

Industry Insights

A roundup of noteworthy foodservice findings
for the week of Dec. 1, 2025



Image Source: Shutterstock

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Foodservice

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How have chain restaurants performed in 2025?

Technomic’s latest performance projections for the industry’s top 1,500 chain restaurants indicates that cumulative chain sales will expand by 3.1% in 2025, a slight uptick from the prior year’s 3.0% increase.

Total top 1,500 chain restaurant sales volume is on pace to reach \$480 billion in 2025, representing a net increase of over \$14 billion compared to 2024.

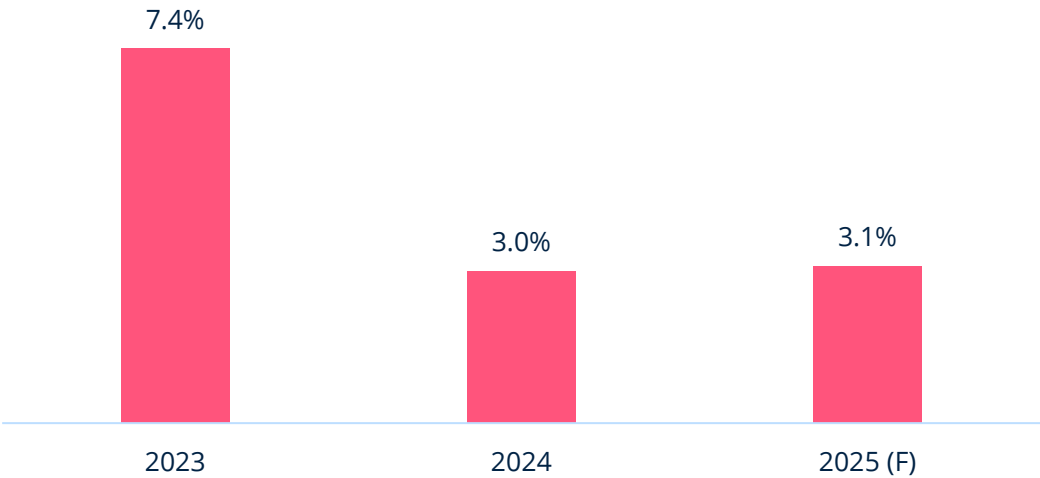
Strengthening sales for McDonald’s, as well as the robust growth of top full-service players Chili’s Grill & Bar and Texas Roadhouse, are key factors boosting overall 2025 chain results.

Access deeper segment and cuisine category performance forecasts in the newly-released *Chain Restaurant Performance Outlook*, now available on Ignite.

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

Source: Technomic Ignite Company
Note: (F)=forecast; All forecasts are preliminary and subject to revision

TOP 1,500 CHAIN RESTAURANTS
ANNUAL U.S. SALES CHANGE



What's trending on noncommercial menus?

Technomic's quarterly *Noncommercial & Retailer Trends* report highlights recent menu and operational development at various noncommercial operations. Here is one menu trend to watch from the most recent installment:

Regional Cuisine

Ohio State University's Ohio Stadium is serving up burgers inspired by the team's opponent this football season. For a game against the University of Texas, the Longhorn Burger included smoked brisket, Colby Jack cheese and caramelized jalapenos. For the game against Louisiana's Gambling State, the Creole Magic Burger featured smoked

andouille sausage, Gouda cheese and a housemade remoulade.

Highmark Stadium, home of the NFL's Buffalo Bills, is introducing new items at each home game highlighting the visiting team's region. When Baltimore visits, the stadium will serve Mr. Crabs, fried crabcakes on a Bavarian pretzel roll with mango salsa and fresh cilantro. Other options will include the Cubano for Miami, a lobster roll for New England and a shrimp po'boy for New Orleans.



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

Source: Technomic Ignite Menu
Image Source: Shutterstock

Diners seeking deals: coupons and discounted offers

With fast-food prices on the rise, many diners are turning to value, deals and promotions to offset the cost of a restaurant purchase.

Data from Ignite Consumer shows that **one in five (19%) chain restaurant guests reported redeeming a coupon or discounted offer** during their most recent occasion. Guests who sought out these deals were most likely to describe the occasion as a routine meal, suggesting that value may play a larger role when the behavior is habitual.

