

Industry Insights

A roundup of noteworthy foodservice findings
for the week of Aug. 25, 2025



Image Source: Shutterstock

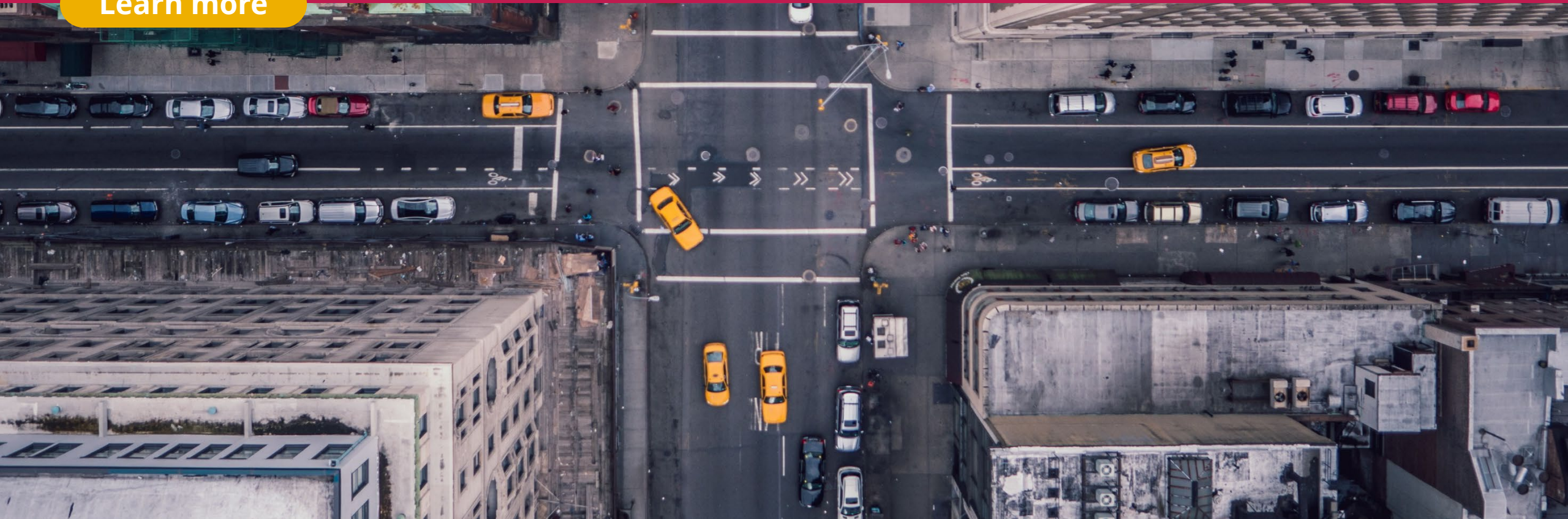
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Top burger chain sales stagnated during the first half of 2025

The first half of 2025 proved challenging for the industry's largest burger players as overall same-store sales dipped by an average of 3.0% during the first quarter of the year, followed by a 1.7% decrease in the second quarter.

