

2026 State of the Industry





Technomic
by informa...

UNPARALLELED DATA AND EXPERTISE

For 60 years, Technomic has been the trusted authority in the foodservice industry, delivering unrivaled insights that drive growth, innovation and empower business decisions.

We provide detailed industry forecasting, market sizing, menu innovation and consumer research, across 25 global markets.

The New Ignite AI Edge Platform

Transactions

Millions of distributor transactions

Traffic leveraging 30 million+ consumer monthly purchases

Menu

Pricing intelligence across 200,000+ locations

Weekly consumer appeal for flavors and ingredients

Operator

Robust, vetted panel of 20,000+ operators

Forecasting 4 years for markets and segments

EXPERT-LED INNOVATION

BETA

Start chatting with Ignite AI to refine your search

Back To Search



Hello 👋 I'm your Ignite AI assistant

What aspect of foodservice industry would you like to explore?

EXPLORE IGNITE COMPANY WITH THESE SUGGESTIONS



Which foodservice companies opened the most locations last year?



How much are restaurant sales forecasted to increase or decrease this year?



Which metro areas are growing faster than the industry average?



How are the top chain restaurants performing?

AI is using data from Reports Company & Industry

What are the fastest-growing metro areas for the fast casual segment? Create a table that ranks each MSA on growth, number of fast casual restaurants (competition), and average demographic skews.

Clear

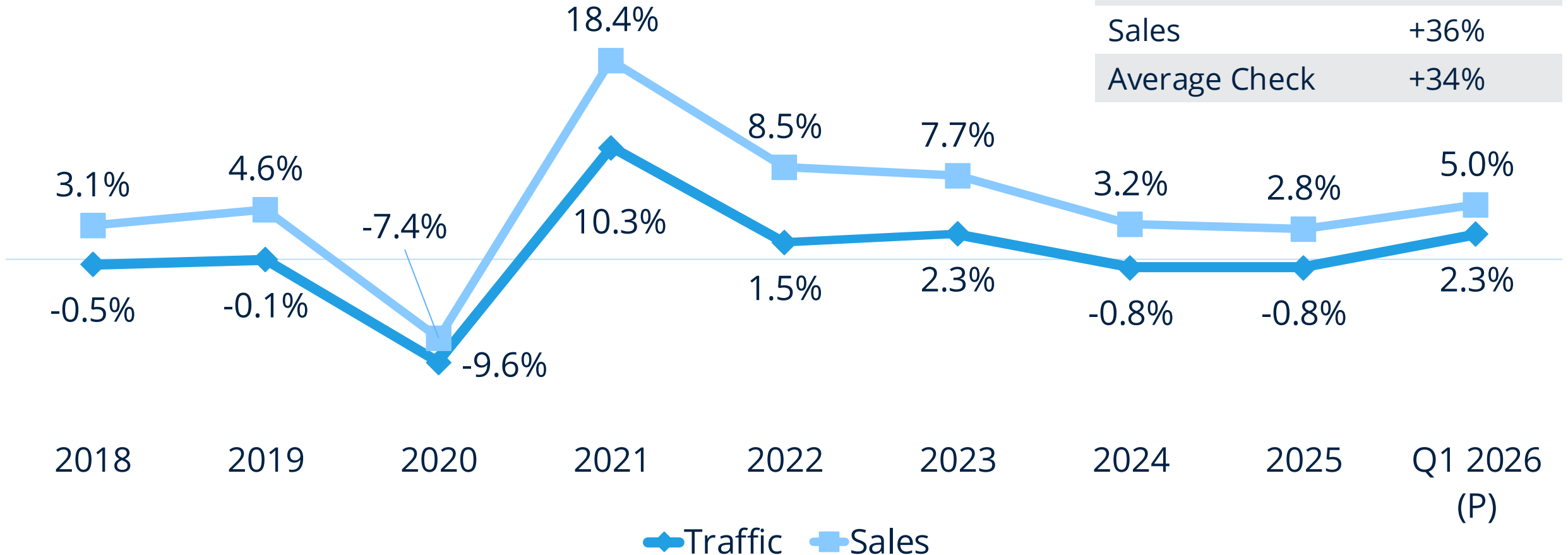
Ignite AI (Beta) is an AI-powered assistant designed to provide foodservice insights. While we strive for accuracy, responses may occasionally vary and should be reviewed for critical decisions.

TOP CHAIN TRAFFIC & SALES GROWTH

CUMULATIVE GROWTH

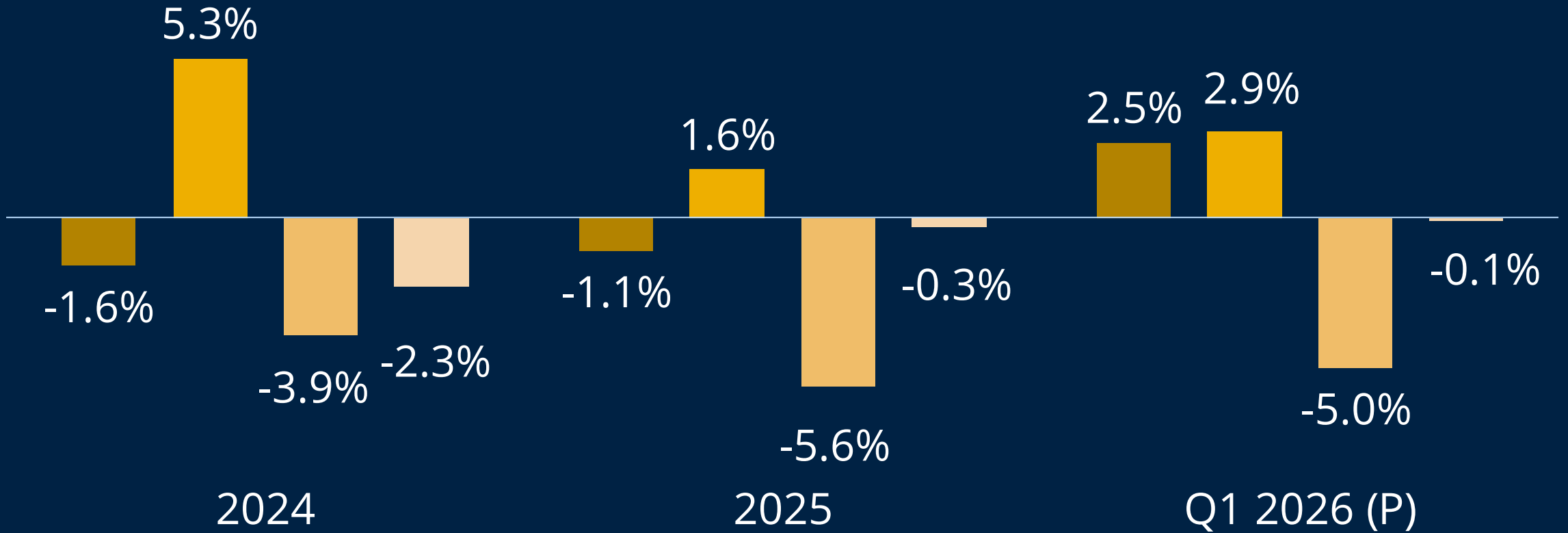
2019 vs. 2025

Traffic	+2%
Sales	+36%
Average Check	+34%



Source: Technomic Monthly Chain Performance Tracker
(P=Preliminary Estimate)

TOP CHAIN TRAFFIC BY SEGMENT



■ Quick service
 ■ Fast casual
 ■ Midscale
 ■ Casual dining

Source: Technomic Monthly Chain Performance Tracker
(P = Preliminary Estimate)

Gas impact causes challenges

OECD Estimates U.S. 2026 Inflation

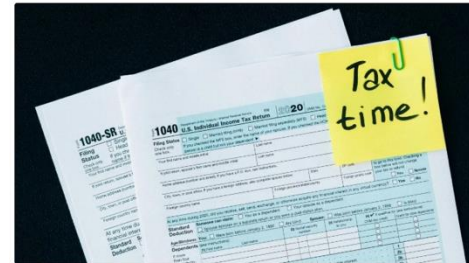
Pre-Iran	Post-Iran
3.2%	4.2%

Source: OECD 2026 Economic Outlook, Interim Report March 2026: Testing Resilience, OECD Publishing

Tax refunds can't outpace gas prices, dampening optimism for restaurant operators

Consumer sentiment has been significantly impacted by quickly rising fuel costs

Alicia Kelso, Executive Editor, Nation's Restaurant News
March 19, 2026 4 Min Read



The Stanford Institute for Economic Policy found that tax refunds won't cover higher gas costs. PHOTO COURTESY OF PEKELS / NATALYA VAITKEVICH



CONTENT SPOTLIGHT
New 2026 Restaurant Guide

INTERIM ECONOMIC OUTLOOK

The conflict in the Middle East is testing the resilience of the global economy

Global GDP growth is projected to remain broadly stable at 2.9% in 2026 before edging up to 3.0% in 2027. However, the evolving conflict in the Middle East weighs on growth and generates significant uncertainty around global demand.

