

Industry Insights

A roundup of noteworthy foodservice findings
for the week of March 9, 2026



Image Source: Shutterstock

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Foodservice continued to gain wallet share in 2025

Foodservice spending accounted for 13.6% of all U.S. retail and food services sales in 2025, continuing a trend of increasing wallet share relative to other categories like food and beverage retailers, general merchandise stores, motor vehicle dealers and clothing retailers.

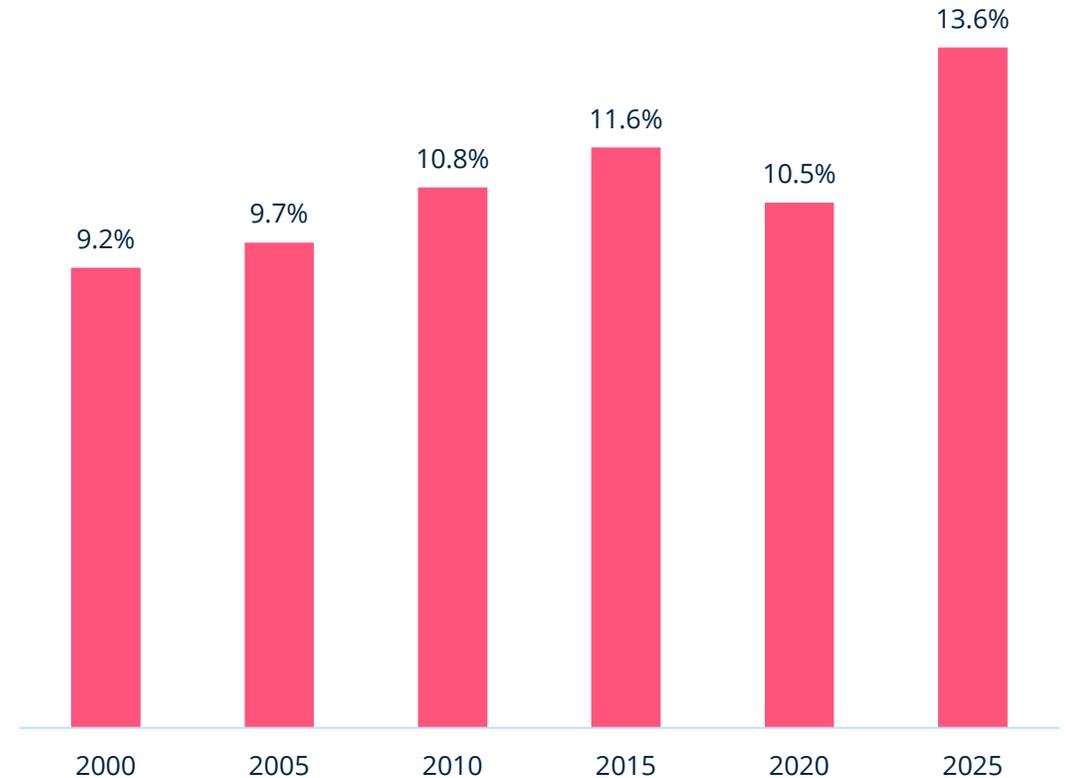
Over the last 25 years, share for foodservice has risen from 9.2% in 2000 to 13.6% in 2025, while share for grocery stores has fallen from 12.4% to 10.5% over the same timeframe.

Take advantage of Technomic's monthly *Foodservice Industry Economic Indicators* report for additional trending insights on economic metrics impacting the foodservice industry.

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Source: U.S. Census Bureau; Monthly Trade Report
NAICS Categories: Total retail and food services sales, Food services and drinking places

FOODSERVICE SHARE OF U.S. CONSUMER SPENDING



Trends among top-rated LTOs

Here are key trends among top-rated recent limited-time offers, as spotlighted in Technomic's LTO Thought Starters report.

Cookie-Inspired Coffee

Snickerdoodle Latte—cinnamon powder, citric acid, Free Rein Homestead espresso, Monin Cinnamon syrup, Monin Cookie Butter syrup, natural cinnamon flavor, natural flavors, pure cane sugar, vegetable glycerin, water, whipped cream and whole milk (HTeaO) **62% of potential purchasers consider this unique or very unique**

Iced Frosted Sugar Cookie Latte—frosted sugar cookie flavor topped with whipped cream and starry blue sugar sprinkles (Biggby Coffee) **65% of potential purchasers consider this craveable or very craveable**

Peppered-Up Appetizers

Inferno CheezyBread—CheezyBread with an extra portion of Carolina Reaper cheese blend infused with Carolina Reaper, habanero and jalapeno peppers, topped with jalapenos (Marco's Pizza) **65% of potential purchasers likely or much more likely to visit**

Kickin' Popper Dip—jalapenos, poblanos and sauteed onions combined with mixed cheeses and topped with crunchy panko, served with kettle chips (Topgolf) **68% of potential purchasers likely or much more likely to visit**

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Base: Approx. 250 LTOs
Source: Technomic Ignite Menu Consumer-Rated LTOs, December 2025
Note: Some item descriptions were shortened for length; Uniqueness, draw and craveability metrics are based on respondents who are likely or very likely to purchase the LTO
Image Source: Shutterstock



Ignite Consumer

Perceived affordability no longer a differentiator between segments

Industry experts have recently pointed to the foodservice affordability crisis as a primary driver for sluggish restaurant traffic, as increased menu prices drive sticker shock, check fatigue and decreased frequency among cash-strapped consumers.

