RCINTEL

RESEARCH

Monthly InfoStats

Reference period: December 2019

March 11, 2020

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

Highlights

Commercial foodservice sales decelerated to a lacklustre 1.6% growth in December 2019, the lowest since Feburay 2013. Adjusted for menu inflation, real sales decreased by 1.0%. Prince Edward Island and Quebec led the country with 9.3% and 5.5% nominal sales growth, respectively.

Full-service restaurant sales advanced by 1.9% in December 2019, compared to 5.2% in November 2019. Sales growth generally moderated in most provinces compared to November.

Sales at **quick-service restaurants** rose by a modest 1.6% in December. Nevertheless, Prince Edward Island (+14.4%) and Alberta (+5.7%) posted strong gains.

Caterers led all segments with a 2.8% increase in revenue. Although Ontario revenues fell by 7.0%, seven provinces posted double-digit increase rates including Nova Scotia, New Brunswick, Saskatchewan and Quebec.

While other segments reported higher sales, sales at **drinking places** fell by 6%. Nova Scotia led the country with an 8.7% surge in sales, but all other provinces reported lower sales.

Commercial foodservice sales in **Newfoundland and Labrador** decelerated to 1.4% growth in December, as a 2.3% increase in sales at quick-service restaurants offset lower spending at full-service restaurants.

Led by strong gains at quick-service restaurants, **Prince Edward Island's** foodservice industry led the country with a 9.3% increase in sales.

Foodservice sales in **Nova Scotia** advanced by 3.2% in December. Although caterer revenues jumped by a robust 28.7%, other segments reported lacklustre gains.

Foodservice sales in **New Brunswick** were flat in December as an 18.7% jump in caterer revenues (+18.1%) offset declines in other segments.

Quebec's foodservice industry outpaced the national average with a 5.5% increase in sales in December. Growth was led by solid gains at restaurants and caterers.

Sales in **Ontario** declined by 0.1% in December, the first decline since October 2009. This is due to lower revenues at caterers and drinking places. In addition, gains were weak at full-service restaurants (+0.7%) and quick-service restaurants (+0.9%).

Foodservice sales in **Manitoba** accelerated to 3.4% in December, compared to 1.8% in November. Although caterer revenues rebounded by 10.6%, sales at drinking places tumbled by 14.2%.

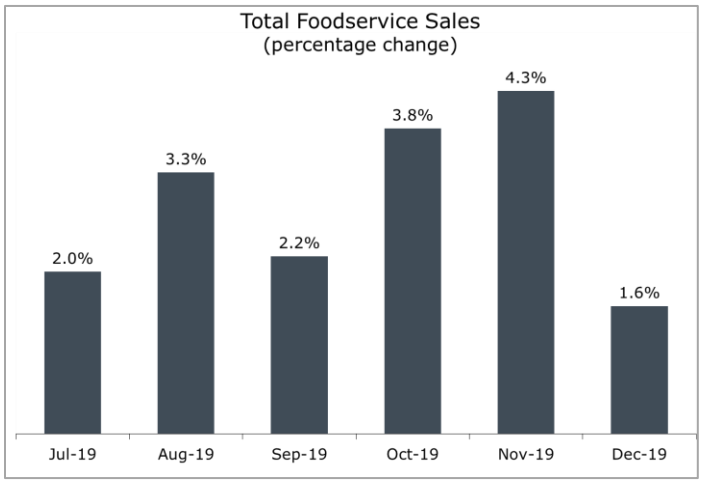
Saskatchewan's foodservice sales increased by 0.5% in December. Although sales declined at full-service restaurants (-1.3%) and drinking places (-8.3%), caterer revenues jumped by 16.4% -- the strongest monthly increase since January 2015.

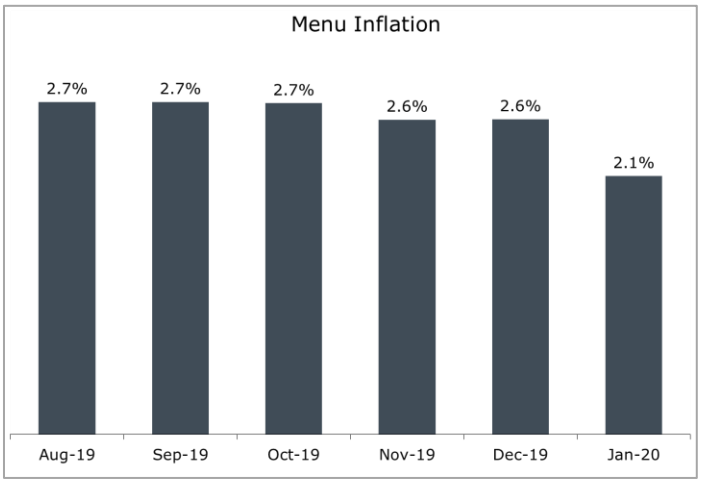
Alberta's foodservice decelerated to 0.7% growth in December compared to 3.1% in November. This is due to lower spending at full-service restaurants (-2.7%) and drinking places (-15.0%).

