

Industry Insights

A roundup of noteworthy foodservice findings
for the week of March 27, 2023

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Understand what consumers want now and in the future with Consumer Trend Reports



2023 Topics

COP: Vegetarian & Alternative Proteins

COP: Poultry & Seafood

Emerging Channels

Burger

Value & Pricing

Starters, Small Plates & Sides

Flavor

Retail Foodservice

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US Foods posts double-digit sales growth in 2022

US Foods, one of the industry's top foodservice distributors, posted net sales of \$34.1 billion in 2022, an increase of more than 15% on an annual basis.

Total case volume for the company improved by 1.7% in 2022 compared to the prior year, boosted by a 4.3% increase in independent restaurant case volume and a 31% jump in volume to hospitality customers, including hotels, country clubs and casinos. In 2021, independent restaurant case volume increased by 28.0% after dropping by 11.2% in 2020.

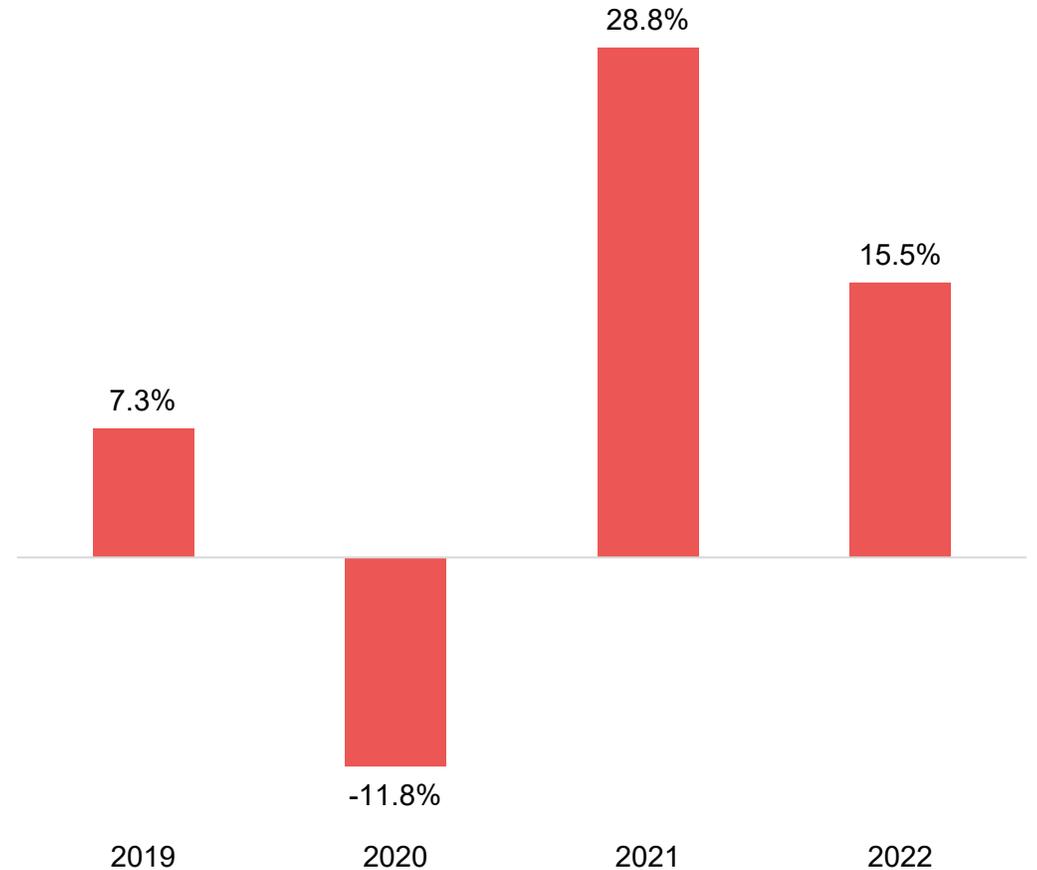
US Foods operates 70 distribution facilities across the U.S. in addition to 86 Chef'Store cash-and-carry locations. The company opened six Chef'Store locations during 2022 and plans to open eight additional locations in 2023.

