

Industry Insights

A roundup of noteworthy foodservice findings
for the week of May 6, 2024

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Chain
Restaurant
Report

2024

MENU

DIRECTIONS

June 17-19, 2024

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Atlanta, GA

The event for all segments of noncommercial foodservice to cultivate meaningful relationships while gathering industry data and insights. Explore the latest menu trends, operational hacks and budget-saving strategies.

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200+ Attendees



20+ Speakers



40% College & University

35% Healthcare

15% K-12

6% Contract Headquarters/
Business & Industry



Ignite Company

Share keeps growing for the industry's top chains

Led by McDonald's, Starbucks and Chick-fil-A, the industry's 10 largest chains registered cumulative sales of \$185 billion in 2023, accounting for 44% of all Top 500 chain restaurant sales during the year.

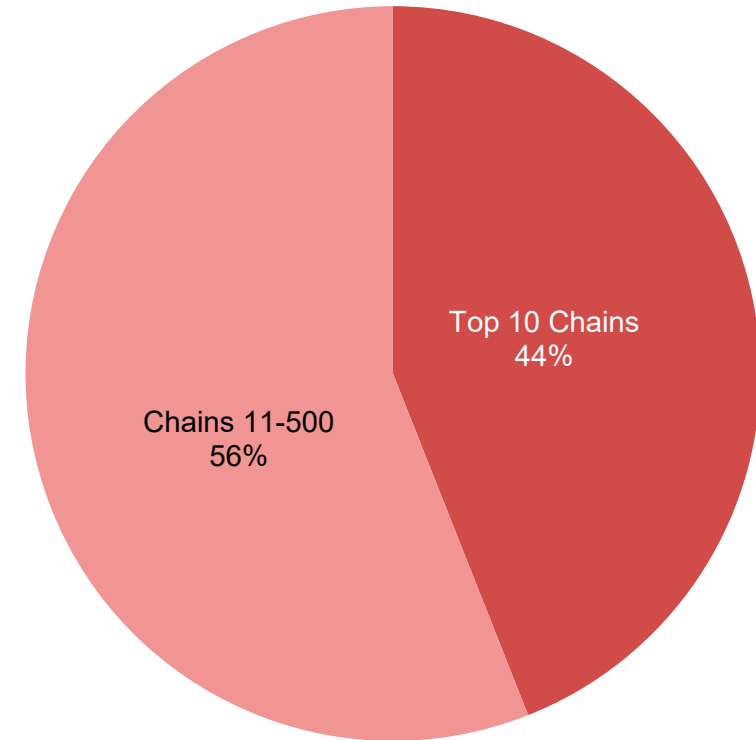
The top 10 chains have steadily taken share from competitors over the past five years, expanding from 42% in 2019 to 44% in 2023. Chick-fil-A has achieved the most notable increase during this period, with share rising from 3.6% in 2019 to 5.1% in 2023.

Additional insights and performance analysis for the industry's largest chain players can be accessed in Technomic's recently released *2024 Top 500 Chain Restaurant Report*.

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

Note: Data reflects 2023 U.S. sales share
Source: Technomic Ignite Company

TOP 500 CHAIN RESTAURANTS
U.S. SALES SHARE



Ignite Menu

Three menu trends to watch

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

Established Trend: Blueberry-Lemon Treats

What? Limited-time seasonal desserts and sweet breakfast items featuring blueberry and lemon flavors together

Where? Limited- and full-service restaurants

Example: Blueberry & Lemon Danish—flaky pastry with blueberries and a lemon center, topped with a lemon glaze drizzle (La Madeleine)

Growing Trend: Floral Ice Creams

What? Floral-flavored ice creams in varieties such as marigold and violet

Where? Quick-service restaurants

Example: Supermoon Ice Cream—candied violet and marshmallows (Jeni's Splendid Ice Creams)

