



Quarterly Foodservice Reports and Trends

Q2 2026



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- Datassential Top 500 Webinar
- Technomic
 - Mid-Year Industry Update
 - Trends and Forecasts

Full reports can be found on the Foodservice Teams page below:

Foodservice Reports

Top 500 Webinar Datassential 6-2026





THE DATASSENTIAL 500 REPORT

In 2025, the Top 500
largest chains in the
U.S. reported **softer,
uneven, and top-
heavy growth figures.**





TOTAL UNITS

243k+ units

+0.8% since Q4 2024

TOTAL SALES

\$445.53 billion

+2.3% since Q4 2024

AVERAGE AUV

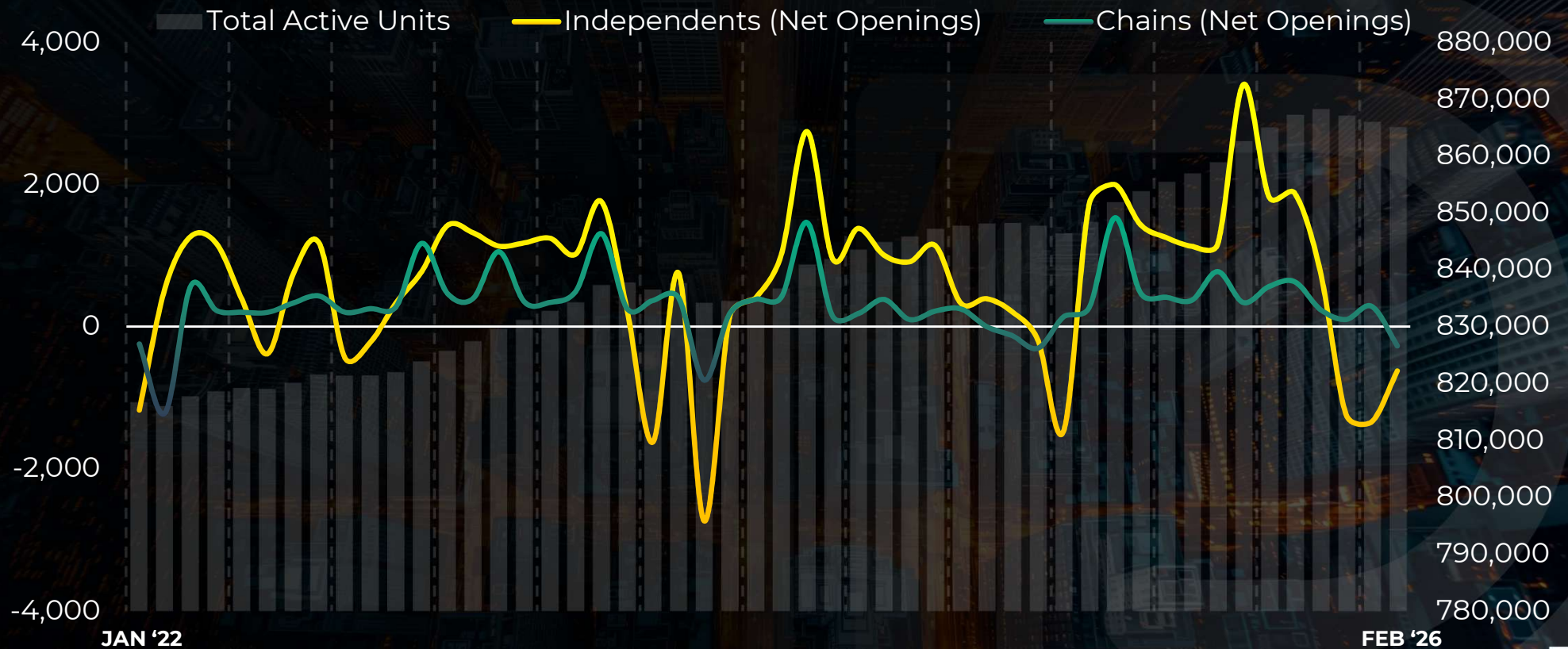
\$1.81 million

+2.1% since Q4 2024



MACRO LANDSCAPE

Restaurant Openings & Closings



THE DATASSENTIAL 500 REPORT

Segment Growth: Sales

FSR REGIONAL/GLOBAL

+5.7%

LSR COFFEE

+4.8%

LSR DESSERT/SNACK

+4.7%

LSR REGIONAL/GLOBAL

+4.4%

LSR CHICKEN

+4.0%

LSR MEXICAN

+3.7%

LSR SALAD/HEALTHFUL

+2.8%

LSR SANDWICH

+2.1%

LSR BURGER

+1.5%

FSR ITALIAN/PIZZA

+1.5%

FSR AMERICAN

+1.2%

FSR SEAFOOD/STEAK

+1.2%

FSR MIDSCALE

+0.3%

LSR BAKERY/CAFÉ

-0.6%

LSR PIZZA

-0.6%

FSR SPORTS BAR

-1.2%

THE DATASSENTIAL 500 REPORT

Notable Rank Changes

#24 → #22



Wingstop

#50 → #49



Raising Cane's

#104 → #64



7 Brew

#95 → #85



CAVA

Chicken chains continue to win big.

HIGH-GROWTH CHAINS

Dave's Hot Chicken



2025 Unit Growth: **+34.3%**
2025 Sales Growth: **+44.6%**

HIGH-GROWTH CHAINS

Wingstop



2025 Unit Growth: **+17.3%**
2025 Sales Growth: **+17.2%**

HIGH-GROWTH CHAINS

Raising Cane's



2025 Unit Growth: **+10.3%**
2025 Sales Growth: **+10.6%**

THE MEGATRENDS WE'LL EXPLORE

Four consumer needs that shaped top chains in 2025 and beyond.

- 01 Health, Wellness, and the Rise Of Protein**
- 02 Indulgence, Treats, and the Beverage Boom**
- 03 Chicken Reigns Supreme**
- 04 Value, From Promo to Platform**

