

Industry Insights

A roundup of noteworthy foodservice findings for the week of May 5, 2025

Image Source: Shutterstock



This report is authorized for use solely by the parties noted in the written contract. No part of the publication may be reprinted, redistributed or put into an electronic or information retrieval system without the prior permission of Technomic, Inc.





Cultivate your menu strategy from ideation to launch

Discover market-level food trends, track limited-time offers and test new menu items on the fly with Ignite Menu

[Learn more](#)



How have the top 10 chains changed since 2014?

While McDonald's and Starbucks continue to remain entrenched as the industry's two-largest chains, several other leading chain players have undergone notable ranking shifts over the last decade.

Chick-fil-A has seen one of the most significant ranking improvements, climbing five spots since 2014 to rank third overall. Chipotle Mexican Grill and Domino's both jumped into the top 10, supplanting Applebee's and Pizza Hut.

Discover more ranking shake-ups and performance insights for the industry's top-ranked chains in Technomic's newly released *2025 Top 500 Chain Restaurant Report*.

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

Source: Technomic Ignite Company featuring the Top 500 Chain Restaurant Report

TOP 10 U.S. CHAIN RESTAURANTS RANKED BY U.S. SYSTEM SALES

Chain Name	2024 Rank	2014 Rank	
McDonald's	1	1	-
Starbucks	2	2	-
Chick-fil-A	3	8	▲
Taco Bell	4	6	▲
Wendy's	5	5	-
Dunkin'	6	7	▲
Chipotle Mexican Grill	7	14	▲
Burger King	8	4	▼
Subway	9	3	▼
Domino's	10	13	▲

Ignite Menu

Top-rated consumer LTOs

Technomic's Ignite Menu Consumer-Rated LTOs data provides consumer insights on Top 500 restaurant and leading 40 convenience-store chains' limited-time products. Here are the top-rated LTOs by metric from last month.

Purchase Intent

Miller's Ale House's **Prime Burger**—half-pound, hand-formed, 100% ground beef patty, melted white American cheese, shaved prime rib, roasted mushrooms, sauteed onions, gravy, crispy onion tangles and garlic crema, all on a toasted black-and-white sesame seed bun (27% of consumers would be very likely to purchase)

Uniqueness

Pret A Manger's **Crunch Miso Mushroom Wrap**—miso-glazed roasted mushroom, carrots, avocado, pickled

cabbage and carrots with chile crunch in a bed of romaine rolled into a seven-grain wrap (34% of potential purchasers found very unique)

Draw

Del Taco's **Dragon Fruit Blueberry Lemonade Poppers**—blueberry fruit-flavored popping boba pearls mixed with real dragon fruit pieces and Minute Maid zero-sugar lemonade, all over ice (38% of potential purchasers would be very likely to increase visits to an operator for this item)