New-to-Market Trend: Raisin Cocktails

What? Whiskey- and rum-based specialty drinks spotlighting raisins

Where? Casual- and fine-dining restaurants

Example: Symmetry Cocktail—Johnnie Walker blended Scotch, Plantation Xaymaca rum, chai, spiced carrot, golden raisin and cream cheese (Jolie in New Orleans)

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

Source: Technomic Ignite Menu

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Jeni's Splendid Ice Creams' Supermoon Ice Cream
Image Source: [Jeni's Splendid Ice Creams website](#)

Ignite Consumer

Uneven erosion of daypart traffic at restaurants

Technomic's February 2024 Consumer Awareness & Visit Report that 30% of consumers reported zero past-week restaurant occasions in the month of February. For broader context, the COVID-19 peak for zero past-week visits was 39%, and the lowest the number has registered since is 26%.

The ongoing pullback in traffic appears to be impacting breakfast disproportionately and, to some degree, it has affected lunch. This is interesting as breakfast can often be a high-value daypart for consumers as it often features lower price points. However,

the "no-cost" option of coffee and breakfast at home, especially for those with less disposable income, is likely too much to pass up given the current inflationary environment.

For many consumers, dinner presents a more significant logistical challenge—a challenge for which foodservice is expertly engineered to solve. And so, those with fewer dollars to spend are likely putting them to use for dinner, where they may count the most, getting the greatest bang for their foodservice buck.

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

Source: Technomic Ignite Consumer Platinum February 2024 Consumer Awareness & Visit Report
Image Source: Shutterstock

YEARLY DECLINE IN PAST-WEEK ORDER/VISITS (JAN-FEB 2024)

Breakfast



-9.3%

Lunch



-7.9%

Dinner



-3.2%

Global Foodservice Navigator

Fried chicken for breakfast

Technomic recently asked consumers in 25 global markets about the dishes they eat for breakfast, including whether they start their day with fried chicken at least occasionally. Below are a few highlights:

While about 16% of restaurant patrons reach for fried chicken for their morning meal, this number jumps to 28% in Southeast Asia, where the top four markets for fried chicken breakfast consumers are located. This is by far most common in Indonesia, where nearly half of all consumers eat fried chicken as a breakfast dish at least occasionally.

India consumers also overindexed on this measurement, as did those in the

UAE and South Africa, with about a fifth to a quarter of all consumers in these three markets choosing fried chicken for breakfast.

While Latin America consumers as a whole slightly underindexed for this, those in Brazil and Mexico both overindexed. Meanwhile, the U.S., China (12% each), Europe markets (8%), Japan (6%) and South Korea (5%) all noticeably underindexed, especially compared to their much higher interest in fried chicken during other dayparts.

Get more data-driven insights into breakfast trends around the world with the upcoming [Breakfast Global Menu Category Report](#).

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

Source: Technomic Global Foodservice Navigator Program
Image Source: Shutterstock

% CONSUMERS WHO ORDER FRIED CHICKEN FOR BREAKFAST AT LEAST OCCASIONALLY



Multi Client Studies

Snacking in K-12 foodservice has untapped potential

Young consumers are driving growth of the foodservice snack occasion, and yet more than two-thirds of K-12 students have either been consistent with or decreased their participation in snack programs and after-school snack/meal programs over the last three months. More than half of K-12 students prefer to bring snacks from home rather than purchasing at school. This is likely due to students' disinterest in current school snack offerings or perceived lack of variety. Snacking patterns often vary among ages, with K-8 students snacking more during the

day and high-school students during the afternoon.

K-12 operators can support the snacking occasion by creating daypart-specific programs tailored to the distinct needs of both K-8 and high-school students. Opportunities include after-school snack programs, a la carte and vending.

Get more data-driven insights into industry, consumer and operator trends and challenges impacting the K-12 segment with the *K-12 Foodservice Multi Client Study*.

[Learn more about Multi Client Studies](#)

Source: Technomic 2024 K-12 Foodservice Multi Client Study
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312-876-0004

info@technomic.com

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