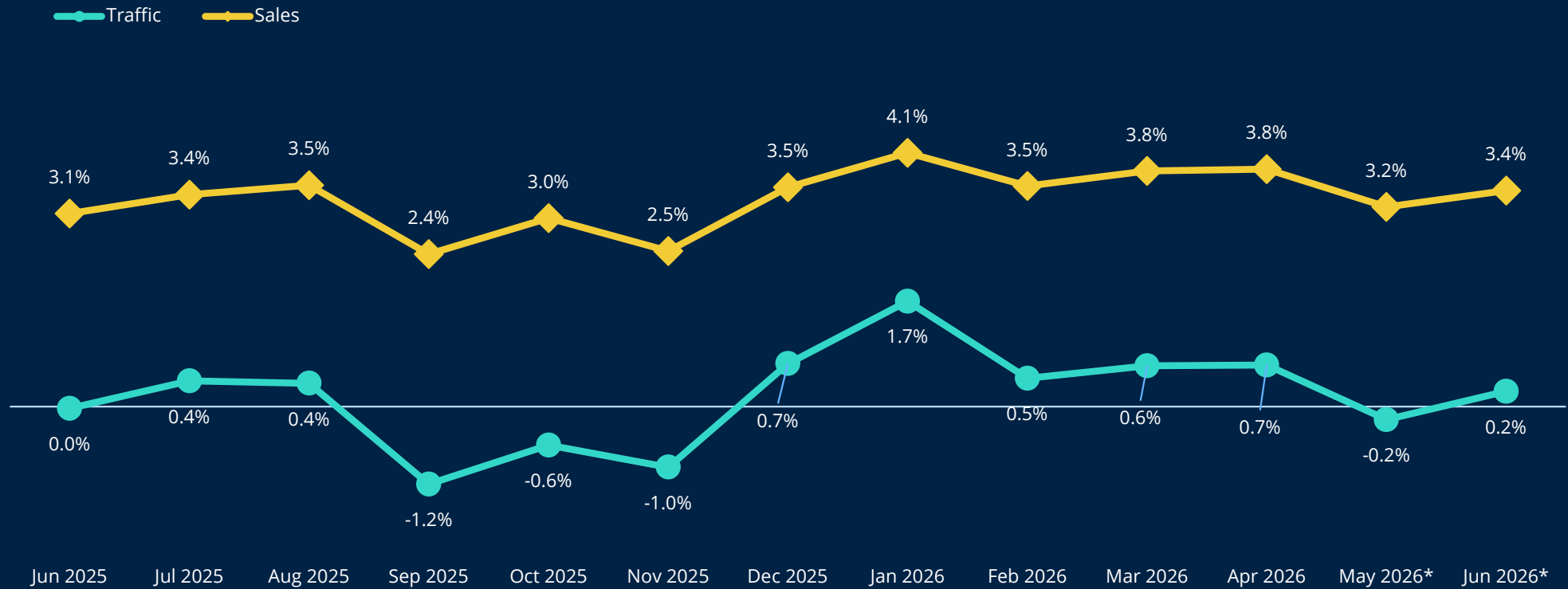




Technomic - Midyear Foodservice State of the Industry Update

RESTAURANT SALES AND TRAFFIC CHANGE YEAR OVER YEAR

High gas prices have had limited