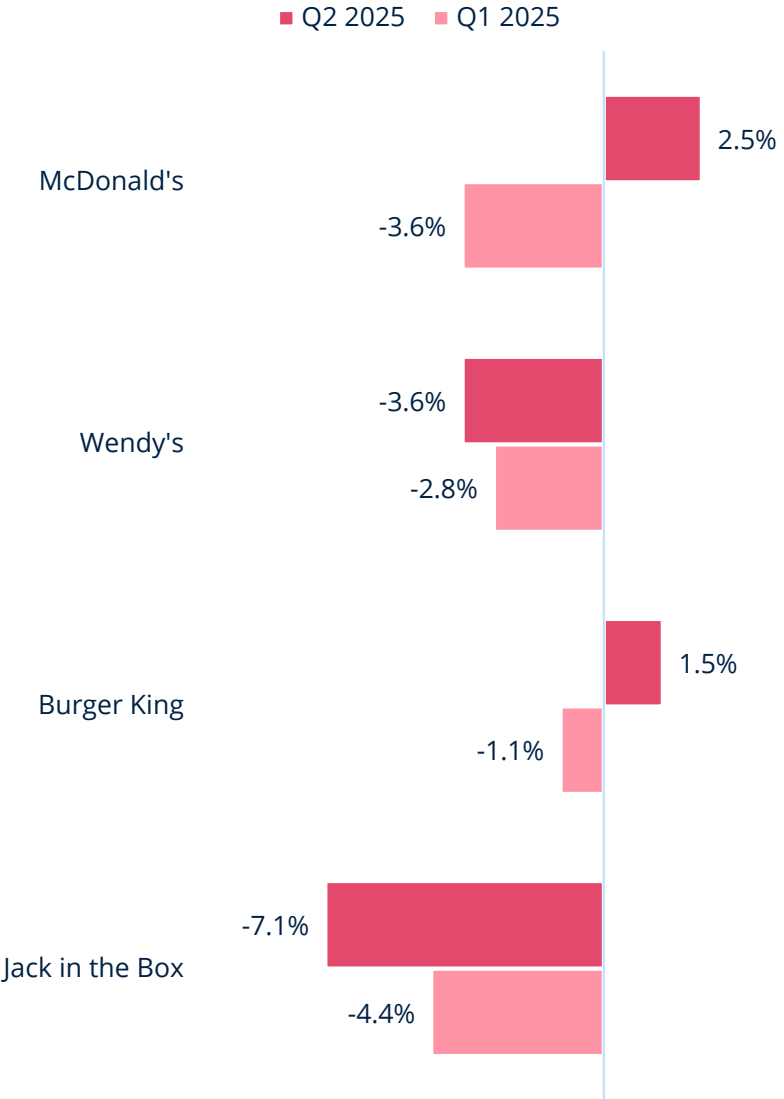
McDonald's was able to regain some momentum with a 2.5% same-store sales increase during the second quarter, boosted by its Minecraft marketing campaign as well as the return of the Snack Wrap.

Take advantage of the *Same-Store Sales and Acquisition Tracker* on Ignite for additional quarterly performance insights for top chain restaurants.

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

Source: Technomic Ignite Company

TOP BURGER CHAINS
U.S. SAME-STORE SALES PERFORMANCE



Adult beverage insights

With the launch of Technomic's new Ignite Menu data for Q2 2025, here are some key takeaways from adult beverage menus.

Adult beverage mentions in the U.S. overall grew 2.8% over the last year.* Several adult beverage categories saw growth over the last year, with alcohol-free beverages (+22%), spirits (+8%) and specialty drinks (+5%) showing the greatest increases. However, every wine category saw declining item counts, with white wine (-2%), Champagne/sparkling wine (-2%), other wines (-3%) and red wine (-5%) all decreasing on menus.

Alcohol-free wine (+733%) and alcohol-free beer (+30%) drove growth in the alcohol-free beverage category.

Driving growth in the spirits category were rum straight (+29%), gin straight (+14%) and whiskey/bourbon straight (+12%). The only spirit on the decline was grappa straight (-14%).

In the specialty drinks category, cocktails such as the French 75 (+42%), caipirinha (+29%) and spritzers (+21%) saw menu growth, while bloody marys/bloody Caesars (-4%), Manhattans (-5%) and Moscow/other mules (-5%) saw declines.

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

Base: Top 500 chains, emerging chains and lodging operators with adult beverage menus

Source: Technomic Ignite Menu, Q2 2024-Q2 2025

*Note: Includes all segments in which Technomic tracks adult beverages in the U.S.

