

Industry Insights

A roundup of noteworthy foodservice findings
for the week of Jan. 16, 2023

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Just how big are the industry's largest chains?

Led by Subway's network of over 20,000 stores, the industry's 10 largest chains account for a staggering total of nearly 97,000 combined locations across the United States.

While Subway's location footprint stands out as the largest by a wide margin among chain restaurants, the sandwich player continues to shrink after hitting a peak of over 27,000 U.S. stores in 2015.

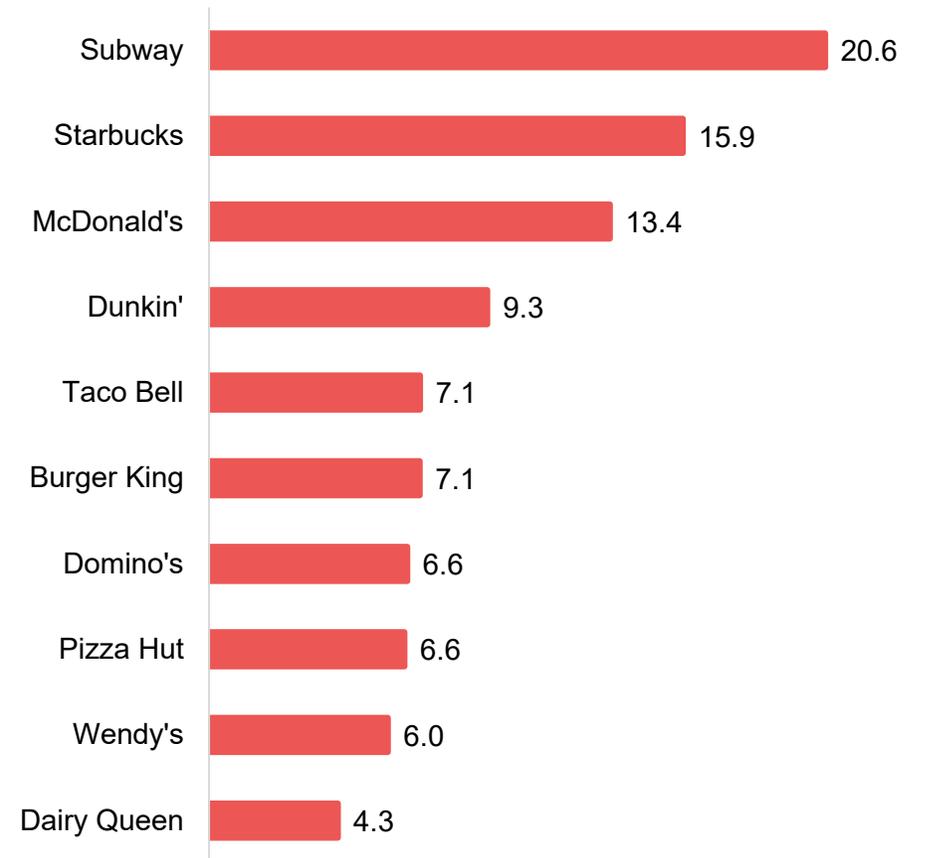
There are currently 40 chain restaurants that boast networks of over 1,000 locations in the U.S., a number

that continues to rise. Over the last five years, Wingstop, Marco's Pizza, Smoothie King and Tropical Smoothie Cafe have all surpassed the 1,000-location benchmark.

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Sources: Technomic Ignite Company

LARGEST U.S. CHAIN RESTAURANTS
TOTAL U.S. LOCATIONS (IN THOUSANDS)



IGNITE MENU

Key themes among emerging menu trends

Technomic's recently published *Emerging Eats* report delves into the top 50 menu trends to watch. Here are some key themes and takeaways.

Southeast Asian Fare

Ingredients, dishes and drinks from the Philippines, Thailand, Vietnam and Laos are trending this quarter, including ginataan, jeow som, nuoc mau and oliang.

New Fruits Sprout Up

Lesser-known fruit types, including salmonberry and tiger fig, as well as

new versions of more popular fruits, such as unripened fruit like green mango and strawberries, are popping up on independent menus.

Leaning Into Beans

Global bean varieties and preps, including Chinese sweet black bean paste chunjang, sweet black Japanese kuromame soybeans and Peruvian mayocoba beans, are trending, providing a protein kick to a plethora of dishes.

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Source: Technomic Ignite Menu

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Tiger Fig
Image Source: Shutterstock

Do diners prefer local independents to chain restaurants?

Today, approximately half of consumers indicate they prefer local independents over chains. This number has grown since 2018, when only 43% agreed or strongly agreed that they prefer to patronize independents as opposed to chains.

Stories of independents' struggles during the pandemic often resonated with diners, as many Americans have watched local favorites close their doors for good since 2020.

Nevertheless, a quarter of Gen Zers agree or strongly agree that there are

no differences between chains and local independents, indicating that the playing field may have leveled somewhat for future competition as younger cohorts move into peak usage years, which typically takes place around the ages of 32-35.

Perceptions of chain restaurants have evolved relative to independents, as perceptions of chains have gained ground on independents for ingredient and food quality, as well as availability of authentic fare.

