

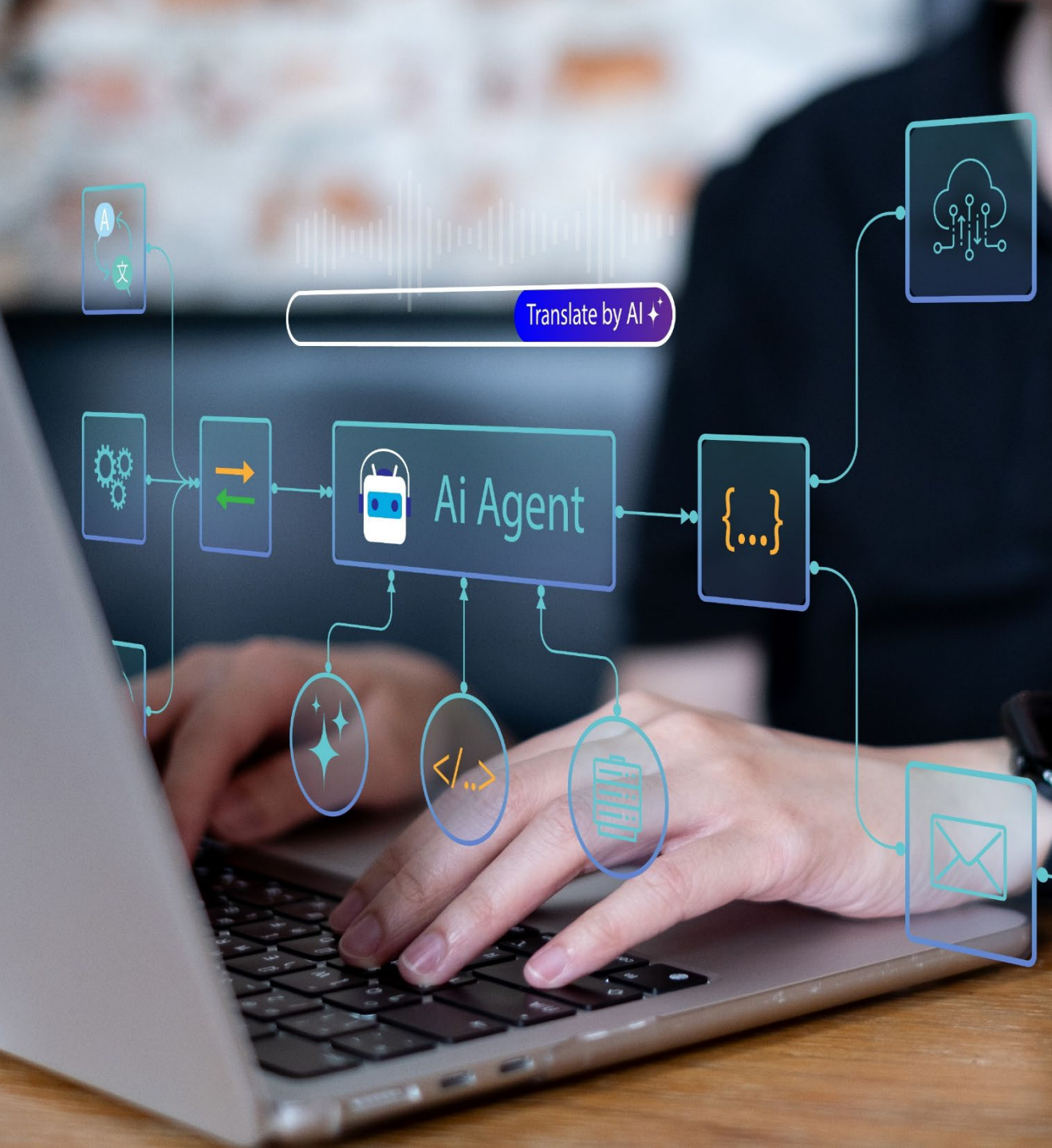
Industry Insights

A roundup of noteworthy foodservice findings
for the week of October 5, 2026



Image Source: Shutterstock

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What if you could ask your data anything?

Which chains are growing fastest?

What menu trends are gaining momentum?

Where are my best opportunities for growth?

Ignite AI Edge delivers instant answers, powered by Technomic's industry-leading intelligence and advanced AI.

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These chains have added 1,000+ units over the last decade

Led by Starbucks, Jersey Mike's Subs and Domino's, 11 chain restaurant brands have expanded by over 1,000 domestic locations during the last decade, with the group accounting for over 70% of all new U.S. chain restaurant location development during the period.

