

Industry Insights

A roundup of noteworthy foodservice findings
for the week of Nov. 10, 2025



Image Source: Shutterstock

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2026 Topics

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Retail Foodservice
Future of LSR
Generational Differences
Delivery & Takeout
Dessert
Burger

2025 Topics

Future of Full-Service Restaurants
Global Fare on U.S. Menus
Healthy Eating
Multicultural Consumers
Pizza
Sandwich
Snacking
Soup & Salad



A look at independent restaurant openings and closures in 2025

According to new analysis from Technomic's Ignite Location Targeting tool, the total number of independent restaurants has contracted by 1.4% through Q3 2025, resulting in a net loss of more than 5,900 restaurants.

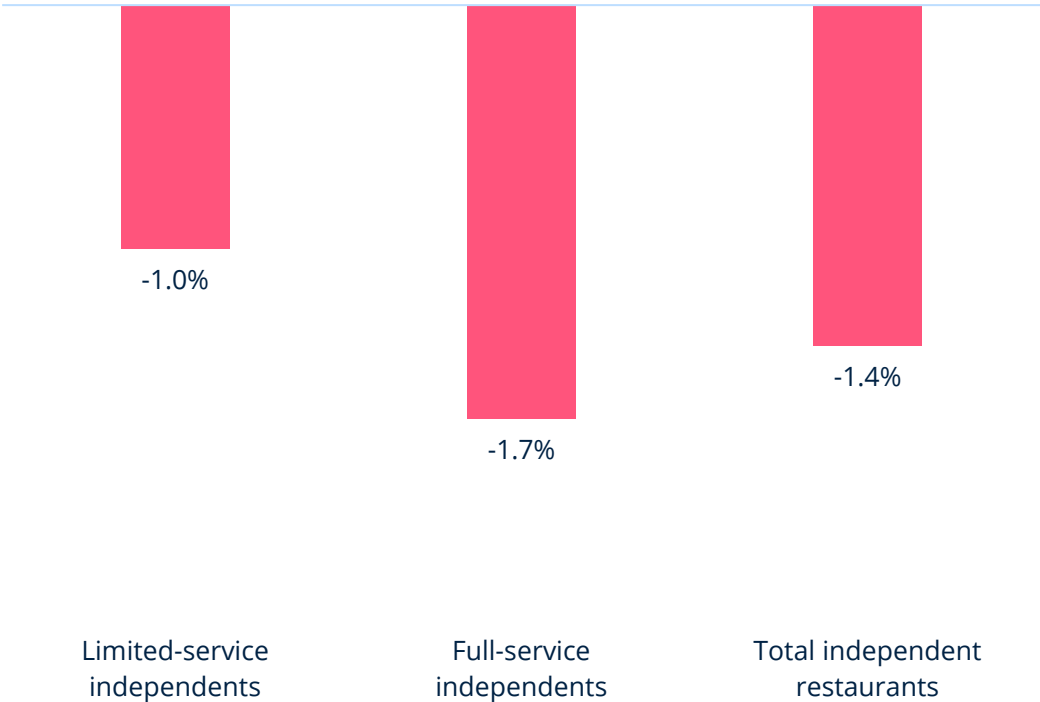
Both the limited- and full-service segments have suffered net location losses so far in 2025, with industrywide location totals shrinking by 1.0% and 1.7%, respectively.

Take advantage of Technomic's new *Openings and Closures at Independent Restaurants* overview to analyze location trends by market, segment and cuisine category.

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

Source: Technomic Ignite Location Targeting
Note: Year to date through Sept. 30, 2025

U.S. INDEPENDENT RESTAURANTS
2025 YEAR-TO-DATE LOCATION CHANGE



Q3 2025 menu data highlights

With the launch of Technomic’s new Ignite Menu data for Q3 2025, here are some key takeaways from menus.

