

# Industry Insights

A roundup of noteworthy foodservice findings  
for the week of Jan. 15, 2024

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# Darden rides strong results from its top chains

Led by Olive Garden and LongHorn Steakhouse, Darden Restaurants registered consolidated same-store sales growth of 2.8% during its most recent quarter ended Nov. 26, 2023. LongHorn Steakhouse paced Darden’s performance with 4.9% same-store sales growth, followed by a 4.1% increase for Olive Garden.

Same-store sales for Darden’s fine-dining and other business segments slipped by -1.7% and -1.1%, respectively, during the period.

Darden notably acquired Ruth’s Chris Steak House in 2023, adding the brand to its fine-dining segment alongside Eddie V’s Prime Seafood and The Capital Grille.

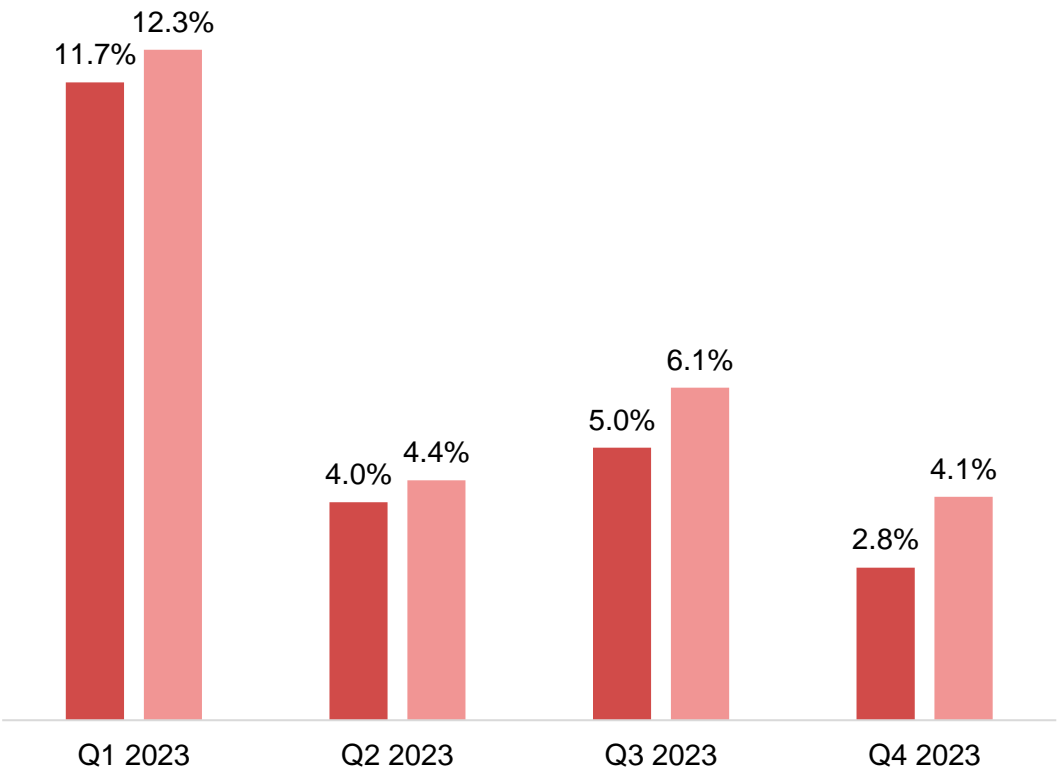
Monitor the quarterly performance trends of chain restaurants in *Technomic’s Same-Store Sales and Acquisition Tracker*, available to Ignite Company subscribers.

Ignite Company clients: [Click here for more](#)

\*Note: Quarters have been adjusted to align to the calendar year  
Source: Technomic Ignite Company

DARDEN RESTAURANTS  
QUARTERLY SAME-STORE SALES\*

■ Consolidated Darden   ■ Olive Garden





## Ignite Menu

# Healthy claims trending in top-rated Q4 LTOs

As we enter the new year and make our resolutions, let's check out the items with healthy claims that consumers are most excited about from the fourth quarter of 2023.