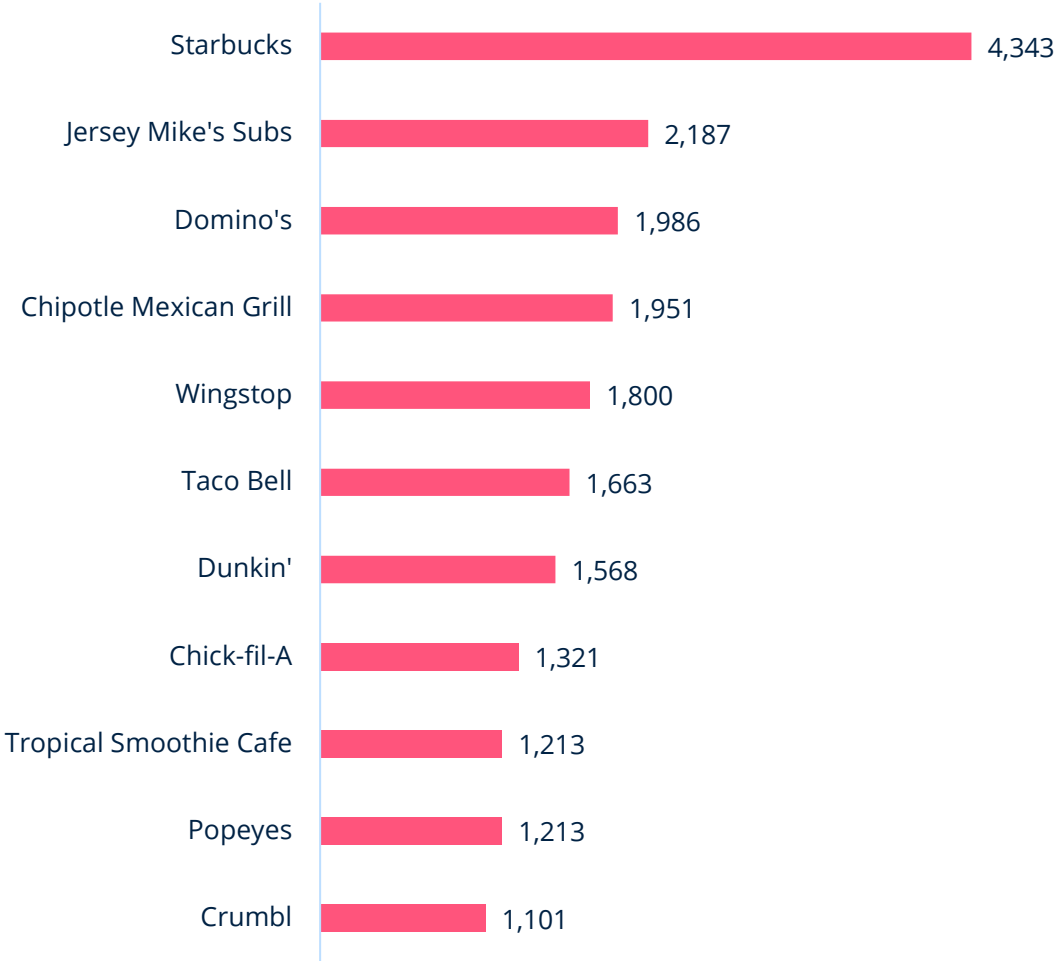
Starbucks saw nearly double the number of net openings as the next closest chain, surging from 12,521 U.S. units in 2015 to 16,864 units as of 2025 year-end. The chain has averaged 430 net new openings per year since 2015.

Head to Ignite today for more long-term sales and location performance trends for the industry's top 1,500 chain restaurant brands.

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Source: Technomic Ignite Company

FASTEST-GROWING CHAIN RESTAURANTS
2015-2025 NET U.S. LOCATION GROWTH



Off-premise dining behavior evolves as economic pressures rise

Consumers report that carryout now leads in order frequency at 45% of monthly orders, while delivery share has declined to 25%, largely in response to rising costs*. Compared to 2024 data, there is a clear migration from one to the other as consumer budgets are pinched.