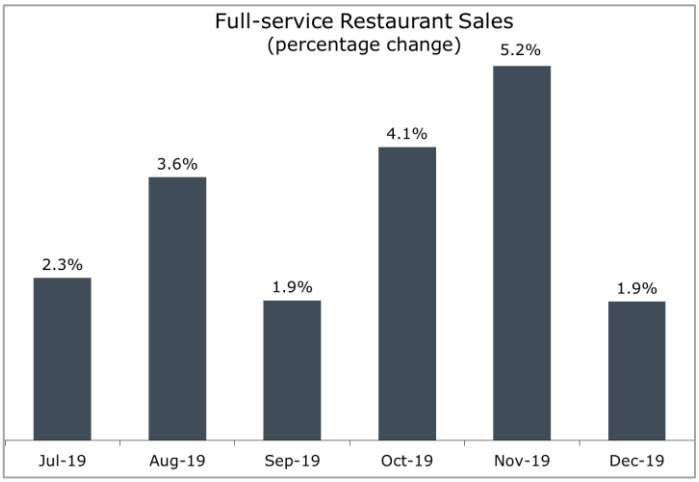
In **British Columbia**, total sales moderated to 1.5% growth in December. On a positive note, full-service restaurants steadily improved from a tepid 0.7% growth in August 2019 to a 5.2% gain in December. Meanwhile, caterer revenues bounced back with a 14.9% increase. In contrast, sales at drinking places (-6.2%) continued to struggle.

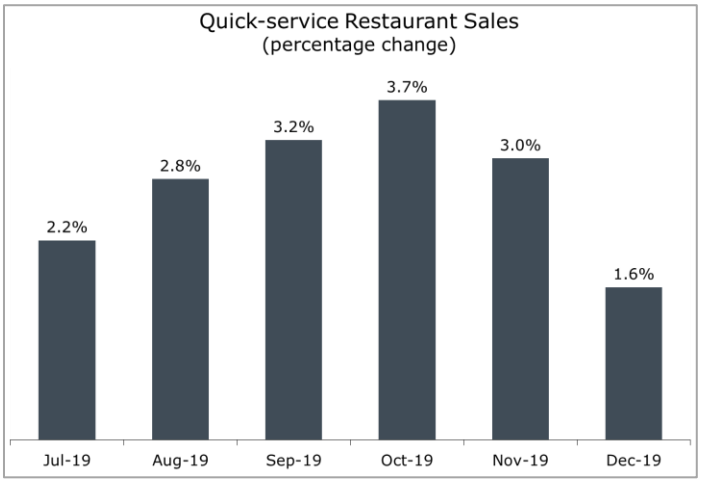
Overall, total annual **commercial foodservice sales** in Canada rose by 3.5% in 2019 to a record $74.5 billion.

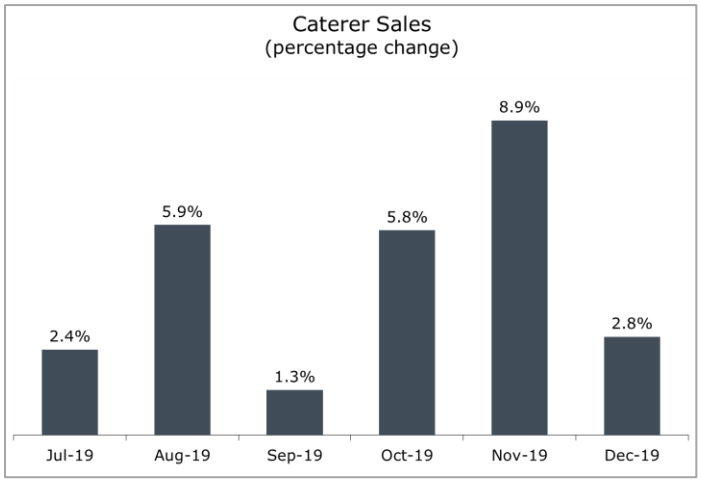
Commercial Foodservice Trends - Canada

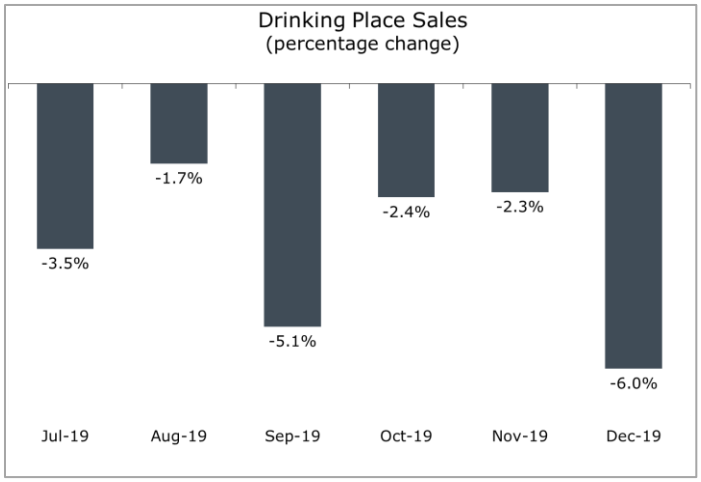












Note: All growth rates are year-over-year and based on preliminary data from Statistics Canada.

Highlights

Canada's economy ended the year on a sour note as real GDP grew by a lacklustre 0.3% (annualized) in Q4 2019. While consumer spending held strong, total economic activity was restrained by lower exports and business investment.

The **United States economy** grew as expected with a healthy 2.1% (annualized) expansion in the fourth quarter of 2019.

In February 2020, **Canada's consumer confidence index** improved for the second consecutive month. The survey was conducted in early February, so would not capture the recent impact of COVID-19.

Retail sales rose by a modest 1.8% in December following a 2.0% increase in November.

Average weekly earnings (for all industries) jumped by 4.2% in February 2020.

Healthy gains in full-time employment boosted n**et employment in Canada** by 30,300 jobs in February 2020.

Net employment in the United States grew by a robust 273,000 jobs in February, lowering the unemployment rate to 3.5%.

Canada's economy eked out a tepid 0.3% (annualized) growth rate in Q4 2019. This represents the slowest pace of economic activity in the past four years. The economy was restrained by a 5.1% drop in exports and lower business investment. On a positive note, real consumer spending held steady with a better-than-expected 2.0% gain in Q4.