Explore the digital report

Report • 26 March 2026



BUSINESS INSIDER · 7h · on MSN

From panic buying in Chile to \$8 gas in California, photos show how people around the world are grappling with a growing energy crisis

Energy costs are rising globally due to the closure of the Strait of Hormuz during the Iran war. Other supply chains could also be in peril.



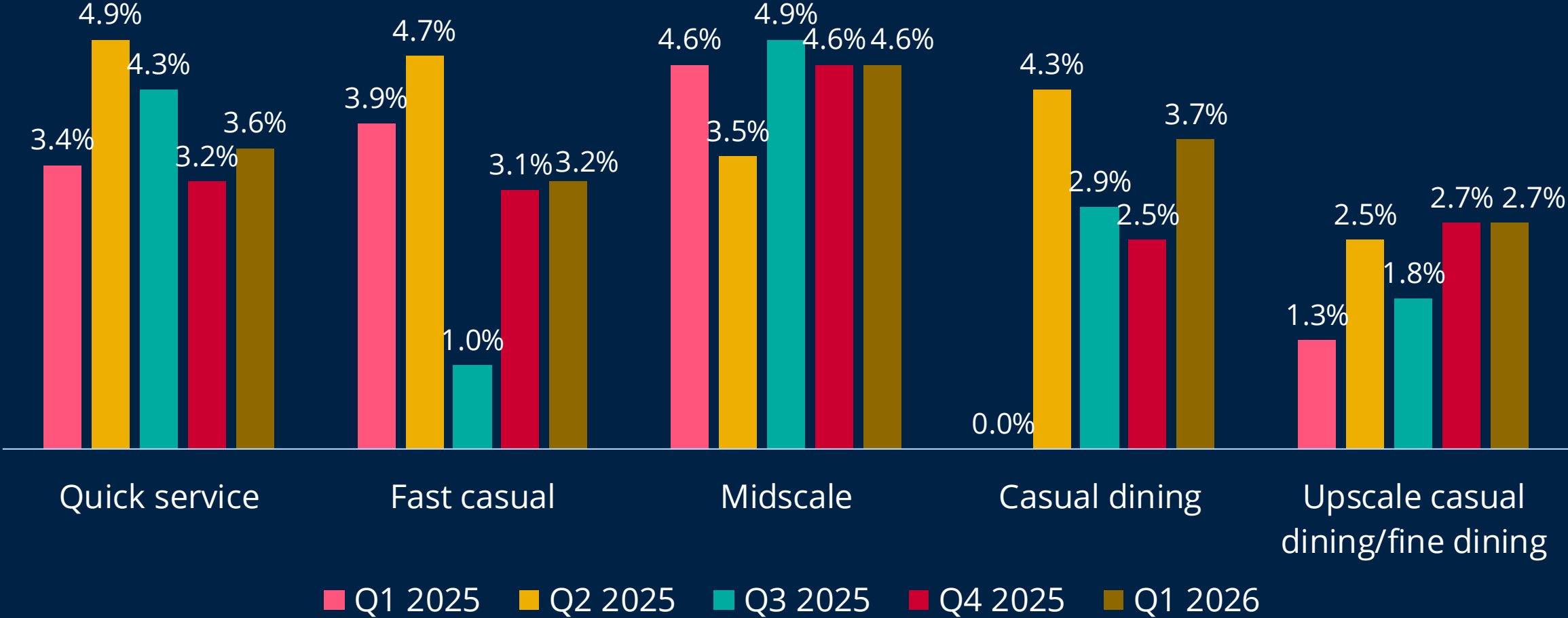
USNews · 1d

US Company CFOs Saw a Solid Economic Outlook, at Least Until War Broke Out, Fed Survey Shows

Tariffs and trade policy remained the top concern among the 473 chief financial officers polled in a quarterly survey ...



2025 QUARTERLY MENU PRICE CHANGE COMPARED TO SAME PERIOD A YEAR AGO



Source: Technomic Ignite Menu Price Pulse

Top 500 Chain Performance Overview

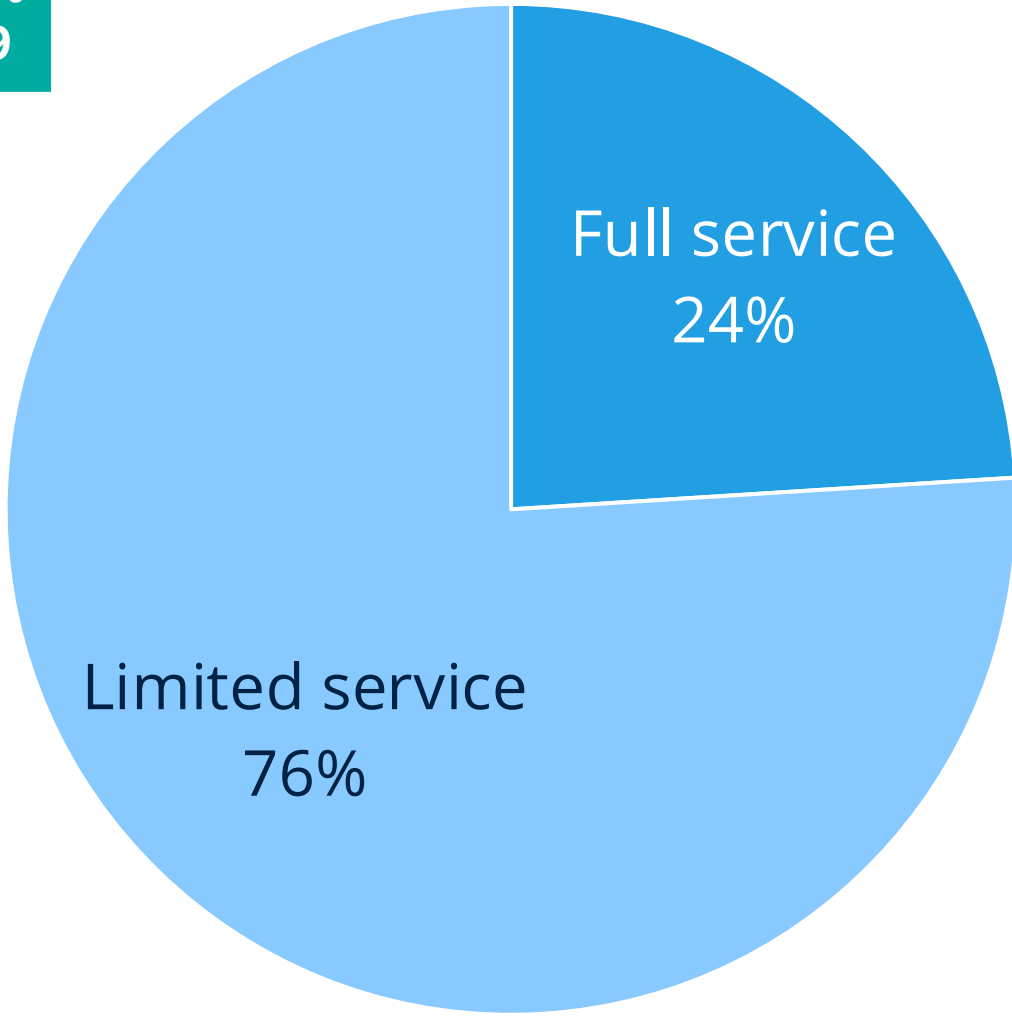
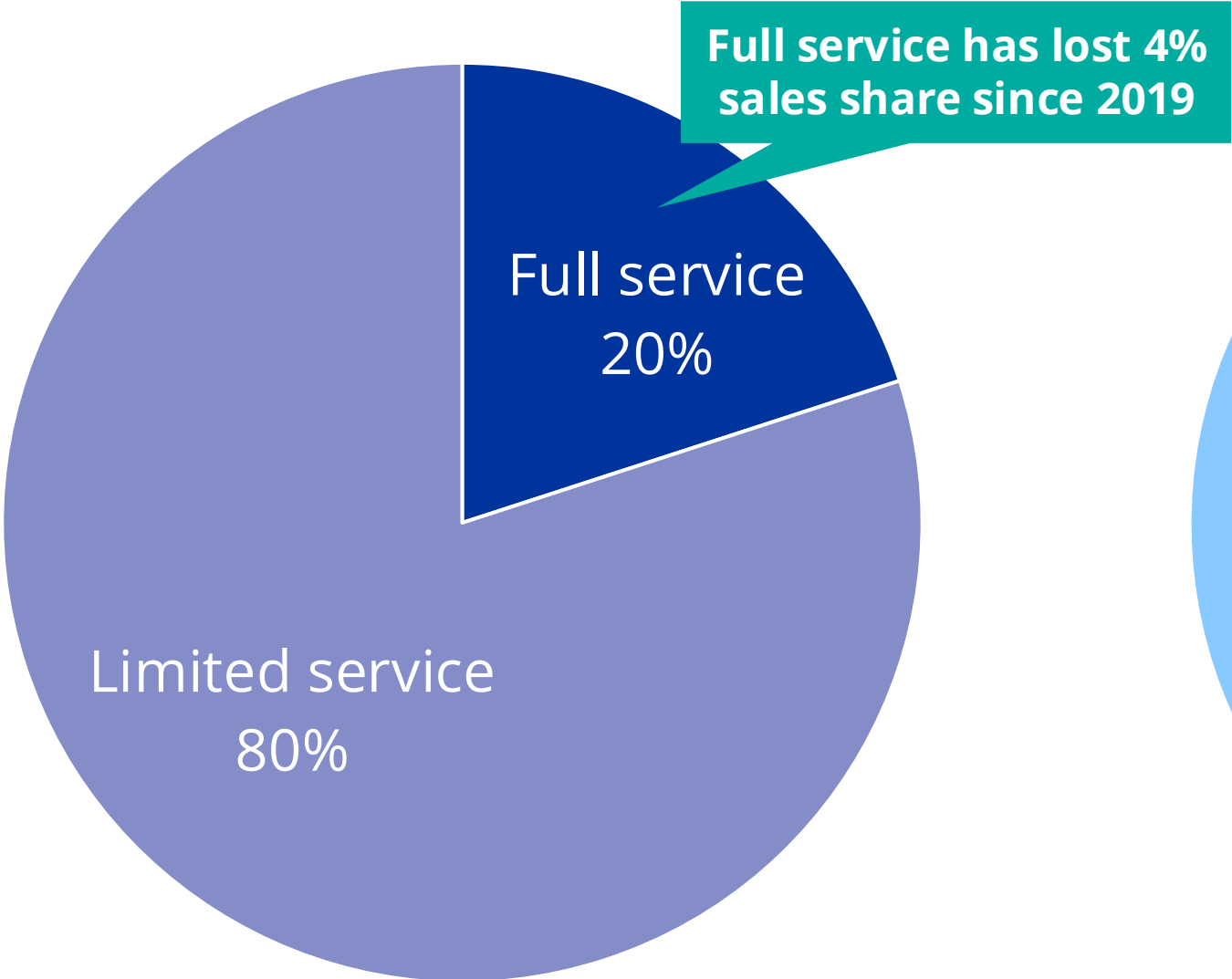


