.0% increase in sales in October. While all segments posted higher sales, caterers and drinking places led the province with revenue growth of 13.3% and 8.0% respectively.

Foodservice sales in **Ontario** grew by 3.0% in October, following a tepid 1.3% increase in September. Full-service restaurants led all segments with a 4.6% increase in October. This represents the segment's strongest gain since January 2019. In contrast, sales at quick-service restaurants underperformed with a sluggish 2.3% increase.

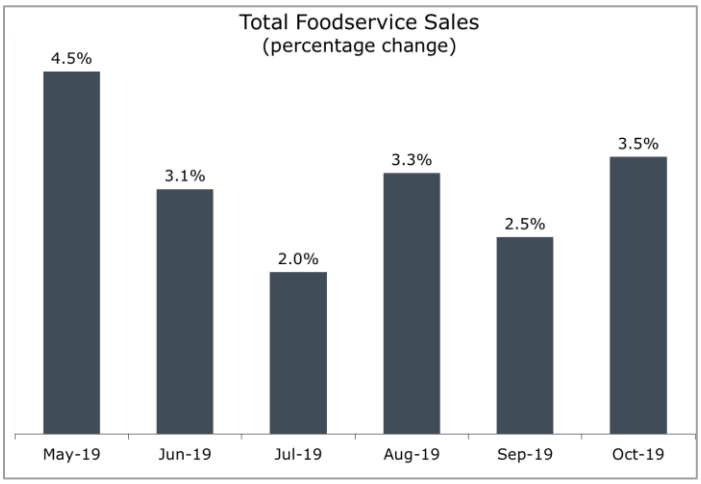
While other provinces reported stronger gains, foodservice sales in **Manitoba** moderated to 2.9% growth. Despite higher sales at full- and quick-service restaurants, revenues fell at caterers and drinking places.

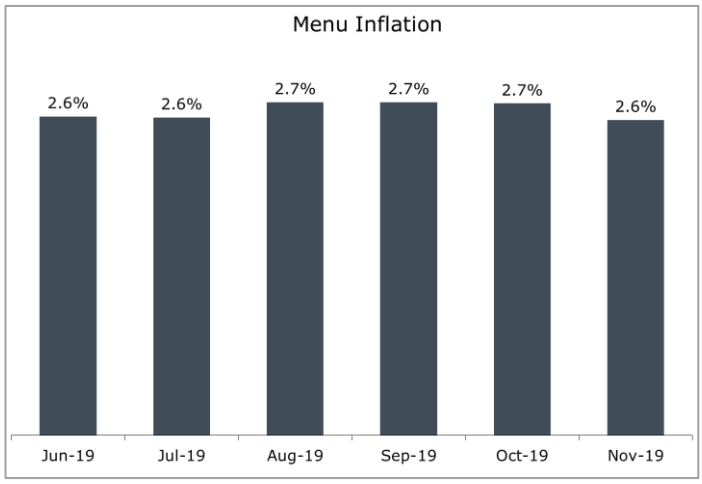
For the second consecutive month, **Saskatchewan** was the only province to report lower year-over-year sales in October (-0.4%). While sales at full-service restaurants increased by 1.6%, spending fell at quick-service restaurants, caterers and drinking places.

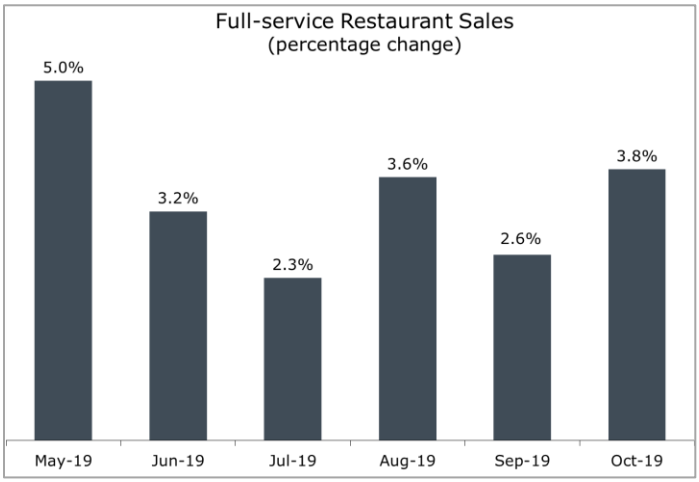
Total foodservice sales in **Alberta** rose by 3.5% in October. As in September, increases at caterers and quick-service restaurants offset lower sales at drinking places. Full-service restaurants posted the lowest gain since October 2018.

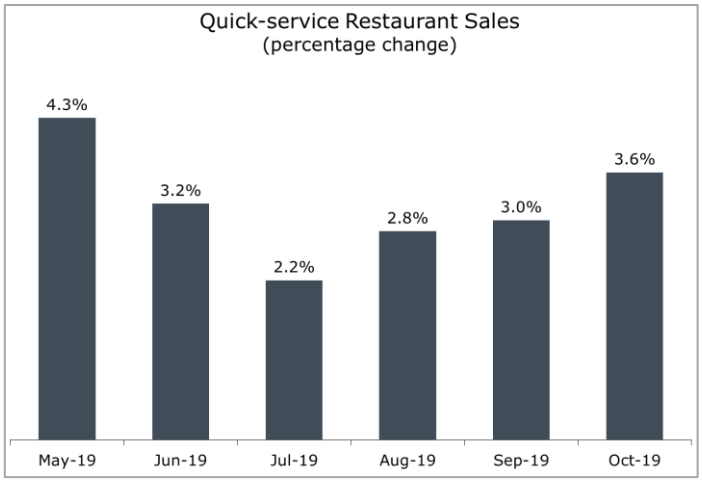
Foodservice sales in **British Columbia** decelerated from 2.3% growth in September to 2.0% in October. Gains at full- and quick-service restaurants balanced the declined revenues at drinking places. A 2.0% increase in total foodservice industry was led by a 3.7% growth in sales at full-service restaurants.