Overall, **Canada's economy** expanded by 1.6% in 2019, compared to a 1.9% increase in 2018 and 3.0% in 2017.

The **United States economy** grew in line with expectations with a 2.1% (annualized) increase in Q4. This was unchanged from the preliminary estimate for Q4 last month.

Disposable income ended the year on a strong note, climbing by a solid 4.7% in Q4. This matches the increase in Q3. Disposable income was bolstered by strong job creation and rising average weekly earnings throughout the second half of 2019.

Consumer confidence in Canada improved for the second consecutive month, rising by 6.5 points to 120.6 in February 2020. While this represents the highest level since July 2019, the survey was conducted between January 31st and February 10th, which was too early to see the impact from COVID-19.

Retail spending in Canada rose by a modest 1.8% in December compared to December 2018. While there were solid gains at motor vehicle and parts dealers (+3.3%), spending once again fell at electronics and appliance stores (-5.8%) and sporting goods, hobby and book stores (-2.8%). Due to high household debt, annual retail sales grew by lacklustre 1.6% in 2019, which represents the slowest increase since 2009.

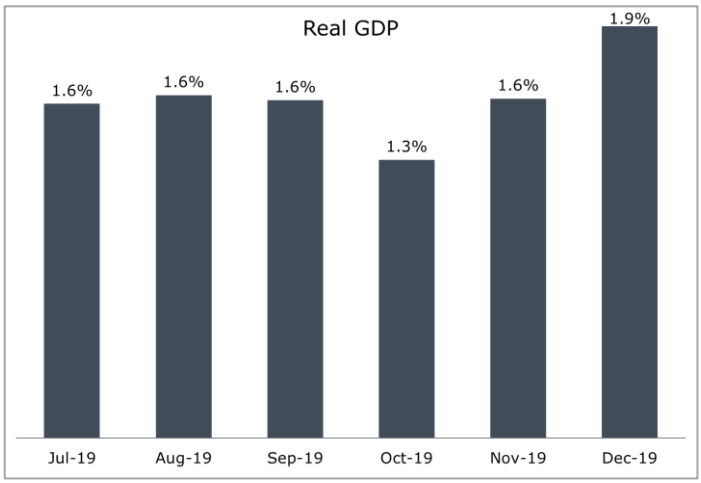
At the provincial level, **retail sales** growth was strongest in Prince Edward Island (+4.9%) and Ontario (+4.6%) in December. In contrast, retail sales in Alberta fell for the second consecutive month, slipping by 2.1%.

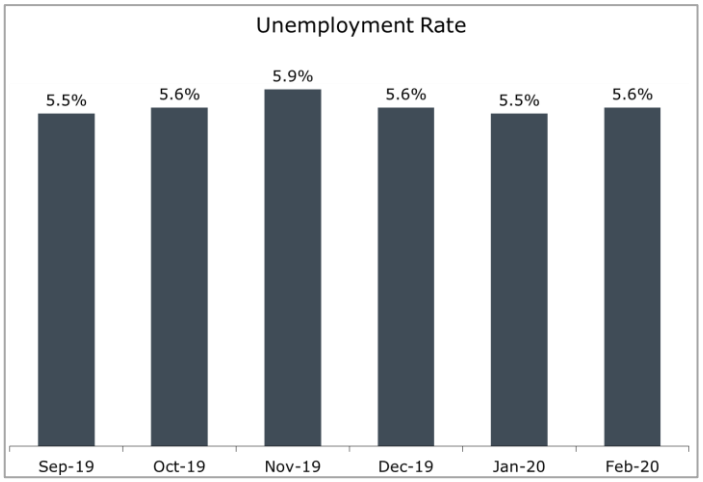
Net employment in Canada rose by 30,300 jobs in February 2020 due to an increase in full-time employment. However, the survey was conducted the week of February 9 to 15. As such, it is too early to tell if COVID-19 had any impact on the labour market.

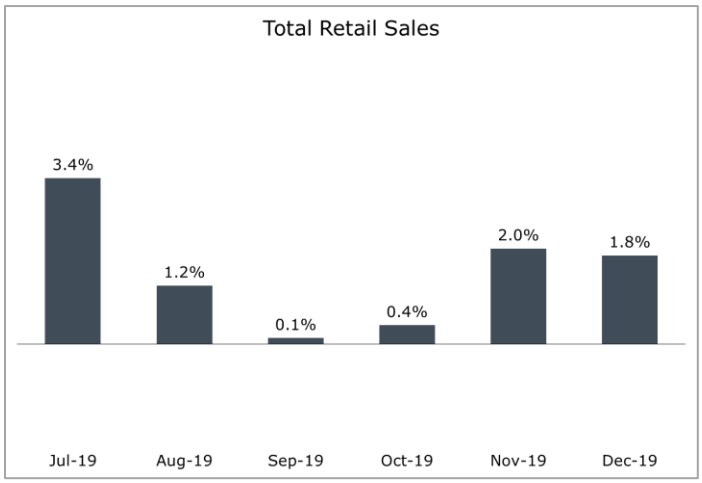
More people entering the labour market raised the **unemployment rate** by a tenth of a percentage point to 5.6% in February.

