Industry Insights

A roundup of noteworthy foodservice findings for the week of Sept. 29, 2025






Image Source: Shutterstock

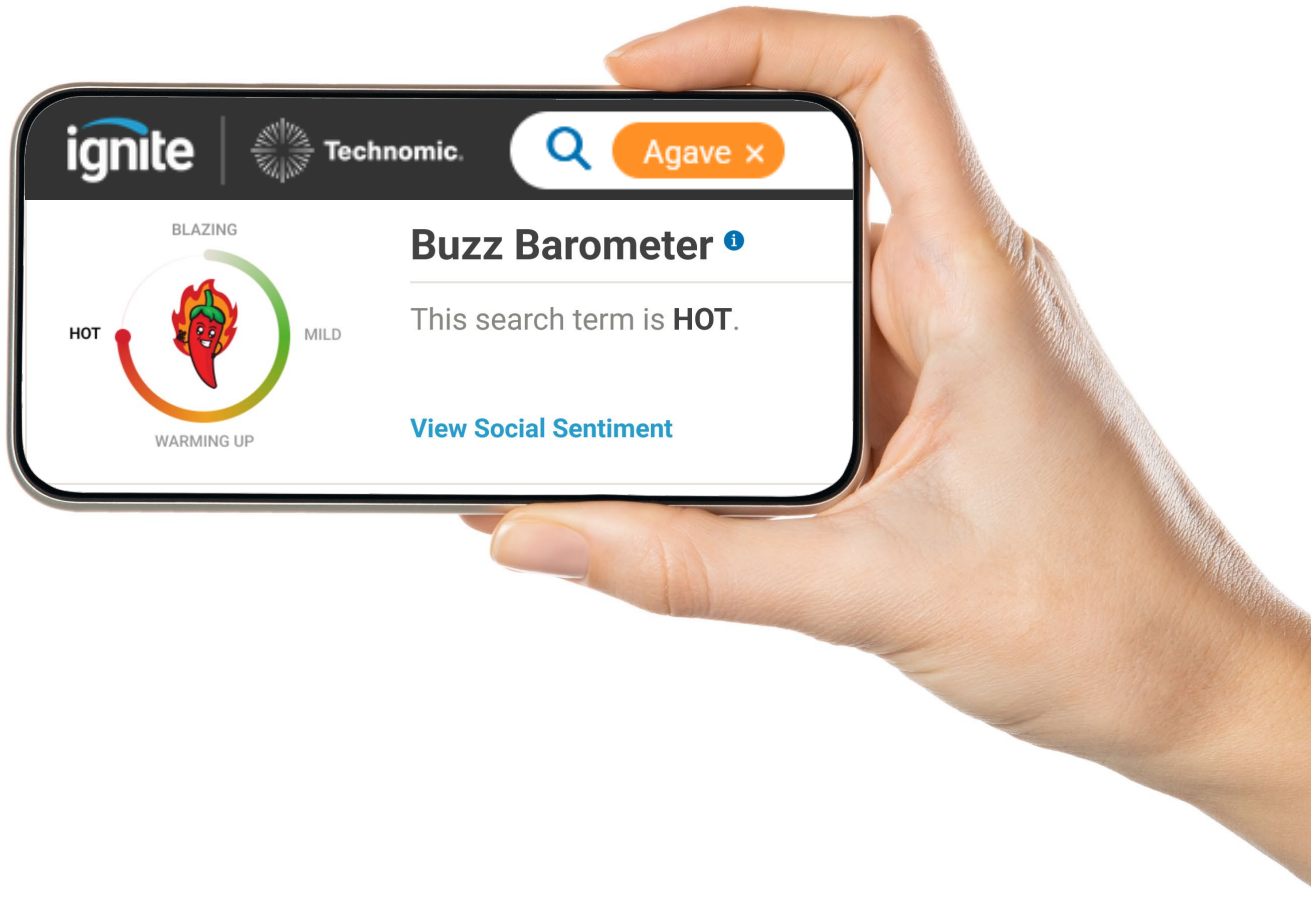
This report is authorized for use solely by the parties noted in the written contract. No part of the publication may be reprinted, redistributed or put into an electronic or information retrieval system without the prior permission of Technomic, Inc.

Technomic by informa

See what's hot in the minds of consumers with Buzz Barometer

Measure the social buzz of ingredients, flavors, preparations or healthy claims with artificial intelligence, social listening and Technomic data—all validated by our subject matter experts

Learn more



Technomic by informa

© 2025 Technomic, Inc.

Ignite Company

How does sales share compare among the Power 50 distributors?

Led by Sysco, Performance Food Group and US Foods, total sales volume for the industry's 50 largest broadline foodservice distributors reached $235 billion last year, increasing by 5% on an annual basis.

Acquisitions continue to play a major role in share consolidation for the industry's top players, driven by deals such as Performance Food Group's purchase of Cheney Brothers, Sysco's takeover of Edward Don & Company, and US Foods' acquisitions of both Saladino's Foodservice and IWC Food Service.