impact on foodservice sales (so far)



Source: Technomic Monthly Chain Performance Tracker

*Note: Preliminary

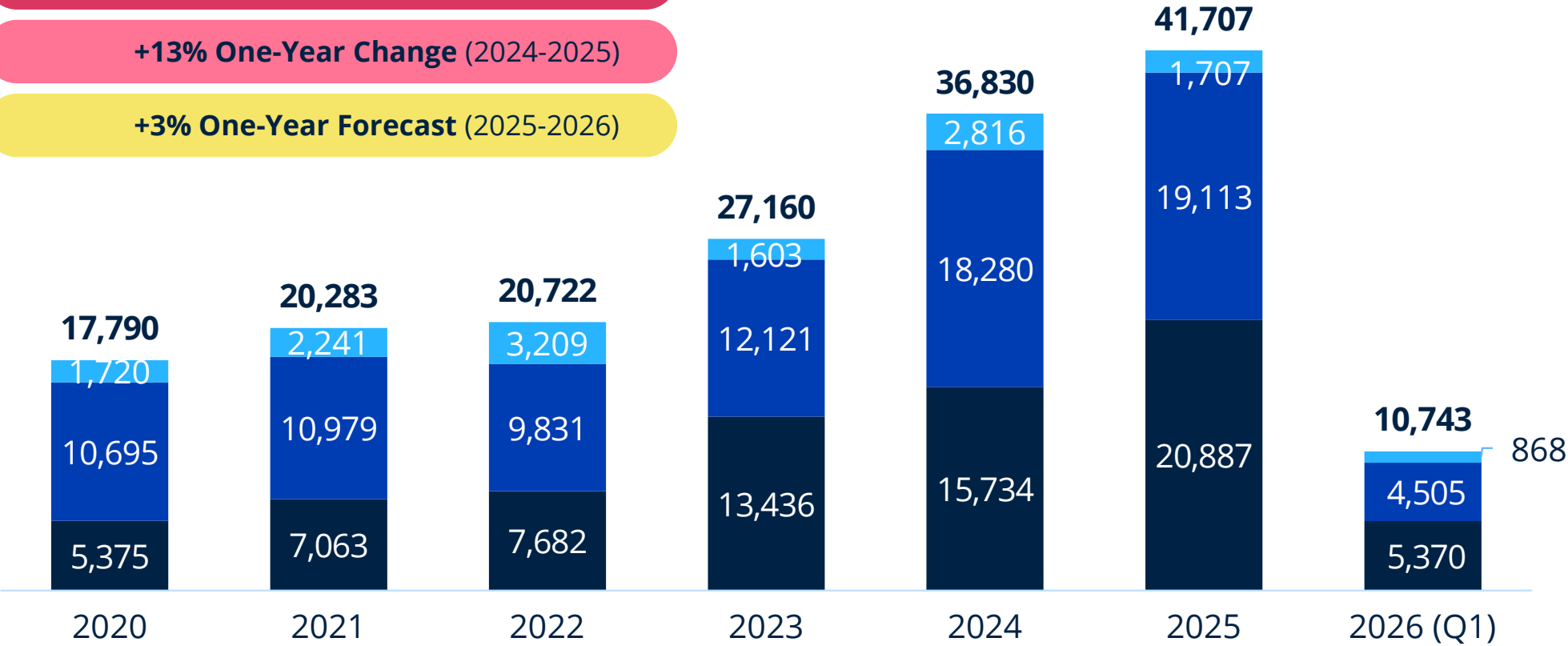
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ANNUAL LTO TRACKER

