

# Industry Insights

A roundup of noteworthy foodservice findings  
for the week of June 22, 2026



Image Source: Shutterstock

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# Texas tops all states as the largest market for pizza chains

More than 3,700 pizza chain locations can be found in Texas, the highest number of any state. Seven pizza players currently boast a footprint of 100-plus locations in Texas, led by Pizza Hut, Domino's and Little Caesars.

Pizza concepts account for 17% of all chain restaurant locations in Michigan, the largest share among the top five states and significantly higher than the overall U.S. benchmark of 13% share.

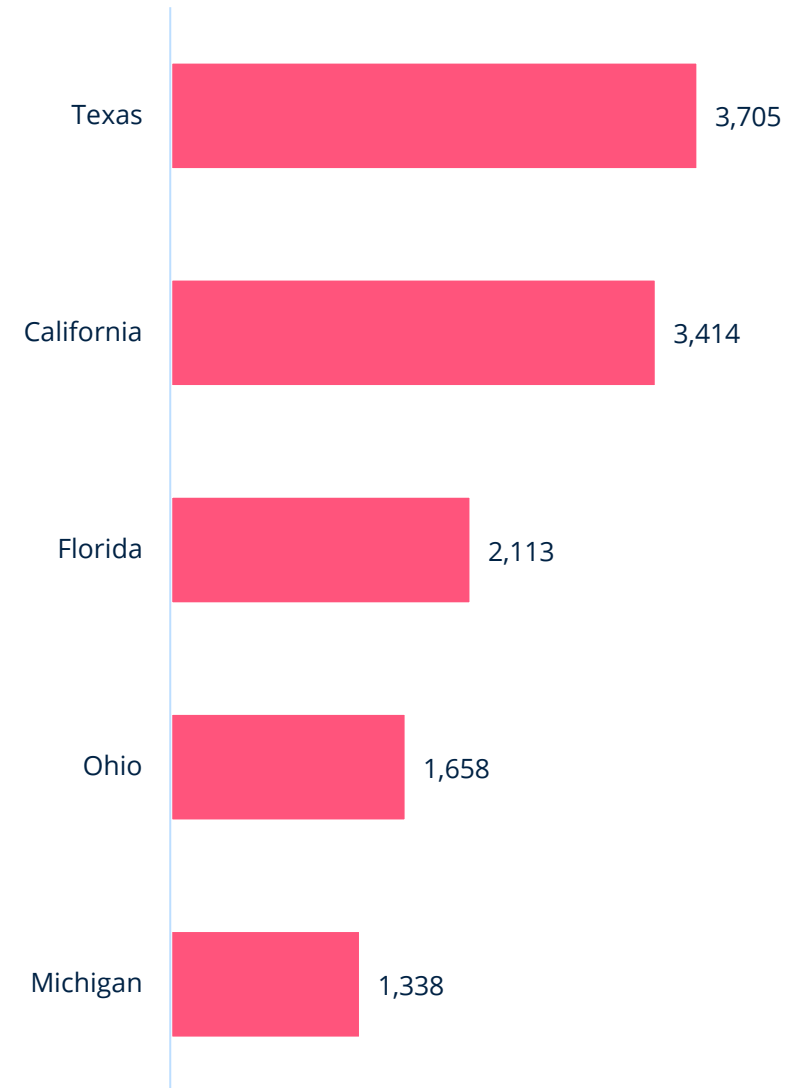
Additional state-level location insights can be found in the newly-released *State of Chain Restaurants* report on Ignite.

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

Source: Technomic Ignite Company

Note: Totals capture all pizza chains among the top 1,500 chain restaurants

**PIZZA CHAIN LOCATIONS BY STATE**  
TOTAL LOCATIONS BY STATE AS OF 2025 YEAR-END



# Emerging menu themes to watch in the coming two years

Technomic's recently published *2028 Menu Predictions* report identifies the top 50 fastest-growing menu items over the coming two years. Let's check out five key takeaways from this report.

**Finishing glazes** dominate the fastest-growing list with 10 entries (20% of all items), led by citrus glaze (+41%), strawberry glaze (+38%), mustard glaze (+38%), maple glaze (+26%), whiskey glaze (+26%) and lemon glaze (+24%), reflecting operators' versatile experimentation across proteins, vegetables and desserts.

**Innovative spreads** are projected to grow in operator penetration, including

fig jam (+21%), bacon jam (+20%) and spreadable Boursin cheese (+20%). Heavier than glazes, these spreads enable operators to showcase bold flavors through condiments and add-ons.

**Spicy global sauces** like Chinese chile crisp (+74%), Korean gochujang (+26%), Tunisian-inspired harissa dressing (+20%) and Thai Sriracha sauce (+20%) are among the fastest-growing, reflecting heightened consumer interest in heat and international ingredients.

Operators are increasingly menuing **underutilized meat products** to offset

costs and appeal to eco-conscious consumers. These include tallow (+43%), chicken jus (+20%), birria (+38%) and chuck roast (+22%), with tougher cuts elevated through long stewing techniques.

