

Industry Insights

A roundup of noteworthy foodservice findings
for the week of June 23, 2025

Image Source: Shutterstock



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What percentage of chain restaurants are franchise-operated?

Three-fourths (74%) of all chain restaurant locations are operated by franchisees or licensees, representing more than 191,200 of the nearly 260,000 total chain restaurants across the United States. The remaining 26% of chain locations are company-owned and -operated.

Ownership rates differ significantly between segments, with franchised and licensed locations accounting for

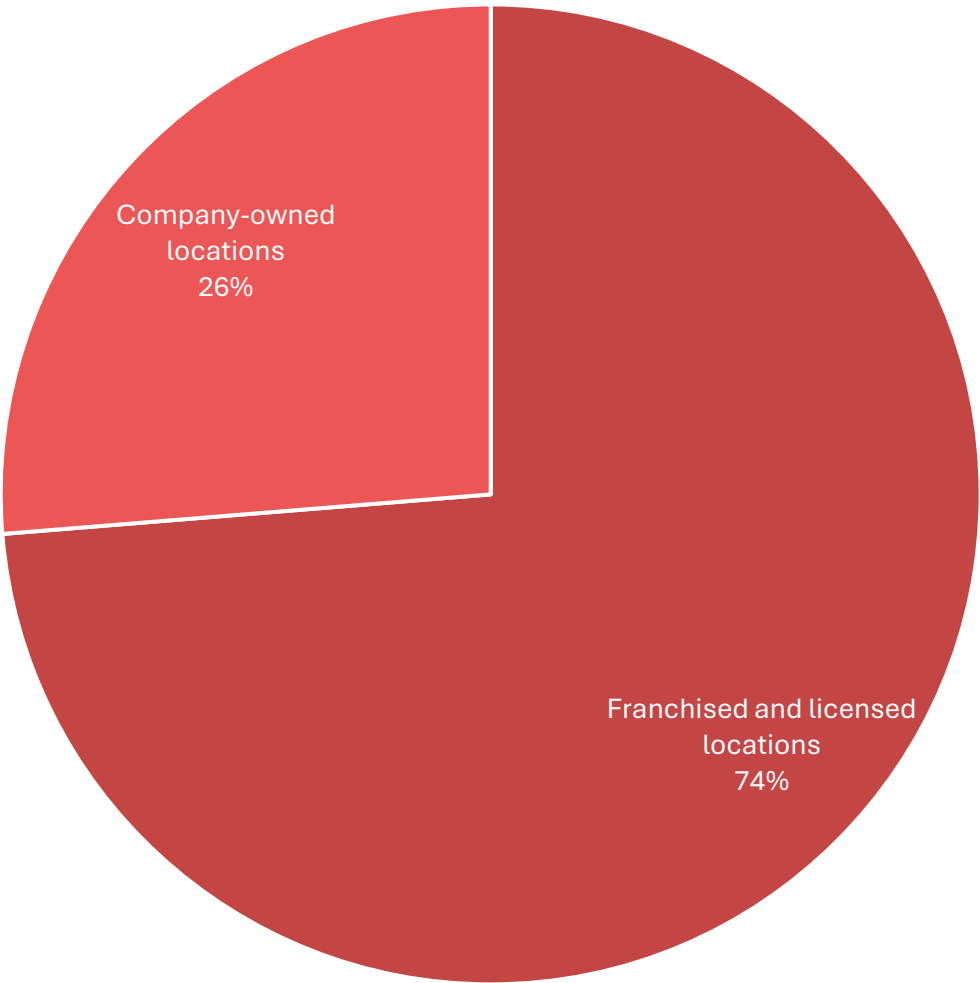
nearly 80% of all limited-service chain locations compared to just 36% for the full-service segment.

Access ownership details for all top 1,500 chain restaurants today with Ignite Company.