In historical periods of high inflation and economic uncertainty, quick-service restaurants (QSR) would typically benefit in a trade-down scenario where diners would opt for QSRs based on lower price points and value menu options. However, casual-dining restaurants (CDR), such as Chili's

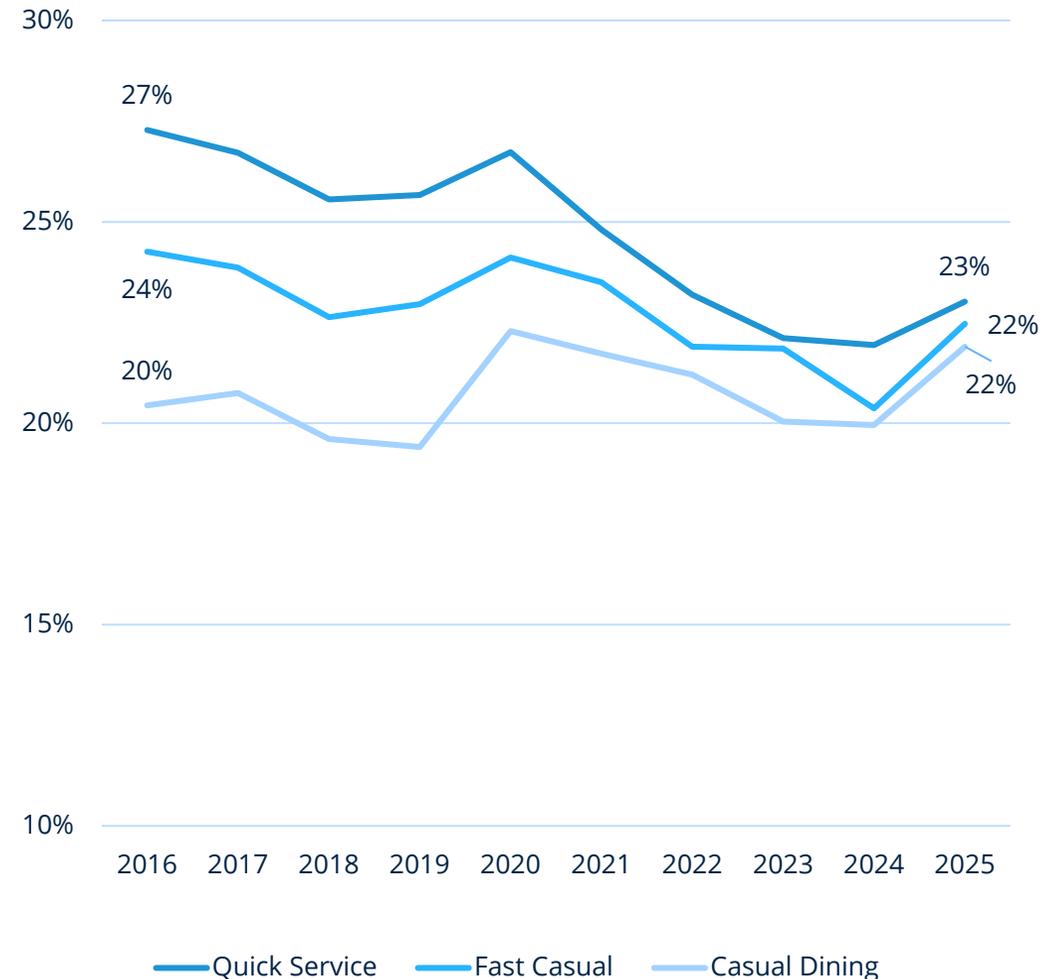
Grill & Bar, may have successfully redrawn the affordability equation for consumers in recent years.

Based on recent occasions, diner perceptions of QSR affordability have dropped significantly over the past 10 years, while those same perceptions of CDRs have risen. What once was a positive perception and leading equity for traditional fast-food players has all but disappeared, and today's diner reports limited difference between segments when it comes to affordability.

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Base: Varies, approx. 95,000 recent restaurant guests ages 18+ per calendar year
Source: Technomic Ignite Consumer

THIS RESTAURANT IS AFFORDABLE
% STRONGLY AGREE



Global popularity of Mexican fare

Cuisine specializations are a key reason for global consumers choosing one brand over another. Mexican food ranks among the most preferred cuisine type around the world, with entrees like tacos, burritos and quesadillas widely popular among restaurant patrons internationally.