Image Source: Shutterstock

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2025 TOP 500 SALES SHARE

2019 TOP 500 SALES SHARE



Source: Technomic 2026 Top 500 Chain Restaurant Report

Noteworthy movement in the 2025 rankings



Dunkin' (#5) surpasses Wendy's (#6)



Domino's (#9) surpasses Subway (#10)



Chipotle (#7) surpasses Burger King (#8)



Texas Roadhouse (#14) and Chili's Grill & Bar (#16) move up in the ranking; Chili's surpasses Olive Garden (#17)



Fastest-Growing Chains by 2025 Sales Growth



+138%



+65%



+51%



+42%

PARIS BAGUETTE

+41%

4 Disruptors Driving Trends & Innovation



Image Source: Shutterstock

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**Regulatory
& Societal**

GLP-1s

Generational

**Order
Channel
Tensions**

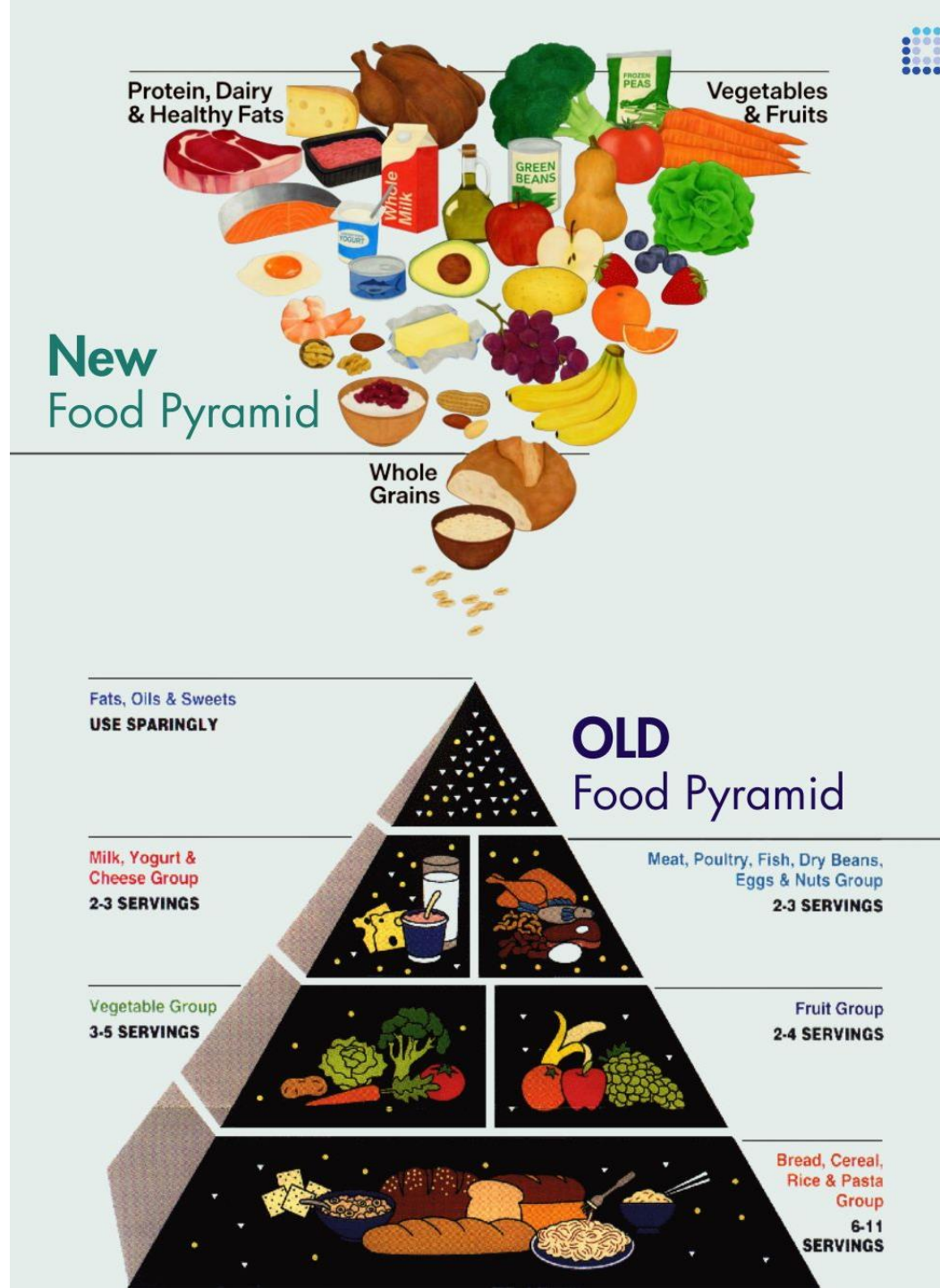
Regulatory & Societal

- New food pyramid
- Cannabis

What Remains:

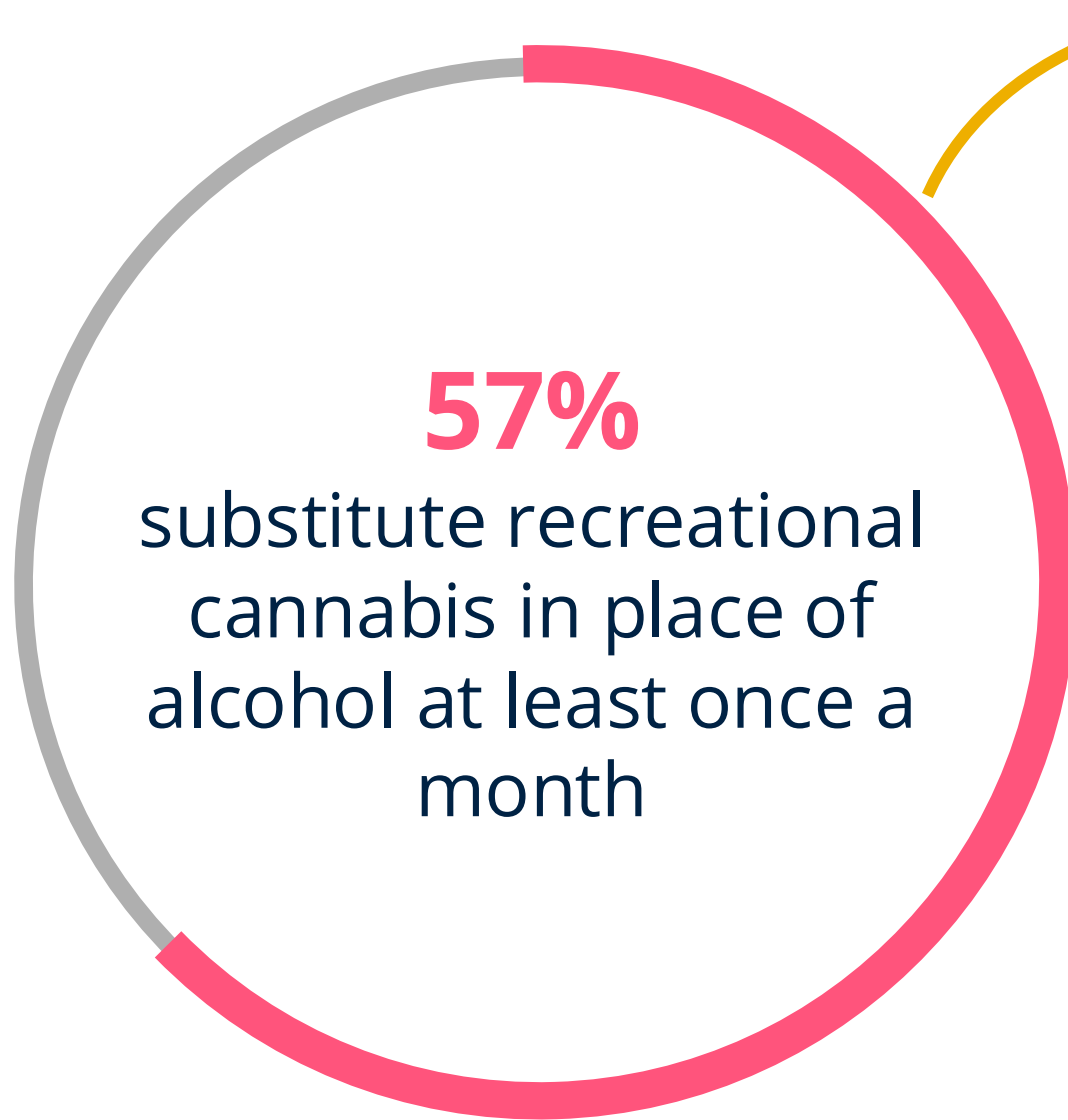
- **Whole grains** are still included, with fiber-rich options prioritized
- **Saturated fat** is still recommended to be limited to <10% of daily calories
- The guidelines continue to influence **school meals, federal nutrition programs and institutional food standards**

Source: U.S. BioTek Laboratories LinkedIn



Changes:

- **Meat, dairy, vegetables and fruits** now at the top
- Greater emphasis on **protein and fats**
- Reduction in **highly processed foods** and **refined carbohydrates**
- A clearer distinction between **whole grains** and **refined grains**



Top Reasons for Substitution

- Prefer the effect
- No hangover
- Enjoy it more than alcohol

Base: 357 consumers ages 21+ who drink alcohol and use recreational cannabis in states where recreational cannabis is legal
Source: Technomic June 2025 Adult Beverage Planning Program consumer survey
Note: During away-from-home occasions

GLP-1s

- Portion control
- Macros focus

Smaller Portion Sizes, Snacks & Shareables

69%

of consumers who currently take or have taken GLP-1s in the past six months say that they are more likely to choose **smaller portion sizes** since they began using the medication*

46%

of consumers usually **skip at least one meal a day or replace it with snacks**, up from 42% in 2021**

*Base: 234 consumers who currently take or have taken a GLP-1 in the past six months

*Source: Technomic January 2025 consumer survey

**Base: 1,501 (2021) and 1,500 (2024) consumers who ever eat snacks

**Source: Technomic 2025 Snacking Consumer Trend Report

Mini Meals

Ono Hawaiian BBQ

Image Source: [Ono Hawaiian BBQ website](#)



Snack Wrap

McDonald's

Image Source: [McDonald's website](#)



Maple Bacon Snack Pack

Hardee's

Image Source: [DoorDash](#)



Craveable Fare With Protein & Fiber Callouts

65%

of consumers seek out **more protein** when using GLP-1s

59%

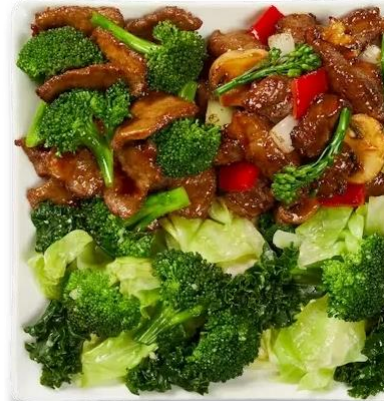
of consumers seek out **more fiber** when using GLP-1s

Base: 234 consumers who currently take or have taken a GLP-1 in the past six months
Source: Technomic 2025 Health in Foodservice Multi Client Study

Pale Egret—vodka, honeydew melon, mint, lemon and whey protein
Chickadee in Boston

Protein & Fiber Plate

Panda Express
Image Source: [Panda Express website](https://www.pandaexpress.com)



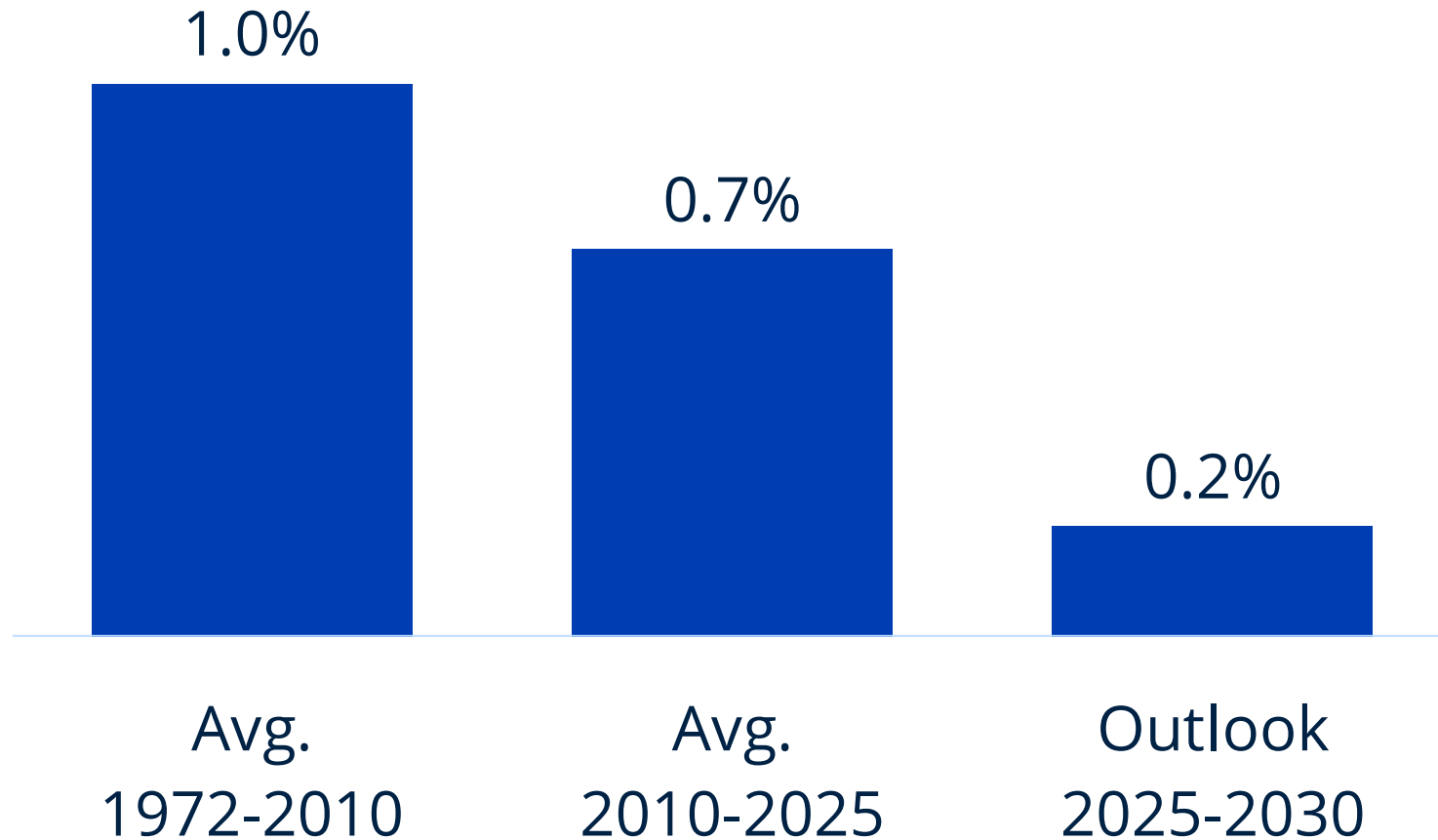
Protein Cold Foams & Protein Lattes
Starbucks
Image Source: [Starbucks website](https://www.starbucks.com)



