

# Industry Insights

A roundup of noteworthy foodservice findings  
for the week of May 4, 2026



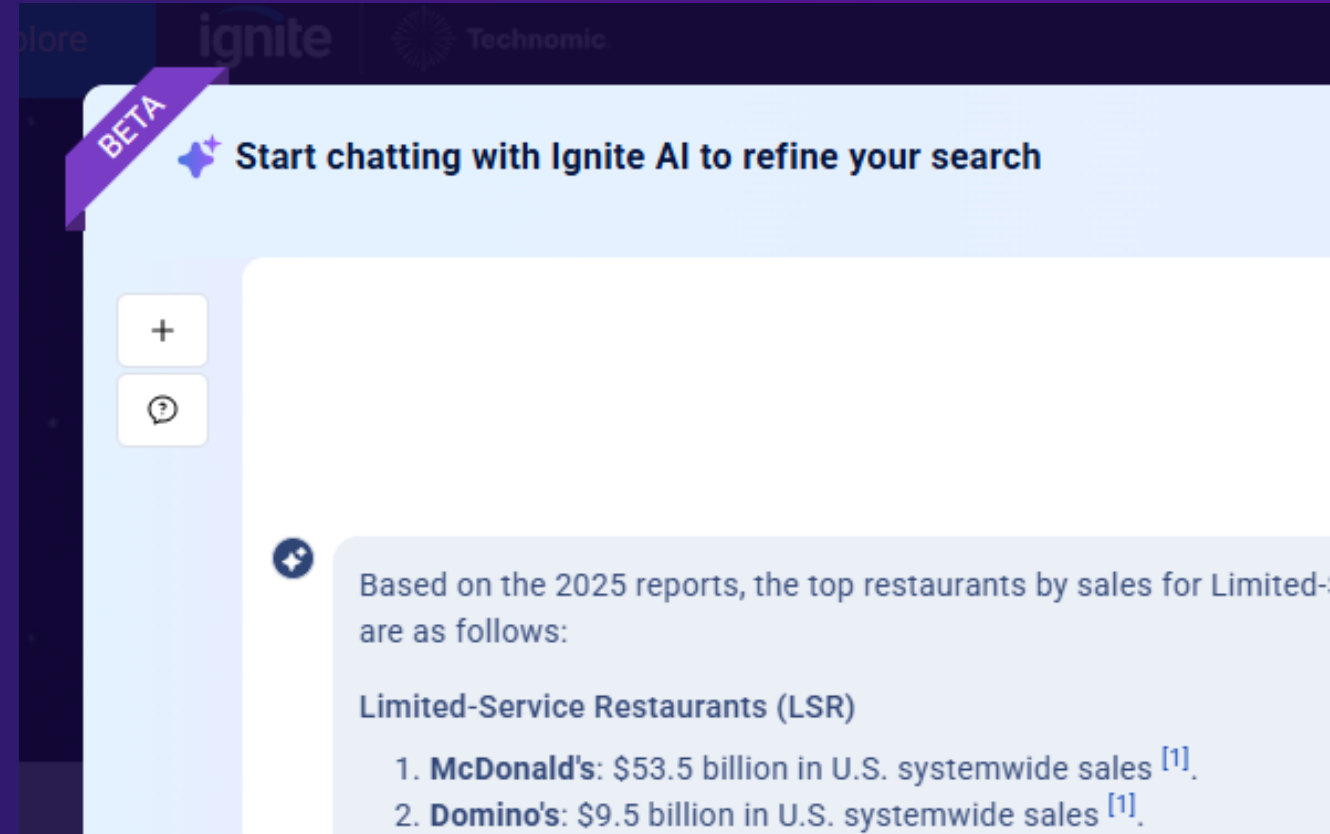
Image Source: Shutterstock

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# Ignite AI is live!

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The screenshot shows the Ignite AI chat interface. At the top, there is a navigation bar with "ignite" and "Technomic" logos. A purple banner with "BETA" is visible. The main chat area has a light blue header with a star icon and the text "Start chatting with Ignite AI to refine your search". Below this, there are two input fields: one with a "+" icon and another with a speech bubble icon. The chat history shows a message from the AI with a star icon, stating: "Based on the 2025 reports, the top restaurants by sales for Limited-Service Restaurants (LSR) are as follows: Limited-Service Restaurants (LSR) 1. McDonald's: \$53.5 billion in U.S. systemwide sales [1]. 2. Domino's: \$9.5 billion in U.S. systemwide sales [1]."