### Diverse Plant-Based Options

Dishes featuring a wide variety of plant-based products were popular on the top-rated LTO lists by purchase intent, craveability and uniqueness. Burgerville's Apple Crumble Sundae, which features plant-based ice cream and whipped cream options, was the top-rated item by purchase intent with a healthy claim (55% of consumers said they were likely to purchase it). Other popular items included Taco Bell's Nacho Fries With Vegan Nacho Sauce,

which 73% of consumers rated as unique, and Starbucks' Sugar Cookie Almondmilk Frappuccino Blended Beverage, which 65% of consumers rated as craveable.

### Featuring Fruits

Items featuring fresh fruit and other fruit mentions appeared on the top-rated lists for all four categories of purchase intent, craveability, uniqueness and draw. Silver Diner's Banana Split Sunrise Bowl, which 72% of consumers rated as at least somewhat likely to draw additional visits, calls out multiple fresh fruits in the item description. Another example, the Fall Peach Refresher With Vitamin Shot at Tim Hortons, which 68% of consumers

considered unique, combines a fruit mention with additional health-boosting elements.

### Healthy, Cage-Free Egg Dishes

Egg dishes featuring healthy ingredients and claims appeared on the top-rated lists for uniqueness and draw. Silver Diner's Burrata Shakshuka, which 78% of potential purchasers considered unique, combines cage-free eggs with local burrata and an assortment of vegetables. The Sunny Seoul Hash at First Watch, which 66% of consumers considered unique, also includes cage-free eggs paired with kimchi, vegetables and seasoned potatoes.

**Ignite Menu clients: [Click here for more](#)**

Source: Technomic Ignite Menu

Image Source: Photo by [Jam Kozar](#) on [Unsplash](#)



# Has build-your-own pizza reached peak popularity?

Build-your-own (BYO) pizzas continue to be the most ordered category across limited-service pizza and Italian/pizza casual-dining chains tracked by Technomic Ignite Consumer.

However, both combo meat and pepperoni pizza saw an increase in the percentage of diners ordering each type compared to the prior year.

BYO-style menus have long been one of the hallmarks of popular fast-casual chains such as Chipotle. However, the