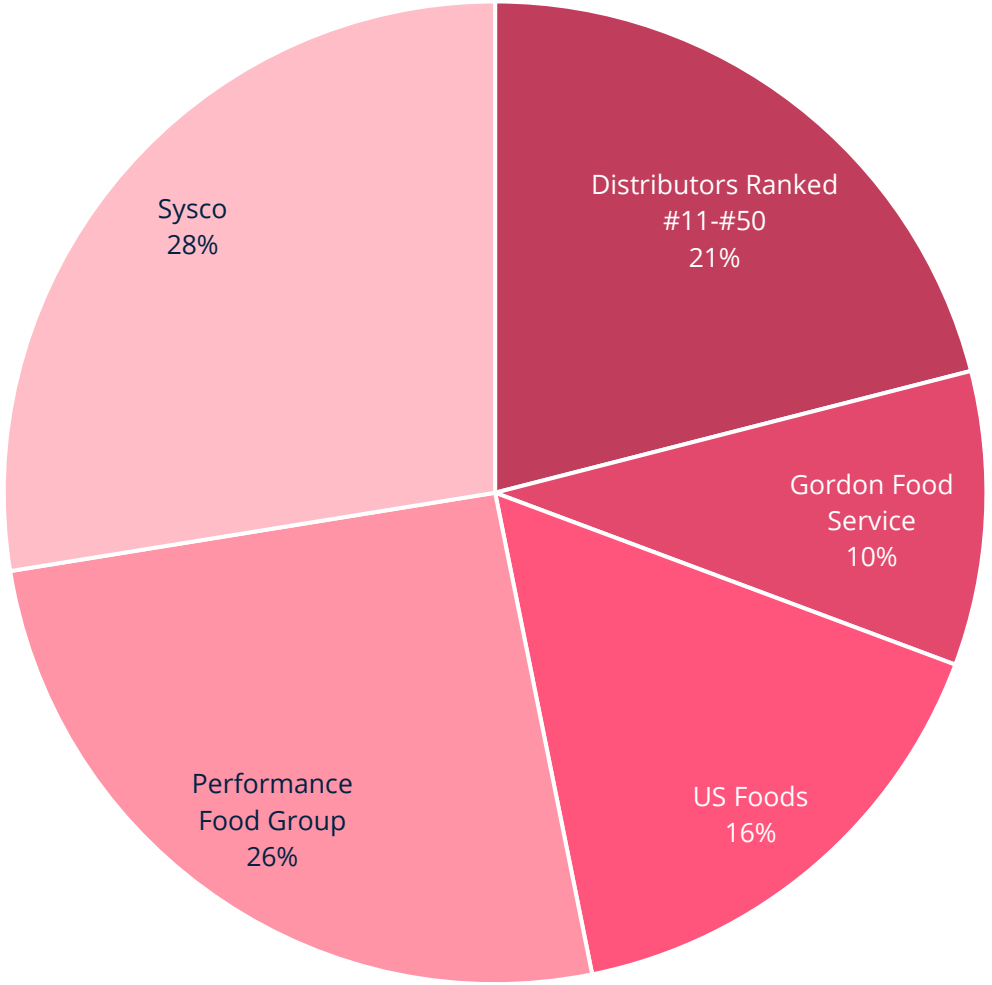
Access Technomic's newly released *Power 50 Distributors* report for deeper sizing and performance insights on the foodservice industry's largest broadline distributors.

Ignite Company clients: Click here for more

Source: Technomic Ignite Company

© 2025 Technomic, Inc.

POWER 50 DISTRIBUTOR SHARE ANALYSIS
SHARE OF TOTAL U.S. SALES VOLUME (%)
$235 Billion Total Power 50 Distributor Sales



Ignite Menu

Three emerging menu trends to watch

This quarter's *Emerging Eats* report spotlights three key themes to watch.

Global spreads, syrups and sauces

Interesting global spreads, syrups and sauces abounded this quarter, including salty options, such as Japanese shiro shoyu, sweet Greek petimezi and Central European powidl, and nut- and veggie-forward choices, including Eastern European ikra and Latin salsa de almendras.

Unusual plants

In this quarter's grouping of trends, we saw quirky plants (and plant parts) appearing on menus, including uncommon varietals of old favorites, such as purplette onion and calabaza squash; shrubs, such as knotweed; and unique usages of plant components, such as asafoetida, cherry bark and sago.

Surprising Swaps

Independent operators are experimenting with all manners of flavor and ingredient swaps to add intrigue to menus. This includes tomatoes swapped for more classic fruits in marinara sauce and pico de gallo; savory and vegetal flavors swapped into sweet treats with umami beignets and celery desserts; and protein swaps in crab rangoon.

Ignite Menu clients: Click here for more

Source: Technomic Ignite Menu
Image Source: Shutterstock



© 2025 Technomic, Inc.

Ignite Consumer

The midday meal occasion: lunch

The lunch daypart remains a crucial opportunity for restaurant operators, with 31% of all restaurant occasions taking place during this daypart.

Lunch is slightly more of an in-unit experience, with 57% of lunch guests dining inside the restaurant. This meal is also somewhat more habitual, with 33% of guests describing their occasion as routine (compared to 29% overall).