**Nutrient-dense, gluten-free ancient grains** like amaranth (+28%) and chia in pudding (+22%) lead the fastest-growing list, appealing to health-conscious consumers and those prioritizing texture and mouthfeel.

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

Source: Technomic Ignite Menu  
Image Source: Shutterstock



# Price-sensitivity keeps value top of mind for retail prepared food purchases

Most consumers (79%) are noticing prices increase,\* and a majority of these individuals (68%) believe prices are increasing at a faster rate than normal,\*\* with that sentiment even higher among consumers ages 55 and older.

Despite these concerns, a growing percentage of consumers perceive retail prepared foods as a good value when compared to restaurants. Perceptions are more mixed when retail prepared foods are compared to

both restaurants and traditional grocery items. While grocery continues to lead in overall value perceptions, there is opportunity for retailers to communicate the convenience and quality benefits of prepared foods to compete with restaurant occasions.

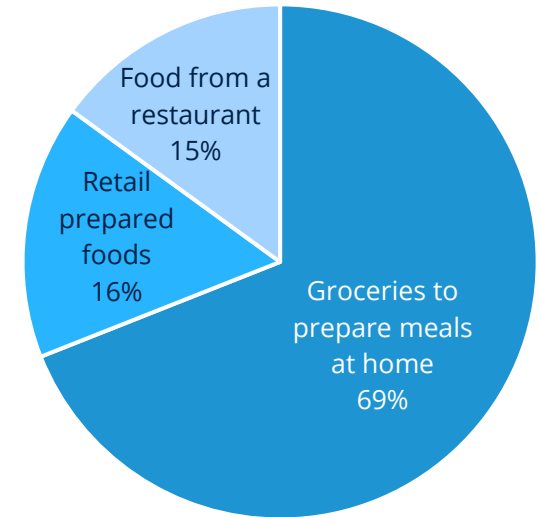
When looking at deals, consumers show strong interest in promotions such as buy one, get one deals and value meals. As value and pricing continue to evolve, SNAP benefit users could be an important consumer group

to monitor. SNAP users' prepared food purchasing has remained relatively consistent despite fluctuations in related legislation over the past year.

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

Base: 1,500 consumers who eat retail prepared foods at least once a month  
\*Q: In your opinion, how have prices for retail prepared foods changed over the past year? Select one.  
\*\*Base: 1,176 consumers who have seen retail prepared food prices increase over the past year  
\*\*\*Q: Which do you think provides the best value for your money? Select one.  
Source: Technomic 2026 Retail Foodservice Consumer Trend Report

WHICH PROVIDES THE BEST VALUE FOR YOUR MONEY?\*\*\*



## Global Foodservice Navigator Program

# Find global menu trends with Ignite

Technomic's Global Foodservice Navigator's menu data is live on Ignite! This tool allows users to explore trends in seasonality, dish type, flavors and more.

For users interested in how seasonality affects menu development, Ignite's global menu data tracks how many items chains have released each month. This data allows users to explore how brands respond to major events, introduce holiday-themed items or roll out seasonal menus.

Ignite's global menu data also includes breakdowns by dish type, including how quickly dishes like iced coffee, fried chicken or loaded fries have grown in global markets. In countries where

menu development is highly active, knowing which dishes are resonating with consumers is critical. This tool provides users with the timely updates they need to adapt to developing trends.

Key flavors and ingredients—and how they've grown—are also available for each market. This feature is ideal for users interested in adapting signature menu items to developing trends.

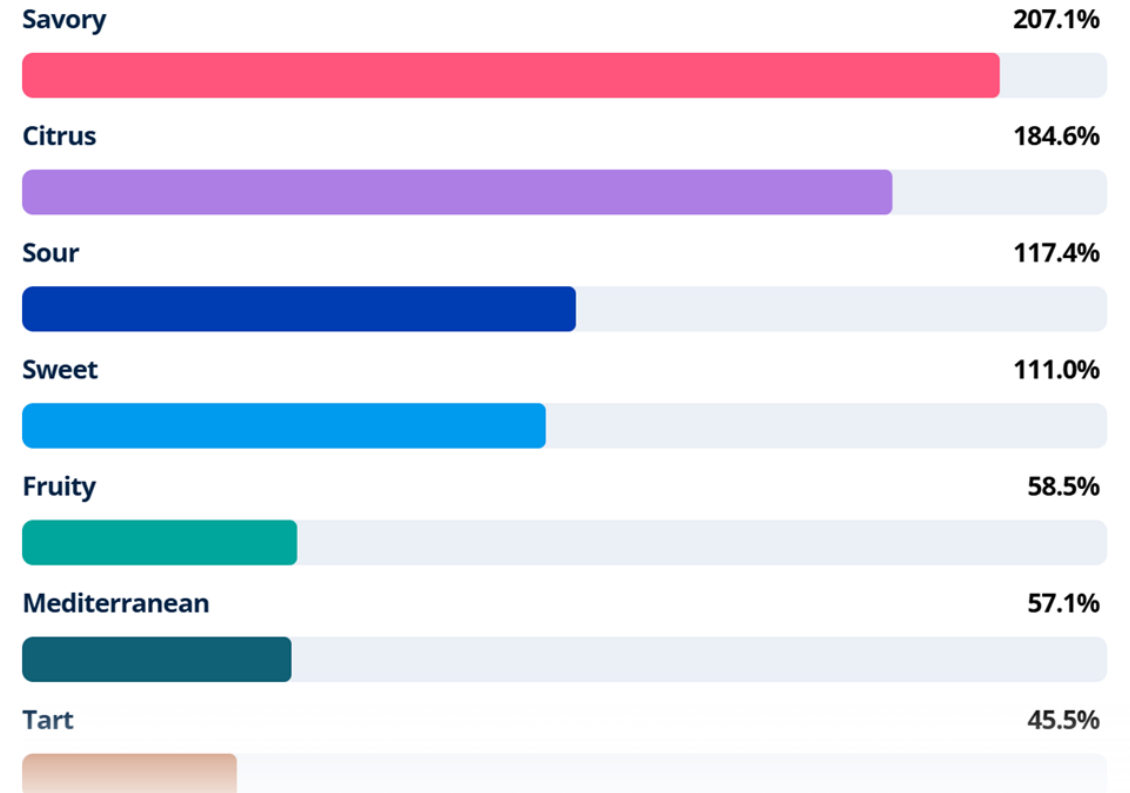
Ignite's market dynamics data helps to contextualize each of these data points. Users can explore this tool to see where foodservice is growing the fastest and which types of restaurants are driving this development.