Overall, menu item counts are on the decline year over year, down more than 1% in the last year. Some mealparts saw small growth, including kids menus (+2.3%) and add-ons (+1.3%).

Several of the fastest-growing ingredients in the last year are health-forward options, such as collagen (+76.3%), basil seeds (+67.7%), purple rice (+66.7%) and pea protein (+50.0%).

On the theme of healthy options, many of the fastest-growing healthy claims year over year revolve around sustainability and transparency. Low carbon (+12.7%), antibiotic-free (+9.7%),

clean label (+8.8%) and sustainable (+8.6%) have all seen increased menu mentions in the past year.

But health isn’t the only thing taking menus by storm. Sweet, nostalgic flavors are reigning supreme when it comes to fastest-growers year over year. Pralines and cream (+79.5%), rocky road (+52.0%), maraschino cherry (+22.1%), Black Forest (+17.9%) and butter pecan (+15.2%) all saw menu growth in the last year.

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

Source: Technomic Ignite Menu, Q3 2024-Q3 2025
Image Source: Shutterstock

ITEM COUNT CHANGE IN THE LAST YEAR Q3 2024-Q3 2025

KIDS MENU
+2.3%

ADD-ON
+1.3%

NONALCOHOL BEVERAGE
+0.0%

SIDE
-0.7%

ENTREE
-2.0%

DESSERT
-2.4%

APPETIZER
-2.6%

OVERALL
-1.6%



Gen Zers shifting to earlier dayparts at casual dining

Notoriously known as the “snacking generation,” Gen Zers are more likely than other generations to visit or order from restaurants during off-peak mealtimes and late-night occasions.

Recent data, however, shows that a shift is happening with this generation at casual-dining restaurants. Gen Zers report casual-dining chain usage moving away from snacks and later dayparts toward earlier times of day.

Compared to the year-ending Q4 2024 period, the share of Gen Z casual-dining occasions noted as morning and lunch occasions increased by 2 percentage

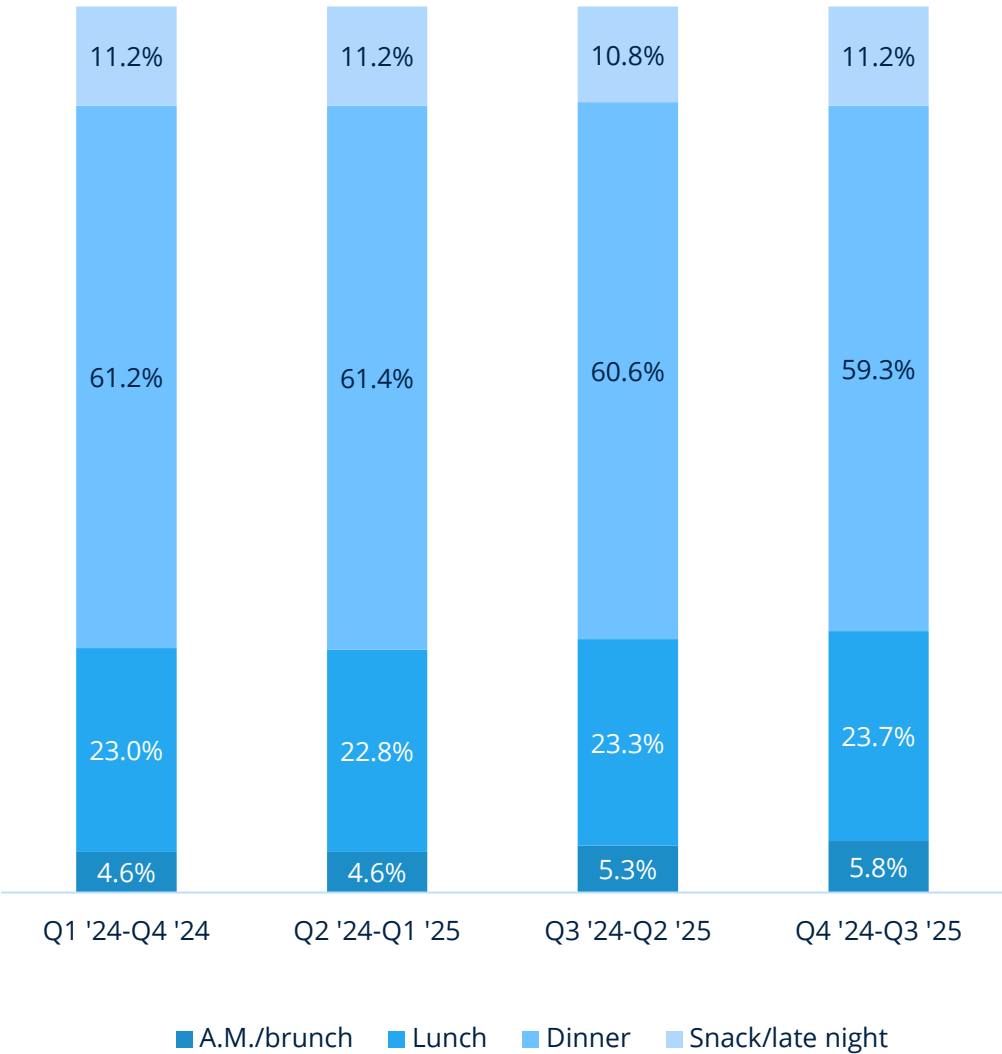
points, while dinner occasions decreased by that same amount. The numbers may seem small, but they do represent a significant change as the data comes from more than 6,000 Gen Z restaurant occasions annually.