Generational

- Aging population
- Slowing population growth

U.S. POPULATION GROWTH YOY CHANGE



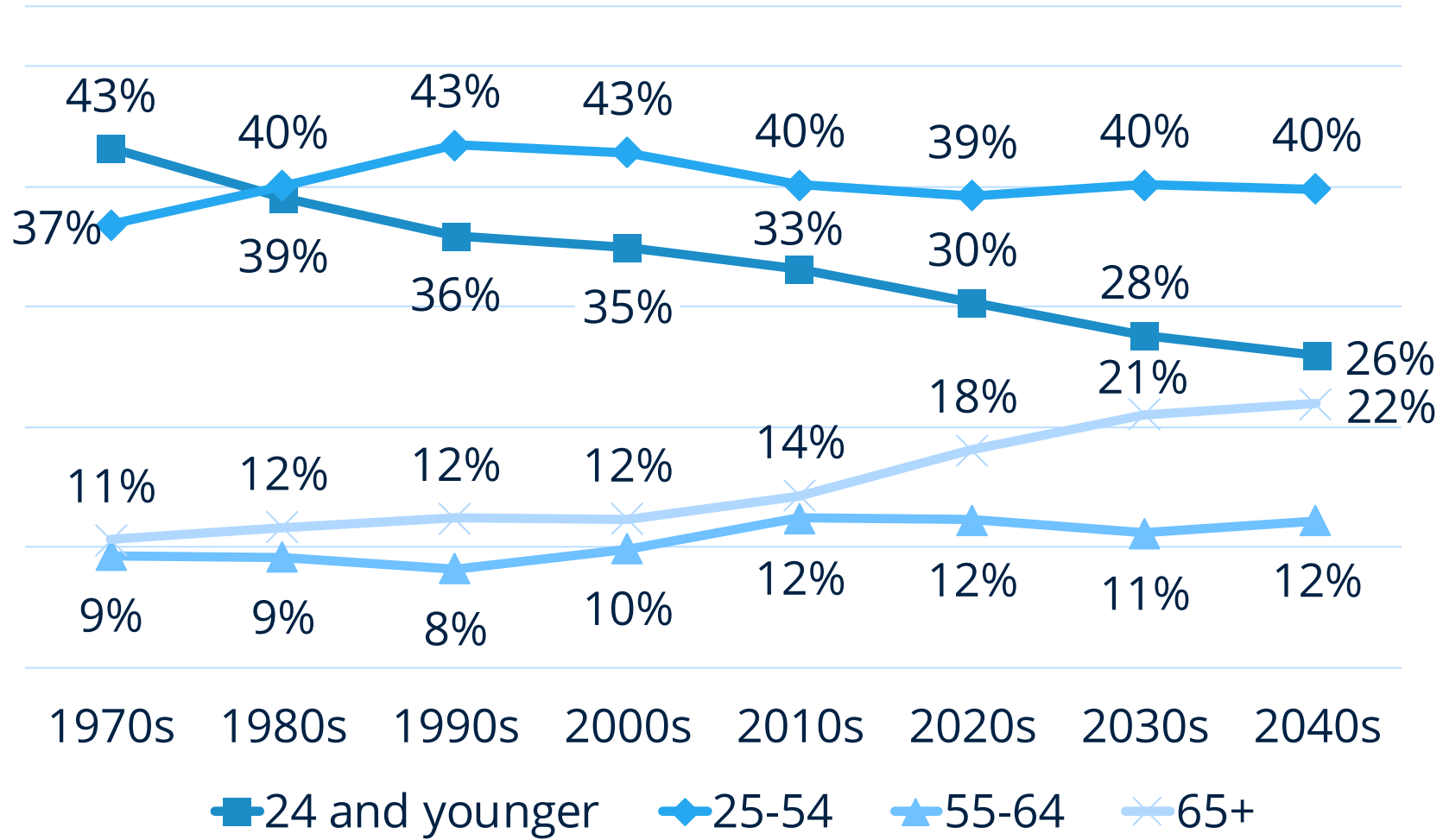
Source: U.S. Census Bureau, FRED and CBO

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U.S. population
growth
decelerating

A slowing
population
impacts overall
industry growth
expectations

% OF TOTAL POPULATION—PROJECTED TO 2049 BY AGE



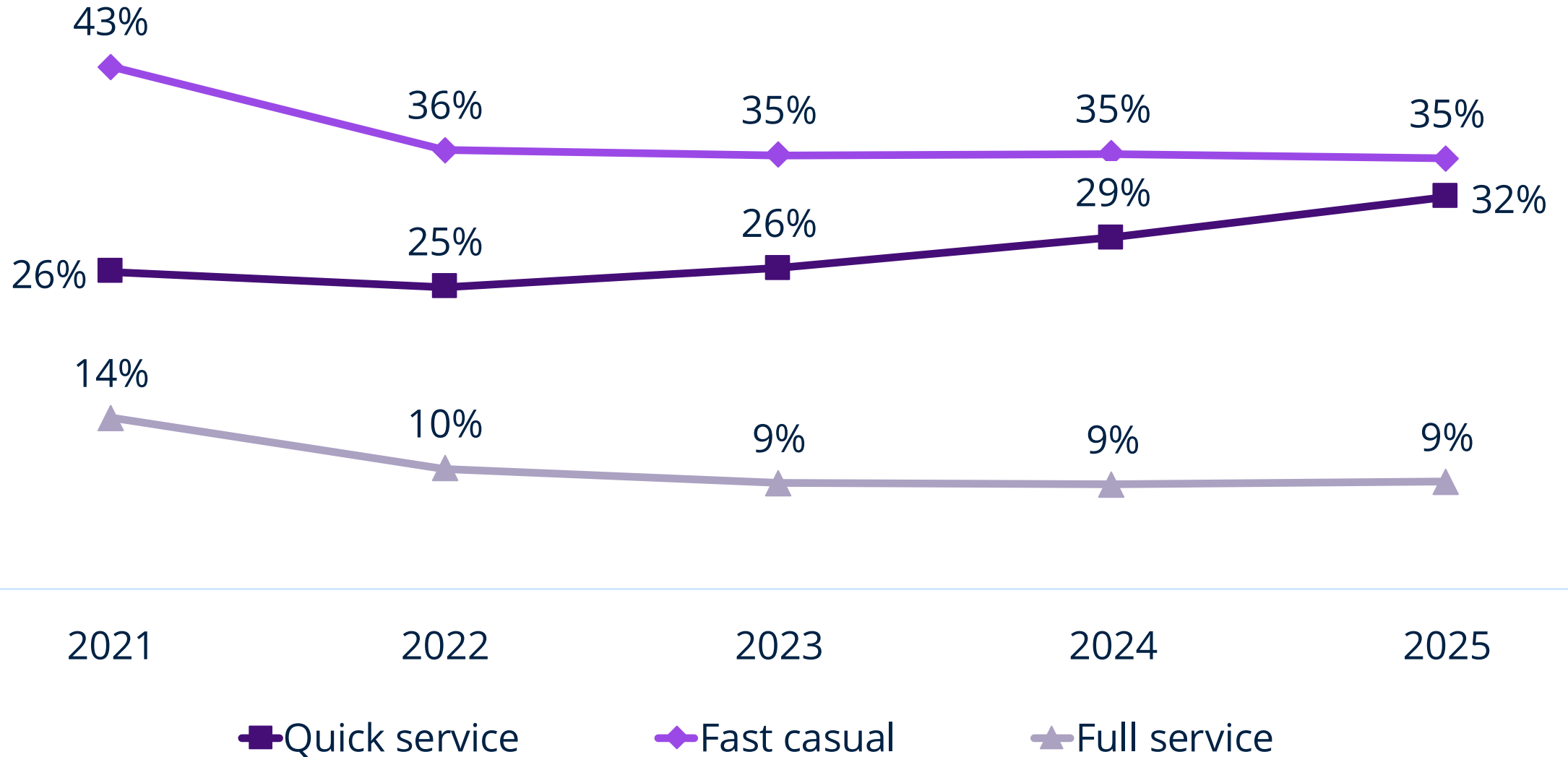
Extend the peak to 54 over the next decade