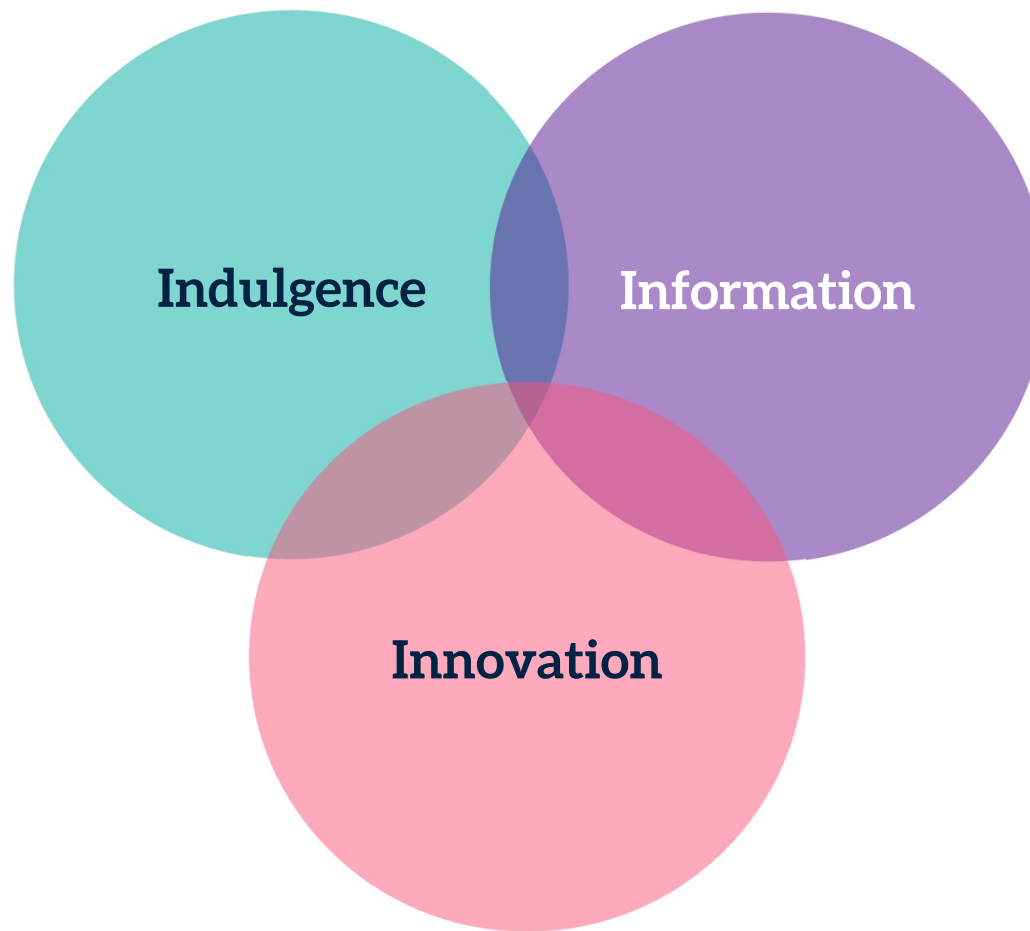
+134% Five-Year Change (2020-2025)