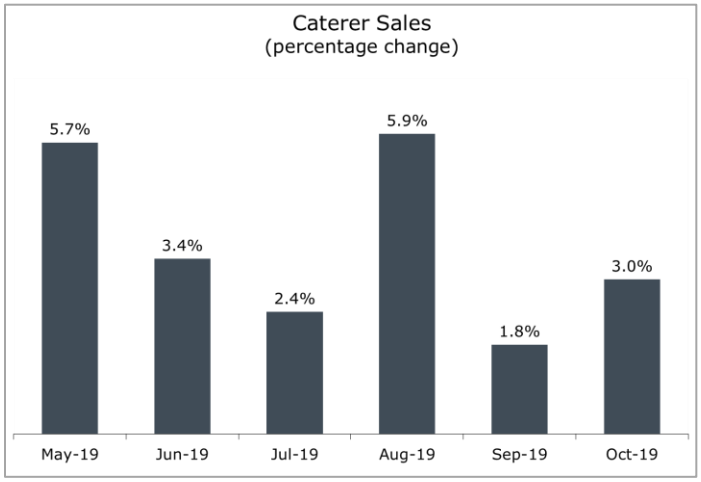
Commercial Foodservice Trends - Canada

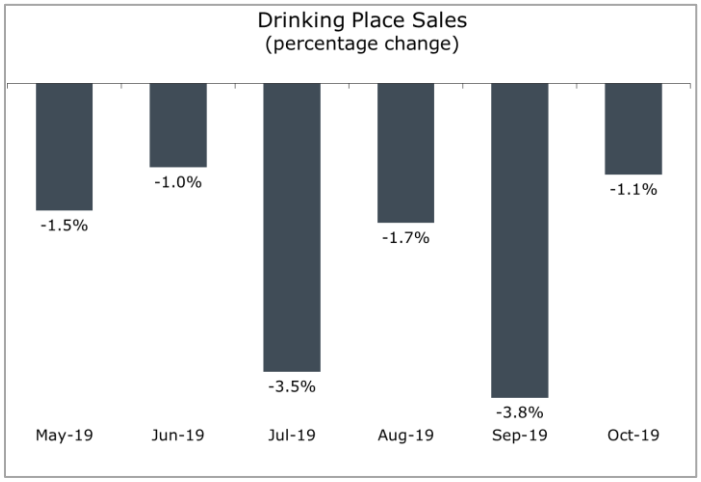












Note: All growth rates are year-over-year and based on preliminary data from Statistics Canada.

Highlights

Canada's economy contracted by a slight 0.1% in October due the spillover effects from the U.S. auto manufacturing strike.

TD Economics is forecasting **Canada's economy** will grow by 1.7% in 2020 and 1.8% in 2021 as a result of a rebound in business investment and residential investment. Consumer spending, however, will be restrained to 1.6% growth over the near term due to high household debt.

In December, **Canada's consumer confidence index** tumbled to a 36-month low of 102.1. This is due to growing concerns in Canadian households about their financial security.

Retail sales rose by a tepid 0.2% in October as gains at general merchandise stores and food and beverage stores were offset by lower spending on automobiles, at gas stations and electronics and appliance stores.

Net employment in Canada grew by 35,200 jobs in December after shedding 71,200 jobs in November.

Net employment in the United States grew by a slightly weaker-than-expected 145,000 jobs following robust gains in November.

On a month-over-month basis, **Canada's economy** contracted by 0.1% in October. This decline was largely due to a 1.4% drop in manufacturing activity, which was mostly the result of spillover effects from the U.S. auto manufacturing strike. In contrast, 13 of 20 major sector groupings reported higher levels of output – a sign that there is some underlying strength in the economy.

According to TD Economic's latest forecast, **Canada's economy** is expected to expand by 1.6% in 2020 compared to a 1.7% increase in 2019. While Canada's economy will benefit from a rebound in business investment and residential investment, real consumer spending is projected to grow by a modest 1.6% in 2020 due to high levels of household debt.

At the **provincial level**, TD Economic's is forecasting that British Columbia and Prince Edward Island will lead the country with 2.0% real GDP growth in 2020. In contrast, demographic challenges will restrain economic activity in New Brunswick (+0.8%) and Newfoundland & Labrador (+0.7%).

Due to growing financial pressures, **consumer confidence** in Canada ended the year on a sour note with the index tumbling by 9.9 points in December. The index is now at its lowest level in 36 months.