But its popularity varies from region to region and market to market. For instance, 86% of consumers in Mexico order the national cuisine at least occasionally when dining out—the highest percentage of any country surveyed and well above the global average of 33%.

More than 40% of consumers in most other Latin American markets turn to

Mexican cuisine, with Puerto Rico posting the second highest percentage of any market worldwide.

About 46% of consumers in North America on average order Mexican cuisine, easily besting other non-Latin America regions.

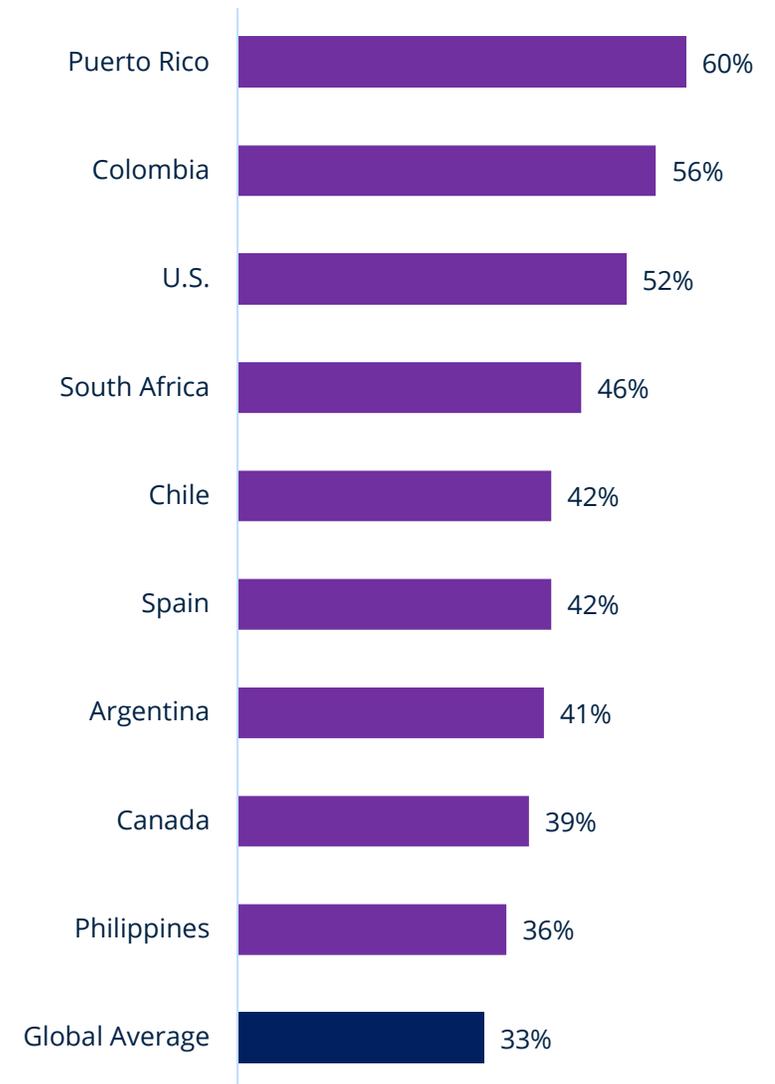
And 30% of consumers in Middle East order Mexican cuisine at least occasionally, slightly below the global average but this region also hosts two markets where the cuisine is growing the most rapidly—Saudi Arabia and the UAE.

Get more data-driven insights into global insights with Technomic's *2026 Global Grab & Go Mexican Cuisine Report*.

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Source: Technomic 2026 Global Foodservice Navigator Program's Global Grab & Go Mexican Cuisine Report

% CONSUMERS ORDERING MEXICAN CUISINE AT LEAST OCCASIONALLY (EXCLUDING MEXICO)



How will the World Cup impact U.S. Foodservice?

Our team is anticipating a **\$1.9 billion** increase to the U.S. foodservice industry due to the World Cup being hosted in North America.

We expect this increase to come from three major areas:

- U.S. visitors specifically visiting for the World Cup and using foodservice
- Increased traffic in sports-oriented venues as Americans look for away-from-home viewing experiences
- Increase in events, like watch parties and informal gatherings, for the World Cup

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Source: Technomic 2025 Industry Forecast
Image Source: Shutterstock

While \$1.9 billion is a large amount of money, it only represents only 0.2% of the total U.S. foodservice industry we forecast for 2026, or **\$1.2 trillion**.

We are forecasting the total U.S. foodservice industry will grow by \$49.82 billion in 2026, or 4.3%.



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We provide insights into consumer, industry and menu trends in the U.S., Canada and 23 markets around the world.

Our team of experts helps leaders in the industry make complex business decisions, set strategy and stay ahead of the curve.

Have questions?

Reach out to us today.

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