# Coffee chains led new location development in 2025

Paced by the strong expansion of players including 7 Brew Drive Thru Coffee, Dunkin' and Dutch Bros Coffee, the coffee chain category added over 1,000 new cumulative locations in 2025. On a percentage basis, the number of coffee chain locations grew by 3.2% in 2025 to a total of approximately 34,700 U.S. locations.

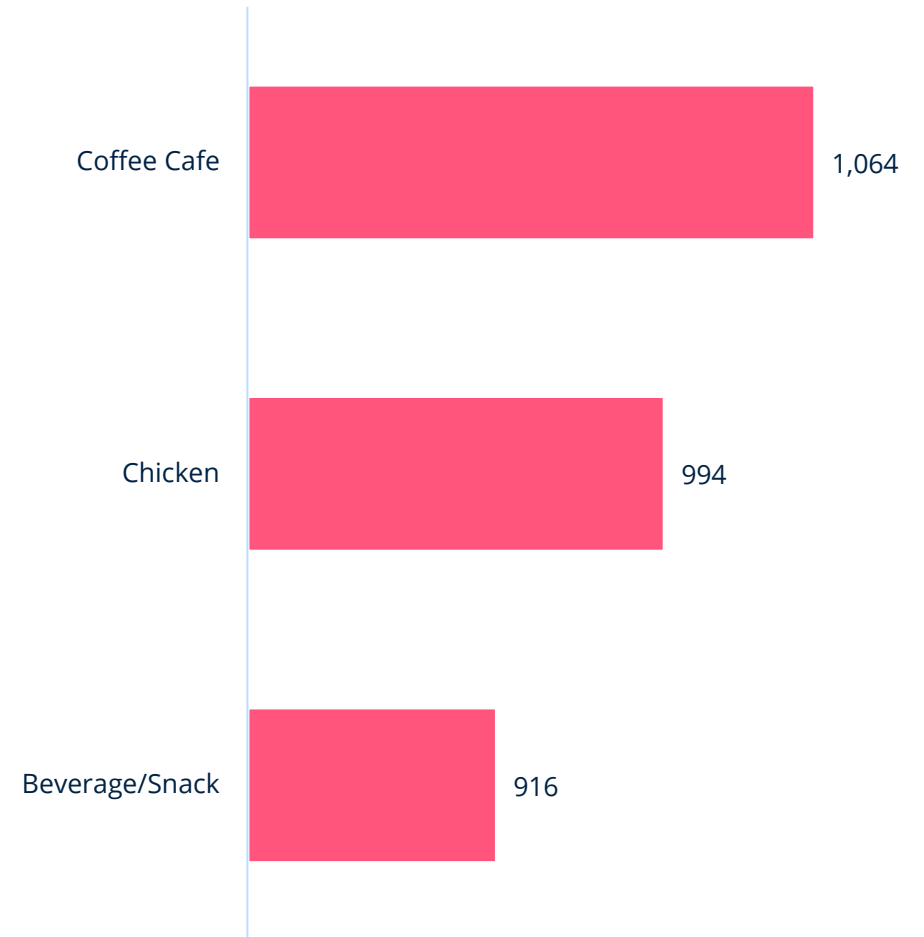
The top 1,500 chain restaurants added nearly 3,500 net new locations in 2025, with over 80% of the openings coming from the coffee cafe, chicken and beverage/snack chain categories.

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Source: Technomic Ignite Company

**TOP 1,500 CHAIN RESTAURANTS**  
2025 NET UNIT GROWTH BY MENU CATEGORY



## Ignite Menu

# Trends among recently launched LTOs

With the launch of Technomic's *LTO Thought Starters*, here are some key trends among top-rated recently launched limited-time offers.