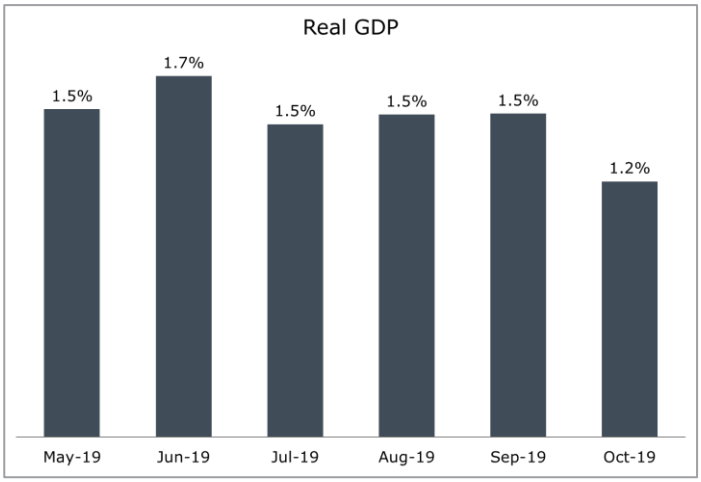
On a year-over-year basis, r**etail sales** in Canada grew by a tepid 0.2% in October compared to a 0.1% increase in September. While consumer spending rose at general merchandise stores (+5.5%) and food and beverage stores (+3.0%), sales fell at electronics and appliance stores (-17.5%), gasoline stations (-4.8%) and motor vehicle and product dealers (-1.3%).

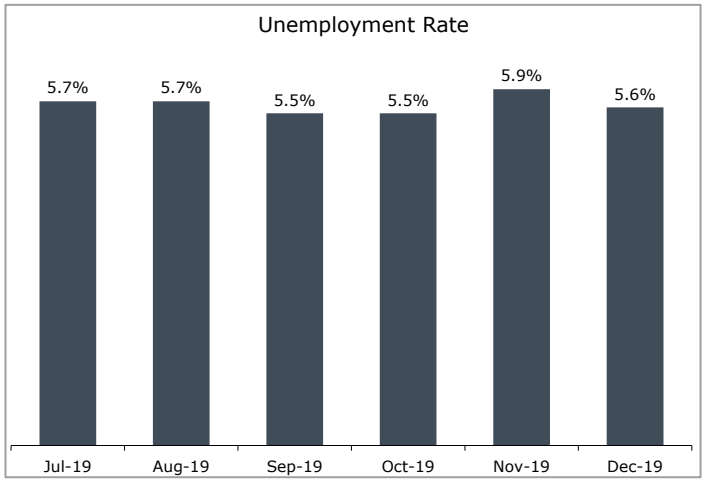
On a year-over-year basis, **prices for food at grocery stores** rose by 3.9% in November compared to November 2018. Consumers paid more for fresh vegetables (+7.1%), fresh fruit (+6.9%), beef (+6.2%) and chicken (+4.5%).

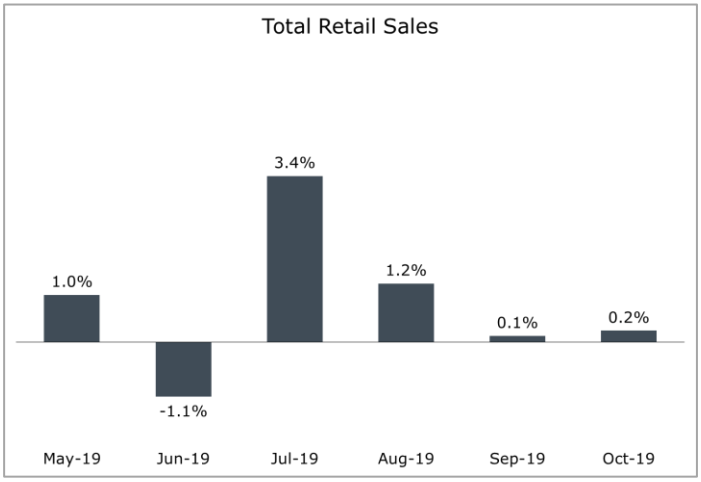
Net employment in Canada improved slightly with the creation of 35,200 jobs in December. This helped lower the unemployment rate from 5.9% in November to 5.6%.

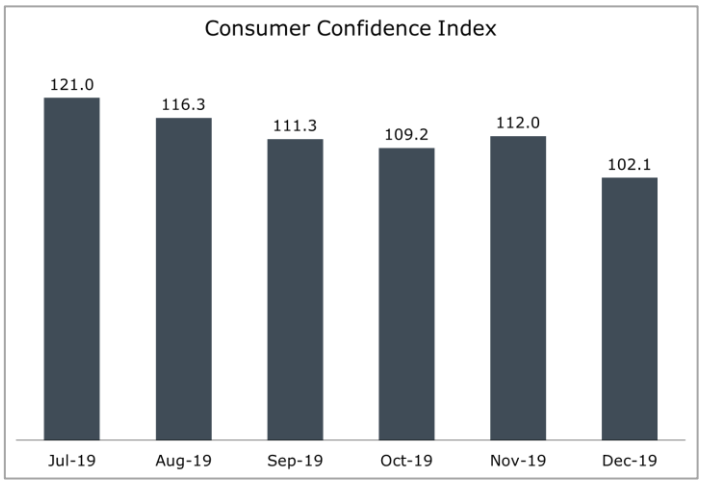
Net employment in the United States increased by a modest 145,000 jobs in December, following the creation of 256,000 jobs in November. The unemployment rate held steady at a 50-year low of 3.5%.