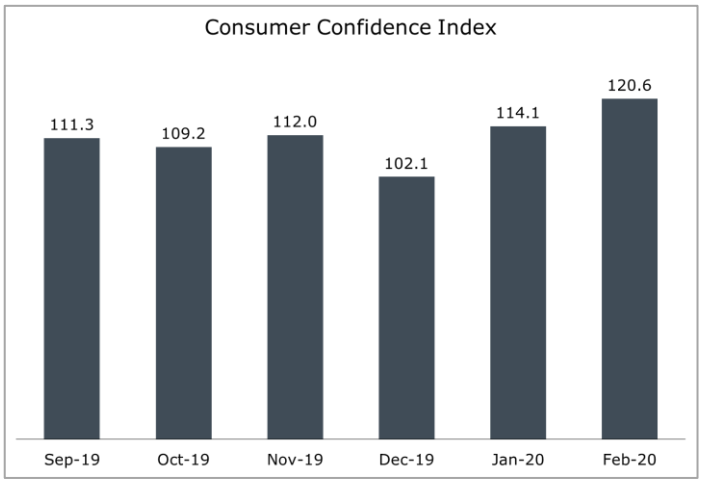
Net employment in the United States jumped by a stronger-than-expected 273,000 jobs in February. This reduced the unemployment rate by a tenth of a percentage point to 3.5%.

