

# Industry Insights

A roundup of noteworthy foodservice findings  
for the week of April 8, 2024

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**2024**

Ignite Company

# America's biggest burger brands

Led by McDonald's, the industry's three largest burger chains finished 2023 with a combined footprint of 26,265 domestic restaurants, shrinking by roughly 1% compared to the prior year.

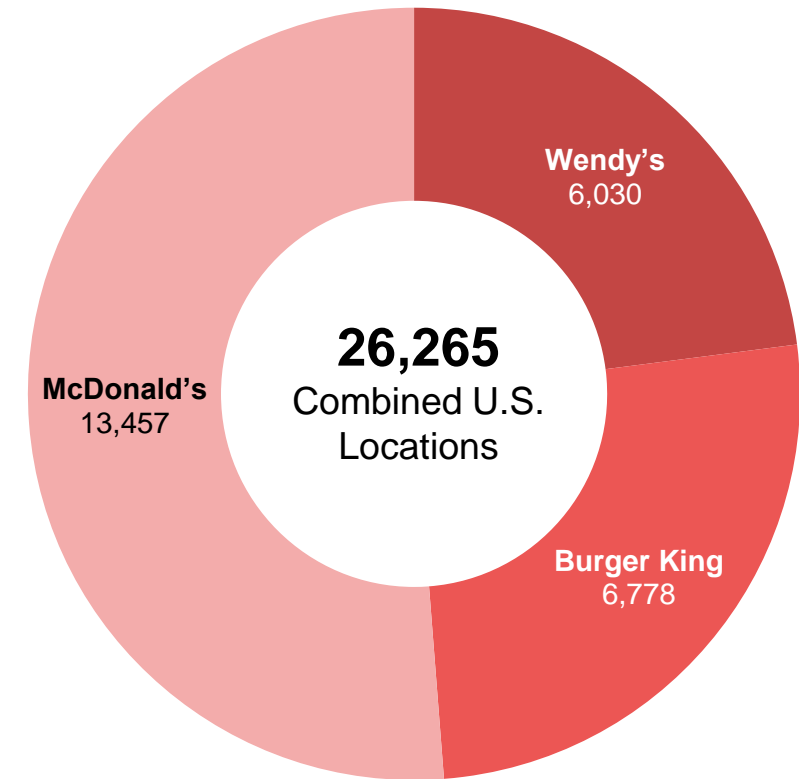
With 13,457 locations, McDonald's has a larger base of U.S. stores than Burger King and Wendy's combined. The burger behemoth posted a net increase of 13 locations in 2023 and plans to accelerate U.S. store development in 2024 and beyond.

Burger King, the second-largest burger player by location count, saw its U.S. store count fall by nearly 4% in 2023 as the chain closed over 260 underperforming stores during the year.

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

Note: U.S. location counts reflect year-end 2023  
Source: Technomic Ignite Company

TOP BURGER CHAINS  
SYSTEMWIDE U.S. LOCATIONS





## Ignite Menu

# Three emerging menu trends to watch

This quarter's *Emerging Eats* report spotlights three key themes to watch.

### Classic Desserts Move into New Mealparts

This quarter, archetypal desserts such as creme brulee and zeppole were menued in savory formats in the appetizer and entree mealparts. Similarly, in Q4 2023, tres leches inspirations moved beyond desserts into the breakfast entree and cocktail mealparts. And in the opposite direction, traditionally savory empanadas got the dessert treatment.

### Color Swaps

Classic ingredients in new color variations are trending, from black apples and blush onions to white/blonde Bolognese and yellow wine.

### Umami Madness

Many of the ingredients trending this quarter feature umami flavor elements, including spicy, fish sauce-based Crying Tiger sauce and nam prik pao chile jam to salty, rich cured egg yolk.

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

Source: Technomic Ignite Menu  
Photo by [Thanh Scholas](#) on [Unsplash](#)



## Ignite Consumer

# Health perceptions drive increased beef consumption

Each week, nearly 70% of consumers eat beef, and the number of consumers frequently purchasing beef from foodservice has grown since 2022. While 53% of consumers indicate their beef purchase frequency has not changed, 32% state they are purchasing beef more often and just 16% are ordering beef less often at foodservice locations.

Beef's high protein content is the primary driver of increases in beef consumption frequency, and some consumers point to an increase in

tempting restaurant items that feature beef.

Although supply challenges may intermittently drive beef prices higher, beef's reputation as a quality, high-protein option helps to increase demand and it is positioned to grow as a protein category.

Operators may leverage the opportunity to maintain a "showpiece" beef- or steak-centered dish that highlights the operation's expertise while strategically shifting toward alternate, less-expensive cut of beef.