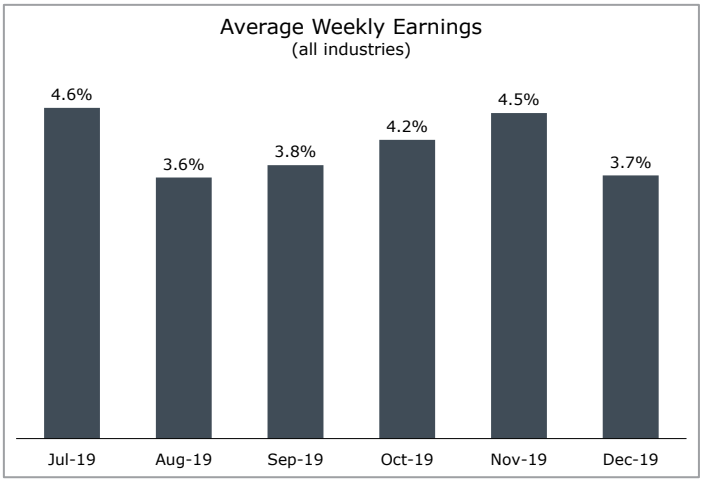
Economic Indicators - Canada

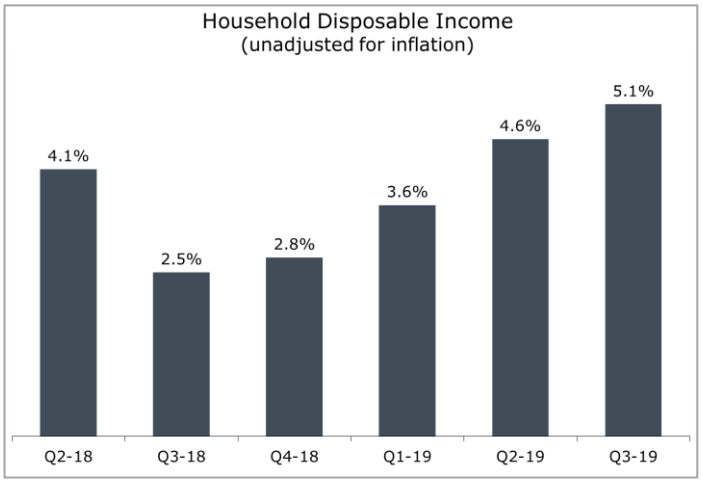












Source: Statistics Canada and Conference Board of Canada

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

Restaurants Canada
The voice of foodservice | La voix des services alimentaires

COMMERCIAL FOODSERVICE SALES

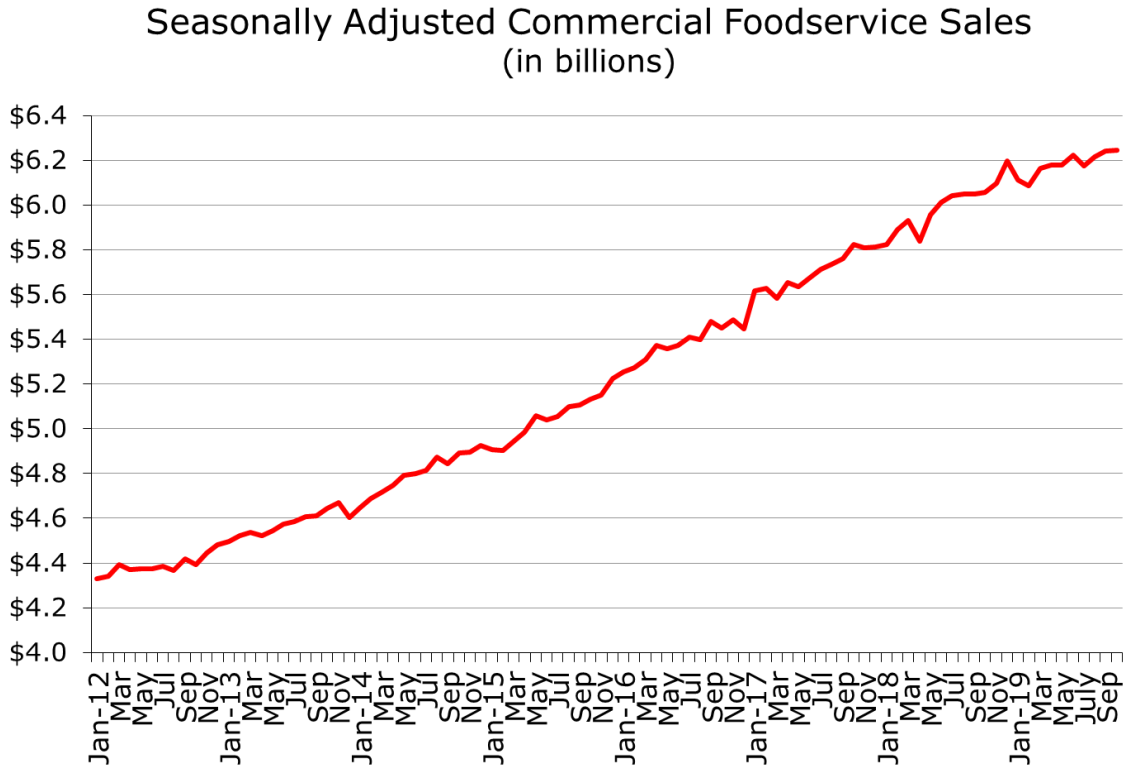
	Period	Amount	This period over year ago (%)	Year-to-date (%)	2018 over 2017(%)	2017 over 2016(%)
NOMINAL GROWTH						
Sales (in $millions)						
Total	October	$6,345.2	3.5%	3.6%	5.1%	5.9%
Sales by Sector (in $millions)						
Full-service Restaurants	October	$2,691.1	3.8%	3.8%	5.4%	6.9%
Quick-service Restaurants	October	$2,904.9	3.6%	3.5%	4.9%	5.7%
Social & Contract Caterers	October	$543.2	3.0%	3.9%	5.5%	4.3%
Drinking Places	October	$206.0	-1.1%	0.6%	2.6%	0.8%
Sales by Province (in $millions)						
Newfoundland and Labrador	October	$75.1	2.5%	3.0%	-0.4%	0.3%
Prince Edward Island	October	$23.7	7.6%	8.2%	6.2%	5.5%
Nova Scotia	October	$153.8	6.4%	4.2%	2.6%	4.6%
New Brunswick	October	$109.9	3.6%	5.1%	2.9%	2.6%
Quebec	October	$1,239.6	6.0%	4.8%	5.8%	7.3%
Ontario	October	$2,532.4	3.0%	3.4%	6.1%	5.9%
Manitoba	October	$187.1	2.9%	4.0%	2.2%	5.1%
Saskatchewan	October	$164.4	-0.4%	1.3%	2.0%	0.8%
Alberta	October	$817.0	3.5%	2.7%	1.5%	3.2%
British Columbia	October	$1,028.2	2.0%	3.3%	7.0%	8.8%
REAL GROWTH						
Sales (in 2002 $ millions)						
Total	October	$4,016.0	0.7%	0.8%	0.8%	3.3%
Sales by Sector (in $millions)						
Full-service Restaurants	October	$1,697.9	1.3%	1.5%	1.5%	4.1%
Quick-service Restaurants	October	$1,851.4	0.2%	-0.2%	-0.4%	3.4%
Social & Contract Caterers	October	$343.8	0.3%	1.2%	1.2%	1.6%
Drinking Places	October	$130.4	-3.7%	-2.1%	-1.6%	-1.7%
Sales by Province (in $millions)						
Newfoundland and Labrador	October	$45.4	-0.3%	1.8%	-3.1%	-2.7%
Prince Edward Island	October	$15.7	6.0%	5.6%	4.1%	2.6%
Nova Scotia	October	$95.5	4.1%	2.8%	0.5%	2.2%
New Brunswick	October	$69.7	1.7%	3.4%	0.3%	-0.3%
Quebec	October	$772.8	2.3%	1.4%	3.1%	4.7%
Ontario	October	$1,605.9	0.7%	1.1%	-0.3%	3.2%
Manitoba	October	$120.1	2.1%	2.3%	0.5%	4.0%
Saskatchewan	October	$98.1	-3.2%	-1.8%	-0.5%	-0.8%
Alberta	October	$512.9	0.9%	-0.3%	-1.9%	0.8%
British Columbia	October	$682.7	-1.5%	0.2%	3.5%	6.2%

