

Industry Insights

A roundup of noteworthy foodservice findings
for the week of July 14, 2025

Image Source: Shutterstock



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Monthly sales and traffic trends

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Chains vs. independents across the country

Independent restaurants make up 63% of all restaurant locations in the U.S., though this distribution varies significantly by region.

The Northeast shows the strongest independent restaurant presence, accounting for 73% of all dining establishments, while chain restaurants make up just 27% of locations in this region.

The South presents a different landscape, boasting the highest

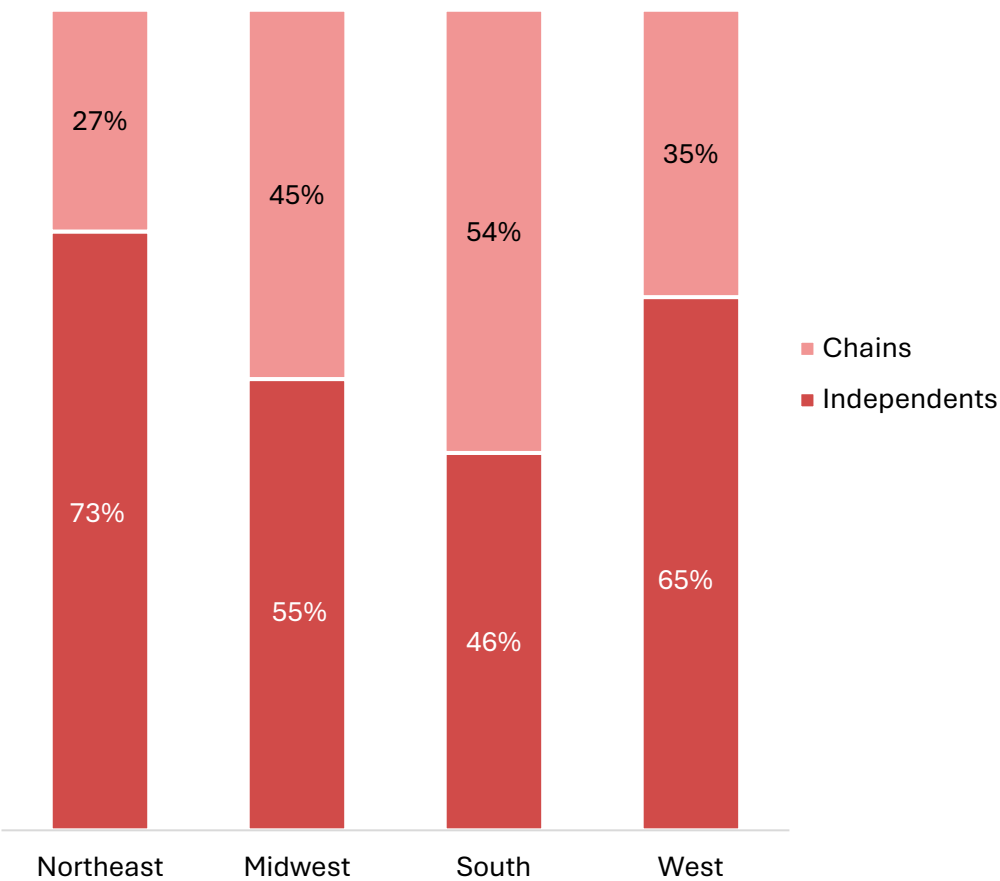
concentration of chain restaurants in the country. Chains comprise over half of all restaurant locations in this region, with Subway, McDonald’s and Starbucks leading in total store count.

For more insights into the foodservice industry across the U.S., check out Technomic’s new report series, *Regional Radar*.

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

Source: Technomic Ignite Company

TOTAL U.S. RESTAURANT LOCATIONS
CHAIN VS. INDEPENDENT SHARE BY REGION



Understanding impact on price

Technomic Ignite Menu recently launched a new impact on price feature that shows how specific ingredients, flavors or preparation methods affect prices of dishes. Let’s check out a few items to see their impact on pricing:

Ingredient: Avocado

Specialty fish dishes are those most impacted by the addition of avocado, with an average increase of \$8.44. Other dishes that see a price bump due to avocado include Cobb salad entrees (+\$1.72), BLT sandwiches (+\$2.28) and salmon/sake rolls (+\$3.39).

