# Industry Insights

A roundup of noteworthy foodservice findings
for the week of Oct. 19, 2026

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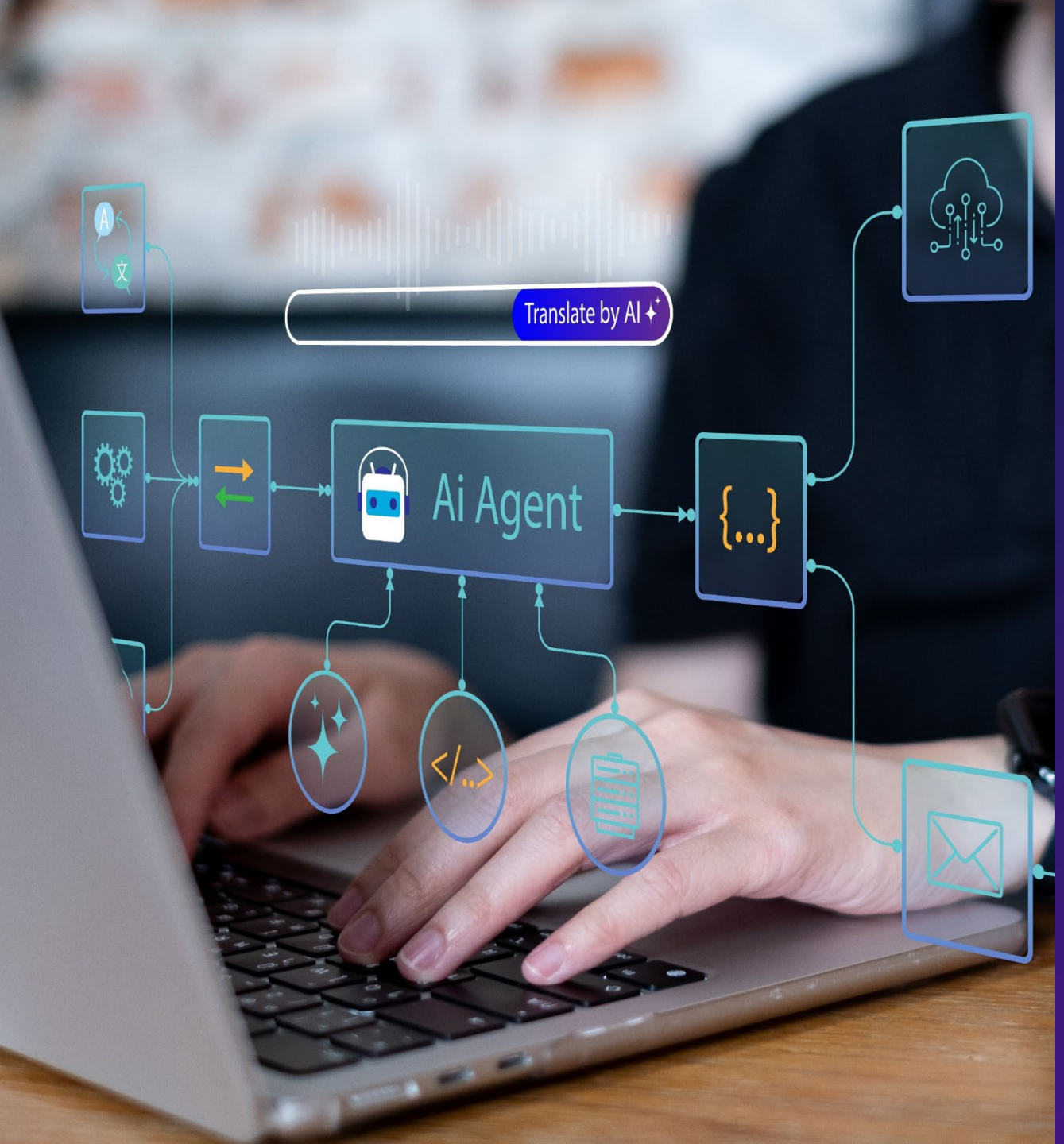


# Foodservice Intelligence, Powered by AI

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# Ignite AI Prompt of the Week

In each Industry Insights, we ask Ignite AI a top-of-mind industry question and share the answer with you. Copy our prompt or write your own to answer your industry questions in our Ignite.

## Key Takeaways

Benihana tops the list with 71.3% of Gen Z diners rating their visit "excellent," outperforming the overall consumer average by 7.6 points, suggesting the brand's experiential dining format resonates strongly with younger consumers.