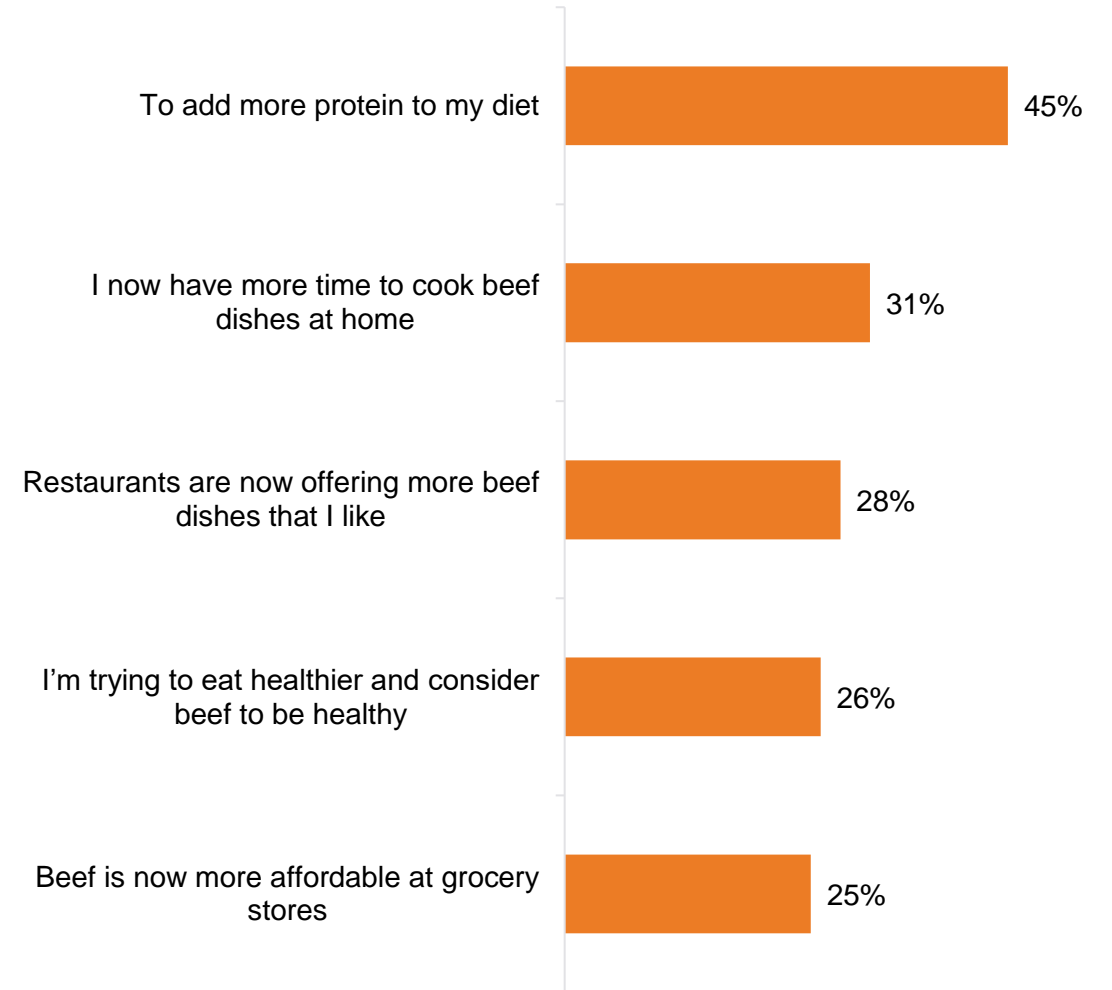
[Ignite Consumer clients: Click here for more](#)

\*Base: 462 consumers who consume beef more often than in 2022

\*Q: You mentioned that you are eating beef more often than in 2022. Why are you doing so? Select all that apply.

Source: Technomic Ignite Consumer featuring the 2024 Center of the Plate: Beef & Pork Consumer Trend Report

## REASONS FOR INCREASING BEEF CONSUMPTION FREQUENCY WITHIN THE PAST YEAR\*



## Global Foodservice Navigator

# Delivery around the world

Technomic recently asked consumers in 25 markets around the world about how they place delivery orders from foodservice locations—whether they only order directly from restaurants, only from third-party platforms or a mix of both. Here are a few standout facts:

Globally, more than half of consumers report placing delivery orders through a mix of first- and third-party services, with the other half of consumers roughly split between exclusively ordering from one or the other.

Indonesia, Brazil, Saudi Arabia, China, Colombia and Mexico showed preference for mixing services, with at least 60% of consumers in each country doing so.