Flavor: Spicy

Specialty tacos are the dish that increases the most in price with the addition of spicy flavor, with an average uptick of \$13.64. Other dishes that spicy flavors boost the price of include pepperoni pizza (+\$2.96) and chicken/cheese/beef nachos appetizer (+\$2.39).

Preparation: Grilled

Some of the dishes that saw the steepest price adds due to the addition of grilled preparations include specialty fish dishes (+\$15.38) and veal entrees (+\$13.05).

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

Source: Technomic Ignite Menu, Q1 2024-Q1 2025
Image Source: Adobe Stock



The role of price in snacking decisions

Economic pressures continue to impact household budgets and consumers are becoming increasingly price-sensitive, actively seeking deals and promotions on snacks.

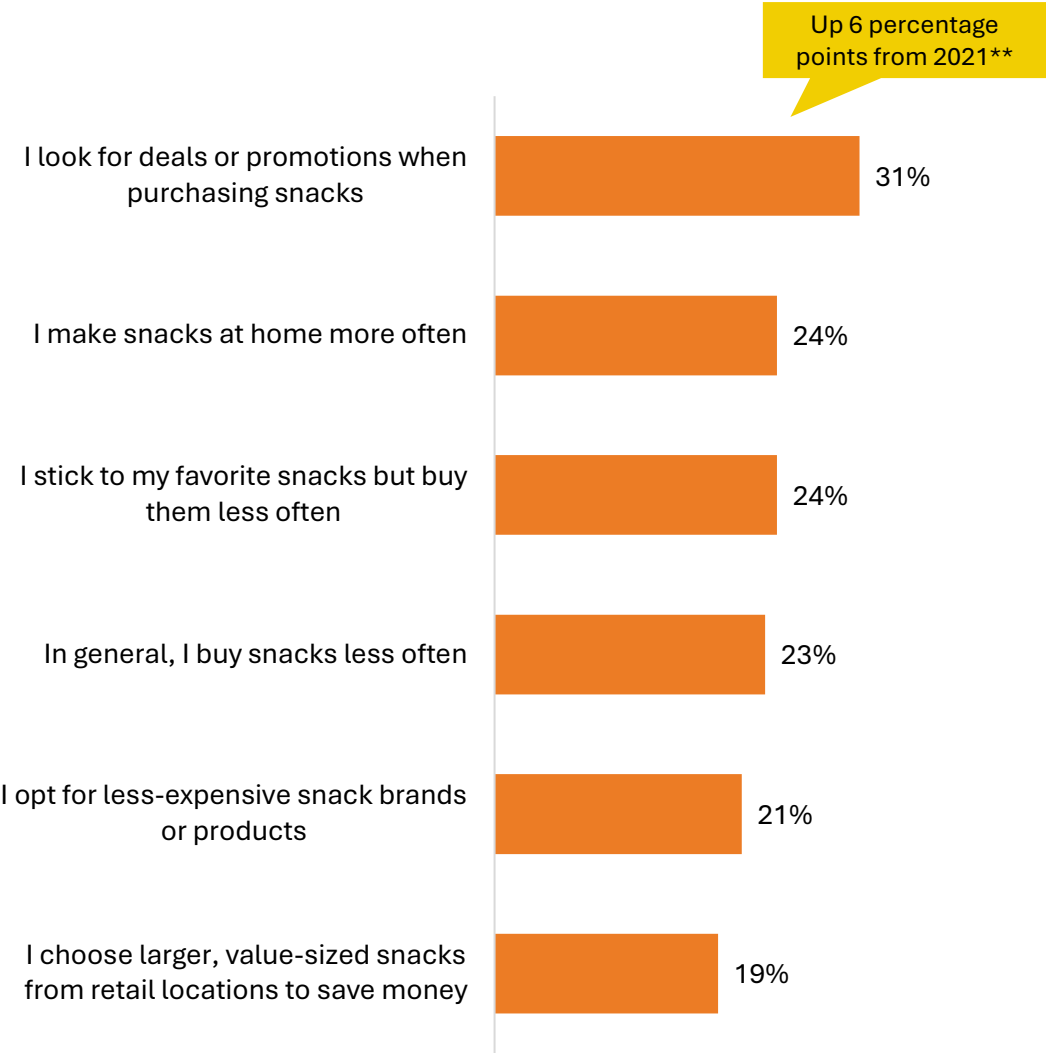
Dollar/value menus are appealing when ordering snacks at restaurants, and nearly half of consumers cite “good value for money” and “price” as key factors when selecting snacks. This shift in behavior is reflected in a broader definition of “snack,” with 18% of consumers now defining snacks by price, an increase from 12% in 2021.