Base: 112,000 consumers ages 18+ per year
Source: Technomic Ignite Consumer, Q4 2024-Q3 2025

Order Channel Tensions

- Digital vs. enhanced experiences

DIGITAL ORDERS % OF TOTAL ORDERS

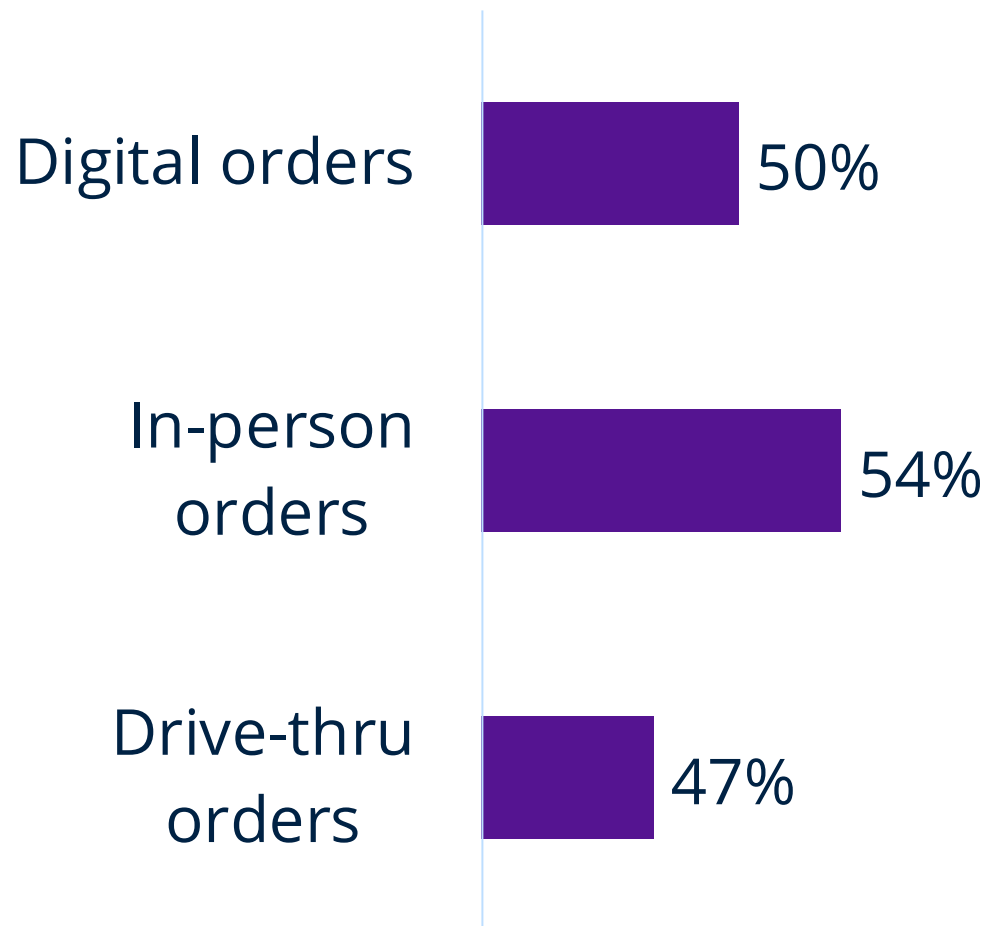


Source: Ignite Company Monthly Chain Performance Visit Tracker

CUSTOMER SATISFACTION

% WHO RATED EXCELLENT ON LAST VISIT

2025



Source: Ignite Consumer

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OPERATIONS

La Madeleine's new menu embraces brunch all day



By **Lisa Jennings** on Mar. 06, 2026

The menu rollout is part of the fast-casual bakery-cafe chain's "Ignite the Joy" transformation plan, which CEO John Dillon said is showing traction in growing sales and traffic.

OPERATIONS

Franchise restaurant chains invest in field operations staff to lift sales



By **Jonathan Maze** on Feb. 23, 2026

Popeyes and Wendy's believe that improving the way their restaurants are run is key to turning their sales around. So they're bolstering their field operations staffs to help franchisees.



How the full-service category is redefining value

NOV 14, 2025 | 5 MIN READ



by **Alicia Kelso**, Executive Editor

State of the Menu 2026



Image Source: Shutterstock

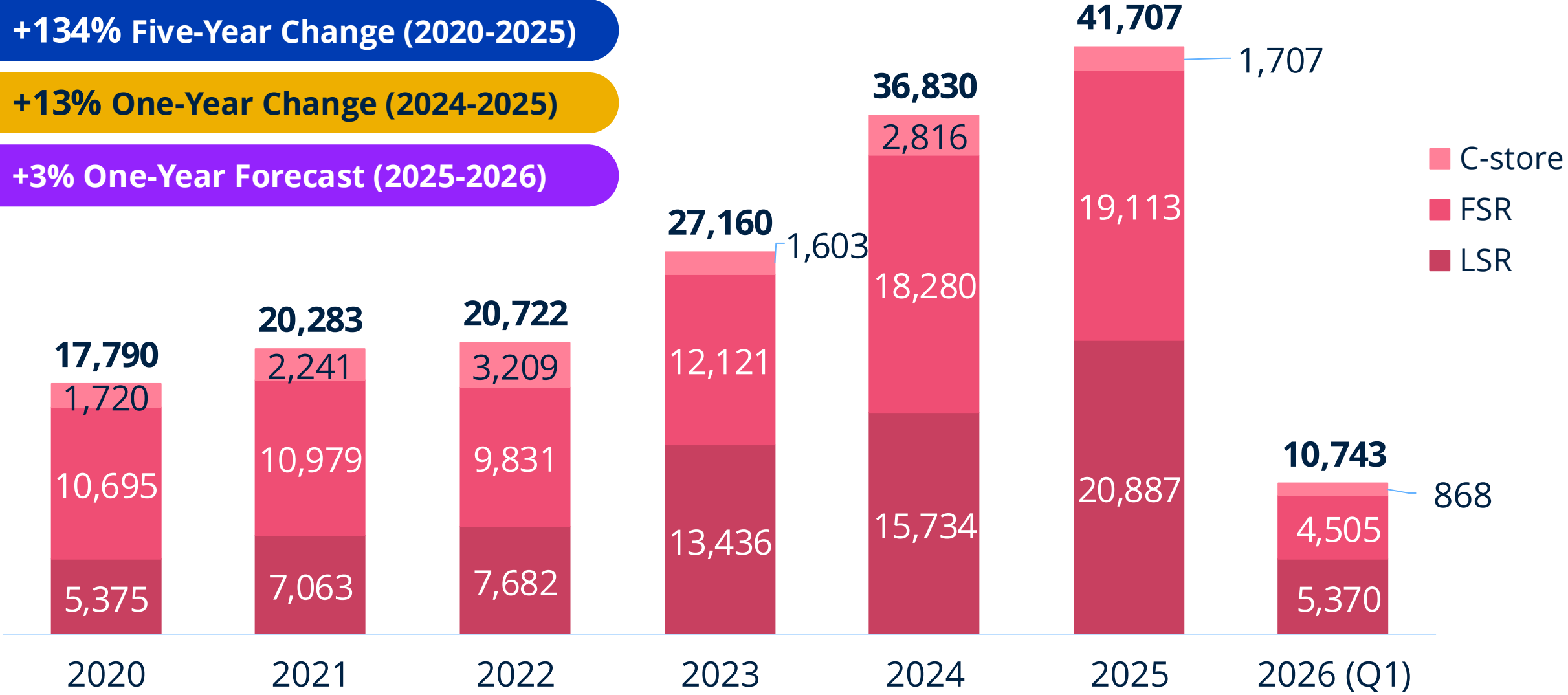
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ANNUAL LTO TRACKER