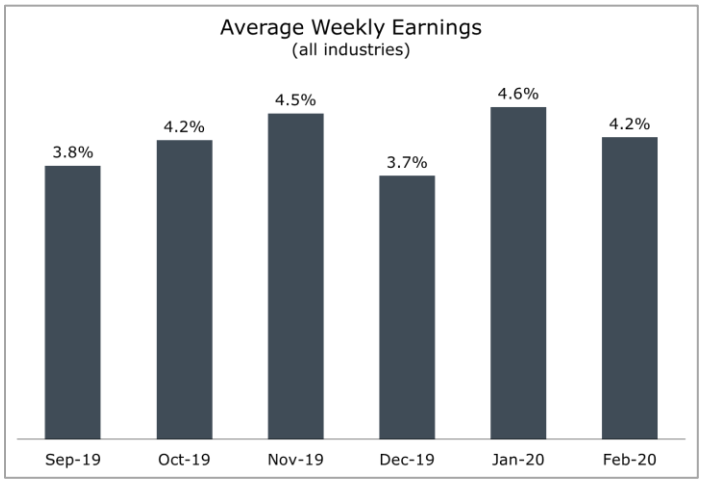
Economic Indicators - Canada

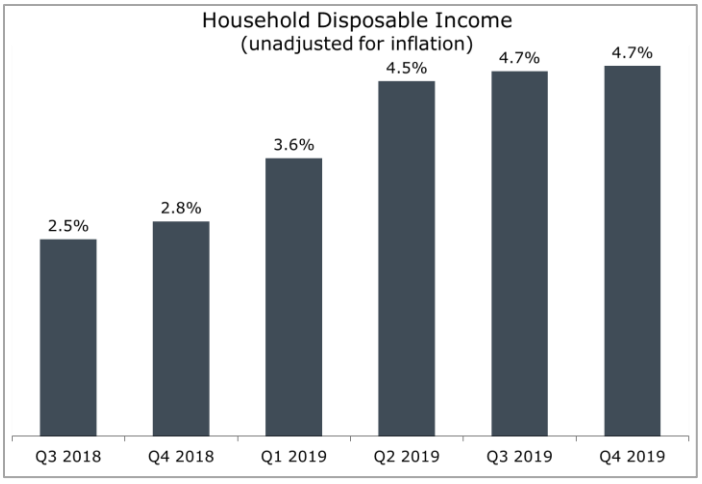












Source: Statistics Canada and Conference Board of Canada

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

COMMERCIAL FOODSERVICE SALES

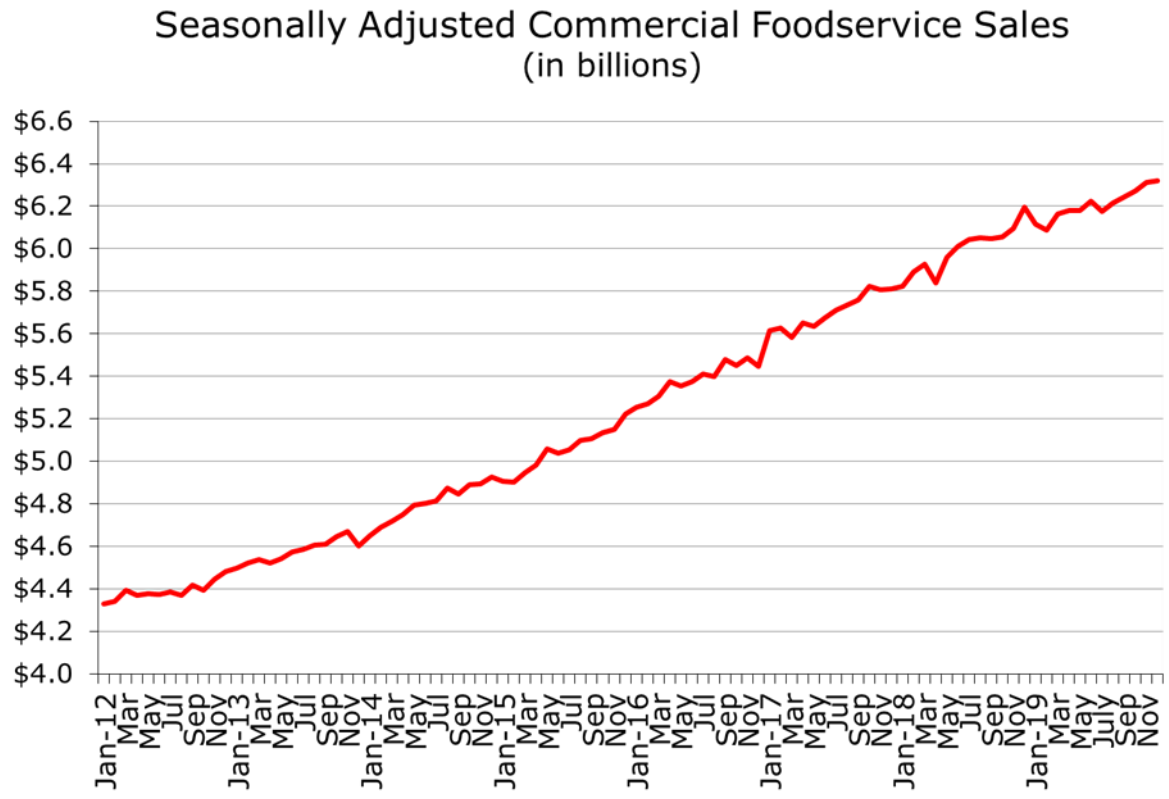
	Period	Amount	This period over year ago (%)	Year-to-date (%)	2018 over 2017(%)	2017 over 2016(%)
NOMINAL GROWTH						
Sales (in $millions)						
Total	December	$6,395.5	1.6%	3.5%	5.1%	5.9%
Sales by Sector (in $millions)						
Full-service Restaurants	December	$2,952.9	1.9%	3.7%	5.4%	6.9%
Quick-service Restaurants	December	$2,718.5	1.6%	3.4%	4.9%	5.7%
Social & Contract Caterers	December	$515.9	2.8%	4.5%	5.5%	4.3%
Drinking Places	December	$208.3	-6.0%	-0.5%	2.6%	0.8%
Sales by Province (in $millions)						
Newfoundland and Labrador	December	$75.2	1.4%	3.0%	-0.4%	0.3%
Prince Edward Island	December	$21.2	9.3%	8.4%	6.2%	5.5%
Nova Scotia	December	$142.4	3.2%	4.6%	2.6%	4.6%
New Brunswick	December	$107.3	0.0%	4.3%	2.9%	2.6%
Quebec	December	$1,239.5	5.5%	5.4%	5.8%	7.3%
Ontario	December	$2,553.5	-0.1%	3.0%	6.1%	5.9%
Manitoba	December	$183.1	3.4%	3.8%	2.2%	5.1%
Saskatchewan	December	$162.5	0.5%	1.2%	2.0%	0.8%
Alberta	December	$817.4	0.7%	2.4%	1.5%	3.2%
British Columbia	December	$1,079.7	1.5%	3.2%	7.0%	8.8%
REAL GROWTH						
Sales (in 2002 $ millions)						
Total	December	$4,050.3	-1.0%	0.8%	0.8%	3.3%
Sales by Sector (in $millions)						
Full-service Restaurants	December	$1,859.5	-0.3%	1.4%	1.5%	4.1%
Quick-service Restaurants	December	$1,742.6	-2.0%	-0.3%	-0.4%	3.4%
Social & Contract Caterers	December	$326.7	0.2%	1.7%	1.2%	1.6%
Drinking Places	December	$131.9	-8.4%	-3.1%	-1.6%	-1.7%
Sales by Province (in $millions)						
Newfoundland and Labrador	December	$45.2	-1.7%	1.5%	-3.1%	-2.7%
Prince Edward Island	December	$14.2	7.1%	5.9%	4.1%	2.6%
Nova Scotia	December	$88.7	1.1%	3.1%	0.5%	2.2%
New Brunswick	December	$68.1	-1.9%	2.5%	0.3%	-0.3%
Quebec	December	$774.2	2.6%	1.9%	3.1%	4.7%
Ontario	December	$1,619.2	-2.2%	0.8%	-0.3%	3.2%
Manitoba	December	$117.2	2.1%	2.3%	0.5%	4.0%
Saskatchewan	December	$96.8	-1.5%	-1.8%	-0.5%	-0.8%
Alberta	December	$512.8	-2.2%	-0.5%	-1.9%	0.8%
British Columbia	December	$717.4	-1.9%	0.0%	3.5%	6.2%

Source: Statistics Canada

SEASONALLY ADJUSTED FOODSERVICE SALES

	Period	Amount	Month-over-month change December	November	October	September
NOMINAL GROWTH						
Sales (in $millions)						
Total	December	$6,318.1	0.1%	0.7%	0.4%	0.5%
Sales by Sector (in $millions)						
Full-service Restaurants	December	$2,821.0	0.4%	1.1%	0.3%	0.5%
Quick-service Restaurants	December	$2,792.2	0.3%	0.0%	-0.1%	0.8%
Social & Contract Caterers	December	$499.8	-3.2%	2.0%	3.9%	-1.6%
Drinking Places	December	$205.2	0.5%	1.2%	0.0%	0.1%
Sales by Province (in $millions)						
Newfoundland and Labrador	December	$74.2	-0.4%	1.2%	-0.5%	0.3%
Prince Edward Island	December	$25.3	0.4%	1.5%	1.7%	-0.9%
Nova Scotia	December	$146.7	-0.7%	-0.1%	-0.1%	1.2%
New Brunswick	December	$106.2	0.4%	-0.3%	0.2%	-0.5%
Quebec	December	$1,243.6	0.2%	1.4%	1.4%	1.0%
Ontario	December	$2,496.5	0.1%	0.7%	0.3%	-0.5%
Manitoba	December	$180.2	0.8%	-1.2%	-1.0%	1.7%
Saskatchewan	December	$162.0	1.2%	0.0%	0.9%	-1.3%
Alberta	December	$803.1	-0.2%	-0.1%	-0.2%	0.4%
British Columbia	December	$1,066.0	0.1%	0.8%	0.3%	2.2%

