

Industry Insights

A roundup of noteworthy foodservice findings
for the week of April 6, 2026



Image Source: Shutterstock

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Yogurt | Salad Dressing | Frozen Vegetable & Cheese Appetizer | Hot Sauce | Barbecue Sauce |
Wing Sauce | Cakes | Gravy | Oils & Shortenings

Fewer chains opened a new restaurant in 2025

Analysis of the industry's top 1,500 chain restaurants reveals that 34% of brands expanded by at least one net location in 2025, while 32% lost one or more locations compared to the prior year. The remaining 34% of chains had no net change in their location footprint.

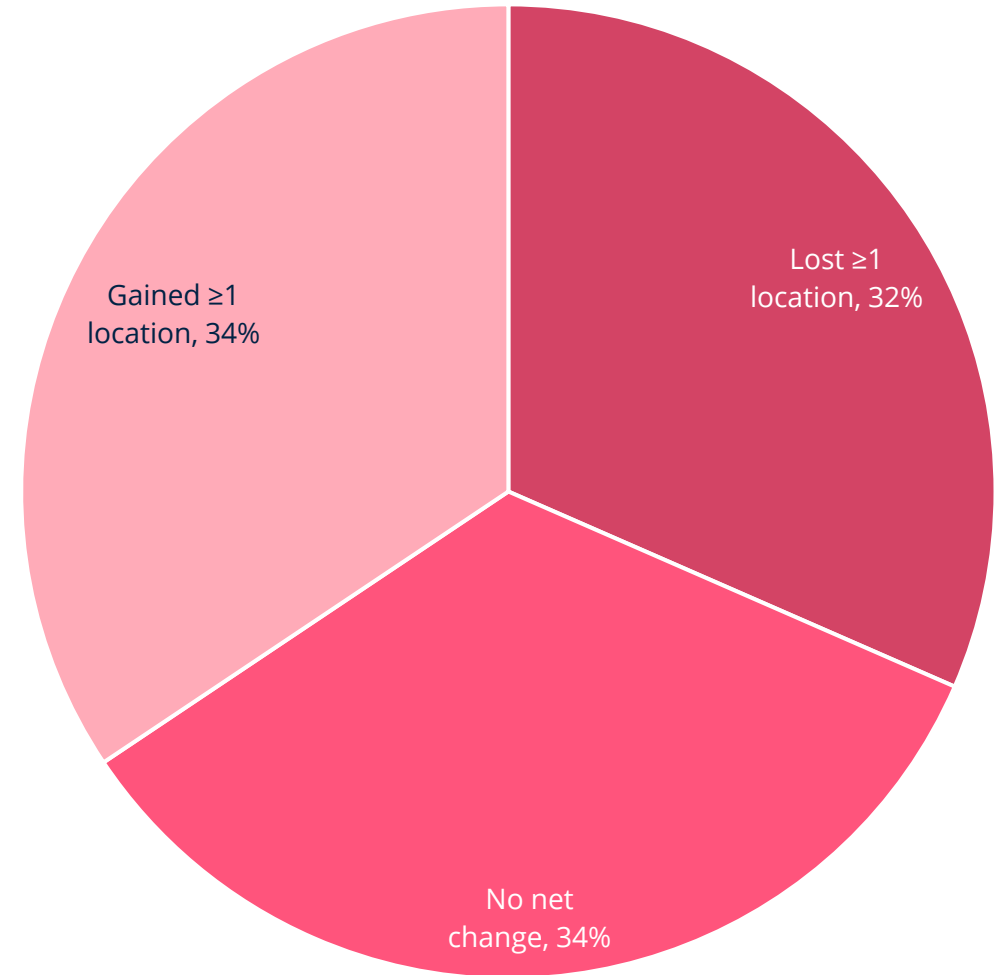
Compared to 2024's share of 38%, the number of expanding chains slipped in 2025, while the percentage of brands that shrank climbed from 29% in 2024 to 32% in 2025, signaling a shift toward increased closures and reduced expansion.

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Source: Technomic Ignite Company

TOP 1,500 CHAIN RESTAURANTS
2025 VS. 2024 NET U.S. LOCATION CHANGE



Three menu trends growing this spring

Technomic's monthly *Dish* report highlights recent menu development news and trends. Here are three menu trends to watch from the most recent installment.