Sizing and performance insights on US Foods, Sysco, Performance Food Group and hundreds more top foodservice suppliers can be accessed via Ignite Company.

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

Source: Technomic Ignite Company

US FOODS
ANNUAL NET SALES GROWTH



IGNITE MENU

The state of today's menus

Technomic's recently launched *State of the Menu 2023* report illuminates menu data and insights from Top 500 chain restaurants. Here are some key themes from recent menus.

The LSR Breakfast Boom

Breakfast seemed to have made the most waves in 2022. LSR breakfast items rose 10.5% over the past year, with notable increases in breakfast appetizers, desserts and sides. Specialty pastries, chillers and energy drinks are trending at LSRs, as are plant-based proteins, steak and dessert toppings.

Sweet Gains Heat

Sweet flavors and items are trending

across segments and dayparts. Specialty pastries and dessert toppings are on the rise at LSR breakfast operations; tarts and specialty desserts are growing on LSR lunch/dinner menus; and French toast entrees are increasing on FSR breakfast and lunch/dinner menus.

Adult Beverage Gets a Boost at FSRs

Of all mealparts within the full-service realm, adult beverages are seeing the most growth over the past year at both breakfast (+62%) and lunch/dinner (+9%). Straight spirits are especially seeing growth, including Scotch whisky straight, vodka straight and mezcal straight.



LSR Breakfast **+10.5%**

LSR Lunch/Dinner **+3.9%**



FSR Breakfast **+0.2%**

FSR Lunch/Dinner **5.1%**

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

Source: Technomic Ignite Menu
Image Source: Shutterstock

Who serves the most craveable dips?

Craveability is the most significant driver behind dining decisions; 34% of recent restaurant guests indicate the need to satisfy a craving was behind the reason for choosing their specific location. Within the Ignite Consumer survey, we examine craveability at the brand level by giving recent diners the opportunity to tell us in their own words which items they find craveable at a specific chain.

Looking at craveable items helps us understand the dishes that have true guest equity and can be leveraged as points of competitive differentiation. The chart on the right shows brands that

rise to the top based on unaided mentions of craveable dips.

Qdoba tops the list, courtesy of its brand-defining queso, as called out by recent guests to the chain:

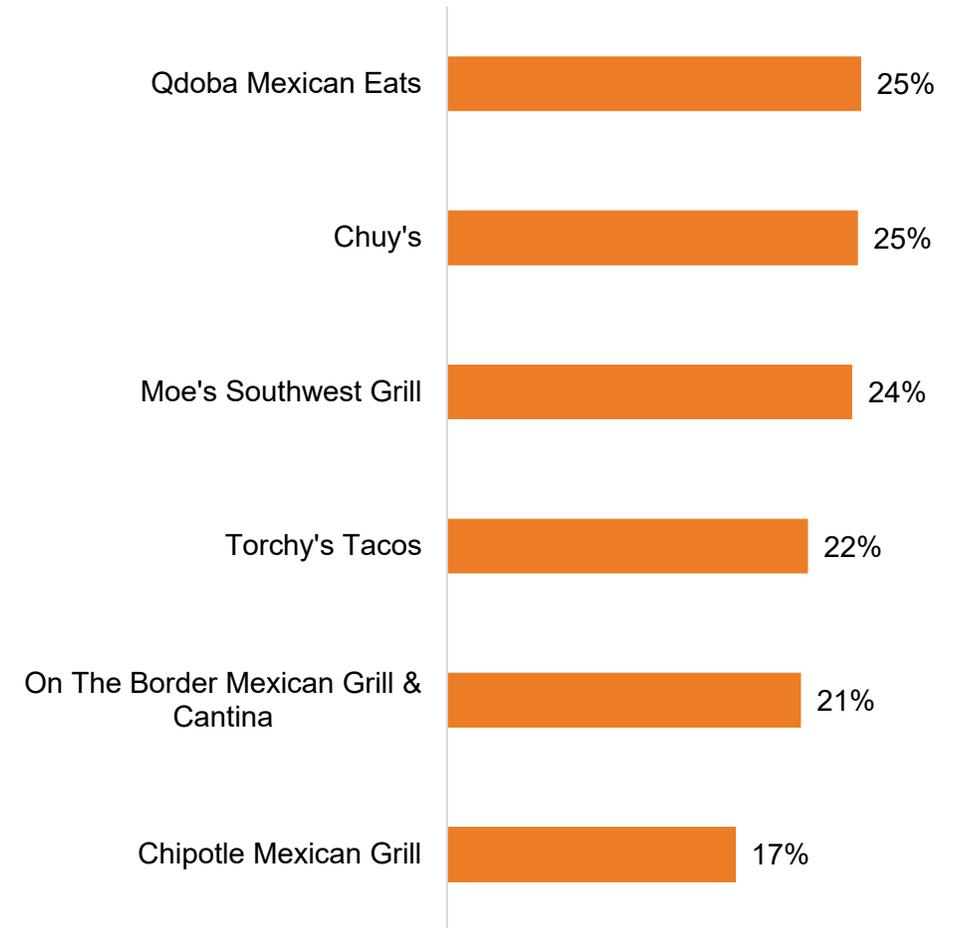
"The queso is amazing!"

"The queso is my favorite."

"I can get chips and queso other places, but I like theirs the best."

"I can only get Qdoba queso here."

PERCENT OF RECENT CHAIN GUESTS CALLING OUT DIPS AS CRAVEABLE



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

Base: 110,000 consumers ages 18+
Source: Technomic Ignite Consumer

Global pizza insights



Pizza preparations, toppings, crusts, sauces and builds all play a key role in determining where consumers order the iconic entree—and how often.

Technomic recently polled consumers across 25 countries to gain insight into their pizza preferences as part of the upcoming *Pizza Global Menu Category Report*. Below are a few fascinating findings.

Globally, 17% of consumers would consider ordering pizza with a nacho cheese sauce base, including 33% of consumers in both Malaysia and the Philippines.

An average of 14% of global consumers would order sweet or dessert pizza builds—a percentage far exceeded in a handful of markets with a much stronger preference for them, including Brazil (36%) and India (32%).

At more than double the global average of 12%, India is the most popular market for pizzas with potato-filled crust edges.

Tomato and marinara-based sauces are the most popular bases worldwide, with a 39% consumer preference on average. In a few markets, however, the flavor is significantly less popular—including in France and South Korea,

where only 23% of consumers in each country report a preference for it.

Globally, 18% of pizza patrons would order a Philly cheesesteak-inspired pizza, with 44% of consumers in China preferring it.

Although only 10% of global consumers prefer a Nashville hot sauce base, this percentage is almost tripled in Indonesia, where 29% would consider ordering it.

In South Africa, 51% of consumers would consider avocado as a pizza topping—a proportion that far outpaces the global average of 16%.

Finally, 17% of global consumers would order a pizza with potatoes as a topping, including 35% in France.

Technomic's upcoming [*Pizza Global Menu Category Report*](#) is the only source of insights for pizza opportunities across 25 global markets using data-driven analysis into market sizing, consumer usage and preferences along with leading operators, product innovation, seasonal influence and menu trends.



[Global Navigator clients: Click here for more](#)

Source: Technomic Global Foodservice Navigator Program
Image Source: Shutterstock

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Global Foodservice Navigator

Understand the global industry, from menu trends to consumers, in 25 countries. [Explore>>](#)

Since 1966, we have produced in-depth research focused on the foodservice industry.

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