

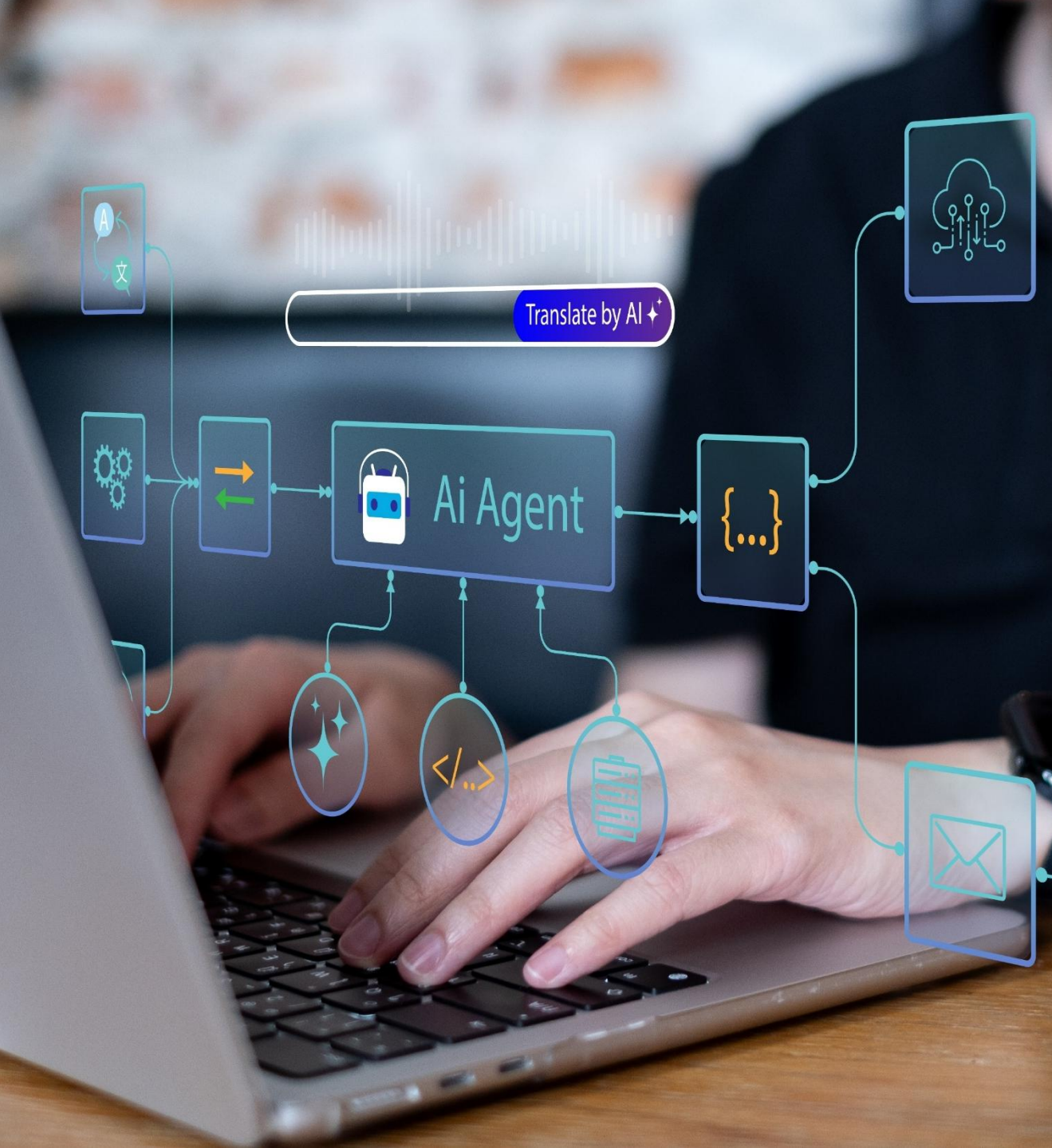
Industry Insights

A roundup of noteworthy foodservice findings
for the week of August 10, 2026



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The number of chains with over 1,000 U.S. locations is on the rise

A total of 70 foodservice chains boast 1,000 or more locations, representing a combined total of nearly 230,000 locations across the United States.

The limited-service restaurant segment accounts for over half of all foodservice chains with 1,000 locations and was the only segment to see an increase in the number of chains over the benchmark, as players including Dutch Bros Coffee, Whataburger, Culver's, Zaxbys and Crumbl all surpassed the milestone within the last three years.

Head to the Ignite Company Directory for further sizing and performance trending insights for the industry's largest foodservice players.

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

Source: Technomic Ignite Company

FOODSERVICE CHAINS WITH OVER 1,000 U.S. LOCATIONS
CHAIN COUNT BY SEGMENT



Shifting value priorities among today’s diners

Consumer priorities are shifting, with affordability becoming increasingly important in dining decisions. Over the past two years, the importance of "low prices" has risen by 2 percentage points to 86%, while "competitive menu pricing" has also seen a 2-point increase. These changes reflect the impact of economic pressures and inflation, as diners place greater emphasis on finding value for their money.

At the same time, technology and loyalty programs are playing a growing role in shaping perceptions of value. The importance of technology-driven value has increased by 6 percentage

points to 61%, and loyalty programs have gained 7 points over the same period. These developments show that diners are looking for practical benefits, such as ease of use and rewards, when choosing where to dine.

Despite the focus on affordability, quality remains a top priority. "High-quality items" continues to rank as the most important factor at 89%, with steady growth over the last two years. Restaurants face the challenge of balancing quality and price to meet consumer expectations in today's competitive market.