+134% Five-Year Change (2020-2025)

+13% One-Year Change (2024-2025)

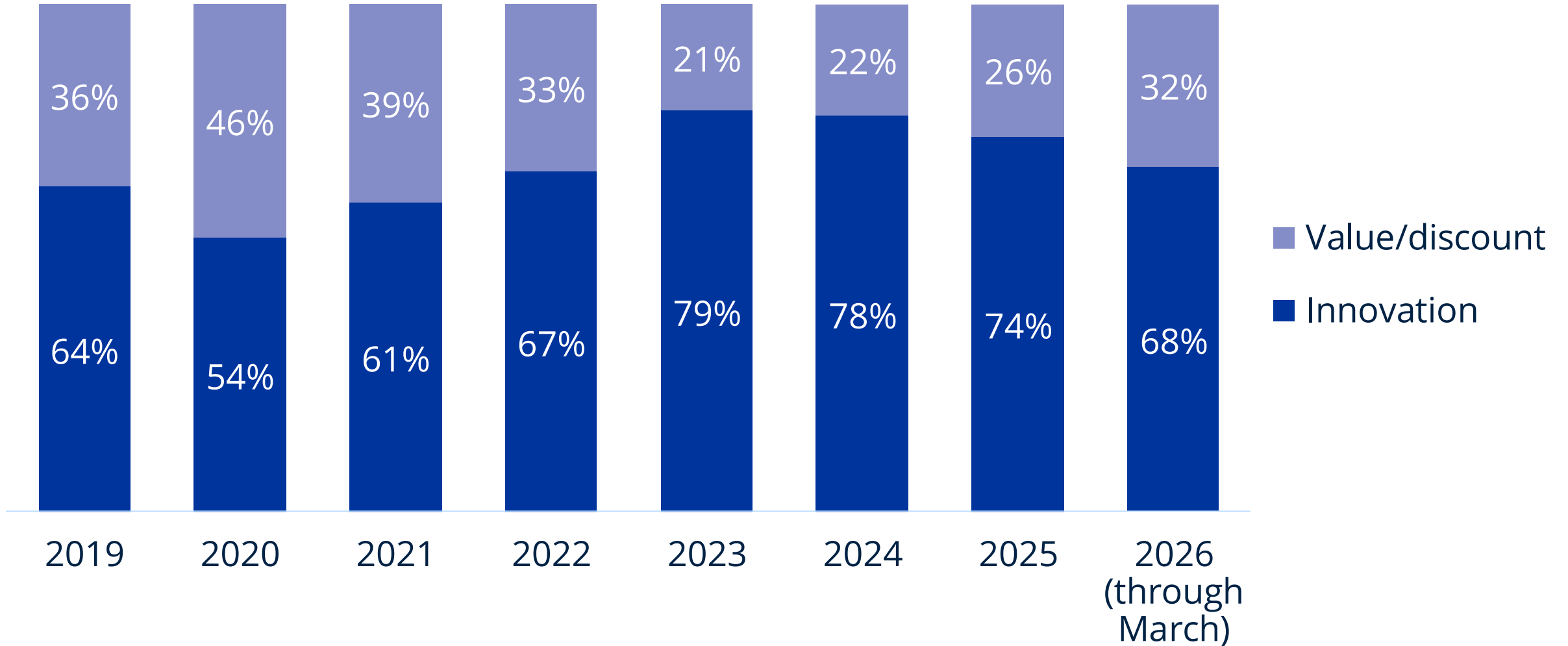
+3% One-Year Forecast (2025-2026)



Source: Technomic Ignite Menu

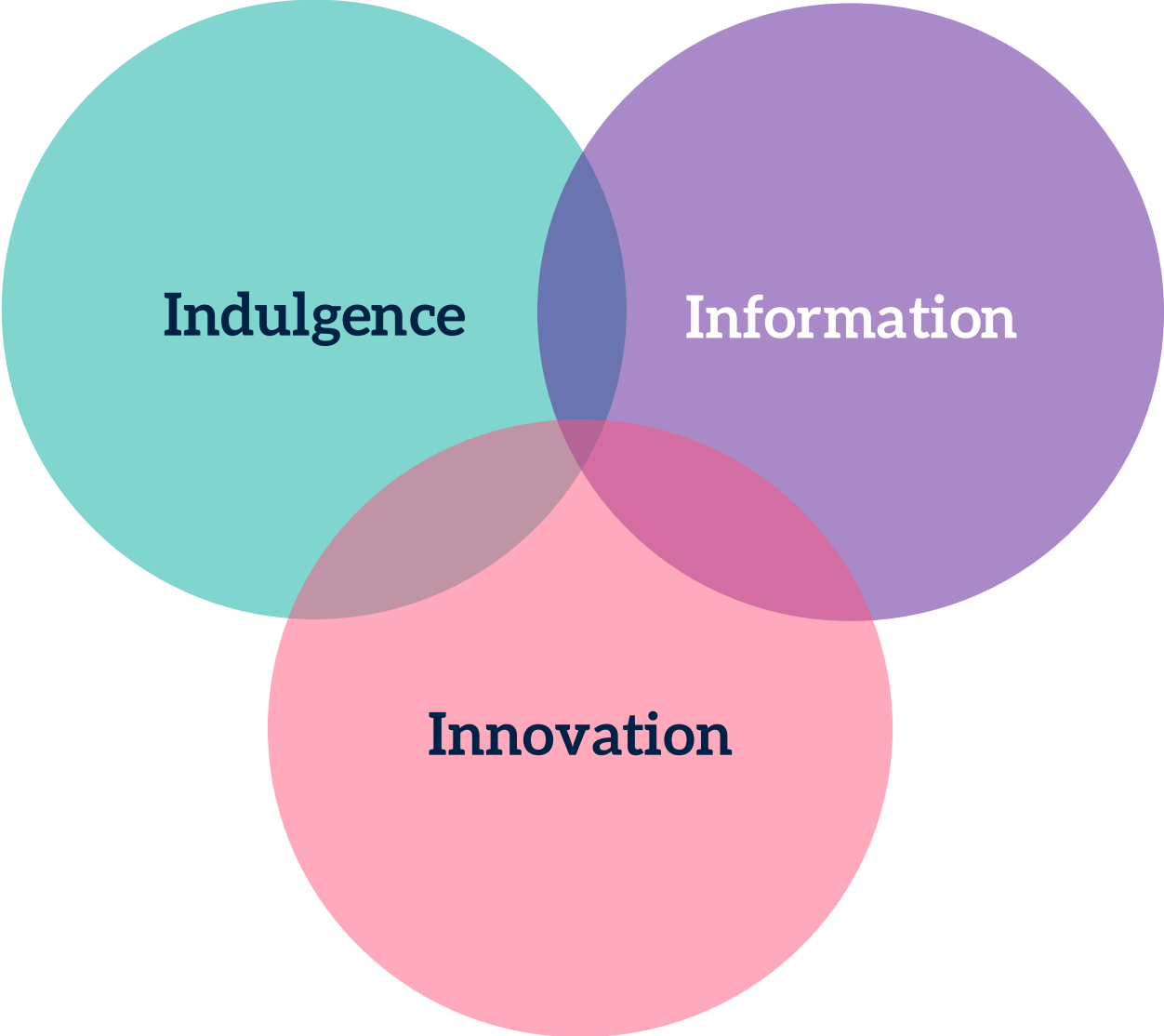
LTO TYPE BREAKOUT

NEW INNOVATIONS VS. VALUE/DISCOUNT OFFERINGS



Source: Technomic Ignite Menu

Trends in Today's Top-Rated Items = The 3 I's



Indulgence

- Loaded carbs
- Surf-and-turf
- Dessert inspirations elsewhere

Ranch Blasted Junkyard Fries

(Krystal Company)



