

Industry Insights

A roundup of noteworthy foodservice findings
for the week of June 8, 2026



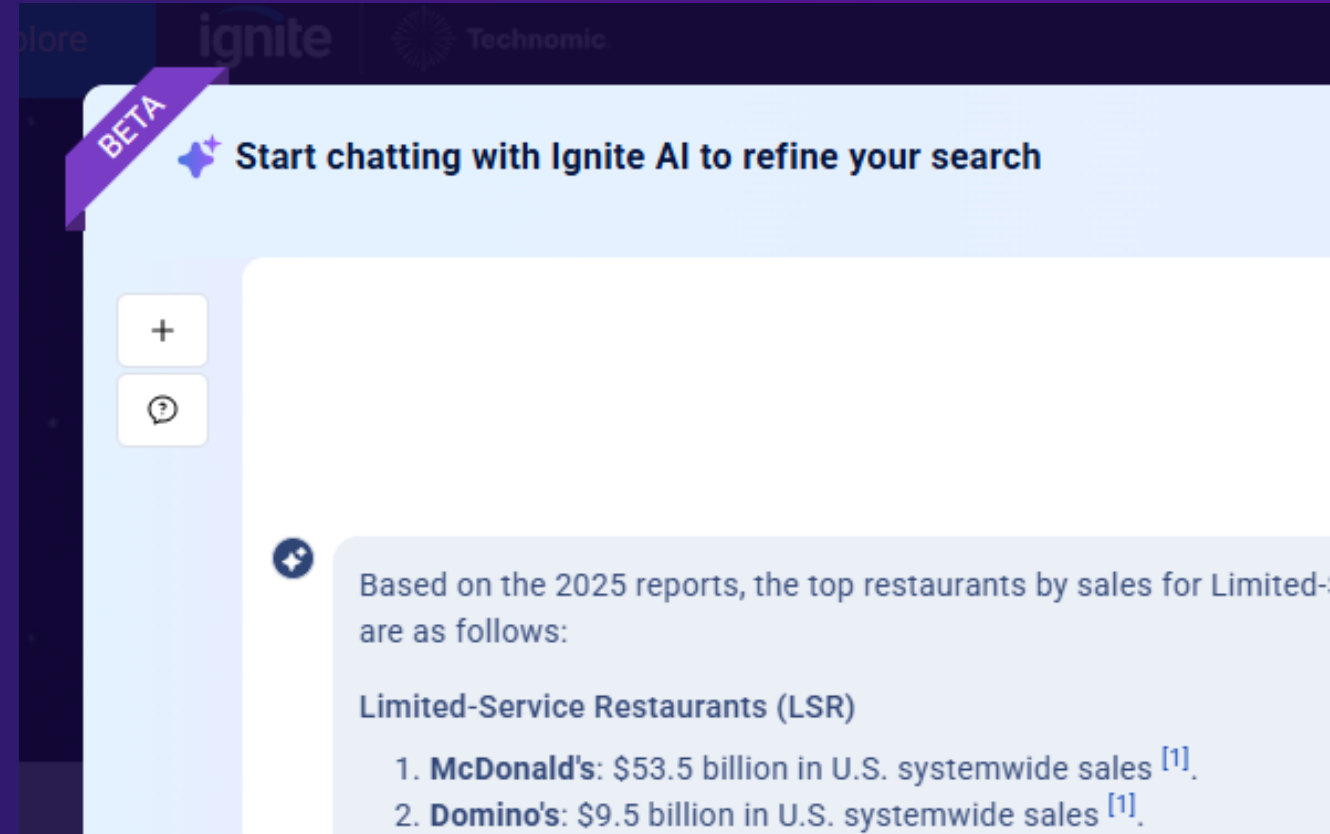
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The screenshot shows the Ignite AI chat interface. At the top, there is a navigation bar with "ignite" and "Technomic" logos. A purple banner with "BETA" is visible. The main chat area has a light blue header with a star icon and the text "Start chatting 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 assistant, indicated by a star icon, with the following text:

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].

Which states have the most chain restaurants?

Led by California, Texas and Florida, nearly 97,000 total chain restaurant locations can be found in just five states, accounting for approximately 37% of all U.S. chain restaurant locations.

Among the top five states, Ohio and Texas overindex the most heavily on chain locations per resident. Ohio is home to one chain restaurant for every 1,097 residents, while Texas has one per each 1,105 residents.