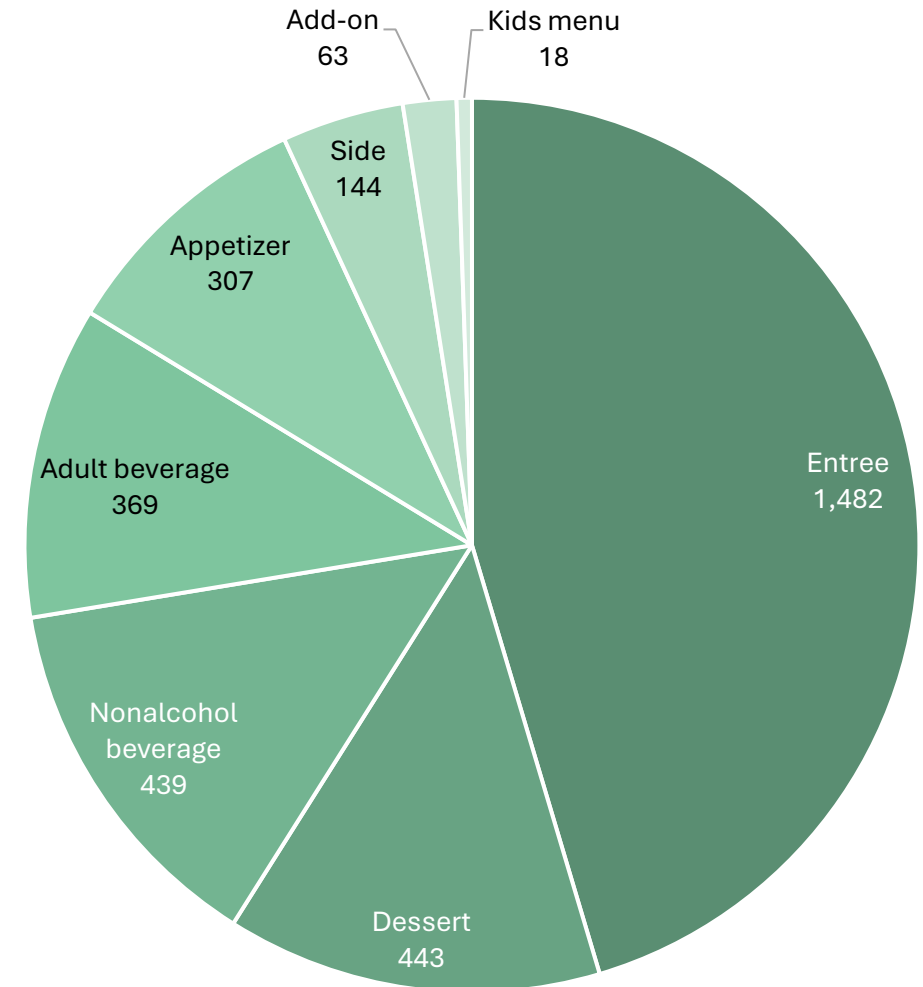
Craveability

Bahama Breeze Island Grille's **Filet Mignon and Coconut Shrimp**—served with asparagus, yuca fries drizzled with jerk honey butter and citrus mustard for dipping (31% of potential purchasers find very craveable)

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

Source: Technomic Ignite Menu

LTOS BY MEALPART



Ignite Consumer

Dine-in increases share of breakfast occasions at LSRs

Among diners who purchase weekday breakfast from restaurants, 47% say they typically eat it at the restaurant, up from 38% in 2021.* This shift highlights the post-pandemic rebound, but also supports the idea that consumers are opting for the variety, enjoyment and dining experience offered by restaurants.

Both fast-food and fast-casual restaurants have seen growth for dine-in breakfast orders, while takeout has decreased for fast-food restaurant breakfast consumption.

With breakfast moving toward dine-in, operators must invest in enhancing the on-premise experience through optimized dining spaces and menu offerings. Operators may also capitalize on this by encouraging add-ons and unique beverages that appeal specifically to dine-in consumers, potentially increasing check during these increasing dine-in visits.

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

*Base: 1,115 (weekday) and 1,072 (weekend) consumers who eat breakfast

**Base: Varies by those who visit each restaurant segment

Source: Technomic Ignite Consumer featuring the 2024 Breakfast Consumer Trend Report

SHARE OF ORDERS BY FORMAT**



Global enthusiasm for foodservice tech

Two stories emerge from recent data surveying consumers about their interest in a variety of foodservice-related technologies.

Respondents in Asia, Latin America and, especially, the Middle East consistently overindex global averages in their enthusiasm for restaurant apps, in-store kiosks, robotics, dynamic menus and many other technologies increasingly offered by restaurants worldwide. Conversely, those in Europe and North America underindex for the same, often by substantial margins.

Outpacing any other region, Middle East consumers' interest in food-preparing and -serving robotics stands at about 15% over the global average. Similar