In each surveyed market, patrons who

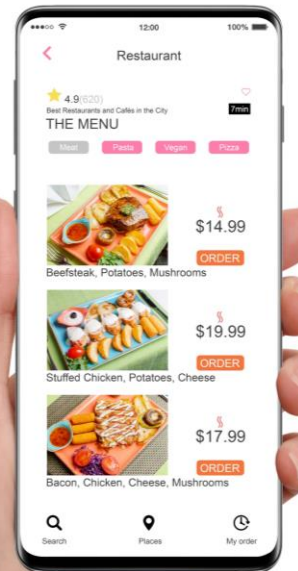
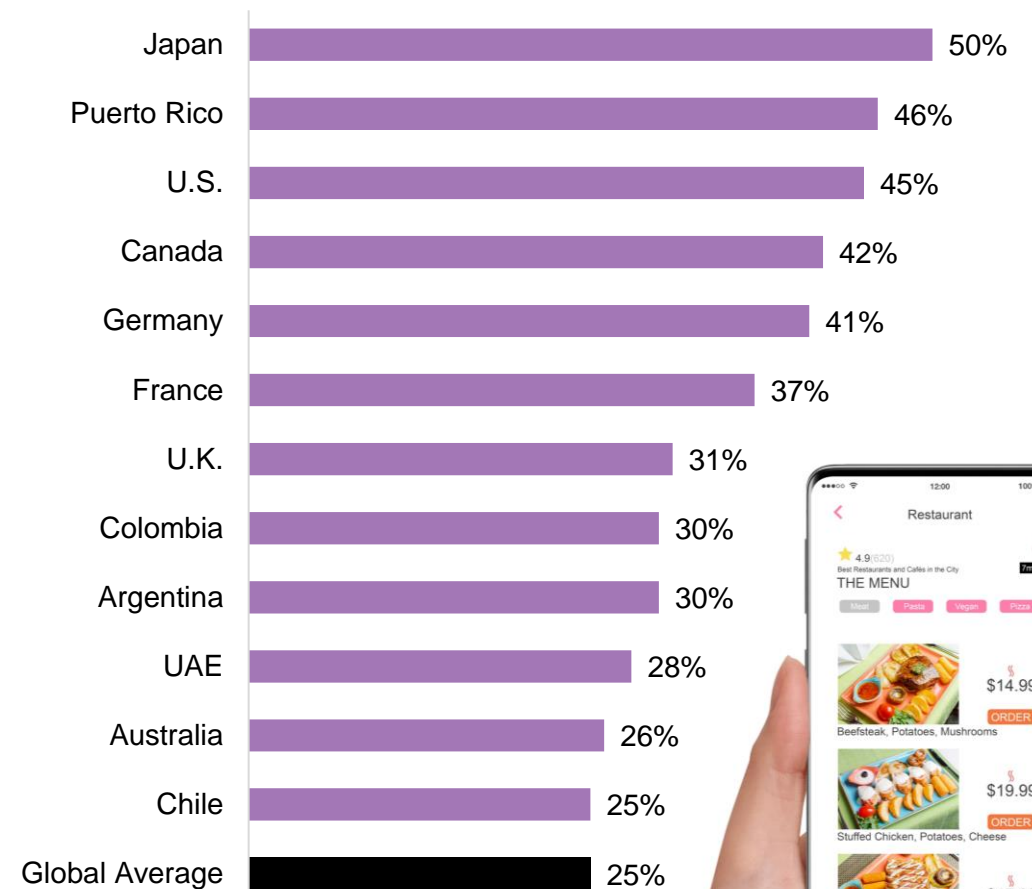
only ordered from one type of service opted for first-party services, often by double digits. Japan, the U.S., Germany, Canada, Puerto Rico and France were standouts in this regard as consumers placed first-party orders at rates greater than or, in Germany's case, equivalent to, using a mix of services.

In no market were consumers most likely to place orders exclusively from third parties, but consumers in Mexico and every tracked East and Southeast Asia country except Japan were more likely to report only using these services than only using first-party ones. South Korea, Singapore, China and Mexico customers all showed a double-digit preference for third-party platforms over direct orders.

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

Source: Technomic Global Foodservice Navigator Program  
Image Source: Shutterstock

### % CONSUMERS WHO ONLY ORDER FROM FIRST-PARTY DELIVERY SERVICES





Consumer Trend Reports

# LSR coffee and specialty beverage opportunities

Beverages hold significant influence in the foodservice industry, appealing to consumers as stand-alone options or add-ons. As such, many global fast-food chains are enhancing offerings with investments in coffee and specialty beverages to boost off-premise consumption. Notably, around two-fifths of LSR consumers report being more likely to visit LSRs that offer a range of beverages, including flavored iced teas, specialty lemonades, etc.

Menu innovation is crucial at LSRs, as over a third of consumers seek out innovative menu items, while 54% of

fast-food and 64% of fast-casual guests prioritize unique flavors/ingredients when making ordering decisions. Additionally, about a third are likely to visit new LSRs offering unique LTOs, underscoring the importance of innovation in driving consumer engagement and patronage.

**Get more data-driven insights on evolving consumer behaviors, attitudes and preferences in the limited-service segment with *The Future of Limited-Service Restaurants Consumer Trend Report*.**

[Learn more about Consumer Trend Reports](#)

Source: Technomic 2024 The Future of Limited-Service Restaurants Consumer Trend Report  
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