The increase in lunchtime traffic is likely attributed to return-to-office mandates and may reflect changing value perceptions. Diners understand they can get a similar-priced meal they perceive to be higher in quality when compared to QSR, and visiting for lunch tends to be more affordable than visiting for dinner.

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

Base: Varies; Approx. 6,000 recent Gen Z casual-dining consumers per four-quarter period shown
Source: Technomic Ignite Consumer

RECENT CASUAL-DINING OCCASION DAYPART
AMONG GEN ZERS



Beverages boom in Southeast Asia

Local, regional and global coffee cafe chains in Southeast Asia have seen markedly high menu development activity through 2025, with new and LTO items rolled out at a similar or faster pace than any other year on record.

On average, coffee cafe operators this year so far have introduced about 11 more items per chain in this region, with 43 items per chain rolled out compared to the average chain adding around 32.

Collectively, this pace amounts to about a quarter of all releases captured in this region. Nonalcohol beverages make up just under half of these chains’ new/LTO items, as well as just over half of nonalcohol beverages introduced by any kind of chain in the region.

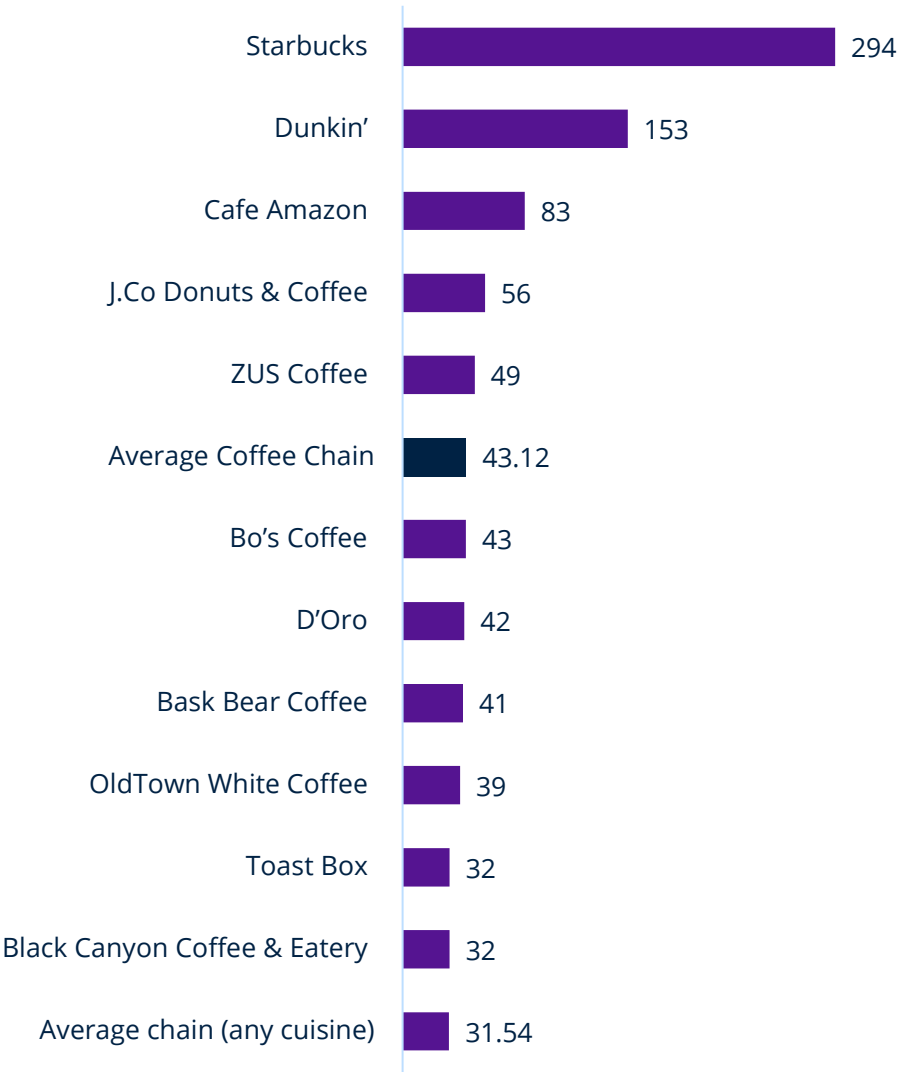
This quick cadence has not only formed a

key part of these chains’ traffic-driving strategies but coincided with unit milestones and expansion plans announcements.

For example, Malaysia-based [ZUS Coffee reached 1,000 systemwide locations](#), Thailand-based Inthanin Coffee [plans to reach 1,800 units](#) (up approximately 500 from today) by EOY 2028, and Indonesia-based Kenangan Brands—Kopi Kenangan’s operator—[outlined plans to enter new global markets](#) in 2026.