Established Trend: Shrimp-Centered Dishes

What? Menu items centered around the tasty crustaceans, particularly as Lenten promotions

Where? Full- and limited-service restaurants

Example: Cajun Shrimp Topped Crab Cake—fried lump crabmeat cake topped with Cajun shrimp, green and red peppers, onions, banana peppers and corn sauteed in Cajun butter, served over rice (O'Charley's)

Growing Trend: Doughy Dippers

What? Soft dough-based bites perfect for shared snacks

Where? Full- and limited-service restaurants

Example: Hushpuppy Dippers—shareable hush puppies (Cracker Barrel)

New-to-Market Trend: Ya Dong

What? Thai herbal-infused alcohol drink

Where? Full-service restaurants

Example: Knockout Tiger—Thai traditional Old Fashioned with pandan house ya dong, smoked to order (11 Tigers in New York City)

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

Source: Technomic Ignite Menu
Image Source: Shutterstock



Diners' need states evolve throughout the day

Within the Technomic Ignite Consumer program, guests at top chain restaurants are asked to profile and evaluate their most recent experience in great detail. One key question asked is what need state drove their specific choice on the occasion—the emotional driver behind their restaurant selection.

Taken in aggregate and by daypart, what emerges is a snapshot of consumer desires as they navigate any given day. For example, diners report better-for-you need states drive approximately one-third of their decisions during morning occasions.

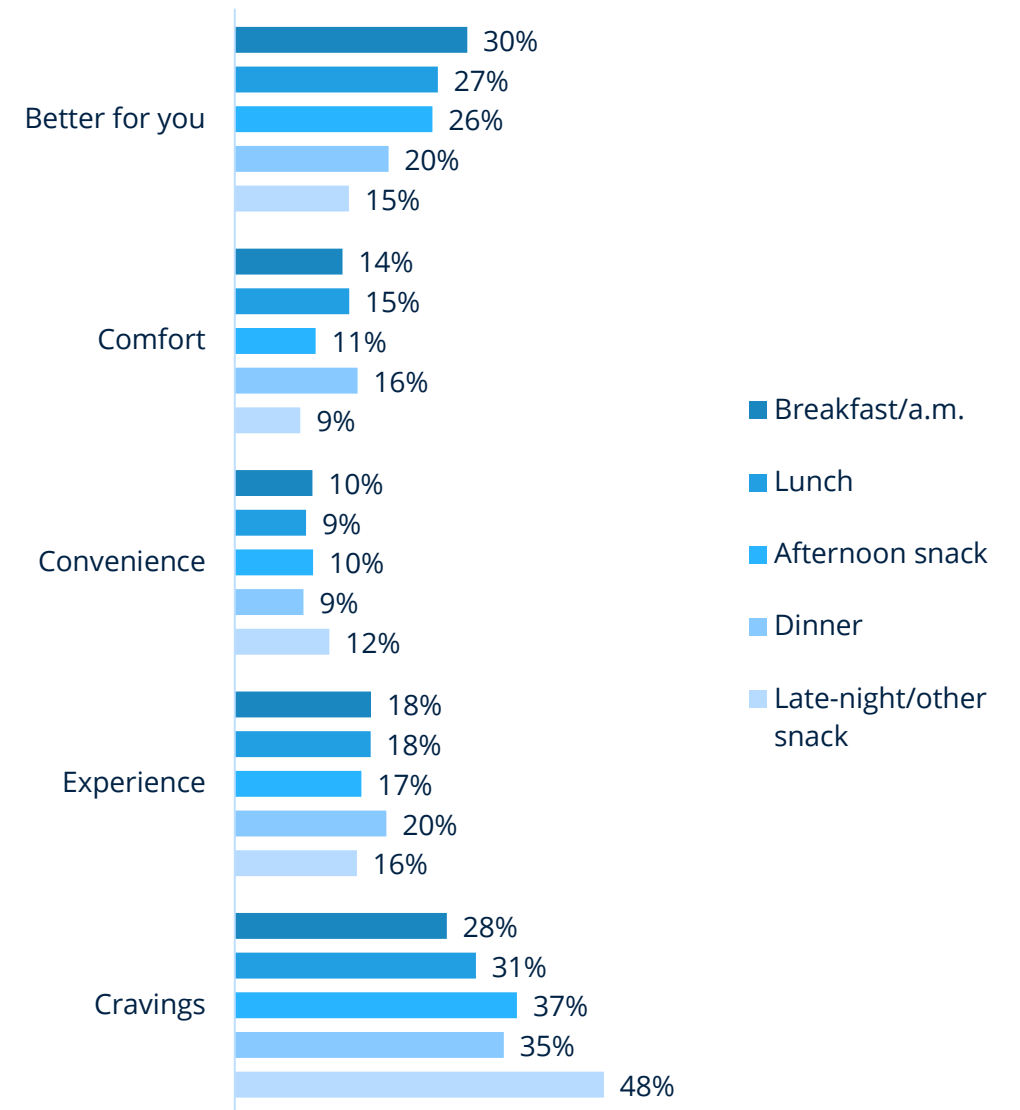
But throughout the day, these healthy need states recede and give way to the need to satisfy a craving or to experiential need states such as social connections or desire for novelty.