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

Base: Approx. 9,000 U.S. consumers ages 18+ per trailing four quarters
Source: Technomic Ignite Consumer

RESTAURANT SELECTION DRIVERS IMPORTANT/VERY IMPORTANT

	Q3 2023- Q2 2024	Q3 2024- Q2 2025	Q3 2025- Q2 2026	Two-Year Change
Offers a good value through high-quality menu items	87%	87%	89%	+2 pp
Offers a good value through quick, high-quality service	87%	87%	87%	0
Offers a good value through low prices	84%	85%	86%	+2 pp
Menu prices are in line with other, similar retailers	83%	84%	85%	+2 pp
Offers a good value through atmosphere/ambiance	76%	77%	78%	+2 pp
Offers a good value through use of technology	55%	58%	61%	+6 pp
Offers loyalty program rewards	50%	55%	57%	+7 pp

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 most recent installment.

Established Trend: Pickle-Forward Fare

What? Items featuring pickles or pickle-flavored ingredients as hero components rather than traditional garnishes

Where? Limited- service restaurants

Example: Pickle Ranch Loaded Baker With Pulled Pork—a baked potato loaded with slow-smoked pulled pork, topped with housemade ranch dressing, pickle slices and dill-salt seasoning (Dickey's Barbecue Pit)

Growing Trend: Hot Dog Innovations

What? Elevated hot dogs featuring premium proteins, bold flavor infusions or playful reinterpretations

Where? Limited-service restaurants

Example: Smoothie Dog—a hot dog-shaped popsicle topped with “ketchup” (strawberry syrup), “mustard” (pineapple syrup) and “relish” (muddled kiwi) (Tropical Smoothie Cafe)

New-to-Market Trend: Breakfast Variations of Classic Cocktails

What? Traditional evening cocktails with a morning twist, served in the morning

Where? Full-service restaurants

Example: Breakfast Martini—gin, Tiptree marmalade and lemon (The Bell in New Orleans)



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

Source: Technomic Ignite Menu
Image Source: [Cracker Barrel website](#)

Around the world with chicken

The newly launched Global Menu Trends tool on Ignite features powerful analytical tools designed to help clients make the most out of the Global Foodservice Navigator program with relevant, timely insights into key trends, performance indicators, flavors and more. As an example of this tool's capabilities, let's take a deep dive into chicken around the world.

Spicy and onion flavors have historically dominated this protein's taste profile, but in the last year, seasonings including lemon, cheese and lime have seen enormous growth.

These flavors are highlighted in dishes such as chicken sandwiches, chicken burgers and fried chicken entrees, which the Global Menu Trends tool spotlights as both the top dishes for the protein (by number of LTOs) and as

showing strong year-over-year growth, with fried chicken growing by nearly 30%.

A few recent examples of lemony chicken LTOs that this tool calls out include a recent [chicken sandwich launch in South Africa](#) with a lemon pepper mayonnaise, a [fried chicken entree from Japan](#) with a honey-lemon-mayonnaise sauce, and a [chicken finger plate in the U.S.](#) that stars a lemon pepper dry rub.

Dishes with chicken are concentrated in the Asia-Pacific, with countries from this region making up four of the top 10 markets for number of LTOs with chicken, including two of the top three. Markets in North America and the Middle East similarly saw active menu development with chicken over the last year.

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

Source: Technomic Global Foodservice Navigator Program and Ignite Global Menu Trends



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.

AI is using data from

Reports

Company & Industry

Consumer

Menu

What are trends in fries in 2026 and what are the most common builds for fries with toppings (loaded fries)?

Clear

Ignite AI is an AI-powered assistant providing foodservice insights from Technomic's research data. While we strive for accuracy, users should validate critical insights against source materials.

The dominant loaded fries architecture is a cheese and bacon foundation, often layered with ranch or a spicy accent. The Mexican-inspired flavor profile reflects Tex-Mex influence in the loaded fries format, driven by chains including Taco Bell.

Also, this Tex-Mex loaded fries build (cheese sauce and jalapeno with Mexican flavor profile) is the most commercially replicated loaded variant. Sour cream, scallions and cheese sauce round out the most common finishing elements.

Cheese and bacon remain the anchor loaded fries build, with the layers of Mexican and spicy flavors as key differentiation levers.

Sauce innovation is the primary LTO mechanism, with brands like Jack in the Box using heat-forward, co-branded sauces to drive trial on an already-familiar format.

MOST COMMON LOADED FRIES TOPPINGS		
Topping	Menu Items	Operators
Cheese (broad)	670	530
Bacon	439	393
Cheddar	289	246
Onion	223	192
Mexican (flavor profile)	207	186
Spicy	201	177
Ranch/ranch dressing	193	172
Beef	180	162
Scallions	175	158
Jalapeno/jalapeno pepper	149-150	135-136
Cheese sauce	149	121
Sour cream	129	118

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

Source: Technomic Ignite AI

Category Sizing Tracker



Access detailed reports on specific foodservice categories, updated twice yearly, with market sizing, brand share, pricing insights and more

[Learn more](#)



Yogurt | Salad Dressing | Frozen Vegetable & Cheese Appetizer | Hot Sauce | Barbecue Sauce |
Wing Sauce | Cakes | Gravy | Oils & Shortenings | Frozen Prepared Entrees & Sides

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Our team of experts helps leaders in the industry make complex business decisions, set strategy and stay ahead of the curve.

Have questions?

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