

Industry Insights

A roundup of noteworthy foodservice findings
for the week of Dec. 15, 2025



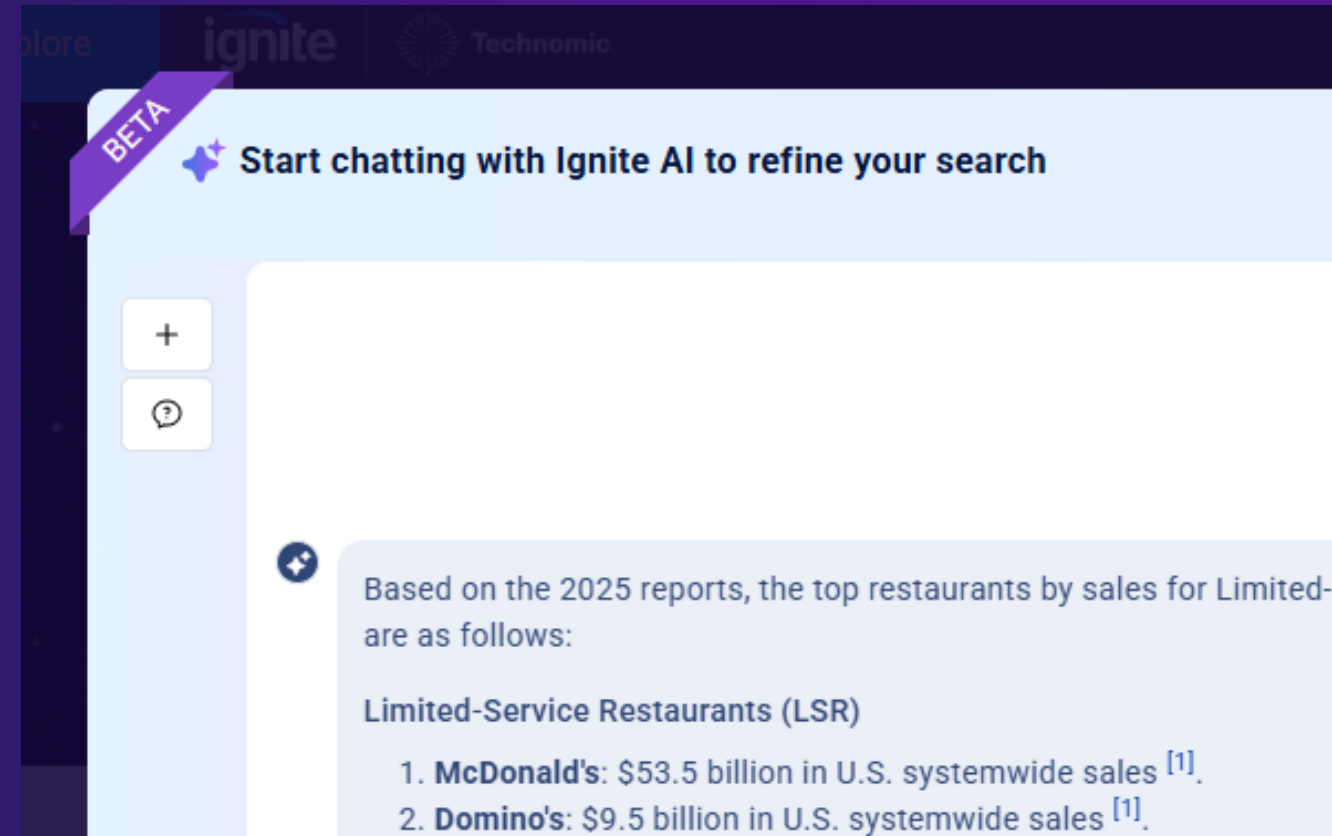
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Evaluating the evolution of cuisine category sales share

Analysis of Technomic’s chain restaurant sales trending data reveals that chicken chains have gained the most sales share over the past decade, outpacing rival categories like burger, pizza and sandwich.