Brands from outside the region, like China’s Luckin Coffee and U.S.-based Dunkin’, have taken similar action to expand in Southeast Asia, with the former [receiving halal certification in Malaysia](#) and the latter signing a [new franchisee](#) to take over the coffee QSR’s existing operations and develop new units.

NEW/LTO ITEMS PER CHAIN IN SOUTHEAST ASIA
Q1-3 2025



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

Source: Technomic Global Foodservice Navigator Program

Foodservice GPOs drive record growth

The foodservice GPO market has achieved a record \$90.3 billion in procurement value for 2025, up from \$54.1 billion in 2021. Despite this growth, GPOs currently penetrate a little over a quarter of the total foodservice market, with adoption varying widely across segments.

GPO purchasing consistently outpaces overall segment growth, particularly in restaurants where adoption remains relatively low despite being the largest overall segment.

Get more data-driven insights on the retail foodservice space, including consumer attitudes, behaviors and perspectives with the *2025 A Strategic Assessment of Group Purchasing Organizations Multi Client Study*.

[Multi Client Studies clients: Click here for more](#)

Source: Technomic 2025 A Strategic Assessment of Group Purchasing Organizations Multi Client Study
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Technomic. Multi Client Studies

A Strategic Assessment of Group Purchasing Organizations

Evolving Procurement Practices in a Mature Industry



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Have questions?

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