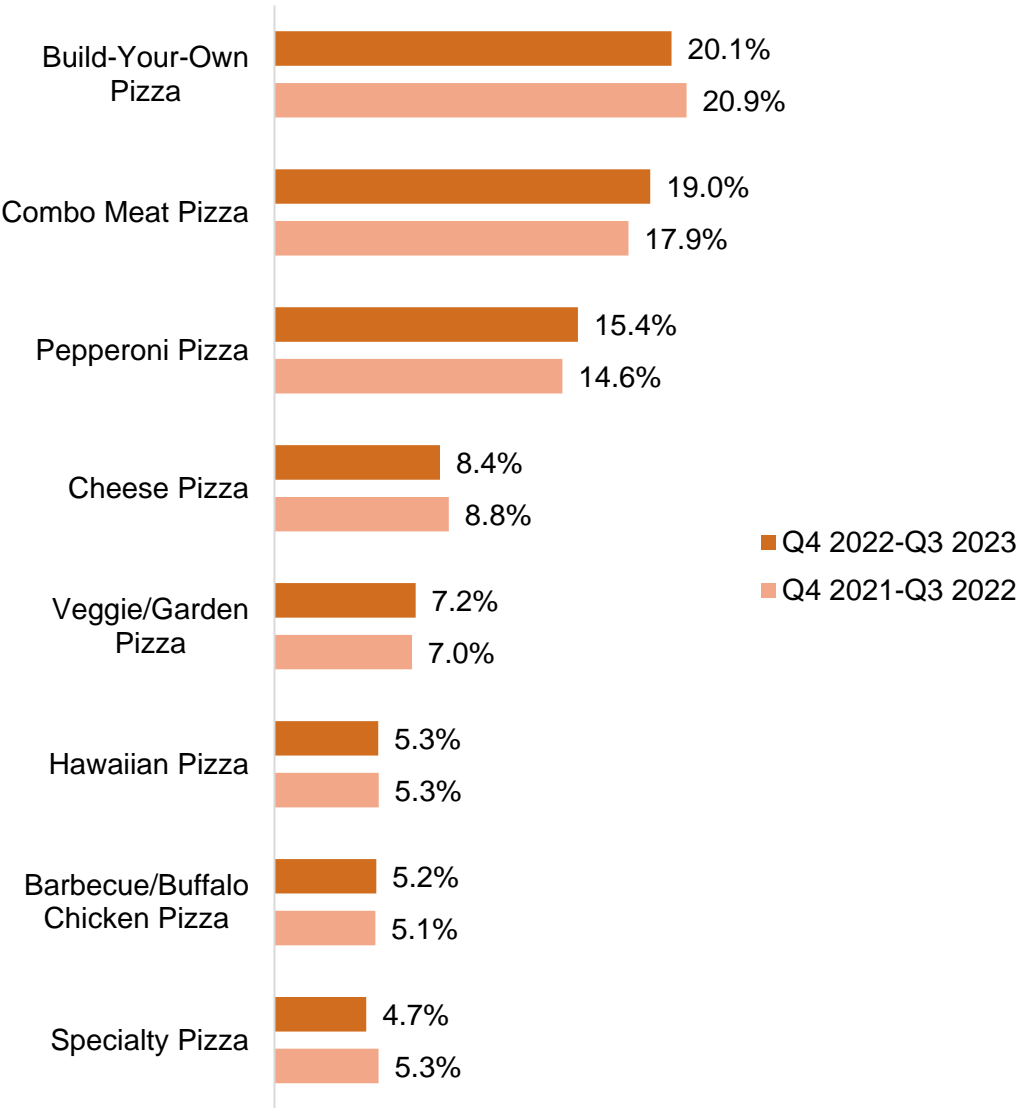
chain with arguably the most significant long-term ties to BYO is Subway, a brand that has taken a different menu direction over the past two years with signature sandwich build rollouts.

Are pizza chains next? One could easily argue that labor issues will continue to encourage operators to simplify back-of-house challenges through fewer customized builds. For now, it appears as though that may be the very same direction consumers are headed.

[Ignite Consumer clients: Click here for more](#)

Base: 14,700 (Q4 2022-Q3 2023) and 14,673 (Q4 2021-Q3 2022) recent Italian/pizza chain guests  
Source: Technomic Ignite Consumer

TOP PIZZA CATEGORIES AT PIZZA/ITALIAN CHAINS  
% OF RECENT GUESTS ORDERING



# Menu development in Puerto Rico

As of 2024, Technomic has begun tracking new and limited-time menu items from 30 chains in a new market for Global Foodservice Navigator Program: Puerto Rico. Here’s a rundown of how Puerto Rico operators stack up against others in Latin America as well as elsewhere in the U.S.

In 2023, Puerto Rico operators released an average of nine new or limited-time items per chain. Among all Latin American markets, only Chile saw menu development proceed at a slower pace (at just 7 per chain).