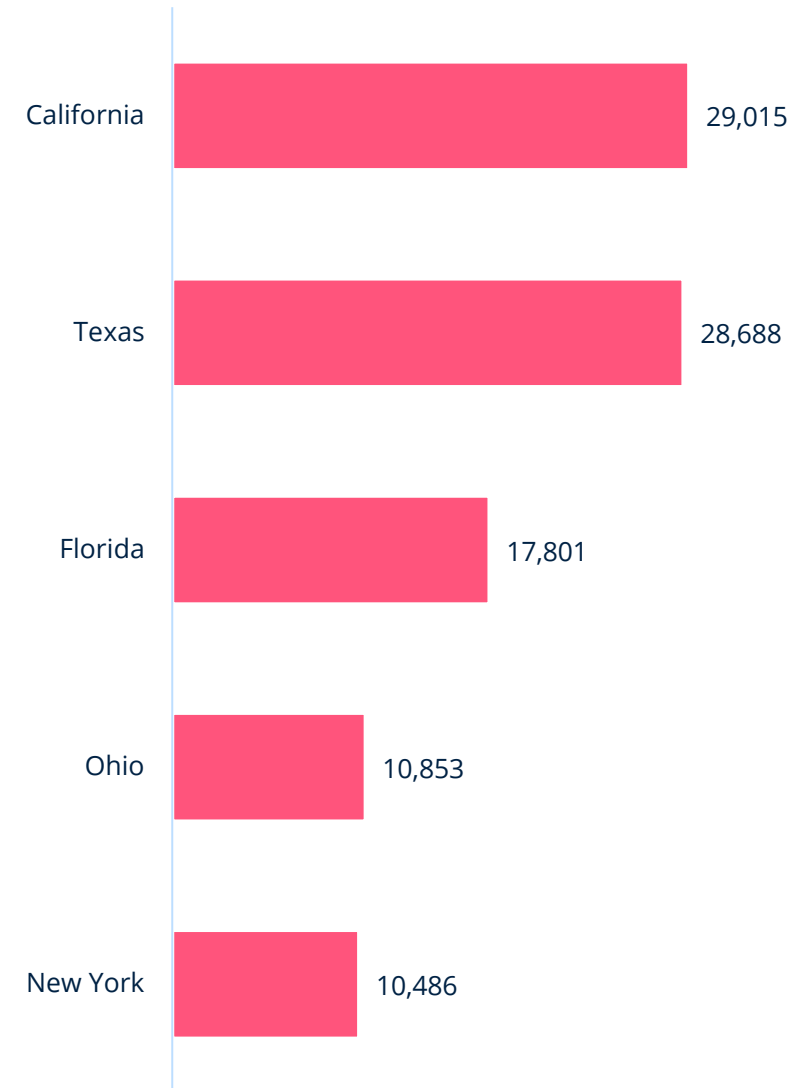
New York has the lowest concentration of chain restaurants among the group, with one location per 1,908 residents.

Additional state-level location insights can be found in the newly-released *State of Chain Restaurants* report on Ignite.

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

Note: Location counts reflect 2025 year-end
Source: Technomic Ignite Company

CHAIN RESTAURANT LOCATIONS BY STATE
TOP 1,500 CHAIN RESTAURANTS



Ignite Menu

Forecasting menu preparations for fall 2026

Technomic's recently published *Season's Eating's* report predicts utilizations and gives recommendations for fall flavors and ingredients. Here are some themes for fall 2026:

Boost the basics

Transform everyday favorites with bold upgrades—think spreadable date butter for a rich, creamy and naturally sweet spread on breakfast classics like toast and pancakes or try highlighting pumpkin-infused spirits and syrups in cocktails to provide a seasonal twist.

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

Source: Technomic Ignite Menu
Image Source: Shutterstock

Harness fall's bounty for wellness

Steep dried mushroom powders into tea for a wellness boost. Lion's mane is touted for cognitive health, while chaga is celebrated for its strong antioxidants. Also consider roasting and blending squash for a vitamin-packed dip or crushing pecans to create a nutrient-rich crust for proteins.

Mix in the unexpected

Incorporate quirky ingredient surprises to provide a twist on familiar dishes to delight guests, such as apples in sushi rolls, spiralized Brussels sprouts as garnishes or pickled cauliflower as a textured taco topping.



Ignite Consumer

Ignite Consumer AI Identifies Gen Z's Top-Rated Chains for Value

Limited-service restaurants (LSRs) have a slight edge when it comes to Gen Z value perception. Six of the top 10 brands are LSRs, with La Madeleine, 7 Brew and Newk's Eatery leading the entire list, underscoring Gen Z's tendency to reward brands that deliver quality and speed without a premium price tag.

Premium full-service brands (FSR) can compete on value with the right positioning. Din Tai Fung, Logan's Roadhouse, Outback Steakhouse and Seasons 52 appear in the top 10, demonstrating that Gen Z does not automatically penalize upscale dining on value metrics when the quality experience is perceived as justifying the price.

Portillo's stands out for return and recommendation intent. Among LSRs, Portillo's posts the second-highest return/recommend top-box score at 45.2% across the full top 25. This suggests strong loyalty conversion among Gen Zers—a meaningful indicator beyond simple satisfaction.