Led by the strong growth of players like Chick-fil-A, Raising Cane’s and Wingstop, the chicken category is forecasted to account for over 12% of all U.S. chain restaurant sales in 2025 compared to 7% share in 2015.

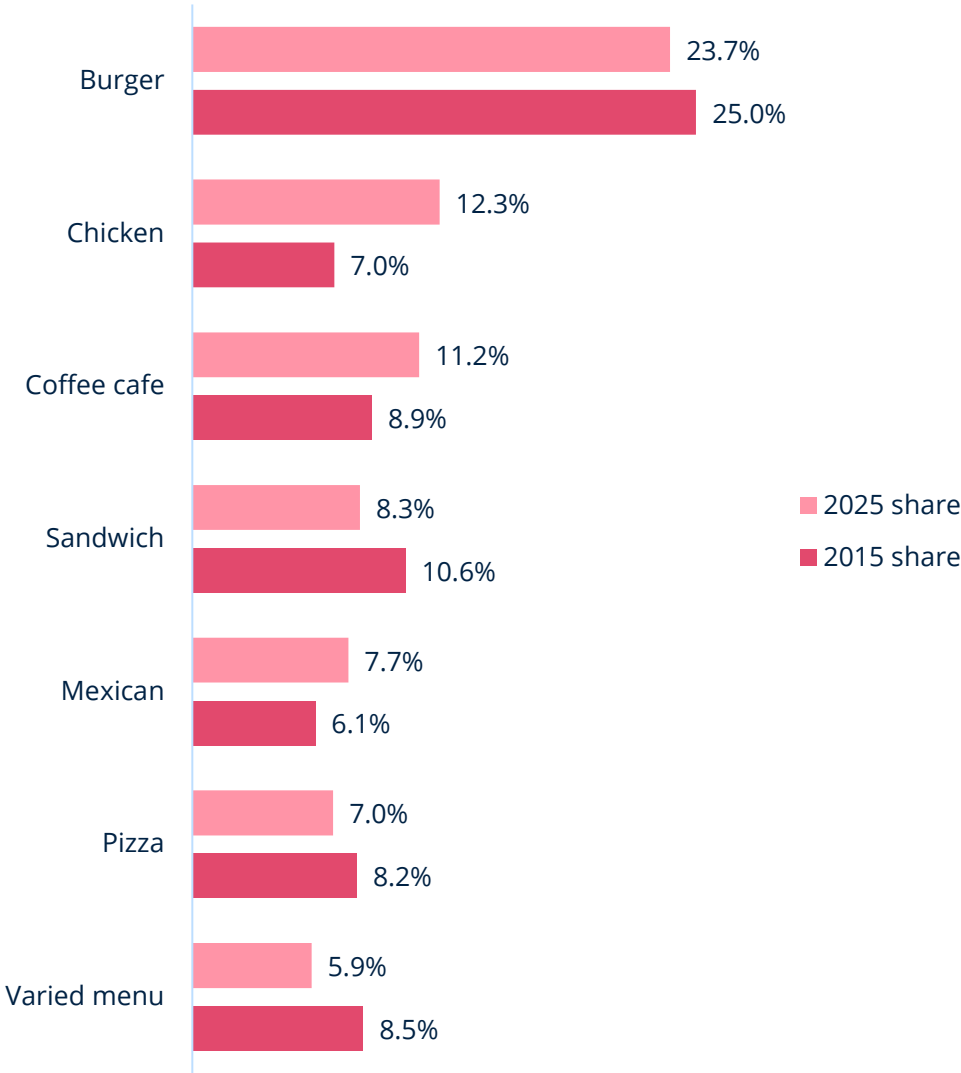
The coffee cafe and Mexican chain categories continue to be winners as well, attaining sales share increases of 2.3% and 1.6%, respectively.