The reasons behind this trade-off are straightforward and financially driven. Delivery fees have become prohibitively expensive for some consumers and, when stacked with inflated menu prices, the total cost feels unjustifiable to budget-conscious diners.***

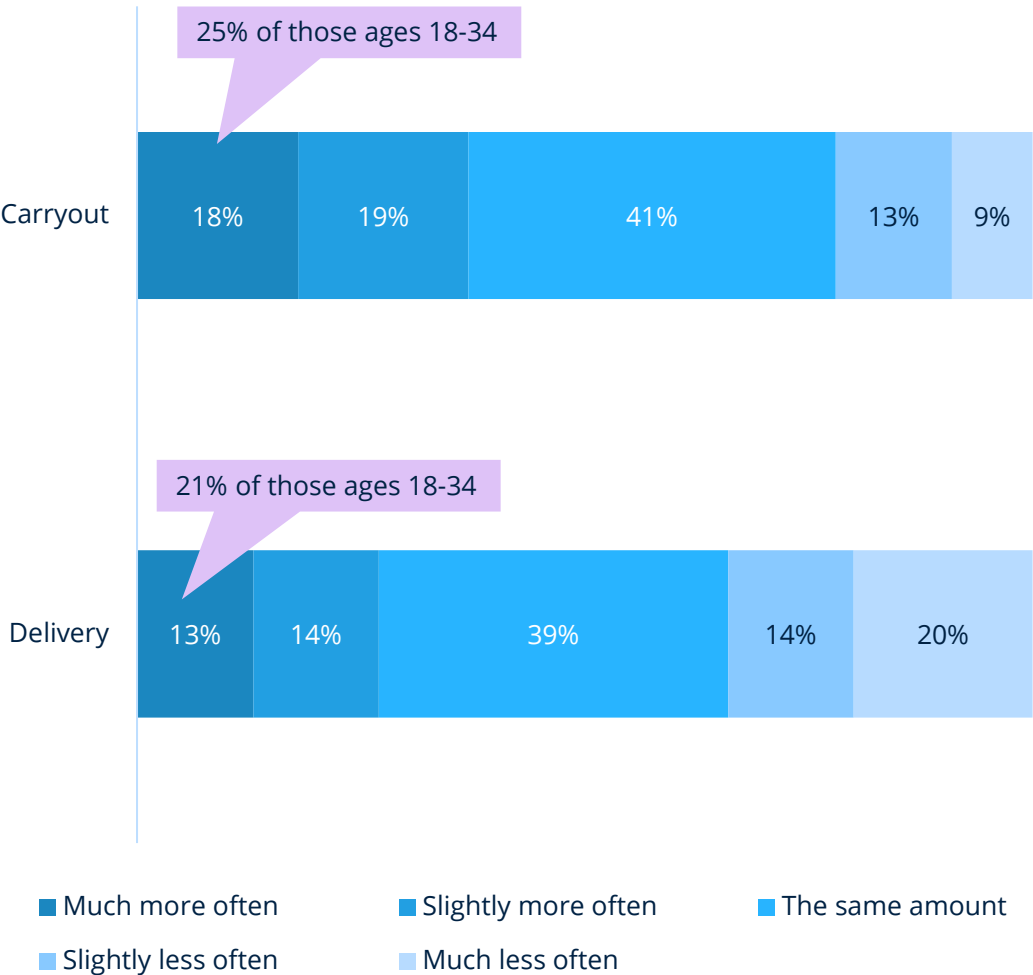
Perceived value for carryout is stronger, with consumers stating this channel offers better deals or specials and more reliable food quality. With 83% of consumers changing behavior due to rising prices, carryout provides the value equation they are seeking: convenience without the premium price tag.****

If prices continue to climb, this trend may accelerate. Consumers expect to reduce order frequency across the board, but delivery faces a steeper decline than carryout.

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

Base: 1,502 consumers who order carryout or delivery at least once a month
*Q: What percentage of your orders from restaurants or other foodservice locations are for dine-in, delivery? The total must equal 100%.
**Q: Compared to a year ago, are you ordering carryout or delivery more often, the same amount or less often?
**Base: 505 consumers who are ordering delivery less often than a year ago
***Q: You indicated that you are ordering delivery less often from at least one foodservice segment compared to a year ago. Why are you ordering delivery less often?
****Base: 548 consumers who are ordering carryout more often than a year ago
****Q: You indicated that you are ordering carryout more often from at least one foodservice segment compared to a year ago. Why are you ordering carryout more often?
Source: Technomic 2026 Delivery and Takeout Consumer Trend Report

CHANGE IN CARRYOUT AND DELIVERY ORDER FREQUENCY COMPARED TO A YEAR AGO**



Trends among today's top-rated limited-time offers

Per Technomic's recently launched *LTO Thought Starters*, notable patterns are emerging from highly rated limited-time offers that recently hit the market.