Source: Statistics Canada

SEASONALLY ADJUSTED FOODSERVICE SALES

			Month-over-month change			
	Period	Amount	October	Septembe	August	July
NOMINAL GROWTH						
Sales (in $millions)						
Total	October	$6,245.0	0.0%	0.5%	0.6%	-0.7%
Sales by Sector (in $millions)						
Full-service Restaurants	October	$2,764.9	-0.3%	0.6%	0.5%	-0.6%
Quick-service Restaurants	October	$2,782.2	0.0%	0.7%	0.6%	-0.7%
Social & Contract Caterers	October	$495.2	2.0%	-1.7%	1.3%	-1.0%
Drinking Places	October	$202.8	-0.1%	0.6%	-0.2%	-1.9%
Sales by Province (in $millions)						
Newfoundland and Labrador	October	$73.1	-2.0%	1.2%	-0.1%	0.3%
Prince Edward Island	October	$24.7	1.2%	-0.8%	-2.1%	0.0%
Nova Scotia	October	$147.2	-0.8%	1.4%	0.7%	0.5%
New Brunswick	October	$106.5	0.3%	-0.2%	-0.8%	-0.3%
Quebec	October	$1,209.9	0.8%	0.7%	1.8%	-0.3%
Ontario	October	$2,473.1	0.2%	-0.4%	0.5%	-1.0%
Manitoba	October	$180.3	-1.0%	1.3%	-0.2%	0.3%
Saskatchewan	October	$159.6	0.9%	-1.7%	0.9%	2.0%
Alberta	October	$807.7	-0.5%	0.9%	0.6%	-0.8%
British Columbia	October	$1,048.7	-0.5%	2.2%	-0.2%	-1.4%