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

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



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)



Surf and Turf

(Cooper's Hawk Winery & Restaurant)



Iced Bananas Foster

(PJ's Coffee of New Orleans)



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

Gut Health Greek Watermelon Smoothie (Smoothie King)



Wagyu Beef and Prosciutto Burger with Snake River Farms American Wagyu ground beef

(Thirsty Lion Gastropub)



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



Image Sources: [Smoothie King website](#), [Thirsty Lion Instagram](#) and [Great American Cookies Instagram](#)

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)

Image Sources: [Applebee's website](#), [Jamba website](#) and [Postmates website](#)

Forecast Need-to-Knows

Source: Technomic
*Note: From January 2026 forecast

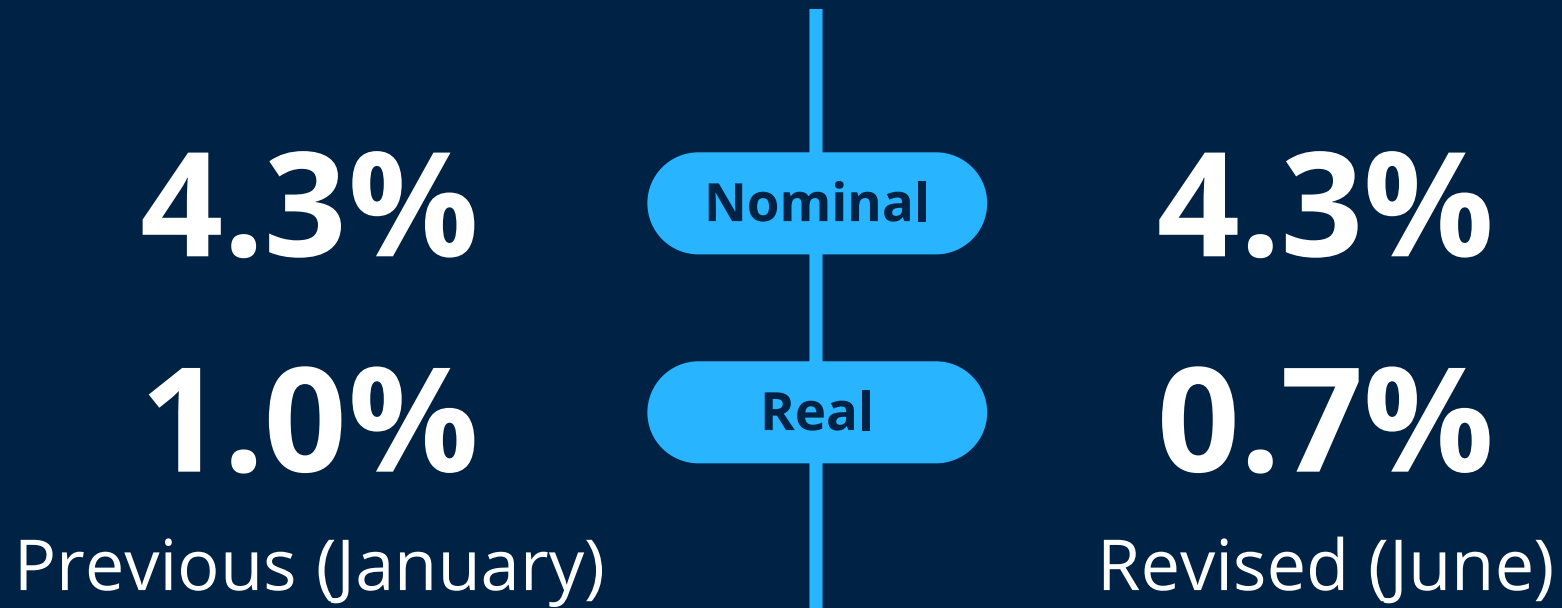
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2026 baseline real forecasts
reduced 0.3 points*