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

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

Source: Technomic Ignite Company
Note: 2025 sales information is preliminary and subject to change

TOP 1,500 CHAIN RESTAURANTS
SHARE OF TOTAL CHAIN SALES BY CATEGORY



Ignite Menu

What's trending with hot beverages on menus?

With cooler winter weather, hot beverages are top of mind for many. Let's check out what's happening with these cozy beverages on menus.

Classic coffee/filter coffee reigns supreme as the top hot beverage on menus, but we're seeing more variety when it comes to the fastest-growing hot beverages year over year. Specialty tea (+18.1%), other specialty coffee (+12.1%) and cortados (+8.1%) are all seeing increased menu mentions in the last year.

The growth of cortado, a Spanish coffee drink made with lightly steamed milk, indicates some global influences on hot

beverages. The fastest-growing flavors with hot beverages reflects this as well, with options including horchata (+23.3%), Cuban (+18.5%) and Mexican (+18.2%) on the rise.

One in-market horchata LTO that performed well this year was Coffee Bean & Tea Leaf's Horchata Latte, with 71% of potential purchasers saying they would be likely to increase visits to an operator for this item.

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Source: Technomic Ignite Menu
Image Source: Shutterstock

Fastest-Growing Hot Beverages YEAR OVER YEAR

+18.1%
SPECIALTY TEA

+12.1%
OTHER SPECIALTY COFFEE

+8.1%
CORTADO

+3.1%
CHAI

+2.3%
MACCHIATO



Younger consumers driving Chili's recent success

Chili's Grill & Bar's recent string of successful quarters has grabbed the industry's attention, and the Technomic Ignite Consumer team is frequently asked what's driving this success.

Across the foodservice landscape, younger diners are consistently the most frequent users of restaurants, with peak frequency typically occurring between ages 30-35. many legacy casual-dining brands tout a high 25- to 34-year-old share among their core guest base, but the casual-dining chain average for share of 18- to 24-year-olds is below 10%.

The table on the right shows the age

distribution of Chili's frequent guest base—those who visit or order from the chain once a month or more frequently—and marks changes over the past three years. The growth of 18- to 24-year-olds among their heavy user base is significant and shows that the brand is resonating with younger diners.

Chili's usage among this group looks and feels very traditional: 85% dine in at Chili's vs. 79% across casual-dining brands. The brand has successfully set itself up with lifetime customer value as the Chili's experience truly resonates with younger consumers.

CHILI'S GRILL & BAR'S FREQUENT GUEST DISTRIBUTION BY AGE

Chili's Frequent Guest Age Group	2023	2024	2025 YTD
18-24	9%	10%	12%
25-34	21%	20%	22%
35-44	22%	19%	25%
45-54	21%	20%	16%
55+	27%	30%	25%

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

Base: Varies; Approx. 2,500 once a month+ Chili's guests ages 18+
Source: Technomic Ignite Consumer

The importance of sustainability globally

In its newly released *Sustainability Grab & Go Report*, Technomic took a deep dive into how consumers around the world respond to socially and environmentally responsible initiatives like sustainable sourcing, recycling programs and more. With global operators stepping up these programs and global consumers broadly responding positively, understanding this relationship is of key importance.

Broadly, consumers in Asia—particularly Southeast Asia—and in Latin America strongly overindex the global average in ranking participation in responsible initiatives as somewhat or very important when choosing which LSRs and FSRs to visit, many doing so by double digits.

Notably, restaurant patrons in India and Indonesia rank these initiatives as more important to them than low prices, doing so by a respective 8% and 3%, respectively, with consumers in many other markets rating the importance of these two attributes within less than 10 percentage points from each other.