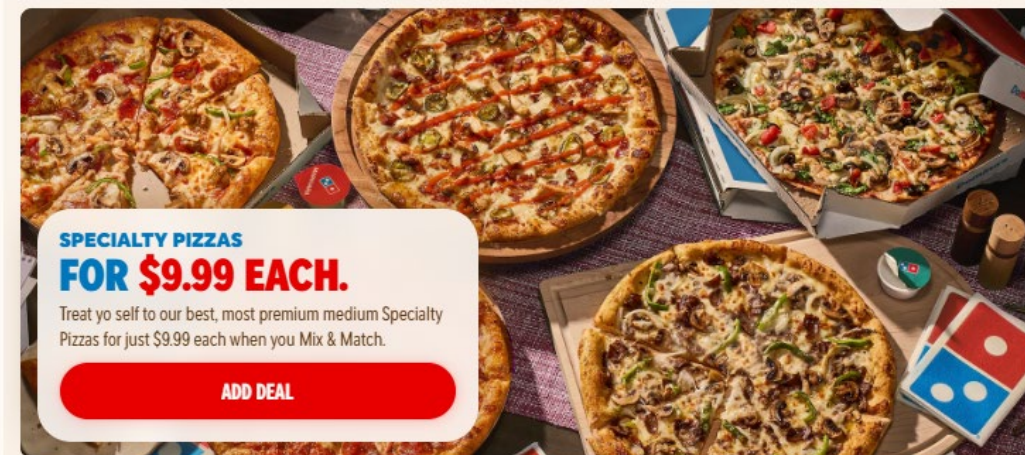
Ignite Consumer clients: Click here for more

Base: 112,700 recent restaurant guests ages 18+
Source: Technomic Ignite Consumer, Q4 2024-Q3 2025
Images Source: [Domino's website](https://www.dominos.com)

Furthermore, more than one-third of diners who reported using a coupon or discounted offer tended to do so during a solo occasion (35%) and a majority indicated they dined off-premise (56%).

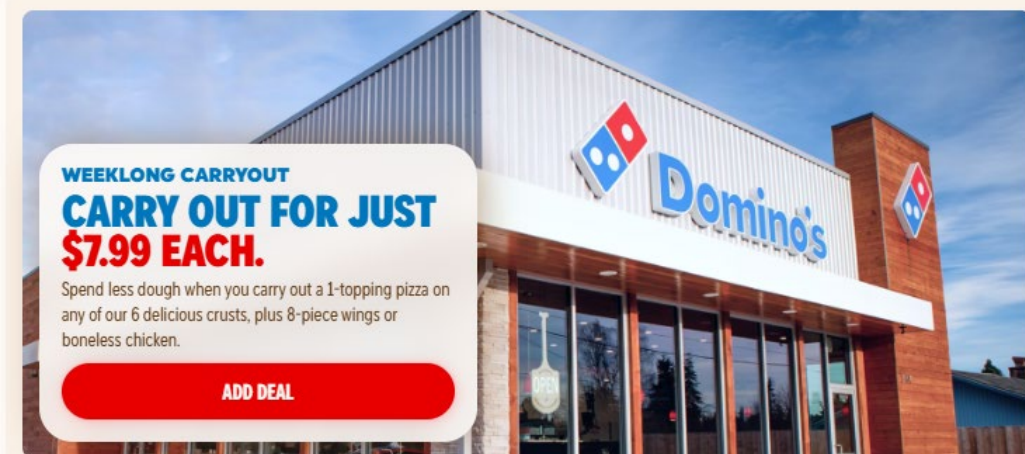
Top limited-service chains for coupon/discounted offer reception include:

1. Domino's
2. Marco's Pizza
3. Papa Murphy's Pizza



OFFER DETAILS

PRICES HIGHER FOR SOME LOCATIONS. Treat yo self to our best, most premium medium Specialty Pizzas for just \$9.99 each when you Mix & Match. You must choose this limited time offer. Prices, participation, delivery area, and charges may vary by store. 2-item minimum. Bone-in Wings, Bread Bowl Pasta, Handmade Pan and Parmesan Stuffed Crust pizzas will cost extra.



OFFER DETAILS

PRICES HIGHER FOR SOME LOCATIONS. You must ask for this offer. Prices, participation, and charges may vary. Carryout only. Excludes XL and Specialty Pizzas.

Trying new flavours with LTOS

According to Technomic’s Global Foodservice Navigator Program, global consumers have complex opinions on restaurant menus, ranging from the importance of LTOS and trendy menu items to willingness to try new flavours. With these issues of key importance to operators and their menus, understanding this relationship requires a deeper dive.