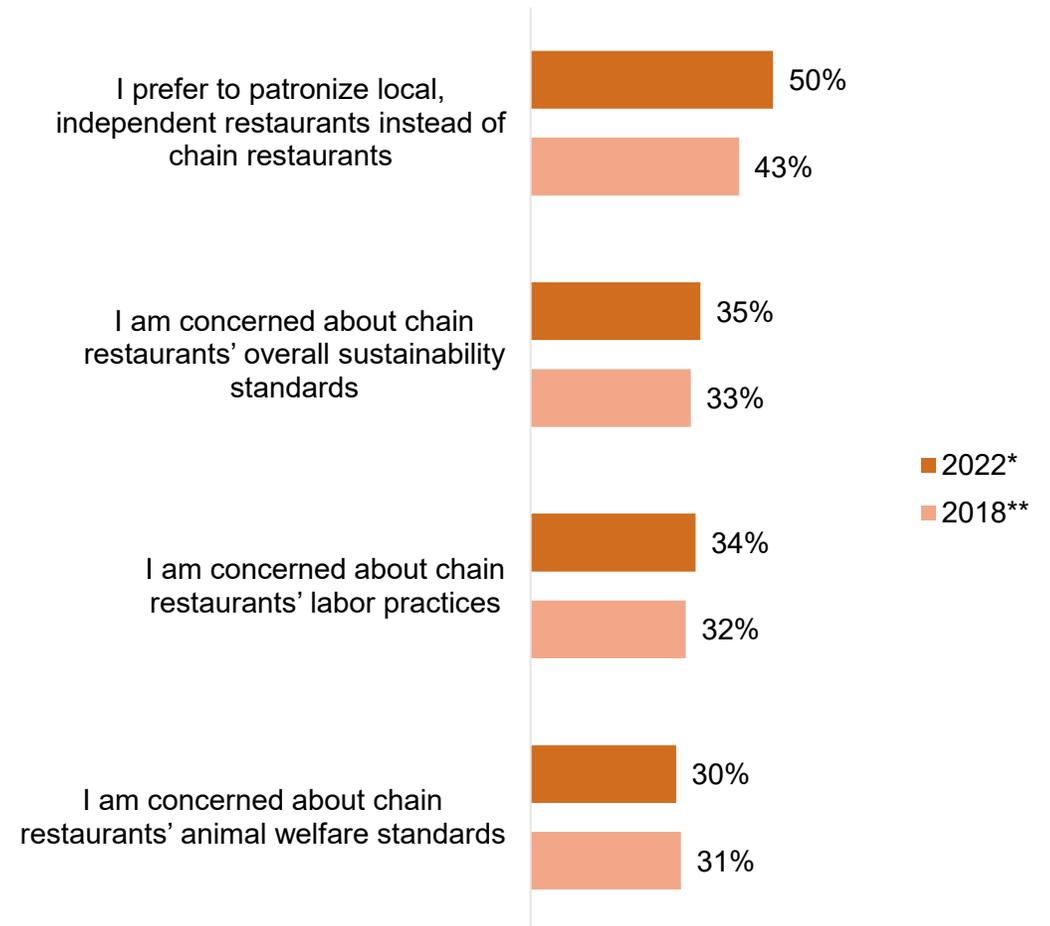
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*Base: 947 consumers ages 18+

**Base: 1,001 consumers ages 18+

Source: Technomic Ignite Consumer featuring the Technomic November 2022 Omnibus consumer survey

PLEASE INDICATE YOUR AGREEMENT WITH THE FOLLOWING STATEMENTS
(TOP TWO BOX=% AGREE/STRONGLY AGREE)



Pizza toppings from around the world



As recent consumer survey data indicates, 64% of consumers worldwide order pizza at least once every 90 days, with the build widely popular across Latin America (75% of restaurant patrons), the U.S. and Canada (70% each), Europe (67%) and the Asia-Pacific region (59%). Technomic recently asked consumers across 25 countries about their preferences among pizza offerings. Below are a few findings:

Shellfish pizza builds remain popular throughout the Asia-Pacific region, where shrimp, prawns and crab toppings are a regular addition for 42%, 34% and 23% of consumers, respectively.

These numbers far outpace other global

markets, particularly in Latin America, where they shrink to just 23%, 12% and 8%, respectively. Brazil, however, stands out as a notable exception in this regard, with nearly half (46%) of all restaurant-goers ordering shrimp-based pizza builds.

Similarly, while the European market as a whole expressed relatively limited interest in shellfish pizzas, a comparatively large number of consumers in France, Germany and Russia (approximately one-quarter to half of pizza patrons per protein type) reported a preference for them.

Among cheeses, provolone stands out as a disproportionately popular pizza cheese in Latin America, where an average 29% of consumers prefer it

against a global average of just 16%. In Argentina and Brazil, where 42% and 54% order pizzas with the cheese at least once every 90 days, respectively, the widespread popularity of smoked varieties known as *provoleta* and *provolone defumado* plays no small part in bolstering these figures. And although much less popular in other markets, provolone nonetheless received similarly high marks in Spain and the U.S. (29% each).

Finally, corn (maize) appears as a topping with widespread, if somewhat regionally uneven, appeal. A strong 27% of all consumers globally reported interest in it, with these numbers concentrated in Latin America (35%), Asia (34%) and Europe (21%).

Within these areas, South America (40%), East Asia (37%) and Germany (34%) stand out as regions and markets where corn is notably popular. By contrast, an average of just 7% of Canadian and U.S. consumers expressed any interest in the topping, joining South Africa and France (8% each) as the only markets where corn captured less than one-tenth of consumers.

Get more in-depth insights into leading pizza trends as well as data-driven consumer and menu insights from a global perspective with Technomic's upcoming [*Global Pizza Menu Category Report*](#). Additional international reports are also available for the pasta, breakfast and dessert categories.

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Source: Technomic Global Foodservice Navigator Program
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