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	December	157.9	2.6%	2.7%	4.2%	2.6%
Menu Inflation – Full-service	December	158.8	2.2%	2.3%	3.8%	2.7%
Menu Inflation – Quick-service	December	156.0	3.7%	3.7%	5.3%	2.2%
Menu Inflation – Cafeterias	December	158.0	2.7%	2.8%	4.2%	2.6%
By Province						
Newfoundland	December	166.3	3.2%	1.5%	2.8%	3.1%
Prince Edward Island	December	149.4	2.0%	2.3%	1.9%	2.9%
Nova Scotia	December	160.6	2.1%	1.4%	2.1%	2.3%
New Brunswick	December	157.5	2.0%	1.7%	2.6%	2.9%
Quebec	December	160.1	2.9%	3.4%	2.7%	2.5%
Ontario	December	157.7	2.1%	2.3%	6.4%	2.6%
Manitoba	December	156.2	1.3%	1.6%	1.7%	1.0%
Saskatchewan	December	167.8	2.1%	3.1%	3.8%	6.7%
Alberta	December	159.4	3.0%	3.0%	3.4%	2.5%
British Columbia	December	150.5	3.5%	3.2%	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)	December	$1,985.3	1.9%	1.6%	2.0%	3.2%
Consumer Price Index (2002=100)	December	136.4	2.2%	1.9%	2.3%	1.6%
Number of Employed ('000's)	December	19,124.6	1.6%	2.1%	1.3%	1.9%
Unemployment Rate[1]	December	5.6%	5.6%	5.7%	5.8%	6.3%
Disposable Income ($billion)	Q4'19	$1,310.0	4.7%	4.3%	3.8%	4.5%
Other (in $ millions)						
Supermarkets and Grocery Stores	December	$8,450.3	0.2%	2.1%	0.8%	3.1%
Total Retails Sales	December	$54,277.8	1.8%	1.6%	2.7%	7.1%
Commercial Foodservice Employment[2]						
Number of Employed ('000's)	December	1,140.1	0.6%	1.8%	1.4%	2.6%
Average Weekly Hours	December	21.2	1.0%	-0.1%	-1.8%	0.4%
Average Weekly Wage	December	$393.83	2.5%	3.9%	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 Dec	2019 Jan	2019 Feb	2019 Mar	2019 Apr	2019 May	2019 Jun	2019 Jul	2019 Aug	2019 Sep	2019 Oct	2019 Nov	2019 Dec	2019 Year-to-date
Canada	**5.5%**	**5.2%**	**3.2%**	**4.3%**	**5.0%**	**4.5%**	**3.1%**	**2.0%**	**3.3%**	**2.2%**	**3.8%**	**4.3%**	**1.6%**	**3.5%**
Full-service Restaurants	5.8%	4.8%	3.9%	5.2%	4.5%	5.0%	3.2%	2.3%	3.6%	1.9%	4.1%	5.2%	1.9%	3.7%
Quick-service Restaurants	5.1%	5.4%	2.6%	3.3%	5.5%	4.3%	3.2%	2.2%	2.8%	3.2%	3.7%	3.0%	1.6%	3.4%
Caterers	4.7%	4.0%	3.1%	5.1%	5.4%	5.7%	3.4%	2.4%	5.9%	1.3%	5.8%	8.9%	2.8%	4.5%
Drinking Places	9.5%	11.3%	3.5%	3.2%	3.5%	-1.5%	-1.0%	-3.5%	-1.7%	-5.1%	-2.4%	-2.3%	-6.0%	-0.5%
Newfoundland and Labrador	**4.7%**	**6.6%**	**3.8%**	**0.5%**	**2.6%**	**0.2%**	**3.2%**	**2.6%**	**3.7%**	**3.0%**	**3.3%**	**5.3%**	**1.4%**	**3.0%**
Full-service Restaurants	13.7%	9.3%	4.9%	-3.2%	-0.7%	-4.2%	-1.8%	0.2%	3.1%	-2.6%	-0.5%	5.1%	-4.3%	0.2%
Quick-service Restaurants	1.2%	3.1%	-0.7%	-0.3%	2.3%	4.8%	6.1%	6.7%	5.3%	6.2%	3.5%	3.3%	2.3%	3.7%
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	**4.2%**	**6.8%**	**8.6%**	**13.1%**	**8.8%**	**10.3%**	**10.3%**	**9.8%**	**5.7%**	**3.0%**	**8.0%**	**10.9%**	**9.3%**	**8.4%**
Full-service Restaurants	4.5%	6.5%	15.7%	17.8%	8.4%	9.9%	9.7%	9.1%	5.4%	-2.9%	8.2%	10.9%	2.2%	7.5%
Quick-service Restaurants	3.6%	6.6%	3.6%	9.6%	8.0%	10.7%	11.0%	10.6%	7.5%	8.3%	7.7%	10.8%	14.4%	9.2%
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%**	**3.7%**	**1.4%**	**4.6%**	**4.2%**	**7.4%**	**2.6%**	**2.7%**	**3.5%**	**4.4%**	**7.0%**	**11.0%**	**3.2%**	**4.6%**
Full-service Restaurants	-2.0%	2.7%	0.5%	7.8%	3.2%	5.5%	-3.5%	-2.4%	1.6%	7.3%	13.0%	19.4%	1.2%	4.1%
Quick-service Restaurants	4.6%	5.4%	2.7%	3.9%	5.6%	9.7%	7.1%	6.4%	4.5%	3.9%	3.2%	4.4%	1.4%	4.9%
Caterers	-4.6%	-4.2%	-1.9%	-3.7%	4.0%	1.2%	13.9%	14.8%	14.7%	-5.5%	12.0%	19.1%	28.7%	7.1%
Drinking Places	-16.9%	5.3%	-1.0%	4.0%	-6.8%	2.5%	0.4%	5.6%	2.8%	-2.9%	-9.9%	12.7%	8.7%	1.5%
New Brunswick	**4.0%**	**7.7%**	**3.3%**	**9.2%**	**6.0%**	**3.7%**	**5.9%**	**6.7%**	**3.8%**	**1.4%**	**3.1%**	**1.4%**	**0.0%**	**4.3%**
Full-service Restaurants	4.1%	11.8%	3.3%	14.0%	6.7%	4.4%	10.3%	3.4%	1.7%	4.0%	5.0%	0.3%	-0.8%	5.0%
Quick-service Restaurants	3.6%	6.1%	3.4%	7.2%	4.9%	2.2%	2.9%	8.1%	4.8%	1.5%	1.6%	1.4%	-0.1%	3.7%
Caterers	-11.4%	-7.4%	1.6%	4.0%	11.4%	9.8%	11.4%	22.5%	32.4%	-3.2%	17.5%	11.9%	18.1%	9.4%
Drinking Places	29.0%	18.0%	5.7%	6.3%	10.1%	14.6%	7.3%	11.4%	-3.5%	-14.5%	-6.7%	-2.6%	-7.7%	2.3%