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

Source: Technomic Ignite Global Menu Trends

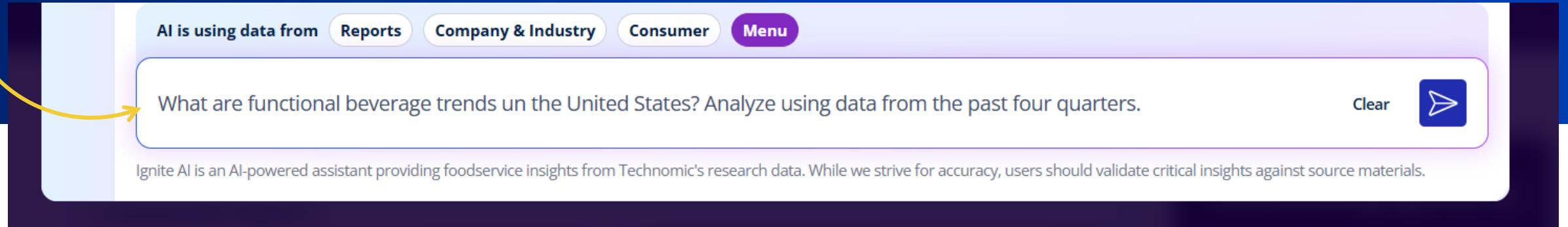
### Fastest Growing LTO Flavors in China ⓘ

Year Over Year Percentage Change



# 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 our prompt or write your own to answer your industry questions in our Ignite.



## Key Takeaways

Functional beverage performance across U.S. national chain menus over the past four quarters reveals a market in transition. While traditional categories, such as energy drinks, coconut water and kombucha, are losing operator traction, **sports drinks, protein-enhanced smoothies and plant-derived functional ingredients** are driving meaningful growth. The standout ingredient-level story is the rapid rise of **matcha, turmeric, botanical infusions and collagen** as

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

Source: Technomic Ignite AI

operators seek more differentiated, wellness-forward beverage positioning.

- 1. Sports drinks are the fastest-growing functional category.** This is the strongest category-level growth in the functional beverage space, and reflects broadening consumer demand for hydration, electrolyte replenishment and performance-positioned beverages beyond traditional athletic contexts.
- 2. Protein-enhanced and smoothie formats are expanding.** This reflects continued consumer appetite for on-the-go nutrition. The format benefits from both the

protein trend, as well as the broader smoothie and blended beverage occasion.

- 3. Matcha is the dominant functional beverage ingredient by far.** It is the largest footprint of any functional ingredient tracked. Its 15.3% operator growth and 18.2% item growth over the past year confirm it has moved from niche positioning into mainstream beverage platform status.
- 4. Turmeric holds the second position.** This spice continues to grow steadily, reflecting sustained interest in anti-inflammatory

beverage positioning.

- 5. Botanical ingredients (41.7% operator growth) and collagen (48.9% item growth) are the highest-growth emerging functional claims.** Botanical beverage applications are expanding as operators look to build proprietary, flavor-forward functional drinks that feel premium and distinct from commodity platforms. Collagen, driven by beauty-wellness consumer demand, is gaining notable traction in menu items despite still relatively small operator counts.



# Track monthly sales and traffic for leading chains

**Dive into leading chains with Ignite Company's Monthly Chain Performance Tracker**

- Monthly sales and traffic trends
- Check averages with year-over-year changes
- Sales and unit forecasts for the top 1,500 chains
- Five-year industry forecast

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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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