Iced Bananas Foster

(PJ's Coffee of New Orleans)



Surf and Turf

(Cooper's Hawk Winery & Restaurant)



Image Sources: [Postmates](#), [Cooper's Hawk Facebook](#) and [PJ's Coffee Facebook](#)

Information

- Health listings and substitutions
- Animal breed callouts
- Prep, location inspiration and brand mentions

Wagyu Beef and Prosciutto Burger with Snake River Farms American Wagyu ground beef (Thirsty Lion Gastropub)



Gut Health Greek Watermelon Smoothie (Smoothie King)

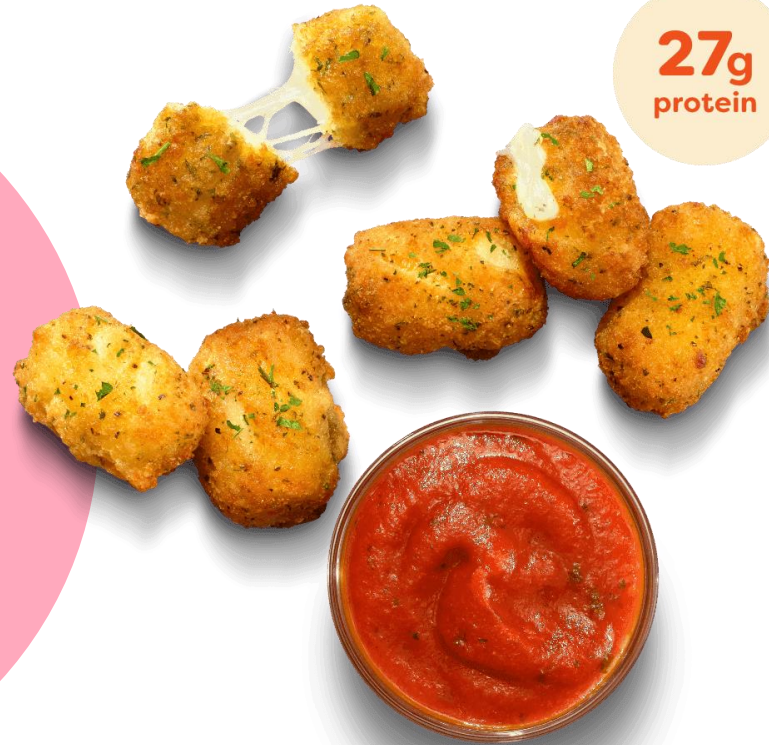


Reese's Peanut Butter Double Stuffed Cookie (Great American Cookies)



Innovation

- Texture or flavor opposition
- Innovative infusions
- Bites and poppers



Crispy 'n Goopy Mozz and Herb Bites

(Jamba)

Hot Honey Glazed Chicken & Bacon Skillet

(Applebee's)



Benedict Smash Burger with chile crisp hollandaise

(Silver Diner)

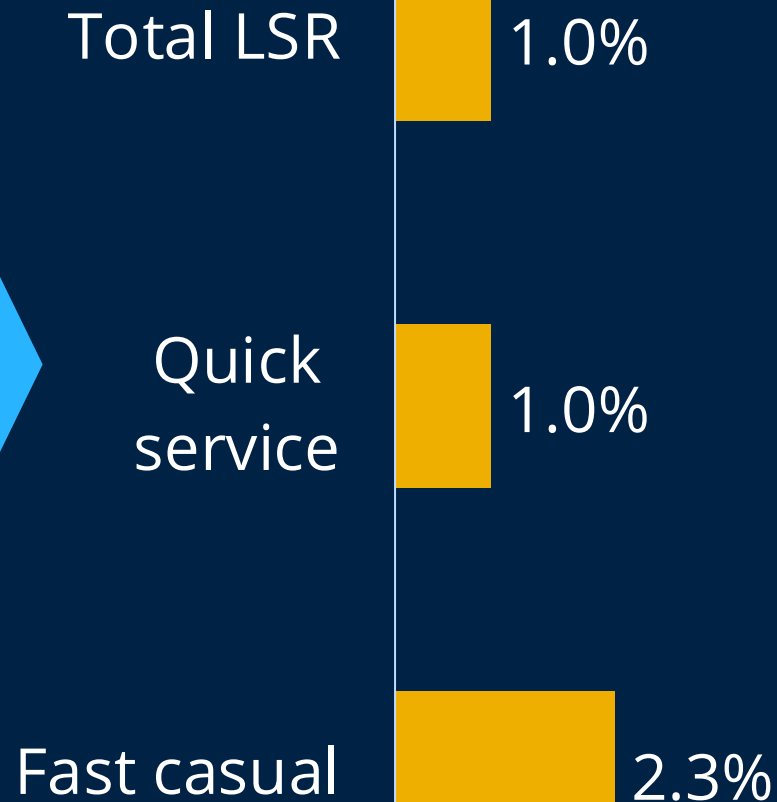
Forecasts for 2026



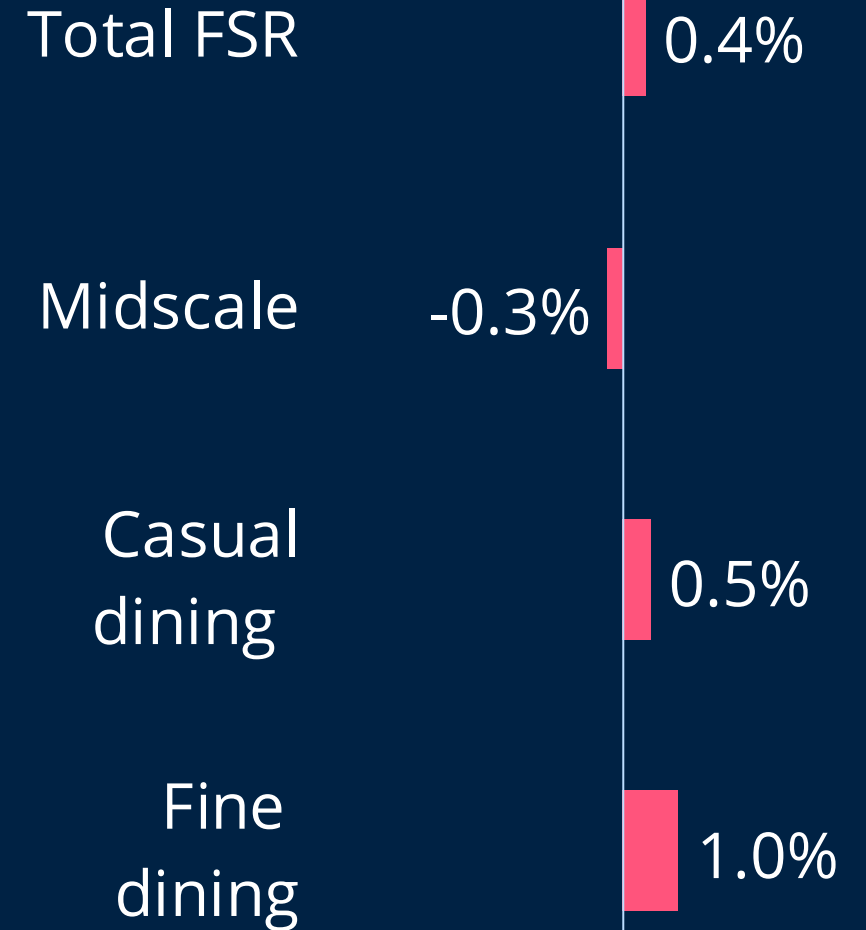
Image Source: Shutterstock

2026 Real Restaurant Growth Forecasts

LIMITED SERVICE



FULL SERVICE



Source: Technomic 2025-2026 Foodservice Industry Forecasts, January 2026 Edition

Final Thoughts

2026 growth forecast is on fragile ground

GDP and inflation projections are in the process of being restated

Innovation is balanced between value and premium, as well as indulgence and health

Implications

Invest in growth now or get left behind

- Menu
- Value
- Service model
- Customer delight

Go direct at your competition

Be bold with your brand

Future growth expectations must account for demographic realities



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