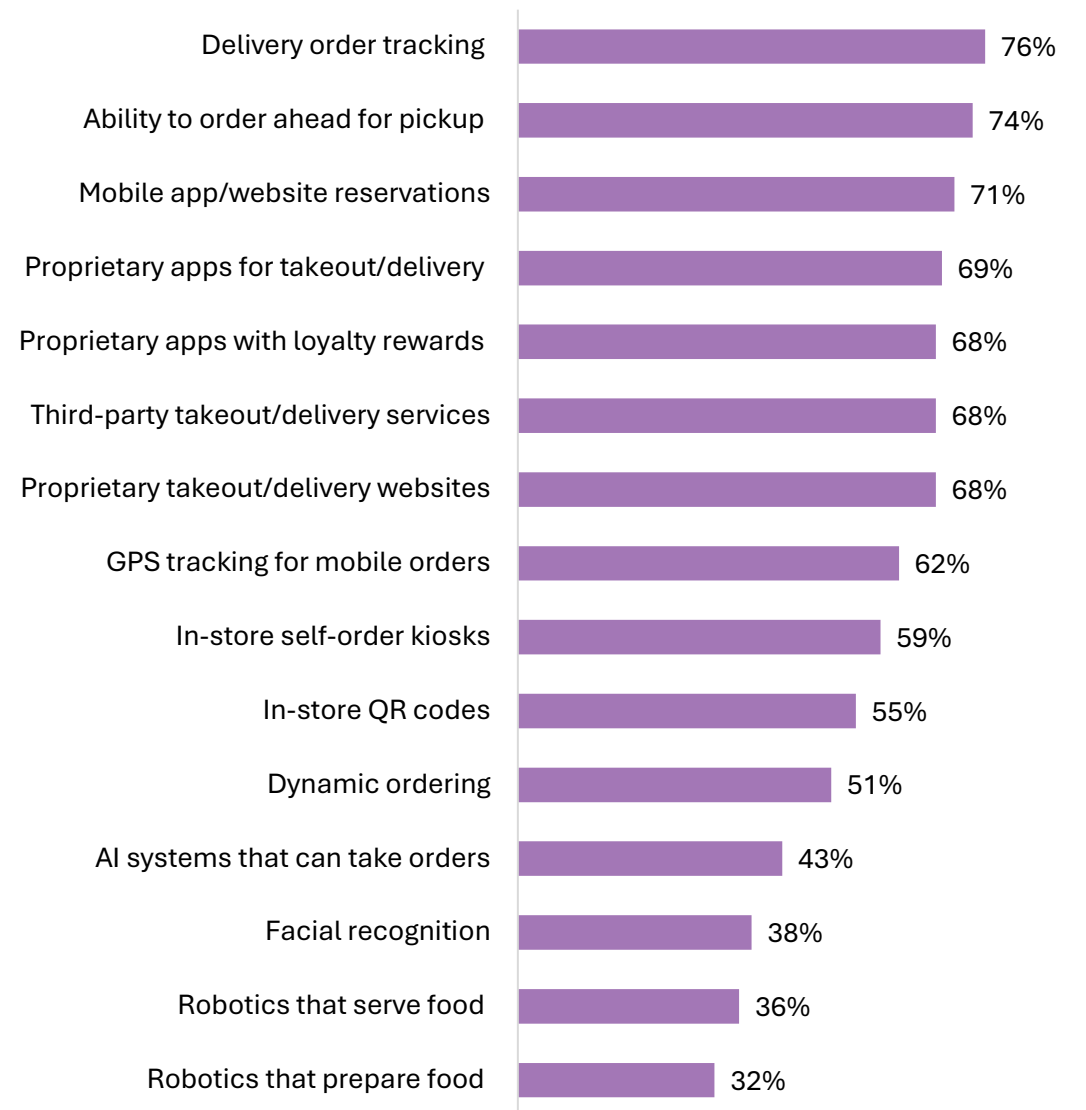
figures exist for Asia consumers' interest in in-store QR codes (+11%) and Latin American consumers' interest in proprietary apps capable of placing orders.

Asia and Middle East consumers again overindexed for interest in artificial intelligence capable of taking orders while Latin America consumers matched the global average (43%). These figures dropped to about a quarter of respondents in Europe and North America. No form of technology was more globally popular than delivery order tracking or, just behind it, the ability to order ahead for pickup, each with about three-quarters of respondents finding it somewhat or extremely appealing.

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

Source: Technomic Global Foodservice Navigator Program February 2025 consumer survey

% CONSUMERS DESCRIBING ___ AS SOMEWHAT OR EXTREMELY APPEALING



Consumer Trend Reports

The rise of budget snacks

As inflation continues to impact household budgets, consumers are becoming increasingly price-sensitive, actively seeking out deals and promotions on snacks. The trend toward home-prepared snacks is rising, with nearly one in five consumers preparing more snacks at home, either for in-home consumption or to bring elsewhere. This shift in behavior is reflected in a broader definition of “snack,” with 18% of consumers now defining snacks by price, an increase from 12% in 2021.

As part of cost-saving measures, many consumers are purchasing larger, more economical snack portions from retail

outlets, highlighting the ongoing prioritization of value. Consumers are also increasingly turning to dollar/value menus when ordering snacks at restaurants, and nearly half cite “good value for money” and “price” as key factors when selecting snacks.

Get more data-driven insights on the retail foodservice space, including consumer attitudes, behaviors and perspectives with the *Snacking Consumer Trend Report*.

[Learn more about Consumer Trend Reports](#)

Source: Technomic 2025 Snacking Consumer Trend Report
Image Source: Shutterstock



Want more insights?



You can get this report delivered to you bi-weekly!

[Sign up here>>](#)

Ignite Company

See where restaurant chains are, how many units they have and how well they're doing. [Explore>>](#)

Ignite Menu

Pinpoint the latest menu trends and see what's on the horizon. [Explore>>](#)

Ignite Consumer

Get to know your customers' customers through 60+ attributes and visit occasion metrics. [Explore>>](#)

Global Foodservice Navigator

Understand the global industry, from menu trends to consumers, in 25 markets. [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 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.

312-876-0004
info@technomic.com
technomic.com