### Pistachio-Enhanced Drinks

- Hot Legendary Chocolate Pistachio—combines nutty pistachio creme, chocolate and kataifi, topped with brown sugar boba (Kung Fu Tea) **69% of potential purchasers consider this unique or very unique**
- Pistachio Rose Latte with Tache Pistachio Milk—velvety Tache pistachio milk and rose syrup, paired with two ristretto shots of Espresso Forte (Peet's Coffee) **75% of potential purchasers likely or much more likely to visit**

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Base: Approx. 250 LTOs

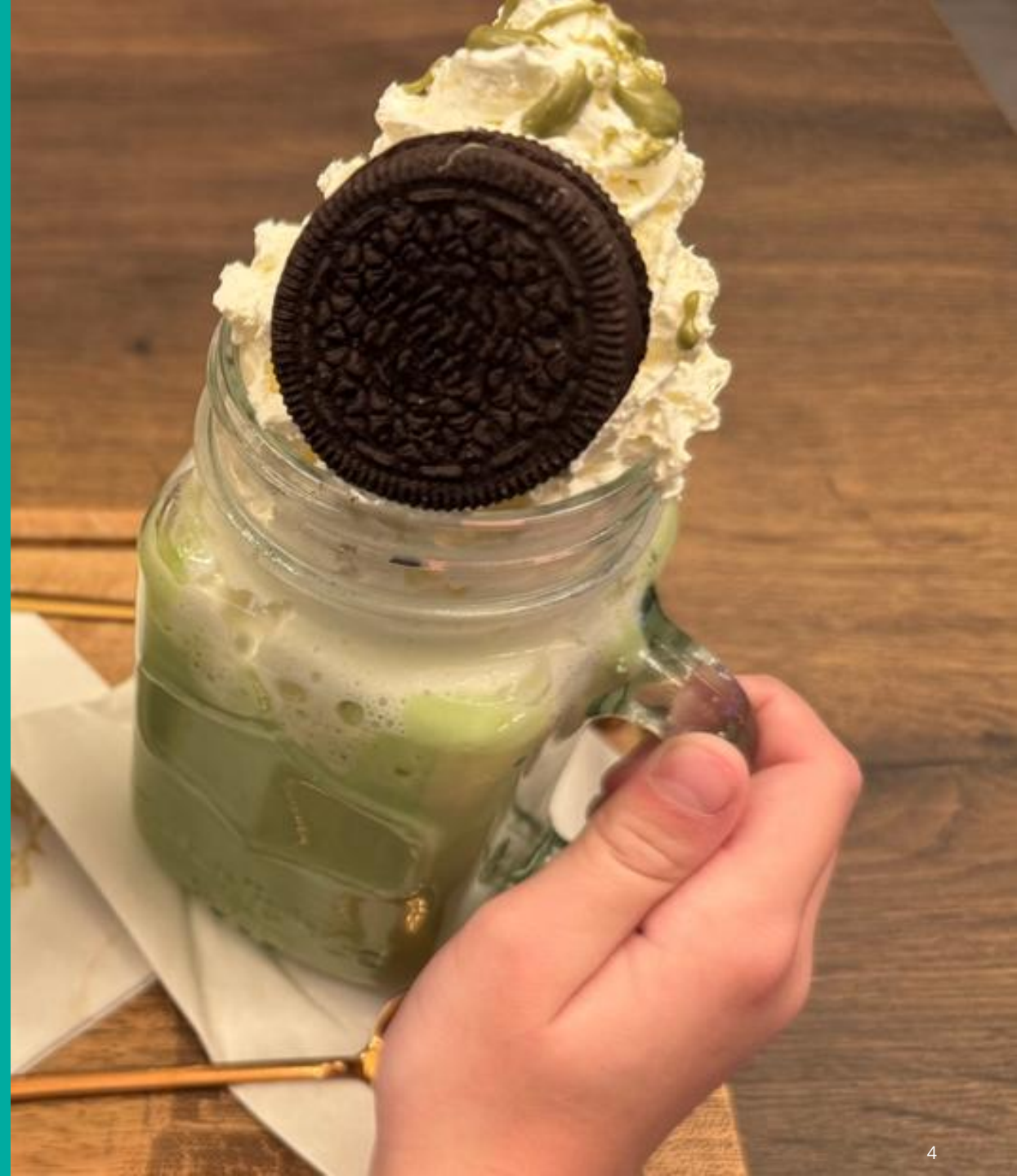
Source: Technomic Ignite Menu Consumer-Rated LTOs, February 2026