Coffee and emerging fast-casual concepts (e.g., 7 Brew, Dutch Bros, Tropical Smoothie Cafe, etc.) feature prominently, indicating Gen Z's affinity for beverage-led, convenience-oriented brands with distinctive experiences.

Nothing Bundt Cakes is the only brand on this list where overall satisfaction (73.9%) exceeds Gen Z satisfaction (66.9%),

suggesting the brand may have broader cross-generational appeal rather than a specific Gen Z skew.

Full-service brands on this list (e.g., Benihana, Fogo de Chao, KPOT, Saltgrass, First Watch, etc.) tend to be experience-driven concepts (e.g., hibachi, Brazilian steakhouse, hot pot, etc.), reinforcing that Gen Z values immersive, social dining occasions.

**Technomic Ignite clients: Click here for more**

Source: Technomic Ignite AI

**TOP BRANDS BY GEN Z TOP BOX SATISFACTION**

| Brand | Gen Z Top Box % | Difference vs. All Guests |
|---|---|---|
| Benihana | 71.3% | +7.6 |
| 7 Brew Drive Thru Coffee | 71.2% | +5.3 |
| Fogo de Chao | 70.7% | +4.4 |
| Dutch Bros Coffee | 68.9% | +5.6 |
| KPOT Korean BBQ & Hot Pot | 62.6% | +6.0 |
| In-N-Out Burger | 67.5% | +1.5 |
| Nothing Bundt Cakes | 66.9% | -7.0 |

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Ignite Company

# What share of chain restaurants are run by franchisees?

More than 193,000 of the nearly 263,000 total chain restaurants across the United States are operated by franchisees, representing 73.5% of all chain locations. Corporate-owned and -operated locations comprise the remaining 26.5% of domestic chain restaurant locations and represent nearly 70,000 collective restaurants.

Corporate-operated chain restaurants have achieved average annual location growth of 2.0% over the last three years, outpacing the 1.4% increase posted by franchisee-operated locations.

Head to Ignite today for more performance analysis breakouts between corporate- and franchisee-operated locations across all the industry's top 1,500 chain restaurant brands.

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Note: Data reflects U.S. location counts as of 2025 year-end
Source: Technomic Ignite Company

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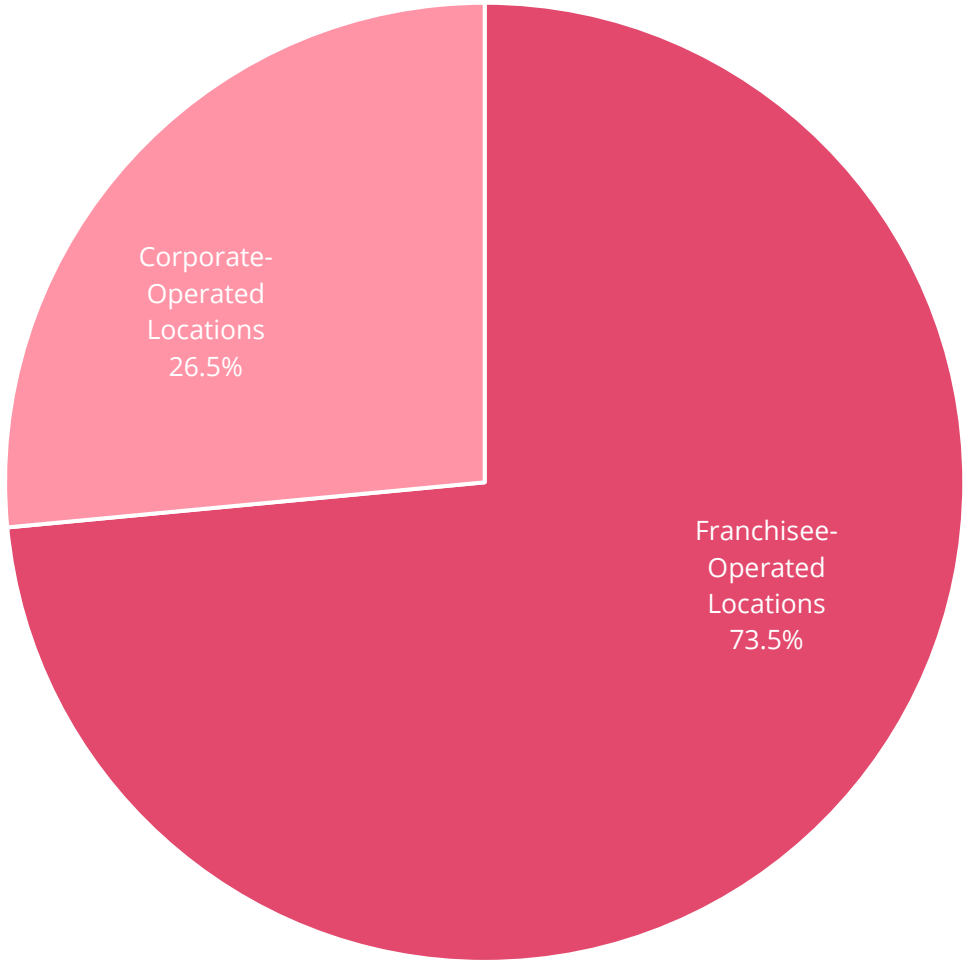
**FRANCHISEE VS. CORPORATE-OPERATED LOCATION SHARE**
TOP 1,500 U.S. CHAIN RESTAURANTS