	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 Dec	2019 Year-to-date
Quebec	**6.4%**	**6.0%**	**6.8%**	**6.1%**	**7.3%**	**6.6%**	**2.3%**	**0.7%**	**4.3%**	**3.8%**	**6.8%**	**9.8%**	**5.5%**	**5.4%**
Full-service Restaurants	7.6%	4.5%	4.3%	5.4%	6.0%	7.2%	3.7%	1.5%	5.1%	2.1%	6.4%	9.7%	4.8%	5.0%
Quick-service Restaurants	3.7%	4.8%	7.1%	5.4%	6.3%	5.2%	0.8%	0.5%	2.2%	5.4%	6.2%	8.2%	5.6%	4.7%
Caterers	0.7%	5.1%	8.9%	5.2%	10.2%	9.3%	0.2%	-3.8%	9.0%	9.7%	12.2%	21.3%	15.4%	8.6%
Drinking Places	22.6%	37.3%	29.7%	18.1%	21.5%	6.3%	2.8%	1.0%	7.4%	-1.6%	6.9%	5.8%	-1.5%	9.5%
Ontario	**6.7%**	**5.6%**	**2.3%**	**3.1%**	**4.3%**	**4.5%**	**3.9%**	**2.9%**	**3.6%**	**1.2%**	**3.1%**	**2.6%**	**-0.1%**	**3.0%**
Full-service Restaurants	7.2%	5.5%	3.1%	3.5%	2.8%	3.8%	3.5%	2.7%	4.2%	1.7%	4.3%	4.2%	0.7%	3.3%
Quick-service Restaurants	5.5%	5.8%	2.1%	2.3%	6.2%	5.0%	4.4%	3.0%	3.3%	2.3%	2.5%	1.5%	0.9%	3.3%
Caterers	8.6%	3.2%	-0.4%	5.8%	1.5%	6.5%	2.5%	4.2%	2.8%	-5.0%	1.3%	3.0%	-7.0%	1.3%
Drinking Places	16.0%	14.2%	3.9%	1.8%	1.7%	0.5%	8.0%	-2.0%	1.1%	-4.4%	2.8%	-4.5%	-5.6%	1.2%
Manitoba	**1.6%**	**3.3%**	**6.1%**	**6.8%**	**5.9%**	**2.8%**	**1.4%**	**2.6%**	**4.4%**	**4.7%**	**3.6%**	**1.8%**	**3.4%**	**3.8%**
Full-service Restaurants	1.8%	2.1%	7.6%	8.0%	5.2%	2.9%	0.7%	2.2%	3.6%	5.3%	0.5%	1.8%	2.8%	3.5%
Quick-service Restaurants	3.0%	6.3%	5.1%	6.9%	5.8%	4.1%	3.8%	3.2%	7.3%	6.9%	5.6%	3.1%	3.3%	5.1%
Caterers	-4.8%	-2.8%	10.0%	4.4%	12.3%	-1.0%	-6.6%	2.3%	-7.9%	-4.6%	11.1%	-1.6%	10.6%	2.1%
Drinking Places	-3.4%	-6.6%	-18.9%	-10.4%	-9.5%	-15.1%	-0.2%	-2.7%	0.6%	-12.9%	-28.7%	-8.1%	-14.2%	-10.6%
Saskatchewan	**3.0%**	**4.8%**	**0.7%**	**5.4%**	**3.1%**	**3.1%**	**-1.4%**	**0.1%**	**1.2%**	**-2.3%**	**-0.3%**	**0.2%**	**0.5%**	**1.2%**
Full-service Restaurants	4.5%	7.9%	-1.8%	6.1%	4.1%	3.8%	-1.6%	0.0%	4.2%	-2.5%	3.1%	0.7%	-1.3%	1.8%
Quick-service Restaurants	4.8%	5.4%	4.4%	8.0%	4.6%	4.6%	1.1%	0.9%	-0.2%	-1.0%	-2.0%	0.3%	1.5%	2.1%
Caterers	-7.6%	-6.8%	-6.3%	-10.3%	-0.3%	-5.7%	-4.5%	16.3%	13.6%	7.3%	0.2%	3.4%	16.4%	1.7%
Drinking Places	-13.6%	-13.5%	-6.0%	-9.9%	-15.4%	-10.4%	-21.4%	-18.9%	-16.4%	-19.1%	-8.7%	-8.1%	-8.3%	-13.3%
Alberta	**1.9%**	**2.8%**	**1.0%**	**2.5%**	**4.0%**	**2.8%**	**1.9%**	**0.7%**	**3.1%**	**3.4%**	**3.3%**	**3.1%**	**0.7%**	**2.4%**
Full-service Restaurants	3.9%	2.1%	3.4%	5.4%	3.9%	5.4%	2.1%	2.3%	4.2%	3.2%	1.5%	2.2%	-2.7%	2.7%
Quick-service Restaurants	-0.2%	2.2%	-2.2%	-0.3%	3.8%	1.0%	0.1%	-1.3%	1.2%	4.1%	5.4%	4.3%	5.7%	2.0%
Caterers	1.2%	14.9%	12.1%	12.1%	15.6%	7.5%	20.8%	9.7%	23.3%	9.4%	8.6%	8.9%	1.6%	11.7%
Drinking Places	3.0%	-2.5%	-8.2%	-9.2%	-8.6%	-11.0%	-5.9%	-5.5%	-12.7%	-11.6%	-12.5%	-11.0%	-15.0%	-9.4%
British Columbia	**6.6%**	**5.8%**	**3.3%**	**5.4%**	**5.3%**	**3.8%**	**3.5%**	**1.9%**	**1.2%**	**1.9%**	**2.7%**	**3.3%**	**1.5%**	**3.2%**
Full-service Restaurants	3.5%	5.5%	5.6%	7.3%	7.0%	5.3%	3.9%	2.9%	0.7%	0.9%	2.0%	4.3%	5.2%	4.1%
Quick-service Restaurants	11.4%	7.6%	2.7%	4.9%	4.8%	3.6%	4.4%	2.3%	2.3%	2.5%	3.7%	1.1%	-3.9%	2.9%
Caterers	4.8%	-0.1%	-0.5%	0.0%	3.7%	2.9%	3.5%	-1.4%	4.2%	7.8%	7.6%	16.3%	14.9%	5.0%
Drinking Places	2.5%	0.3%	-9.2%	-0.3%	-3.0%	-6.2%	-7.0%	-7.0%	-6.4%	-2.0%	-7.1%	-3.8%	-6.2%	-4.9%