Forecasts subject to range
+/- 0.5 points

Middle East uncertainty
limits precision

2026 Forecast Adjustments



Source: Technomic
Note: RSE basis

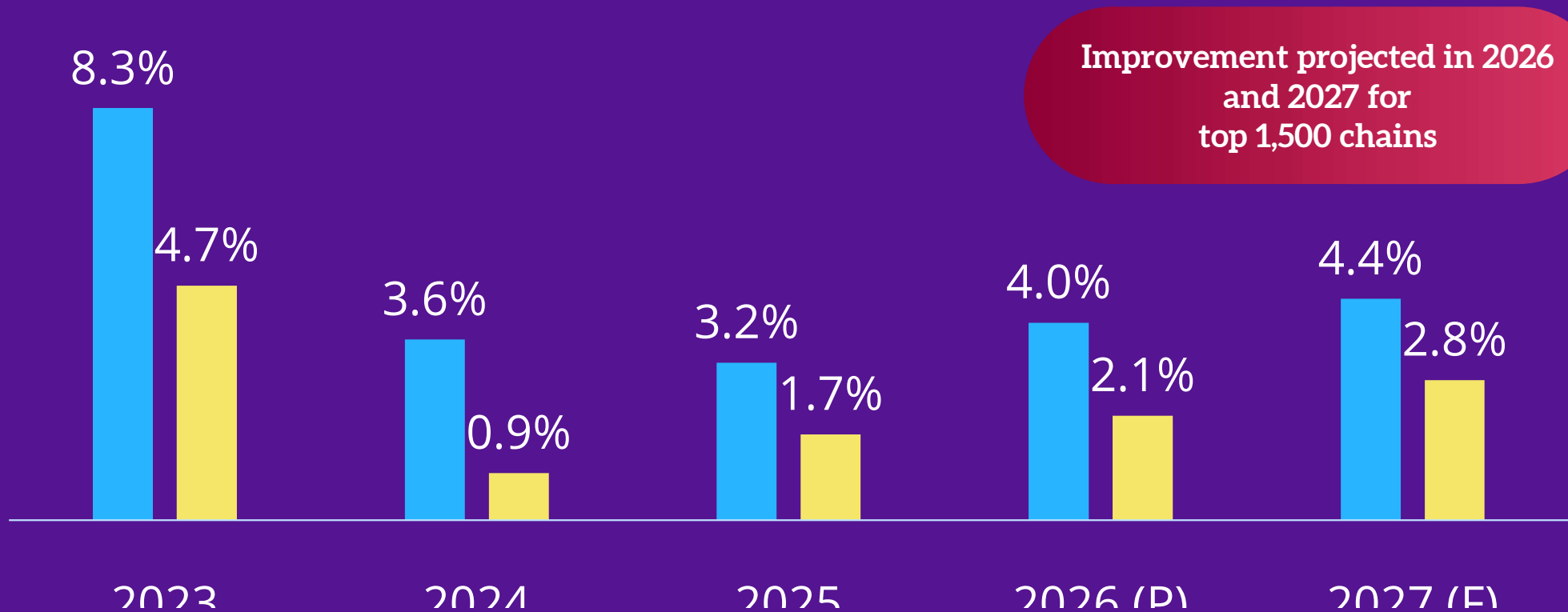
2025-2027 Industry Growth

Nominal	2.9%	4.3%	4.5%
Real	-0.8%	0.7%	1.3%
	2025	2026 (P)	2027 (F)