While about 57% of global consumers report that they seek out new flavours from time to time, only about 35% say that choosing a meal explicitly to try new flavours is an occasion they visit foodservice for.

A similar percentage (33%) say they always or often order new or unique menu options from restaurants.

However, more than half of consumers state that on-trend menu options and

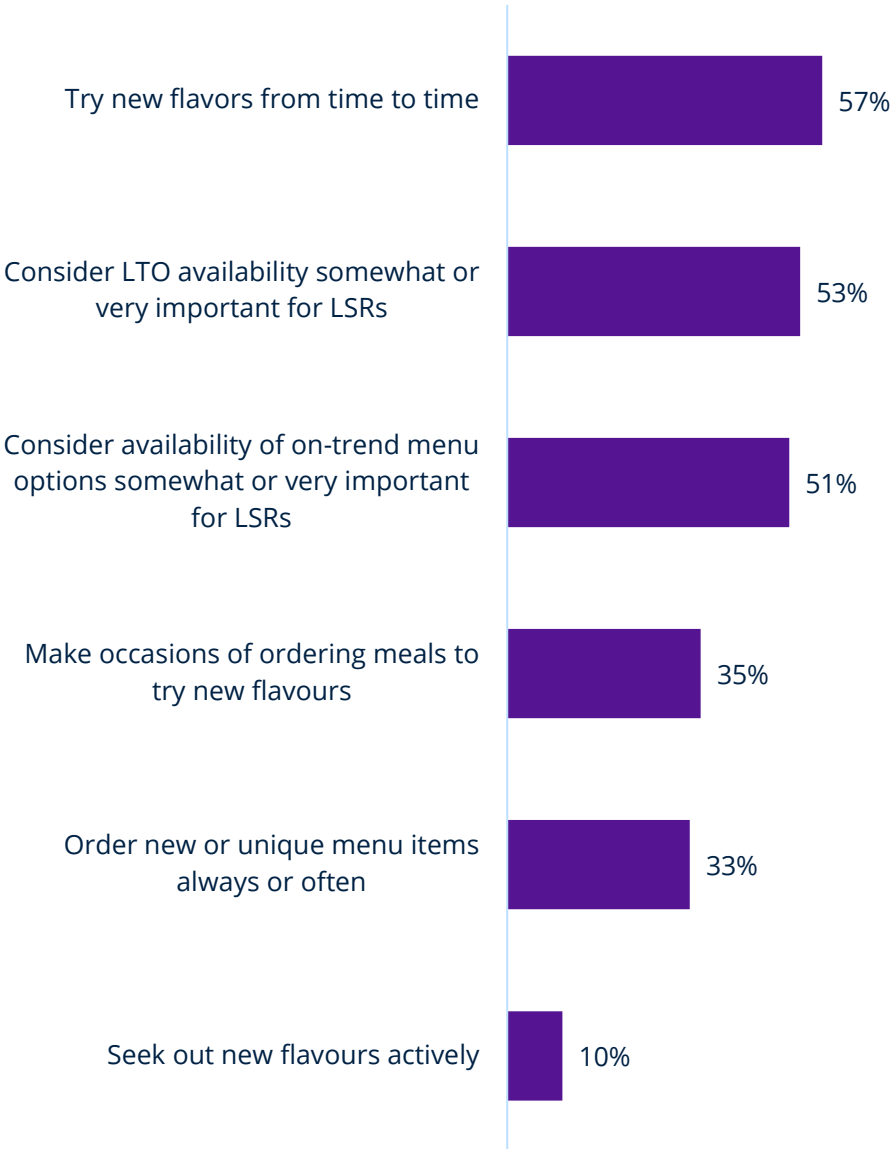
the availability of LTOS—both of which often feature new flavours or repurpose familiar ones—are important factors in choosing LSRs to visit.

At the most basic level, global consumers may be seeking out different kinds of LTOS. The ability to customize food is somewhat or very important to 66% of foodservice patrons worldwide, with consumers reporting that they customize about 35% of their food and nonalcohol beverage orders.

Introducing trendy LTO add-ons to recognizable food and beverages is a potential strategy that bridges the gap between consumers’ stated interest in new flavours and their actual orders by offering new experiences in relatively familiar dishes.

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

% GLOBAL CONSUMERS WHO...



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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?

Reach out to us today.

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