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	October	158.0	2.7%	2.7%	4.2%	2.6%
Menu Inflation – Full-service	October	158.5	2.5%	2.3%	3.8%	2.7%
Menu Inflation – Quick-service	October	156.9	3.4%	3.8%	5.3%	2.2%
Menu Inflation – Cafeterias	October	158.1	2.8%	2.8%	4.2%	2.6%
By Province						
Newfoundland	October	165.4	2.8%	1.2%	2.8%	3.1%
Prince Edward Island	October	150.8	1.5%	2.4%	1.9%	2.9%
Nova Scotia	October	161.1	2.2%	1.3%	2.1%	2.3%
New Brunswick	October	157.8	1.8%	1.7%	2.6%	2.9%
Quebec	October	160.4	3.6%	3.4%	2.7%	2.5%
Ontario	October	157.7	2.2%	2.3%	6.4%	2.6%
Manitoba	October	155.8	0.8%	1.6%	1.7%	1.0%
Saskatchewan	October	167.6	2.9%	3.2%	3.8%	6.7%
Alberta	October	159.3	2.6%	3.0%	3.4%	2.5%
British Columbia	October	150.6	3.5%	3.1%	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)	October	$1,975.4	1.2%	1.5%	2.0%	3.2%
Consumer Price Index (2002=100)	October	136.6	1.9%	1.9%	2.3%	1.6%
Number of Employed ('000's)	October	19,163.4	2.4%	2.2%	1.3%	1.9%
Unemployment Rate[1]	October	5.5%	5.7%	5.6%	5.8%	6.3%
Disposable Income ($billion)	Q3'19	$1,298.8	5.1%	4.4%	3.8%	4.5%
Other (in $ millions)						
Supermarkets and Grocery Stores	October	$8,088.4	3.7%	2.0%	0.8%	3.1%
Total Retails Sales	October	$52,514.2	0.2%	1.5%	2.7%	7.1%
Commercial Foodservice Employment[2]						
Number of Employed ('000's)	October	1,149.9	1.7%	1.9%	1.4%	2.6%
Average Weekly Hours	October	22.7	6.1%	-0.1%	-1.8%	0.4%
Average Weekly Wage	October	$401.90	6.1%	3.8%	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 Oct	2018 Nov	2018 Dec	2019 Jan	2019 Feb	2019 Mar	2019 Apr	2019 May	2019 Jun	2019 Jul	2019 Aug	2019 Sep	2019 Oct	2019 Year-to-date
Canada	**4.0%**	**5.7%**	**5.5%**	**5.2%**	**3.2%**	**4.3%**	**5.0%**	**4.5%**	**3.1%**	**2.0%**	**3.3%**	**2.5%**	**3.5%**	**3.6%**
Full-service Restaurants	2.9%	6.5%	5.8%	4.8%	3.9%	5.2%	4.5%	5.0%	3.2%	2.3%	3.6%	2.6%	3.8%	3.8%
Quick-service Restaurants	4.3%	4.2%	5.1%	5.4%	2.6%	3.3%	5.5%	4.3%	3.2%	2.2%	2.8%	3.0%	3.6%	3.5%
Caterers	8.8%	8.7%	4.7%	4.0%	3.1%	5.1%	5.4%	5.7%	3.4%	2.4%	5.9%	1.8%	3.0%	3.9%
Drinking Places	2.7%	7.4%	9.5%	11.3%	3.5%	3.2%	3.5%	-1.5%	-1.0%	-3.5%	-1.7%	-3.8%	-1.1%	0.6%
Newfoundland and Labrador	**-1.0%**	**0.7%**	**4.7%**	**6.6%**	**3.8%**	**0.5%**	**2.6%**	**0.2%**	**3.2%**	**2.6%**	**3.7%**	**4.8%**	**2.5%**	**3.0%**
Full-service Restaurants	3.4%	5.7%	13.7%	9.3%	4.9%	-3.2%	-0.7%	-4.2%	-1.8%	0.2%	3.1%	-0.8%	0.2%	0.5%
Quick-service Restaurants	-2.3%	-1.8%	1.2%	3.1%	-0.7%	-0.3%	2.3%	4.8%	6.1%	6.7%	5.3%	6.0%	3.4%	3.9%
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	**5.3%**	**2.5%**	**4.2%**	**6.8%**	**8.6%**	**13.1%**	**8.8%**	**10.3%**	**10.3%**	**9.8%**	**5.7%**	**3.0%**	**7.6%**	**8.2%**
Full-service Restaurants	6.0%	-0.4%	4.5%	6.5%	15.7%	17.8%	8.4%	9.9%	9.7%	9.1%	5.4%	-2.9%	8.1%	7.7%
Quick-service Restaurants	4.5%	4.0%	3.6%	6.6%	3.6%	9.6%	8.0%	10.7%	11.0%	10.6%	7.5%	8.3%	7.4%	8.5%
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	**0.6%**	**-2.8%**	**0.6%**	**3.7%**	**1.4%**	**4.6%**	**4.2%**	**7.4%**	**2.6%**	**2.7%**	**3.5%**	**4.9%**	**6.4%**	**4.2%**
Full-service Restaurants	-6.4%	-10.9%	-2.0%	2.7%	0.5%	7.8%	3.2%	5.5%	-3.5%	-2.4%	1.6%	8.4%	12.5%	3.3%
Quick-service Restaurants	6.7%	3.1%	4.6%	5.4%	2.7%	3.9%	5.6%	9.7%	7.1%	6.4%	4.5%	3.5%	3.5%	5.3%
Caterers	-0.1%	1.7%	-4.6%	-4.2%	-1.9%	-3.7%	4.0%	1.2%	13.9%	14.8%	14.7%	-5.7%	-0.8%	1.6%
Drinking Places	-8.3%	-16.5%	-16.9%	5.3%	-1.0%	4.0%	-6.8%	2.5%	0.4%	5.6%	2.8%	6.0%	6.4%	2.6%
New Brunswick	**2.1%**	**4.8%**	**4.0%**	**7.7%**	**3.3%**	**9.2%**	**6.0%**	**3.7%**	**5.9%**	**6.7%**	**3.8%**	**1.8%**	**3.6%**	**5.1%**
Full-service Restaurants	-1.4%	10.3%	4.1%	11.8%	3.3%	14.0%	6.7%	4.4%	10.3%	3.4%	1.7%	3.6%	5.4%	6.2%
Quick-service Restaurants	3.8%	2.2%	3.6%	6.1%	3.4%	7.2%	4.9%	2.2%	2.9%	8.1%	4.8%	1.5%	2.7%	4.4%
Caterers	-11.6%	-11.9%	-11.4%	-7.4%	1.6%	4.0%	11.4%	9.8%	11.4%	22.5%	32.4%	-0.3%	3.7%	6.6%
Drinking Places	30.7%	23.4%	29.0%	18.0%	5.7%	6.3%	10.1%	14.6%	7.3%	11.4%	-3.5%	-4.3%	1.7%	6.1%