Coffee and beverage concepts show strong price-value alignment. 7 Brew (46.5% price value) and Tous les Jours (40.0% price value) rank among the highest for price/affordability within their overall tier, reinforcing that beverage-led formats resonate with Gen Z's everyday value expectations.

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

Note: Based on response to the following Technomic Ignite Consumer AI prompt: "Which restaurants do Gen Zers rate highest for value?"

Source: Technomic Ignite Consumer

TOP 10 BRANDS—GEN Z'S VALUE TOP-BOX RATINGS

Brand	Overall Value Top Box %	Price/Affordability Top Box %	Quality Value Top Box %	Return/Recommend Top Box %
La Madeleine	50.4%	52.2%	63.6%	48.5%
7 Brew Drive Thru Coffee	47.3%	46.5%	66.3%	44.8%
Newk's Eatery	46.9%	47.9%	61.5%	43.2%
Din Tai Fung	43.8%	33.1%	66.7%	44.0%
Logan's Roadhouse	41.7%	39.7%	55.4%	38.3%
Scooter's Coffee	41.6%	39.7%	57.7%	41.2%
Outback Steakhouse	41.5%	38.2%	57.1%	33.9%
Portillo's	40.8%	34.4%	54.1%	45.2%
Tous les Jours	40.3%	40.0%	58.0%	39.2%
Seasons 52	40.2%	37.2%	48.2%	36.8%

Where are fried chicken brands growing?

Bb.q Chicken operator Genesis BBQ reportedly inked a new deal to expand the chain into India. The South Korea-based multibrand operator is now partnering with [SrikG Group](#) to develop the chicken QSR in the market.

California Fried Chicken operator PT Pioneerindo Gourmet International plans to open 20 units in 2026. The [Indonesia-based multichain operator](#) intends to open the units under its flagship chicken QSR, as well as its secondary brands.

Church's Texas Chicken is set to enter China. The U.S.-based chicken QSR is

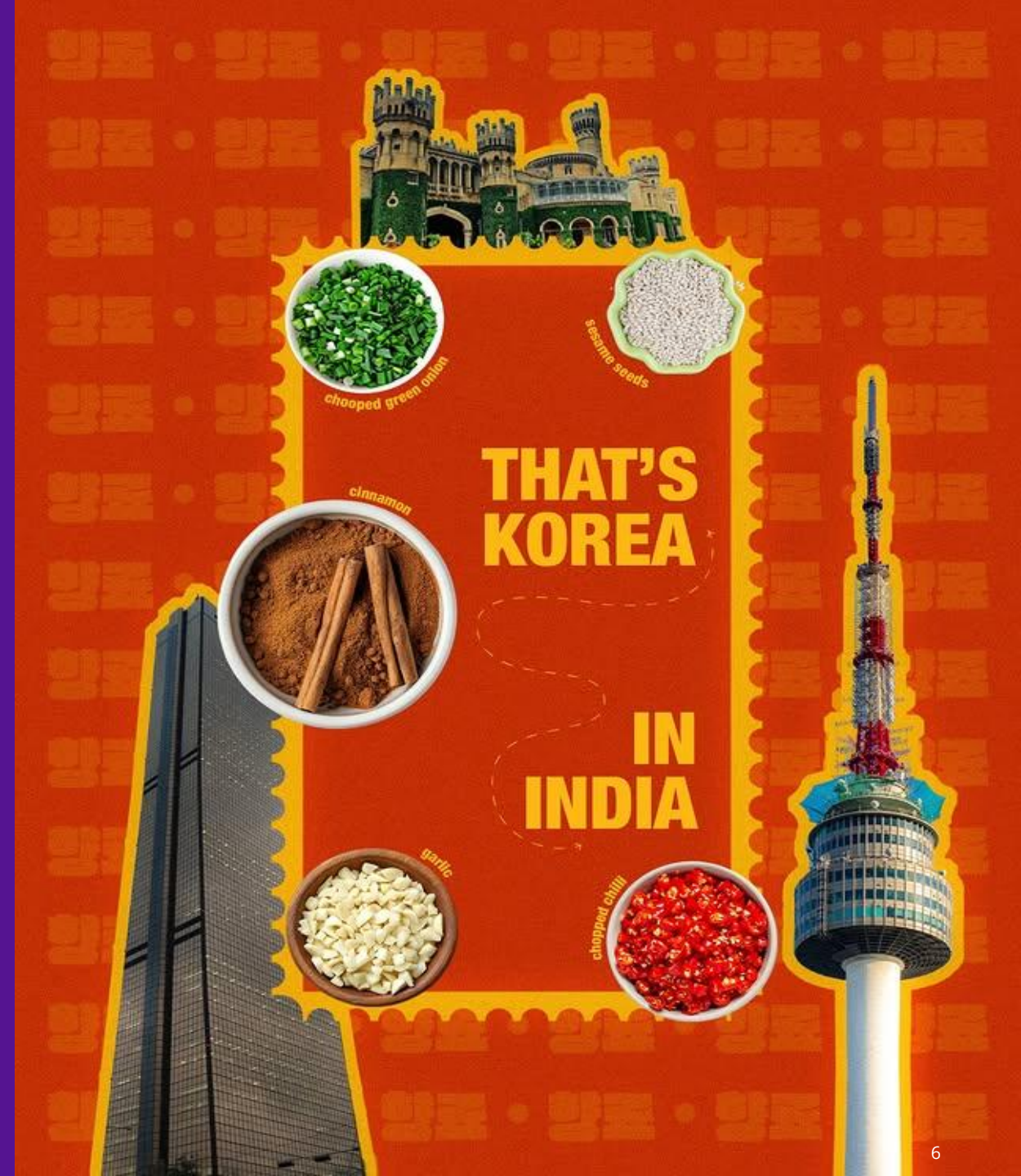
partnering with franchisee [Deke Shengtang](#) to develop at least 600 units in the coming years.