Source: Technomic
Note: RSE growth basis; (P)=preliminary; (F)=forecast

TOP 1,500 CHAIN YEAR-OVER-YEAR NOMINAL GROWTH

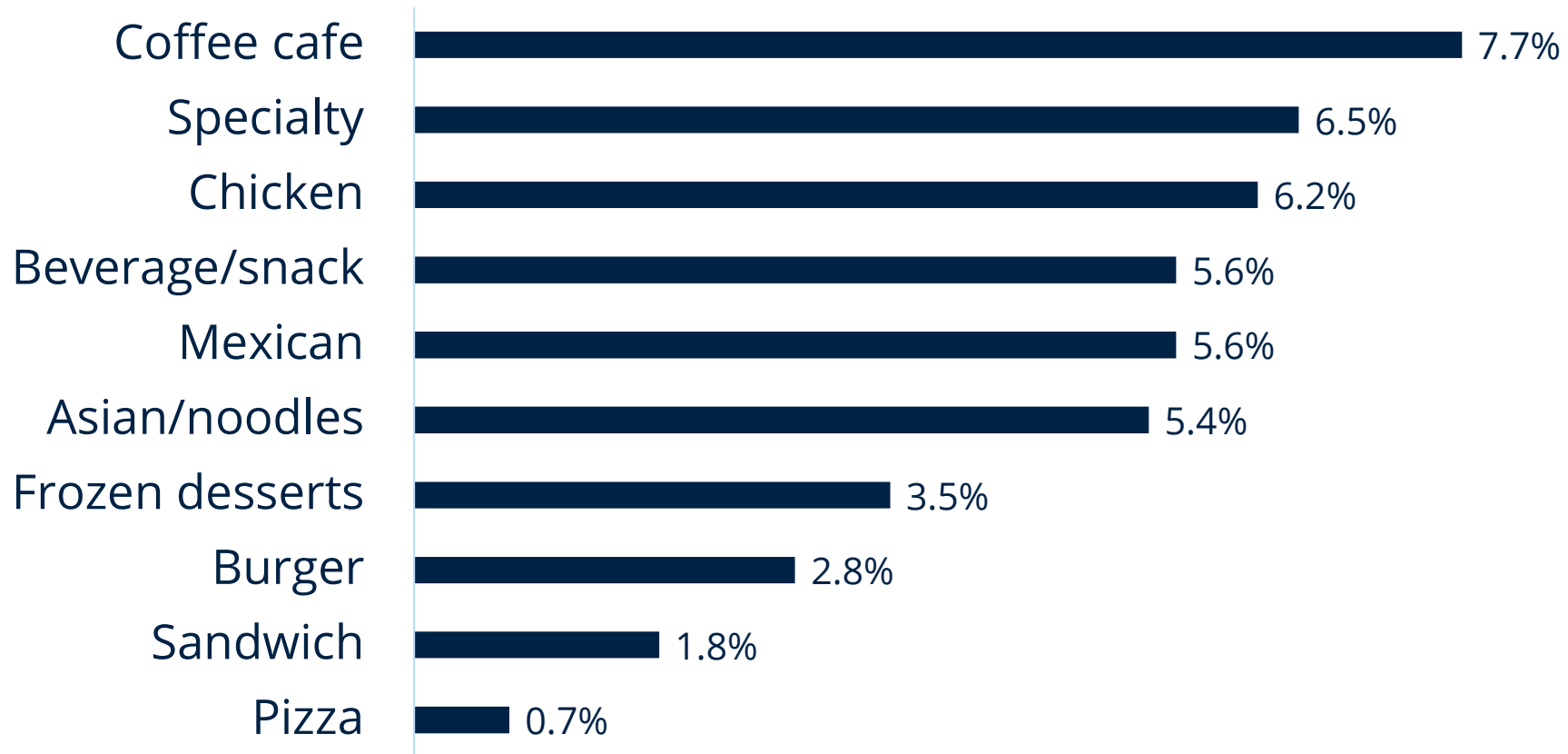
■ Limited-service chains ■ Full-service chains