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

Source: Technomic Ignite Company

TOP 1,500 CHAIN RESTAURANTS
U.S. LOCATION SHARE BY OWNERSHIP TYPE



Q1 2025 Ignite Menu highlights

With the launch of Technomic’s new Ignite Menu data for Q1 2025, here are some key takeaways from U.S. menus.

Overall, menu item counts are up year over year, with average item counts for all mealparts showing an increase of 8.0%. Dessert (+11.9%) is the mealpart that saw the most increases in the last year, driven in part by an uptick in pudding/gelatin dessert mentions, including panna cotta (+38.0%) and plain creme brulee (+20.6%).

Several of the fastest-growing flavors over the last year are fruity and floral flavors, including finger lime (+61.9%), elderflower (+58.7%), dark cherry (+43.8%), juniper (+40.4%) and bing

cherry (+37.5%). Many of the fastest-growing sauces over the past year are either spicy options such as chile crisp (+62.0%), sweet options such as apple glaze (+135.7%) or a combination of the two, such as honey-chile sauce (+57.1%). Several of the fastest-growing proteins year over year are seafood options, including salt cold (+57.1%), coho salmon (+47.1%) and bass (+38.9%). In addition, specialty meat products such as lardo (+64.3%), a cured pork fat with herbs and spices, and nduja (+31.9%), a spicy spreadable pork sausage, are finding momentum on menus.

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

Source: Technomic Ignite Menu, Q1 2024-Q1 2025
Image Source: Shutterstock

ITEM COUNT GROWTH OVER THE LAST YEAR Q1 2024-Q1 2025

Dessert | **+11.9%**

Appetizer | **+10.5%**

Entree | **+7.2%**

Nonalcohol Beverage | **+7.1%**

Side | **+6.9%**

Add-On | **+6.8%**

Kids Menu | **+6.7%**

Overall | **+8.0%**



Cravings will top healthy decisions in uncertain times

Today’s consumer has a lot on their mind, including high household debt, housing affordability, inflation, global tensions and much more, which impacts overall consumer confidence and spending, especially at restaurants.