\*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

### Protein Forward Positioning

- Maple Waffle Protein Latte—espresso, salted caramel, cinnamon, white chocolate, protein milk, Soft Top, caramel drizzle and raw sugar sprinkles (Dutch Bros Coffee) **74% of potential purchasers likely or much more likely to visit**
- Protein-zza—protein-packed cauliflower crust pizza with 56 grams of protein, topped with tomato sauce, mozzarella, double chicken, veggies, basil and a Frank's RedHot drizzle (Blaze Pizza) **65% of potential purchasers consider this unique or very unique**



## Ignite Consumer

# More than income, having children in the household drives restaurant frequency

Regardless of income level, households with children are significantly more likely to visit or order from restaurants more often than once per week compared to homes without children.

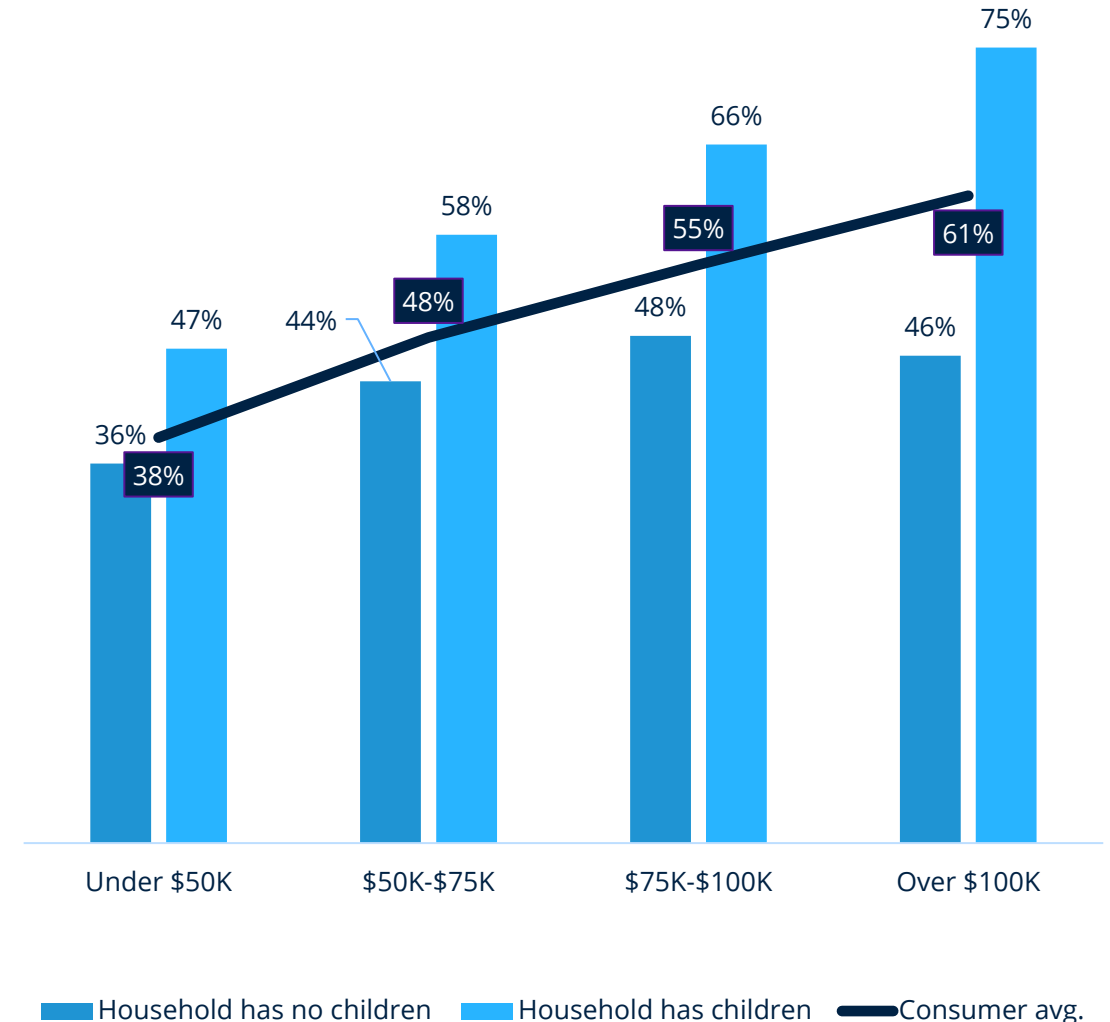
For example, 75% of families earning over \$100K annually report frequent restaurant usage, compared to just 46% of households without children within the same income bracket.