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	2018 Oct	2018 Nov	2018 Dec	2019 Jan	2019 Feb	2019 Mar	2019 Apr	2019 May	2019 Jun	2019 Jul	2019 Aug	2019 Sep	2019 Oct	2019 Year-to-date
Quebec	**5.4%**	**5.3%**	**6.4%**	**6.0%**	**6.8%**	**6.1%**	**7.3%**	**6.6%**	**2.3%**	**0.7%**	**4.3%**	**3.8%**	**6.0%**	**4.8%**
Full-service Restaurants	5.4%	7.2%	7.6%	4.5%	4.3%	5.4%	6.0%	7.2%	3.7%	1.5%	5.1%	2.1%	4.9%	4.4%
Quick-service Restaurants	4.1%	2.3%	3.7%	4.8%	7.1%	5.4%	6.3%	5.2%	0.8%	0.5%	2.2%	5.0%	5.5%	4.1%
Caterers	9.8%	5.0%	0.7%	5.1%	8.9%	5.2%	10.2%	9.3%	0.2%	-3.8%	9.0%	11.1%	13.3%	6.8%
Drinking Places	9.0%	9.3%	22.6%	37.3%	29.7%	18.1%	21.5%	6.3%	2.8%	1.0%	7.4%	-0.4%	8.0%	11.4%
Ontario	**4.3%**	**6.1%**	**6.7%**	**5.6%**	**2.3%**	**3.1%**	**4.3%**	**4.5%**	**3.9%**	**2.9%**	**3.6%**	**1.3%**	**3.0%**	**3.4%**
Full-service Restaurants	1.9%	6.3%	7.2%	5.5%	3.1%	3.5%	2.8%	3.8%	3.5%	2.7%	4.2%	2.4%	4.6%	3.6%
Quick-service Restaurants	4.8%	4.2%	5.5%	5.8%	2.1%	2.3%	6.2%	5.0%	4.4%	3.0%	3.3%	2.0%	2.3%	3.6%
Caterers	12.5%	14.1%	8.6%	3.2%	-0.4%	5.8%	1.5%	6.5%	2.5%	4.2%	2.8%	-5.3%	0.5%	2.0%
Drinking Places	1.2%	12.2%	16.0%	14.2%	3.9%	1.8%	1.7%	0.5%	8.0%	-2.0%	1.1%	-4.2%	-1.8%	2.1%
Manitoba	**2.5%**	**3.4%**	**1.6%**	**3.3%**	**6.1%**	**6.8%**	**5.9%**	**2.8%**	**1.4%**	**2.6%**	**4.4%**	**4.3%**	**2.9%**	**4.0%**
Full-service Restaurants	6.1%	3.8%	1.8%	2.1%	7.6%	8.0%	5.2%	2.9%	0.7%	2.2%	3.6%	5.4%	2.6%	3.9%
Quick-service Restaurants	-0.3%	3.1%	3.0%	6.3%	5.1%	6.9%	5.8%	4.1%	3.8%	3.2%	7.3%	5.9%	5.5%	5.4%
Caterers	2.8%	3.6%	-4.8%	-2.8%	10.0%	4.4%	12.3%	-1.0%	-6.6%	2.3%	-7.9%	-4.6%	-3.7%	-0.1%
Drinking Places	-5.5%	3.2%	-3.4%	-6.6%	-18.9%	-10.4%	-9.5%	-15.1%	-0.2%	-2.7%	0.6%	-13.9%	-18.0%	-9.6%
Saskatchewan	**2.2%**	**4.8%**	**3.0%**	**4.8%**	**0.7%**	**5.4%**	**3.1%**	**3.1%**	**-1.4%**	**0.1%**	**1.2%**	**-2.5%**	**-0.4%**	**1.3%**
Full-service Restaurants	0.1%	6.0%	4.5%	7.9%	-1.8%	6.1%	4.1%	3.8%	-1.6%	0.0%	4.2%	-1.9%	1.6%	2.2%
Quick-service Restaurants	5.5%	6.4%	4.8%	5.4%	4.4%	8.0%	4.6%	4.6%	1.1%	0.9%	-0.2%	-2.1%	-1.2%	2.4%
Caterers	0.5%	-4.0%	-7.6%	-6.8%	-6.3%	-10.3%	-0.3%	-5.7%	-4.5%	16.3%	13.6%	6.3%	-0.6%	-0.1%
Drinking Places	-10.8%	-9.2%	-13.6%	-13.5%	-6.0%	-9.9%	-15.4%	-10.4%	-21.4%	-18.9%	-16.4%	-16.4%	-8.1%	-13.8%
Alberta	**0.5%**	**3.8%**	**1.9%**	**2.8%**	**1.0%**	**2.5%**	**4.0%**	**2.8%**	**1.9%**	**0.7%**	**3.1%**	**4.2%**	**3.5%**	**2.7%**
Full-service Restaurants	0.2%	4.2%	3.9%	2.1%	3.4%	5.4%	3.9%	5.4%	2.1%	2.3%	4.2%	4.9%	1.4%	3.5%
Quick-service Restaurants	1.1%	2.9%	-0.2%	2.2%	-2.2%	-0.3%	3.8%	1.0%	0.1%	-1.3%	1.2%	4.2%	6.1%	1.5%
Caterers	-1.5%	10.6%	1.2%	14.9%	12.1%	12.1%	15.6%	7.5%	20.8%	9.7%	23.3%	9.1%	6.3%	12.9%
Drinking Places	-0.1%	-1.1%	3.0%	-2.5%	-8.2%	-9.2%	-8.6%	-11.0%	-5.9%	-5.5%	-12.7%	-11.7%	-10.7%	-8.5%
British Columbia	**6.2%**	**9.0%**	**6.6%**	**5.8%**	**3.3%**	**5.4%**	**5.3%**	**3.8%**	**3.5%**	**1.9%**	**1.2%**	**2.3%**	**2.0%**	**3.3%**
Full-service Restaurants	5.3%	10.3%	3.5%	5.5%	5.6%	7.3%	7.0%	5.3%	3.9%	2.9%	0.7%	1.3%	1.3%	3.9%
Quick-service Restaurants	7.0%	8.7%	11.4%	7.6%	2.7%	4.9%	4.8%	3.6%	4.4%	2.3%	2.3%	2.5%	3.7%	3.8%
Caterers	11.0%	1.1%	4.8%	-0.1%	-0.5%	0.0%	3.7%	2.9%	3.5%	-1.4%	4.2%	9.6%	0.0%	2.4%
Drinking Places	1.0%	12.1%	2.5%	0.3%	-9.2%	-0.3%	-3.0%	-6.2%	-7.0%	-7.0%	-6.4%	-0.2%	-3.3%	-4.3%