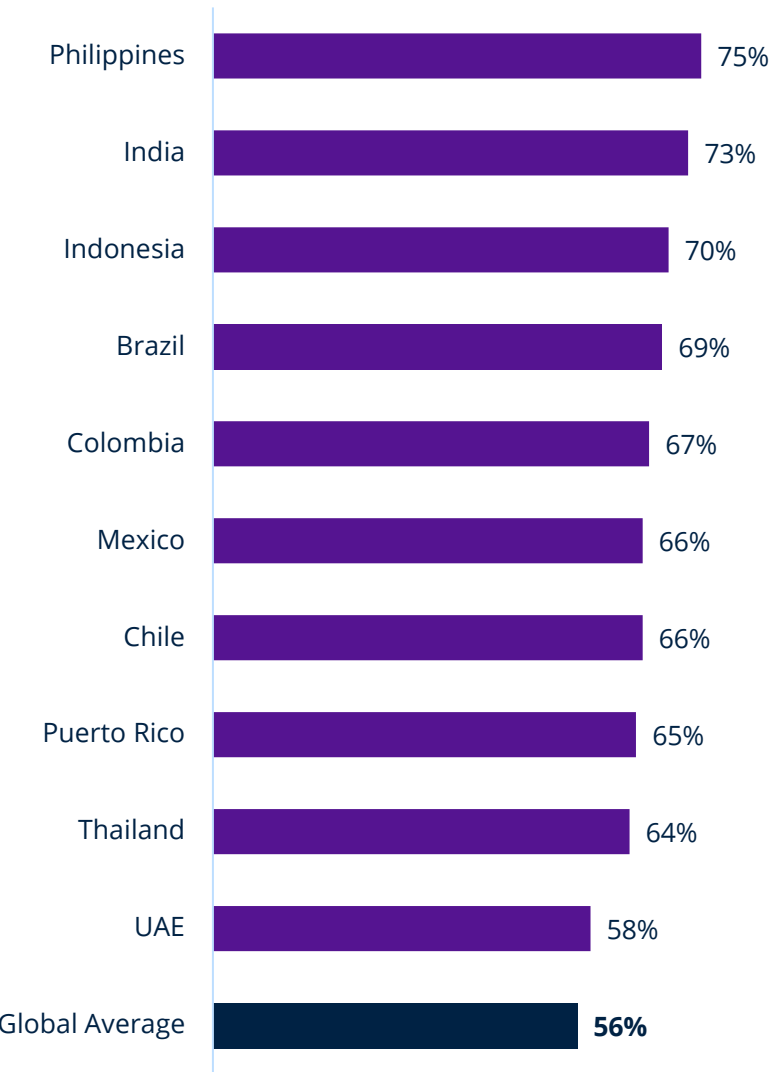
Additionally, More than half of all surveyed consumers indicated they are more likely to order from restaurants that provide sustainable packaging.

Likewise, whereas only about a third of consumers have participated in reusable cup or food container programs, 54% note that they would if these options were available to them.

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

Source: Technomic Global Foodservice Navigator Program

% CONSUMERS WHO FIND SOCIALLY RESPONSIBLE INITIATIVES SOMEWHAT/VERY IMPORTANT WHEN CHOOSING AN LSR TO VISIT



Multi Client Studies

Food and beverage trends among employees

Employees find comfort foods and spicy flavors and ingredients appealing. In terms of healthfulness, they are increasingly interested in items with natural ingredients, which taps into the growing trend of consumers in general demanding more real and wholesome menu items when dining out. As for beverages, employees prefer carbonated beverages, juice, coffee, etc., and they typically prefer their beverages in the bottle format due to being able to grab it and go about their day without worrying about their beverage spilling.

Overall, consumers want variety and the option to choose and customize

their meals regardless of whether they're dining out during the workday, after work or on the weekends. It's imperative for operators to tap into these trends to encourage employees to spend their time and dining dollars at their foodservice locations.

Get more data-driven insights on the retail foodservice space, including consumer attitudes, behaviors and perspectives, with the Technomic 2025 *Business & Industry Multi Client Study*.

[Learn more about Multi Client Studies](#)

Source: Technomic 2025 Business & Industry Multi Client Study
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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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