**This trend persists across all income levels, with the gap growing dramatically as income increases. This suggests that family dynamics, rather than income alone, play a more vital role in driving frequent restaurant usage.**

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Base: 29,000 consumers 18+  
Source: Technomic Ignite Consumer, Q1 2026

**RESTAURANT USAGE BY HOUSEHOLD INCOME AND FAMILY STATUS**  
% OF CONSUMERS VISITING/ORDERING FROM RESTAURANTS MORE THAN ONCE A WEEK



## Global Foodservice Navigator Program

# Where has fried chicken grown?

The recently released *Global Consumer Trends Study*, available as part of Technomic's Global Foodservice Navigator Program, is a deep dive into consumer preferences and behaviors in the foodservice, including which foods they order at least occasionally.

Global preference for fried chicken has grown by an average 5% since Q2 2022, with this growth meriting a closer look: At an average 18% growth, Middle East consumers saw by far the highest growth in ordering fried chicken at least occasionally.

Two of the top five markets were found in this region, including Saudi Arabia's first-place 25% growth. At an average 7% growth, Asia-Pacific consumers saw

the second-highest growth in ordering fried chicken at least occasionally.

Six of the top 10 markets were found in this region, including China, which landed in second place with 21% growth.

At an average 6% and 5% growth, North America and Europe consumers, saw the third- and fourth-highest growth, respectively. These averages approximately match the global average, with only the U.S. seeing above-average growth at 8%. Finally, at an average 1%, Latin America consumers lagged behind their counterparts elsewhere, with Chile a notable exception at 11% growth.

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Source: Technomic 2022-2026 Global Foodservice Navigator Program consumer surveys  
Q: Which types of food do you order at restaurants or other dining establishments at least occasionally (once every 90 days)? Select all that apply.

## % CONSUMERS ORDERING FRIED CHICKEN AT LEAST OCCASIONALLY



## IGNITE AI PROMPT OF THE WEEK

In each Industry Insights, we ask Ignite AI a top-of-mind industry question and share the answer with you. Copy and paste our prompt or write your own to answer your industry questions in our Ignite.

# What are the fastest-growing metro areas for the fast-casual segment?

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Source: Technomic Ignite AI

### 1. Provo, Utah

- Growth Rate: 8.72% YOY
- Population: 733,218
- Fast-Casual Locations: 202 restaurants (competition index of 183.7)
- Key Demographics: Young population, affluent households
- Strategic Assessment: Provo represents a mature fast-casual market with exceptional demographic fit. The 184 location index indicates saturation risk, but the young, affluent population and 8.7% growth rate suggest continued capacity for premium and innovative fast-casual concepts. Focus on differentiation and daypart expansion rather than traditional QSR-style fast casual

### 2. Huntsville, Ala.

- Growth Rate: 7.60% YOY
- Population: 527,254
- Fast-Casual Locations: 141 restaurants (competition index of 137.7)
- Key Demographics: Balanced age distribution (i.e., no extreme skews,

strong income profile and large population of people ages 25-34)

- Strategic Assessment: Huntsville's high-tech economy drives both population growth and income levels. The 138 location index indicates competitive but not saturated conditions. Prime target for health-conscious and tech-forward fast-casual brands (e.g., mobile ordering, loyalty programs, customization, etc.)

### 3. St. George, Utah

- Growth Rate: 8.34% YOY
- Population: 202,452
- Fast-Casual Locations: 71 restaurants (competition index of 159.9)
- Key Demographics: Older population, middle-to-upper income
- Strategic Assessment: Small but rapidly growing market with strong existing fast-casual presence. The 160 index suggests competitive intensity. Best suited for established brands with proven senior appeal and family-friendly positioning



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### Have questions?

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