Menu Inflation

	2018 Nov	2018 Dec	2019 Jan	2019 Feb	2019 Mar	2019 Apr	2019 May	2019 Jun	2019 Jul	2019 Aug	2019 Sep	2019 Oct	2019 Nov	2019 Year-to-date
Canada	**4.1%**	**3.8%**	**3.5%**	**2.7%**	**2.8%**	**2.6%**	**2.5%**	**2.6%**	**2.6%**	**2.7%**	**2.7%**	**2.7%**	**2.6%**	**2.7%**
Full-service Restaurants	3.5%	3.5%	3.1%	2.2%	2.1%	2.2%	2.0%	2.1%	2.2%	2.3%	2.4%	2.5%	2.4%	2.3%
Quick-service Restaurants	5.5%	4.7%	4.4%	3.7%	4.4%	3.6%	3.4%	3.9%	3.6%	3.7%	3.5%	3.4%	3.3%	3.7%
Cafeterias	4.1%	3.8%	3.5%	2.7%	2.8%	2.6%	2.5%	2.6%	2.7%	2.8%	2.8%	2.8%	2.7%	2.8%
Newfoundland and Labrador	**1.6%**	**1.5%**	**0.9%**	**1.5%**	**0.7%**	**0.6%**	**0.2%**	**0.9%**	**0.7%**	**1.6%**	**1.7%**	**2.8%**	**2.8%**	**1.3%**
Prince Edward Island	**1.7%**	**0.3%**	**1.7%**	**1.9%**	**1.8%**	**3.9%**	**3.3%**	**3.7%**	**2.7%**	**2.0%**	**1.9%**	**1.5%**	**1.6%**	**2.4%**
Nova Scotia	**1.7%**	**1.4%**	**1.2%**	**1.0%**	**0.9%**	**0.8%**	**0.4%**	**1.0%**	**1.9%**	**1.7%**	**1.8%**	**2.2%**	**2.3%**	**1.4%**
New Brunswick	**1.9%**	**1.4%**	**1.6%**	**1.6%**	**1.8%**	**0.6%**	**2.0%**	**2.0%**	**2.0%**	**1.7%**	**1.7%**	**1.8%**	**1.8%**	**1.7%**
Quebec	**2.6%**	**2.8%**	**3.2%**	**3.3%**	**3.5%**	**3.3%**	**3.3%**	**3.4%**	**3.4%**	**3.6%**	**3.4%**	**3.6%**	**3.4%**	**3.4%**
Ontario	**6.1%**	**5.8%**	**4.5%**	**2.2%**	**2.4%**	**2.2%**	**1.9%**	**2.0%**	**1.9%**	**2.0%**	**2.1%**	**2.2%**	**2.1%**	**2.3%**
Manitoba	**1.6%**	**1.4%**	**2.3%**	**2.5%**	**2.6%**	**1.8%**	**1.5%**	**1.6%**	**1.2%**	**1.0%**	**1.0%**	**0.8%**	**1.2%**	**1.6%**
Saskatchewan	**2.7%**	**3.1%**	**3.1%**	**3.1%**	**3.3%**	**3.2%**	**3.4%**	**3.7%**	**3.3%**	**3.1%**	**3.3%**	**2.9%**	**2.5%**	**3.2%**
Alberta	**3.7%**	**2.7%**	**3.0%**	**2.8%**	**3.0%**	**2.9%**	**2.9%**	**3.3%**	**3.1%**	**3.2%**	**3.3%**	**2.6%**	**2.5%**	**3.0%**
British Columbia	**3.6%**	**3.0%**	**3.0%**	**3.0%**	**3.0%**	**2.9%**	**2.7%**	**3.1%**	**3.3%**	**3.5%**	**3.4%**	**3.5%**	**3.6%**	**3.2%**

Source: Statistics Canada

Restaurants Canada

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