However, this market saw a total of 260 new items released through this same period (a number closely comparable to Colombia’s 272), indicating that a

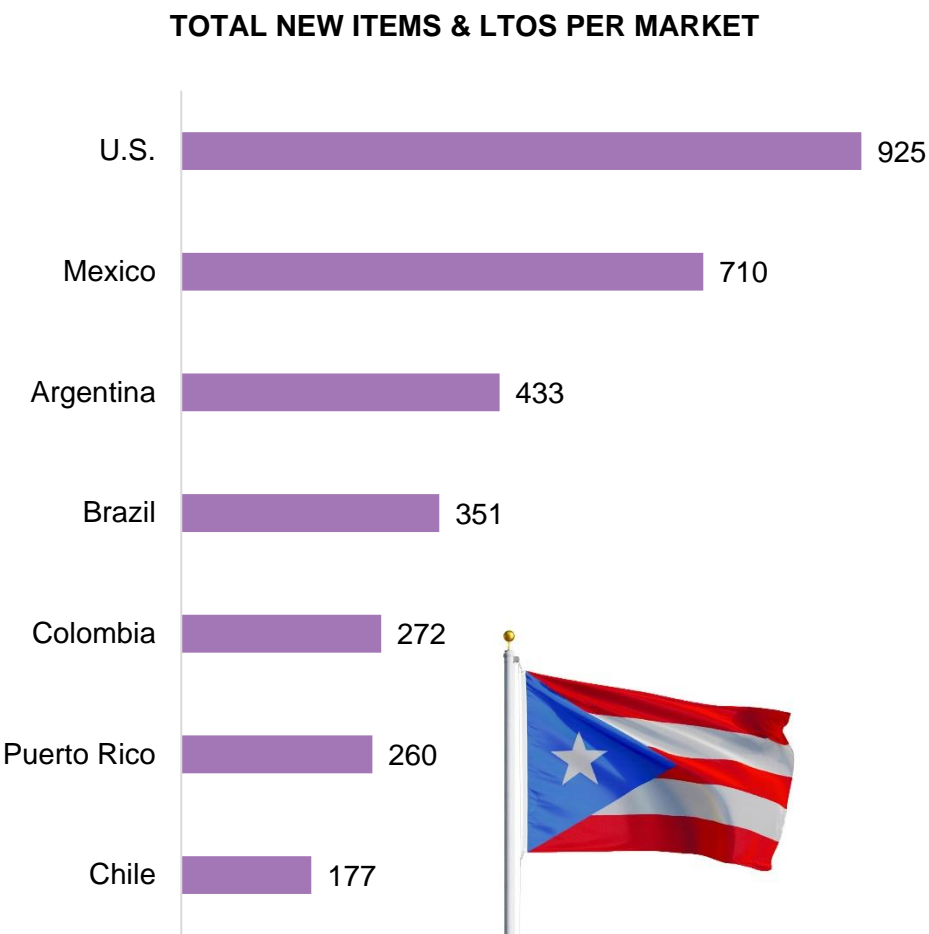
smaller number of operators are particularly active in rolling out new items.

Compared to other Latin American markets and the U.S., new items from coffee cafe chains in Puerto Rico make up a smaller portion of new items, while burger operators roll out new items at a pace somewhat similar to those in the U.S. Frozen dessert, pizza and sandwich operators, meanwhile, are significantly more proportionally active than elsewhere in Latin America and the U.S.

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Source: Technomic Global Foodservice Navigator Program





## Pizza Multi Client Study

# Innovation is a top priority among operators menuing pizza

Innovation within the pizza category is more important than ever. Operators are seeing increased demand for global flavors (particularly Asian and Latin), spicy flavors and ingredients (such as hot honey and chile crisp), and specialty/gourmet toppings. In fact, more than two-thirds (70%) of operators indicated that they are experimenting with globally inspired pizza ingredients more than they were two years ago. Also, plant-based ingredients and gluten-free crusts, while still appealing to a niche set of customers, continue to attract operators' attention.

Operators are leveraging trade shows, social media, the internet and other sources to stay up to date on the latest trends in pizza ingredients and technology/equipment.

**Get more data-driven insights on the pizza category, including market sizing, operator intel and consumer perspectives with the *Pizza Multi Client Study*.**

**Learn more about the Pizza Multi Client Study**

Source: Technomic 2023 Pizza Multi Client Study  
Image Source: Shutterstock



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