To maintain and enhance the snack value proposition, operators should focus on value-driven promotions, deals and loyalty programs that resonate with consumers. Optimizing bundled snack deals and combos can help attract consumers who are increasingly mindful of costs. Suppliers can play an active role by offering co-branded digital promotions, limited-time bundles or marketing tools to support execution. Additionally, suppliers can help support operator margins by providing bulk-packaged snack formats or cost-effective ingredient alternatives.

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

Base: 1,500 consumers who ever eat snacks
Q: In what ways, if any, have higher prices impacted your snacking behavior? Select all that apply.
Source: Technomic Ignite Consumer featuring the 2025 Snacking Consumer Trend Report

IMPACT OF HIGHER PRICES ON SNACKING BEHAVIOR
TOP FIVE SHOWN



What's new with global chicken chains

Alongside the recent [Global Chicken Category Report](#), a deep dive into overall category performance, consumer attitudes, menu trends, operator performance and more, Technomic also tracks operator news and developments from around the world. Below are a few recent highlights in the chicken category:

Bb.q Chicken operator Genesis BBQ plans to restart expansion of the brand in China. The [South Korea-based multibrand operator](#) plans to develop 1,000 units of the chicken QSR in the market in the coming years. Bb.q Chicken had about 150 units in China at its peak, before shrinking to its current handful of sites.

Goobne operator G&Food opened the brand's 1,200th location in South Korea. The [homegrown operator](#) launched the chicken CDR in 2005.

Linyu Fried Chicken Legs reportedly reached 4,400 locations. The [China-based chicken QSR](#) was founded in 2017.

KFC plans to open 500 units in the U.K. by 2035. The [U.S.-based chicken QSR](#) currently has more than 1,000 locations in the market.

Mang Inasal operator Jollibee Foods Corp. plans to reach 1,000 locations of the brand by 2030. The [Philippines-based multibrand operator](#) currently has about 600 units of the chicken QSR.

Popeyes outlined its growth plans for France. The [U.S.-based chicken QSR](#) plans to reach about 30 locations by the end of 2025 and 250 locations by 2032. Popeyes ended 2024 with 22 units in the market.

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

Image Source: [Popeyes France Instagram](#)



Le poulet de la veine.

POPEYES

OUVERTURE À MARSEILLE
PLAN DE CAMPAGNE



Consumer Trend Reports

Convenience drives sandwich purchases

Convenience is a key driver in sandwich dining decisions, demonstrated by the fact that 54% of sandwiches are ordered for takeout and another 20% for delivery. Today's consumers are mindful of their time and highly value convenience in their dining decisions. Restaurants known for speed of service and efficiency are extremely appealing to on-the-go consumers. As a result, limited-service segments are the top choice for sandwich purchases, and the most frequently visited chains are primarily fast-food restaurants. Quick-service concepts also appeal due to the convenience of their locations.

Sandwich orders through off-premise formats are thriving. Consumers increasingly agree that it's easier to purchase sandwiches away from home out of convenience. Grab-and-go sandwich purchases have also increased since 2022.

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

[Learn more about Consumer Trend Reports](#)

Source: Technomic 2025 Sandwich Consumer Trend Report
Image Source: Adobe Stock



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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.

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