Image Source: Shutterstock



First-time guests twice as likely to order restaurant LTOs

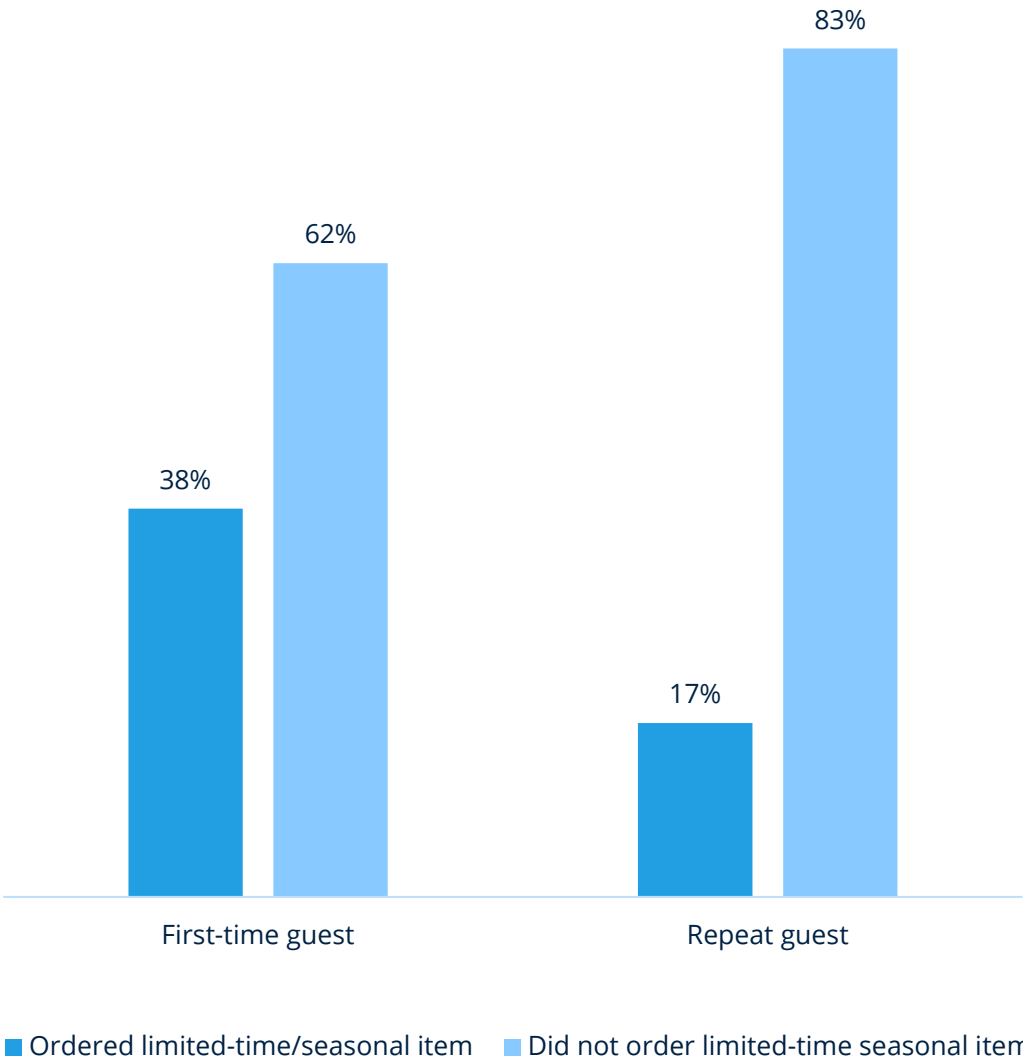
Limited-time offers (LTOs) represent a significant opportunity for restaurant operators looking to drive incremental traffic and boost sales. These items can create brand excitement, generate new social media buzz and help attract new customers while also giving existing guests a reason to come back. Recent data from Ignite Consumer reveals an interesting distinction between first-time and repeat visitors as it relates to LTOs. First-time guests demonstrate a much higher propensity to order LTOs (38%) compared to returning customers (17%).

Restaurant operators can leverage these insights to develop targeted strategies that acknowledge the different motivations and ordering behaviors of new vs. returning visitors. For example, for first-time guests, prominently featuring current LTOs in window displays, entrance signage and digital marketing content can intrigue and encourage willingness to try a new place with appealing new menu items. Meanwhile, returning guests might respond better to loyalty programs that highlight their favorite core menu items, with LTOs presented as complementary additions rather than replacements to tried-and-true options.

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

Base: 57,575 recent chain restaurant guests ages 18+
Source: Technomic Ignite Consumer

% WHO ORDERED LTO OR SEASONAL ITEM DURING MOST RECENT OCCASION



Menu development activity in LatAm

As part of its regular monthly menu collection, Technomic’s Global Foodservice Navigator Program tracks changes in operator development activity on the market and regional levels. Below are a few highlights:

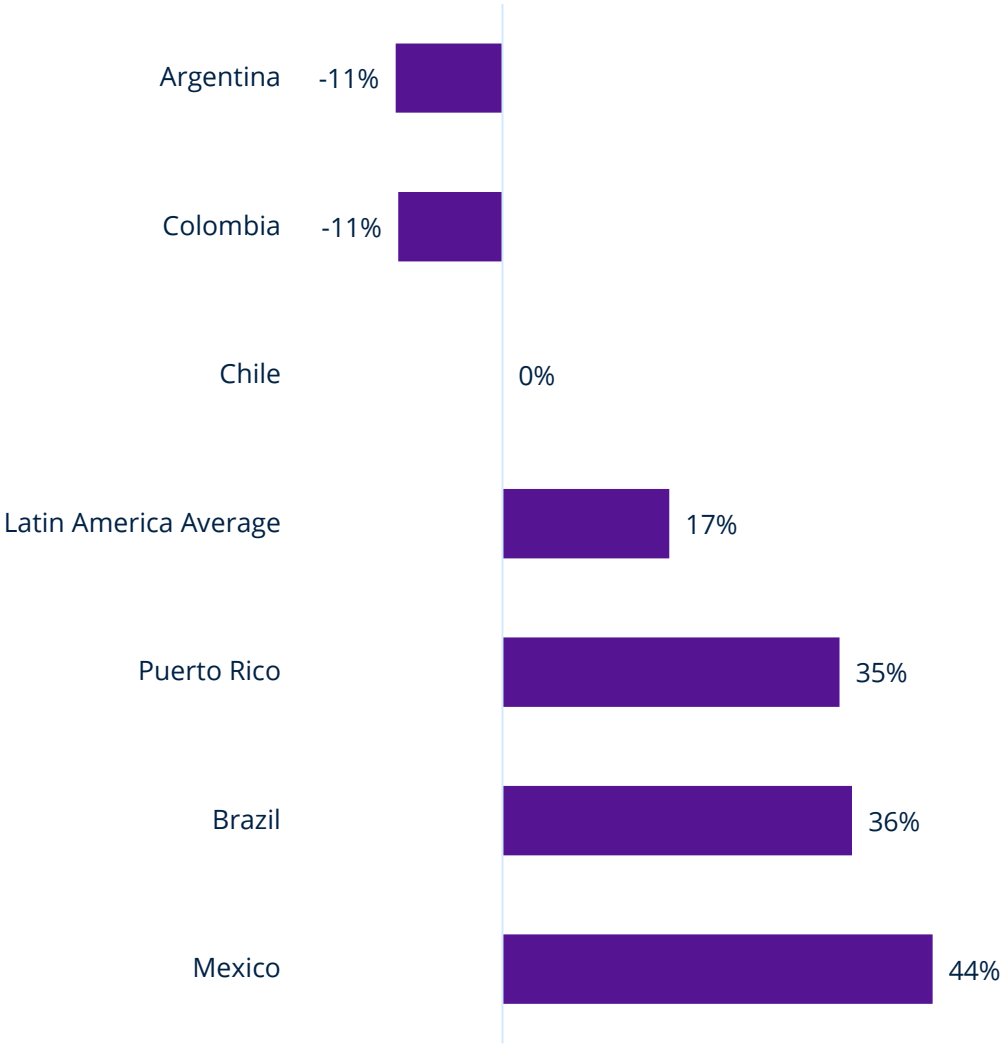
From 2023 to 2024, Latin America markets as a whole saw a 17.2% increase in items released per chain, the second largest regional increase in the world (after North America). This figure encompasses wide market differences, ranging from Argentina’s 11% decrease to Mexico’s global second-highest 44.4% increase.

Alongside those in Mexico, chains in Brazil and Puerto Rico also featured globally high increases in items released per chain, with these operators in these markets respectively

sixth and seventh of any tracked market at 36% and 35%. Unlike in other regions, menu development in these three markets was not concentrated in any particular mealpart; operators in 2024 added new entrees, desserts, nonalcohol beverages, sides/snacks and other mealparts in similar proportions to the previous year, just at higher overall rates.

Chains in Argentina, Chile and Colombia fared differently. While those in Chile saw no overall difference between 2023 and 2024, those in Argentina and Colombia released approximately 11% fewer items per chain year over year. These were the third- and fourth-sharpest declines of any tracked markets.

% CHANGE IN AVERAGE ITEMS ADDED PER CHAIN, 2023-2024



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

Source: Technomic Global Foodservice Navigator Program

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Since 1966, we have produced in-depth research focused on the foodservice industry.

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?

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