Menu Inflation

	2019 Jan	2019 Feb	2019 Mar	2019 Apr	2019 May	2019 Jun	2019 Jul	2019 Aug	2019 Sep	2019 Oct	2019 Nov	2019 Dec	2020 Jan	2020 Year-to-date
Canada	**3.5%**	**2.7%**	**2.8%**	**2.6%**	**2.5%**	**2.6%**	**2.6%**	**2.7%**	**2.7%**	**2.7%**	**2.6%**	**2.6%**	**2.1%**	**2.1%**
Full-service Restaurants	3.1%	2.2%	2.1%	2.2%	2.0%	2.1%	2.2%	2.3%	2.4%	2.5%	2.4%	2.2%	2.1%	2.1%
Quick-service Restaurants	4.4%	3.7%	4.4%	3.6%	3.4%	3.9%	3.6%	3.7%	3.5%	3.4%	3.3%	3.7%	2.2%	2.2%
Cafeterias	3.5%	2.7%	2.8%	2.6%	2.5%	2.6%	2.7%	2.8%	2.8%	2.8%	2.7%	2.7%	2.1%	2.1%
Newfoundland and Labrador	**0.9%**	**1.5%**	**0.7%**	**0.6%**	**0.2%**	**0.9%**	**0.7%**	**1.6%**	**1.7%**	**2.8%**	**2.8%**	**3.2%**	**2.8%**	**2.8%**
Prince Edward Island	**1.7%**	**1.9%**	**1.8%**	**3.9%**	**3.3%**	**3.7%**	**2.7%**	**2.0%**	**1.9%**	**1.5%**	**1.6%**	**2.0%**	**1.1%**	**1.1%**
Nova Scotia	**1.2%**	**1.0%**	**0.9%**	**0.8%**	**0.4%**	**1.0%**	**1.9%**	**1.7%**	**1.8%**	**2.2%**	**2.3%**	**2.1%**	**2.5%**	**2.5%**
New Brunswick	**1.6%**	**1.6%**	**1.8%**	**0.6%**	**2.0%**	**2.0%**	**2.0%**	**1.7%**	**1.7%**	**1.8%**	**1.8%**	**2.0%**	**2.0%**	**2.0%**
Quebec	**3.2%**	**3.3%**	**3.5%**	**3.3%**	**3.3%**	**3.4%**	**3.4%**	**3.6%**	**3.4%**	**3.6%**	**3.4%**	**2.9%**	**2.2%**	**2.2%**
Ontario	**4.5%**	**2.2%**	**2.4%**	**2.2%**	**1.9%**	**2.0%**	**1.9%**	**2.0%**	**2.1%**	**2.2%**	**2.1%**	**2.1%**	**1.5%**	**1.5%**
Manitoba	**2.3%**	**2.5%**	**2.6%**	**1.8%**	**1.5%**	**1.6%**	**1.2%**	**1.0%**	**1.0%**	**0.8%**	**1.2%**	**1.3%**	**1.2%**	**1.2%**
Saskatchewan	**3.1%**	**3.1%**	**3.3%**	**3.2%**	**3.4%**	**3.7%**	**3.3%**	**3.1%**	**3.3%**	**2.9%**	**2.5%**	**2.1%**	**2.5%**	**2.5%**
Alberta	**3.0%**	**2.8%**	**3.0%**	**2.9%**	**2.9%**	**3.3%**	**3.1%**	**3.2%**	**3.3%**	**2.6%**	**2.5%**	**3.0%**	**2.4%**	**2.4%**
British Columbia	**3.0%**	**3.0%**	**3.0%**	**2.9%**	**2.7%**	**3.1%**	**3.3%**	**3.5%**	**3.4%**	**3.5%**	**3.6%**	**3.5%**	**3.5%**	**3.5%**

Source: Statistics Canada