KFC plans to open 100 units in Africa in 2026. The majority of the growth for the [U.S.-based chicken QSR](#) is expected to take place in South Africa.

Lao Xiang Ji expanded into Malaysia—its first international outpost. The [China-based chicken QSR](#)—also known as Hometown Chicken and LXJ—ended 2025 with about 1,750 units on the mainland.

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

Image Source: [Bb.q Chicken India Instagram](#)



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.

How does the importance of value compare across generations?

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

Source: Technomic Ignite AI

Key Takeaways

1. Baby Boomers Lead on Value

Baby boomers top these rankings, scoring 88.3% to 91.4%, suggesting these factors are all important to them.

2. Gen X Holds Strong in the Middle

Gen X consistently scores in the mid- to upper-80s across all value attributes, placing notably high on value through quality menu items (87.9%), suggesting this cohort remains highly quality-conscious when assessing worth.

3. Millennials Are Value-Aware But Selective

Millennials score in the low- to mid-80s across all dimensions, indicating value is still a meaningful driver but not as dominant as it is for older cohorts.

4. Gen Z Registers the Lowest Value Importance

Gen Z scores range from 78.5% to 80.3%. This gap vs. older generations suggests Gen Z may weight other factors, such as brand identity, experience, digital convenience or social values more heavily when choosing a restaurant.

IMPORTANCE RATINGS BY GENERATION (% IMPORTANT/VERY IMPORTANT)

Value Attribute	Gen Z	Millennials	Gen X	Baby Boomers
Value through quick, high-quality service	77.8%	80.5%	82.7%	82.4%
Right place for this specific occasion	71.7%	77.4%	83.2%	85.9%
Value through high-quality menu items	76.7%	79.4%	79.9%	80.7%
Will return in the near future	72.1%	78.1%	82.2%	82.8%

Inflation drives value-focused dining

Value is top of mind when choosing where to eat, with nine in 10 consumers saying value plays an important role. This means rising prices pose a threat to foodservice traffic, as 83% of consumers say they notice increasing prices at restaurants and a majority (63%) are cooking at home more as a result.

In response to rising prices, nearly half of consumers (45%) plan to visit restaurants less often over the next 12 months, and 38% say they will actively seek out more deals and promotions. Price sentiment remains strained, with just 29% believing current restaurant prices are reasonable, compared to 40% who disagree. In addition, half of consumers (50%) are concerned that

tariffs could push prices even higher, emphasizing ongoing price-sensitivity and uncertainty. Guests are adjusting their spending in various ways, with some cutting back on certain mealparts. Alcohol beverage, a high-margin category, is the most likely to be skipped due to high prices, which could threaten operators who rely heavily on the bar to drive profit. Promotions and specials, such as BOGOs and value menus, will be key to getting customers in the door.

Get more data-driven insights on the retail foodservice space, including consumer attitudes, behaviors and perspectives with the Technomic 2026 *Value & Pricing Consumer Trend Report*.

Value & Pricing CTR



The image shows a hand holding a receipt over a table with a donut, coffee, and a wallet. The receipt lists items and prices:

1 Potato Soup	9.50
1 Salad With Tomatoes	15.00
1 Apple Juice	5.30
1 Crispy Bread	7.50
1 Coffee	5.00
Sub Total	42.30
Tax	
TOTAL	

consumer trend reports

Technomic
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Image Source: Shutterstock

[Learn more about Consumer Trend Reports](#)

Source: Technomic 2026 Value & Pricing
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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?

Reach out to us today.

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