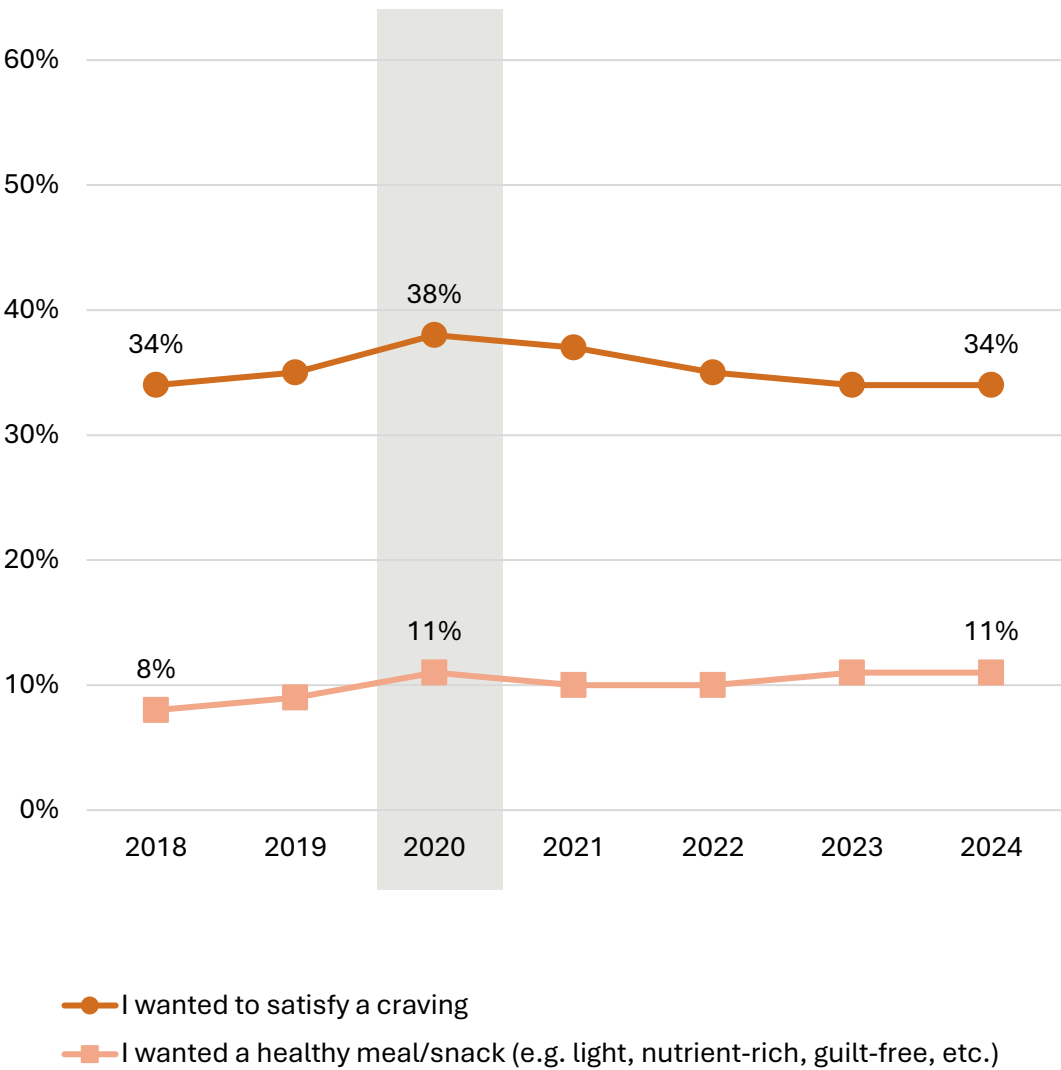
And so, it seems the word of the year is uncertain. Fortunately for us, Technomic has historical data to suggest how uncertainty drives consumer choices.

The chart to the right provides a historical snapshot of primary need states that influenced a recent restaurant occasion. In 2020, the most

recent and significant period of global uncertainty, the need to satisfy a craving spiked at 38%. More consumers than ever turned to restaurants to satisfy their cravings. While health shows growing importance, it still sits below cravings as a top restaurant driver.

The good news is that craveability spans across all cuisines, so there is tremendous opportunity for operators and suppliers to actively promote their craveable items—whether they are sweet or savory—and, in turn, drive traffic to their restaurants.

PRIMARY REASON FOR ORDERING/VISITING A RESTAURANT



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

Base: 112,000 restaurant consumers ages 18+ per calendar year
Source: Technomic Ignite Consumer

Which markets are China's tea chains entering?

Alongside Mixue Ice Cream & Tea recently becoming the largest chain in the world, other China-born tea operators have rapidly expanded into new markets. Below are a few recent highlights:

- ChaPanda is set to enter France. The [China-based tea drinks QSR](#)—also known as Chabaidao—has entered several international markets since kicking off its global expansion in 2024.
- Charlie's Tea expanded into the U.K. The [China-based tea QSR](#)—also known as Cha Li Yi Shi—currently has an estimated 500 shops in its home market.
- Chagee laid out its growth plans for 2025. The [China-based tea QSR](#) intends to open about 1,000 units in its home market, 50 in Hong Kong, 100 in Southeast Asia and 10 in the U.S.
- More Yogurt is set to enter Canada. The [China-based QSR specializing in yogurt drinks](#) currently has about 1,200 locations in its home market.
- Ningji Lemon Tea expanded into the U.S. The [China-based tea drinks QSR](#) entered the market via a new concept called Bobobaba that serves bubble tea instead of fruit tea.

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

Source: Technomic Global Foodservice Navigator Program

Image Source: [ChaPanda France Instagram](#)



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