This provides suppliers and operators a powerful tool in targeting consumers. Understanding how motivations differ dramatically across dayparts is an essential strategic building block for operators and suppliers working together to build traffic and appeal during different dayparts that may be struggling.

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

Base: 112,000 recent restaurant guests ages 18+
Source: Technomic Ignite Consumer, Q1 2025-Q4 2025

DINER NEED STATES BY DAYPART



Proteins with pasta around the world

Along with pasta type, protein choices make up a critical differentiator in which dish—or restaurant—a consumer prefers over another. But which proteins are most popular with pasta?

Fifty-three percent (53%) of global consumers prefer chicken as their main protein in pasta dishes. This easily bests any other surveyed protein and, notably, is generally stable across tracked regions. In some markets in Latin America and Southeast Asia, this figure reaches nearly two-thirds of all consumers.

Forty-four percent (44%) of global consumers opt for ground beef in pasta dishes. This figure shows more regional variation, with Latin America, Europe and North America consumers about

15% more likely to select it than those in Asia or the Middle East.

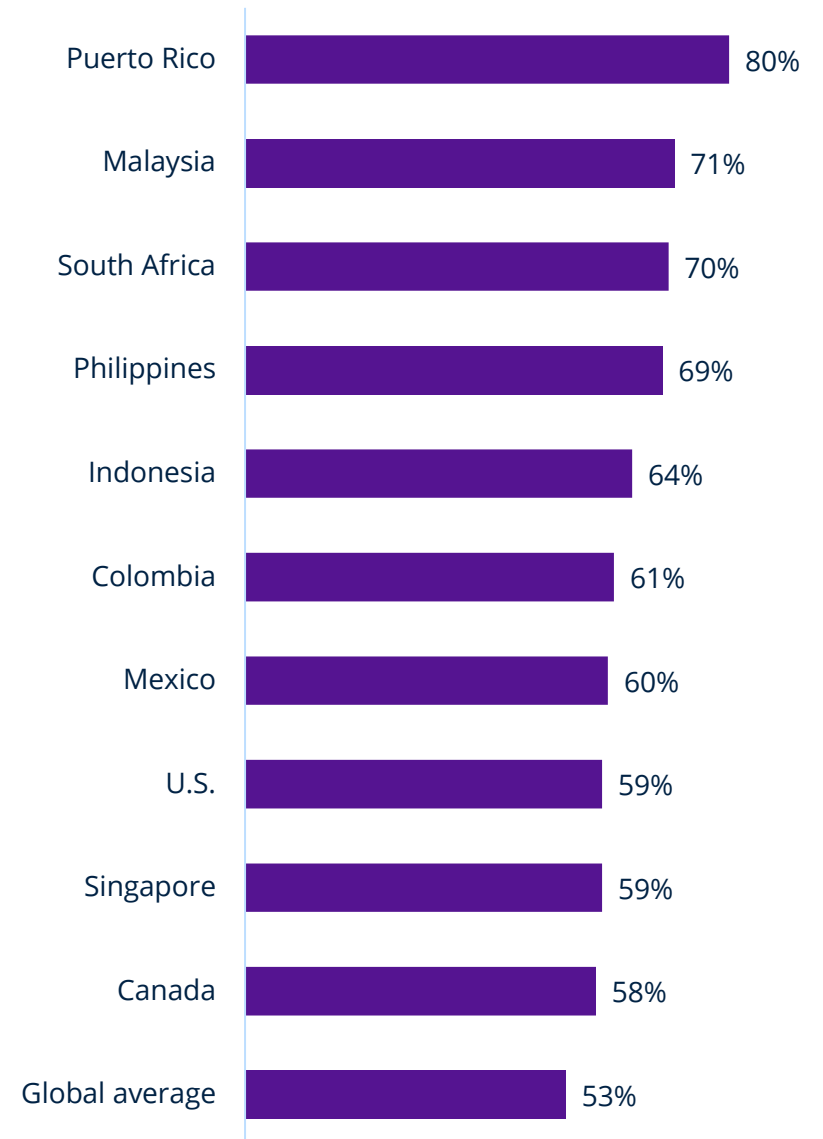
Forty-one percent (41%) of global consumers order meatballs with pasta. This figure shows similar regional variation as ground beef. On a market level, consumer preference differs strongly between these two proteins, with consumers in Japan, South Korea and others twice as likely to pick one over the other.

Forty percent (40%) of global consumers order shrimp with pasta dishes. This figure is easily the highest of any seafood or shellfish protein, at least doubling that of mussels and scallops. North America consumers are notably more likely to prefer this protein than in other regions.

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

% CONSUMERS ORDERING CHICKEN WITH PASTA



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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?

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