Ignite Consumer

# Restaurants must give consumers a reason to leave the kitchen

Interest in cooking and meal mindfulness are on the rise. Cash-strapped consumers are eating out less and cooking more at home. To win them back, operators must deliver something the home kitchen can't, whether that's convenience, experience, quality or value that justifies leaving the house.

Ongoing traffic struggles have been widely reported across the foodservice industry for some time, as headlines have reported more than a few large-scale bankruptcies and outright closures of once mighty restaurant brands.

Inflation and the cost of living will continue to force consumers to make tough decisions about their food spend, often leading to rising at-home food options rather than foodservice.

*Technomic predicts high-profile operators will promote and bring into sharper focus solid reasons for consumers to place that foodservice order or get out and have a restaurant experience.*

**Ignite Consumer clients: Click here for more**

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

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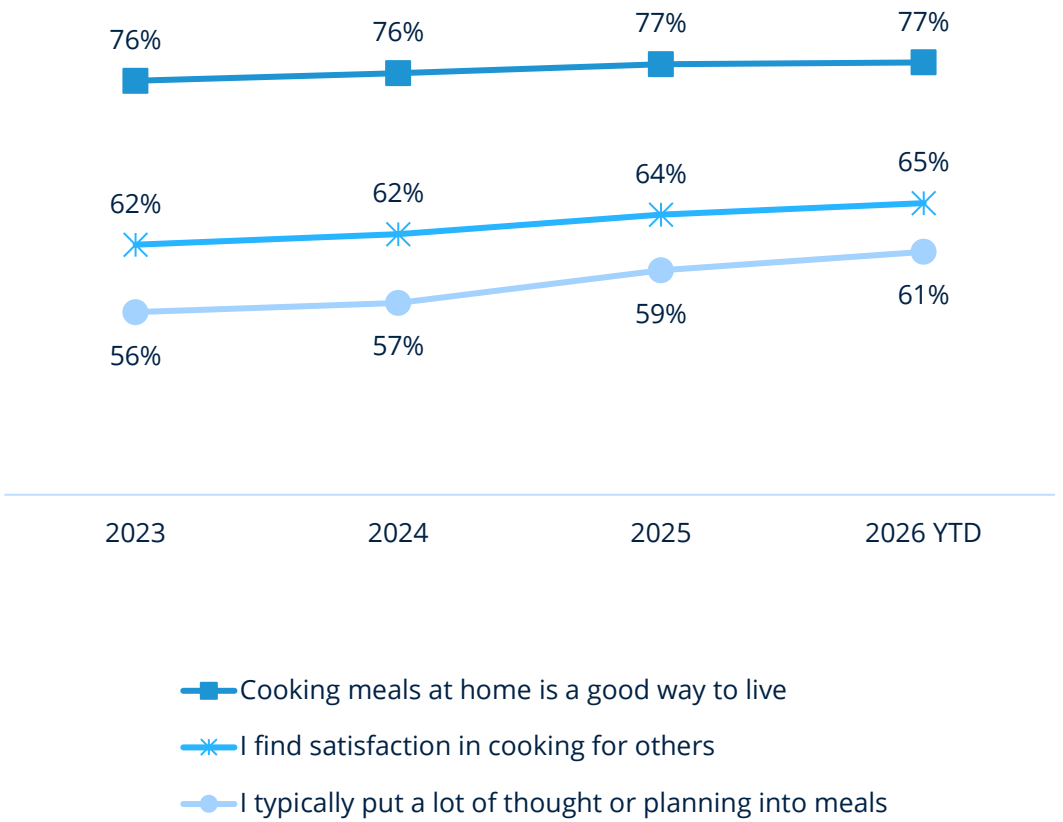
**% OF CONSUMERS WHO AGREE/STRONGLY AGREE WITH STATEMENT**



Ignite Menu

# Three menu trends worth watching

This quarter's *Emerging Eats* report spotlights three menu themes worth watching.