Health plays a larger role, as noted by 26% of diners who cited better-for-you need states drove their decisions. This health-focused mindset helps explain why brands with fresh positioning, such as Chicken Salad Chick and Jason's Deli, claim top spots among chains visited for lunch.

Operators looking to build traffic during the lunch daypart should focus on:

- Creating consistent—even predictable—experiences that foster weekday loyalty
- Promote health-forward menu options and attributes to meet elevated better-for-you demand
- Optimize operation efficiency during peak lunch hours

Addressing these lunch-specific demands will help convert occasional visitors into regular diners while satisfying distinct midday consumer demands.

Ignite Consumer clients: Click here for more

Base: 111,950 consumers ages 18+
Source: Technomic Ignite Consumer, Q3 2024-Q2 2025
Image Source: Shutterstock

© 2025 Technomic, Inc.



Global Foodservice Navigator

Menu development activity in North America

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, tracked North America together saw about a 39.2% increase in items released per chain, with this growth by far the highest of any tracked region and nearly double that of the runner-up region (Latin America). Unlike in other regions, this difference was not driven by any single market, with both Canada and the U.S. seeing nearly 40% increases.

While menu development in the U.S. did not see substantial daypart change year over year, Canadian operators broadly shifted away from all-day items toward those rolled out for lunch and dinner, with the latter daypart seeing an 11% increase from 2023.

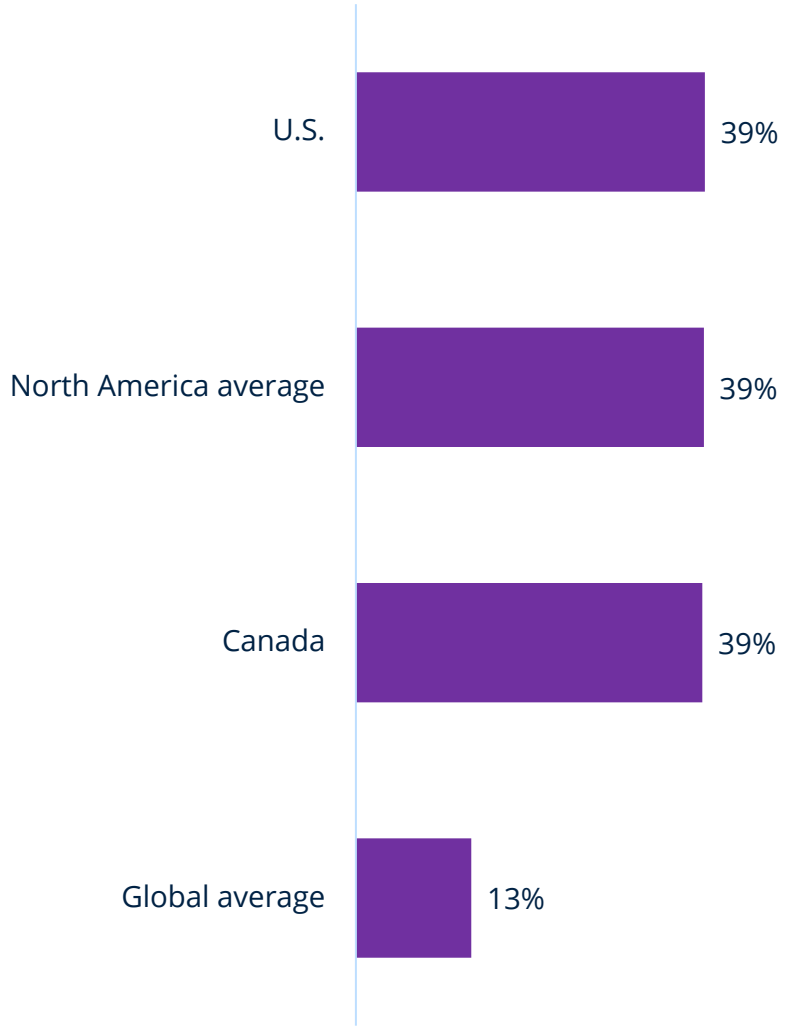
At the same time, this change saw a notable (approximately 5%) decrease in nonalcohol beverage and side/snack development in the market in favor of entrees and adult beverages (also approximately 5%). This mealpart shift was only partially reflected in the U.S., where chains introduced a similarly reduced number of nonalcohol beverages (-5%) but saw smaller growth in entrees (3%) and desserts (2%).

Global Navigator clients: Click here for more

Source: Technomic Global Foodservice Navigator Program

© 2025 Technomic, Inc.

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



Want more insights?

You can get this report delivered to you biweekly!

Sign up here>>

Ignite Company

See where restaurant chains are, how many units they have and how well they're doing. **Explore>>**

Ignite Menu

Pinpoint the latest menu trends and see what's on the horizon. **Explore>>**

Ignite Consumer

Get to know your customers' customers through 60+ attributes and visit occasion metrics. **Explore>>**

Global Foodservice Navigator

Understand the global industry, from menu trends to consumers, in 25 markets. **Explore>>**

Technomic by informa

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?
Reach out to us today.

312-876-0004
info@technomic.com
technomic.com

© 2025 Technomic, Inc.