Dirty Sodas

Molten Mallow **Dirty Soda**—Dr. Scoots soda mixed with marshmallow flavor and sweet cream over ice with mallow drizzle (Scooter's Coffee) *60% of consumers deem unique or very unique*

Founders Cherry Vanilla **Dirty Soda**—vanilla syrup, grenadine and Pepsi mixed and topped with cold foam and a maraschino cherry (Famous Dave's) *63% of consumers likely or much more likely to visit*

Island **Dirty Soda**—real mango syrup, lime juice, half and half, and lemon-lime

soda (Drake's Come Play) *61% of consumers deem craveable or very craveable*

Yuzu (Japanese Citrus)

Yuzu Dashi Oil Yellowtail—imported yellowtail from Japan that is cut and drizzled in housemade **yuzu** dashi (Kura Sushi) *70% of consumers deem unique or very unique*

King Crab Ceviche—grapefruit, **yuzu kosho**, watercress and citrus vinaigrette (STK) *62% of consumers deem craveable or very craveable*

S.O.S Sangria—sauvignon blanc, **yuzu puree**, lemon juice and soda (Drake's Come Play) *64% of consumers likely or much more likely to visit*

Ranch Sauce Variations

Avocado Ranch Crispy Chicken Burrito—flour tortilla with breaded chicken, cheddar cheese, pico de gallo, lettuce, purple cabbage and **avocado ranch sauce** (Taco Bell) *60% of consumers deem craveable or very craveable*

Peppercorn Ranch Chicken Protein Pocket—tender grilled chicken strips, Monterey cheddar, lettuce, Roma tomatoes, pickles and **peppercorn ranch**, toasted in a tortilla (Subway) *61% of consumers likely or much more likely to visit*

Crunchy Dorado Taco—a crunchy shell filled with shredded chipotle chicken, **chipotle ranch dressing**, crisp lettuce, shredded cheddar cheese and fresh pico de gallo (Taco John's) *66% of consumers likely or much more likely to visit*

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

Base: Approx. 250 LTOs

Source: Technomic Ignite Menu Consumer-Rated LTOs, August 2026

Image Source: Shutterstock



Pizza around the world

City 1+1 Pizza plans to reach 500 units by 2030. Founded in 2008, the [China-based pizza QSR](#) currently has about 170 locations.

Papa Johns is set to enter Brazil. The [U.S.-based pizza QSR](#) is currently seeking a development partner for the market.

Pizza Hut operator Yum China plans to accelerate unit expansion of the brand in China. The [multichain operator](#) plans to open about 800 locations of the CDR specializing in Italian fare per year, up from a previously planned 600 per year.

Pizza Hut operator PT Sarimelati Kencana launched a new spinoff concept. Called Fresh Batch, the new concept from the [Indonesia-based operator](#) specializes in sourdough pizzas in a contemporary QSR setting.

Pizza Pilgrims is set to enter Germany. The U.K.-based pizza CDR and its [local operating entity L'Osteria](#) are both owned by McWin.

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

Image Source: [Fresh Batch Indonesia Instagram](#)

SO FRESH IT'S A FLEX



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.

Using data from

Company & Industry

Ignite AI provides insights from Technomic's research data. While we strive for accuracy, validate critical insights against sources.

Which metro areas are growing faster than the industry average?

Clear

In 2025, **159 U.S. metro areas** outpaced the national industry foodservice growth benchmark of **+2.28% nominal growth** (year-over-year). The chart to the right highlights the top outperformers.

Key Regional Patterns

Southeast / Sun Belt Surge: Florida (Ocala, Lakeland, Port St. Lucie, Homosassa Springs, The Villages) and the Carolinas (Myrtle Beach, Spartanburg, Hilton Head, Charleston, Raleigh, Charlotte) dominate the high-growth tier, driven by population migration and tourism.

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

Source: Technomic Ignite AI

Mountain West Expansion: Utah (Provo, St. George, Salt Lake City, Ogden, Logan) and Idaho (Boise City, Coeur d'Alene) reflect strong demographic growth and an expanding consumer base.

In 2026, **131 U.S. metro areas** are forecast to outpace the national foodservice industry average of **+4.5% nominal growth** year-over-year. Outperformance is concentrated across Mountain West, Southeast, and Sun Belt corridors — with Utah and Florida markets leading the charge at rates more than double the national benchmark.

HIGH-VALUE ABOVE-AVERAGE MARKETS (3.5%–5.0%)		
Metro Area	2025 FS Sales (\$B)	YoY Growth
Charlotte, NC	\$8.59B	4.91%
San Diego, CA	\$11.51B	4.86%
Atlanta, GA	\$20.02B	4.09%
Austin, TX	\$8.33B	4.67%
Phoenix, AZ	\$14.80B	4.52%
Denver, CO	\$9.55B	4.43%
Columbus, OH	\$6.11B	4.47%



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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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312-876-0004
info@technomic.com
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