### Beyond the Loaf

Beloved breads and baked goods are taking on unexpected new forms. Operators are giving banana bread and monkey bread the dessert-hybrid treatment with nontraditional flavors, while mixologists are turning bread into cocktail inspiration.

### Experimentation With Trendy Sauces & Condiments

Operators are already experimenting with today's buzziest sauces and condiments. Chefs are revamping Mexican salsa macha and chamoy with new flavors like blackberry and plum, while menuing Korean gochujang and Middle Eastern tahini in unexpected mealparts, such as desserts and cocktails.

### Fat Focus

Chefs are celebrating fat as a featured ingredient rather than hiding it. For example, bone marrow is becoming spreadable condiments like marrow butter for oysters and "marrownaise" for burgers, as well as whipped into potatoes. And following tallow and schmaltz trends, lard is also taking the spotlight.

**Ignite Menu clients: Click here for more**

Source: Technomic Ignite Menu
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Ignite Global

# New markets coming to renamed global program

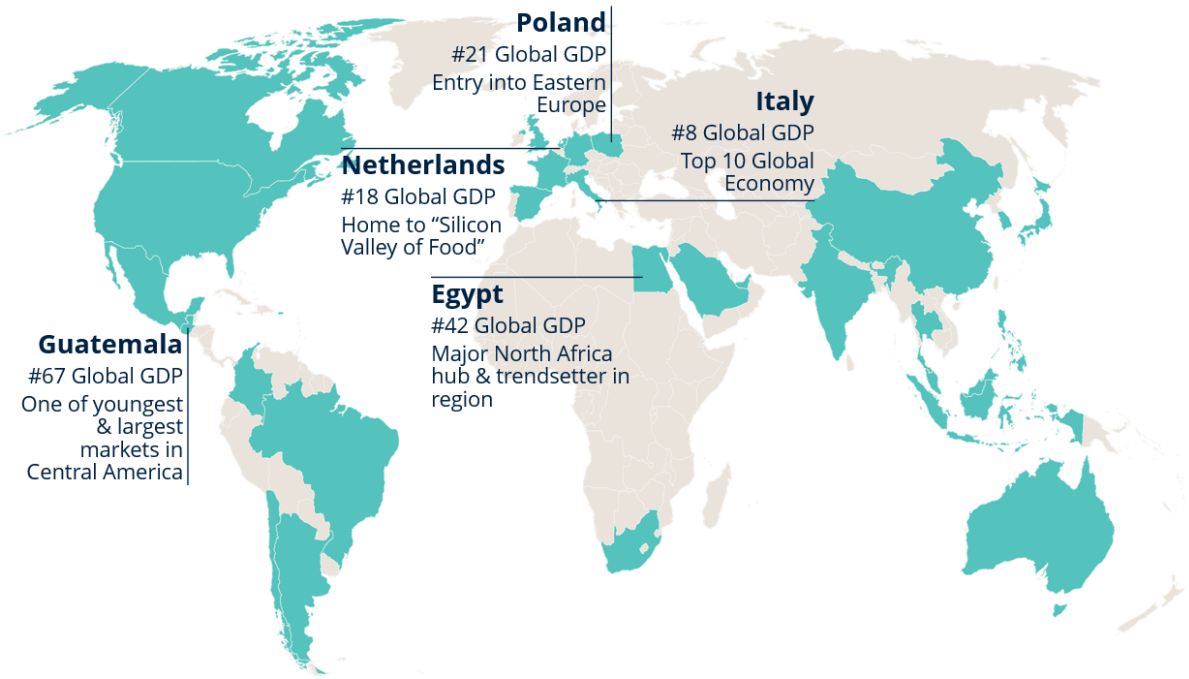
Starting in 2027, Ignite Global, previously known as Global Foodservice Navigator Program, will be adding five new markets to its ongoing global coverage.

Italy, the Netherlands, Poland, Egypt and Guatemala will bring the total number of our industry-leading restaurant and foodservice research to 30 markets worldwide.

These markets span key international economies, including some of the largest GDPs in the world and critical players in global foodservice. This list includes major regional economies, such as Egypt and Guatemala, alongside the Netherlands, home to the "Silicon Valley of Food."

Our global chain news coverage has already begun to cover these new markets. Menu data and trend content will arrive at the start of the new year, with leading chain data shortly after.

Ignite Global clients: Click here for more




## Initiating coverage of five new markets in 2027

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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?**
Reach out to us today.

312-876-0004
info@technomic.com
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