Source: Technomic Ignite Company
Note: (P)=preliminary; (F)=forecast

TOP 1,500 LSR CHAIN MENU SEGMENT PROJECTIONS

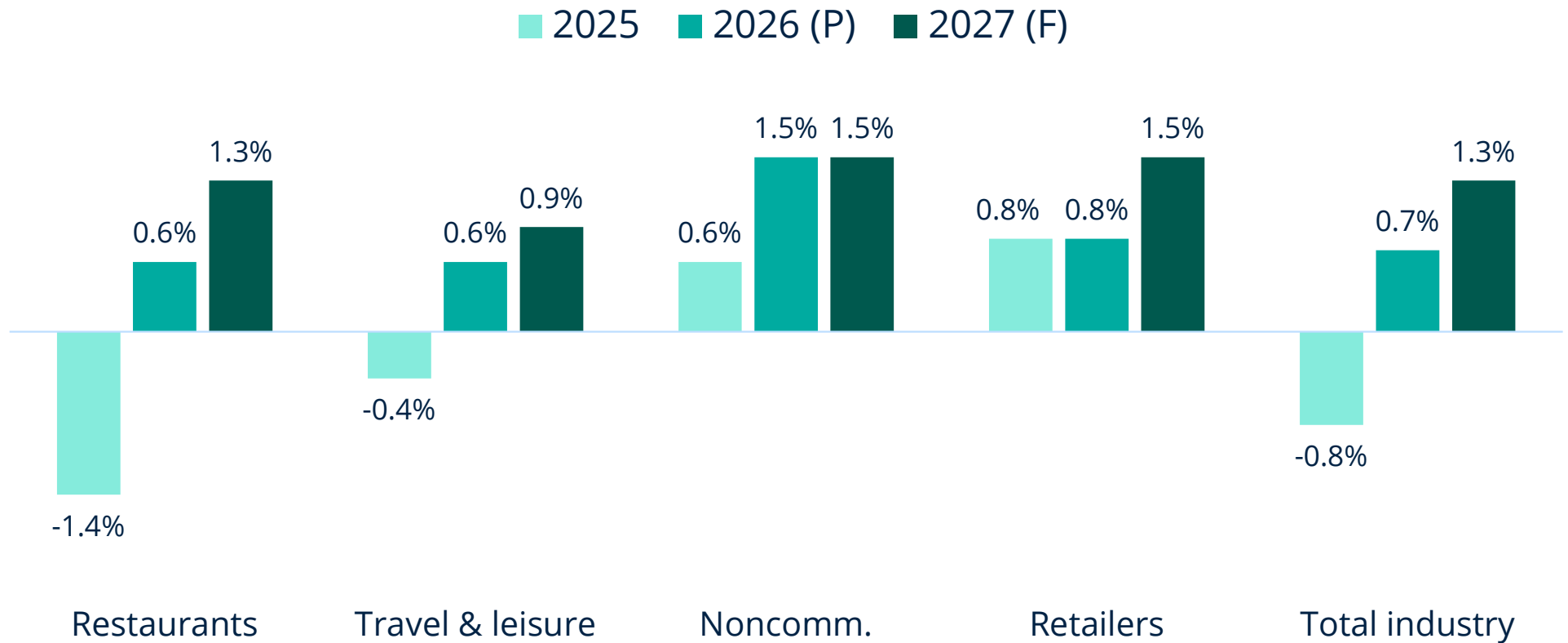
2025-2027 TWO-YEAR CAGR—NOMINAL



Source: Technomic

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SEGMENT OUTLOOK—REAL RSE YEAR-OVER-YEAR CHANGE



Source: Technomic

Note: Real=inflation removed; (P)=preliminary; (F)=forecast

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Final Thoughts

Near term, forecast hinges on Middle East outcome

2026 growth forecast is on shaky ground

GLP-1 impact a mixed bag

The 3 “I’s” produce success

Sysco/RD-Jetro may considerably change distribution landscape

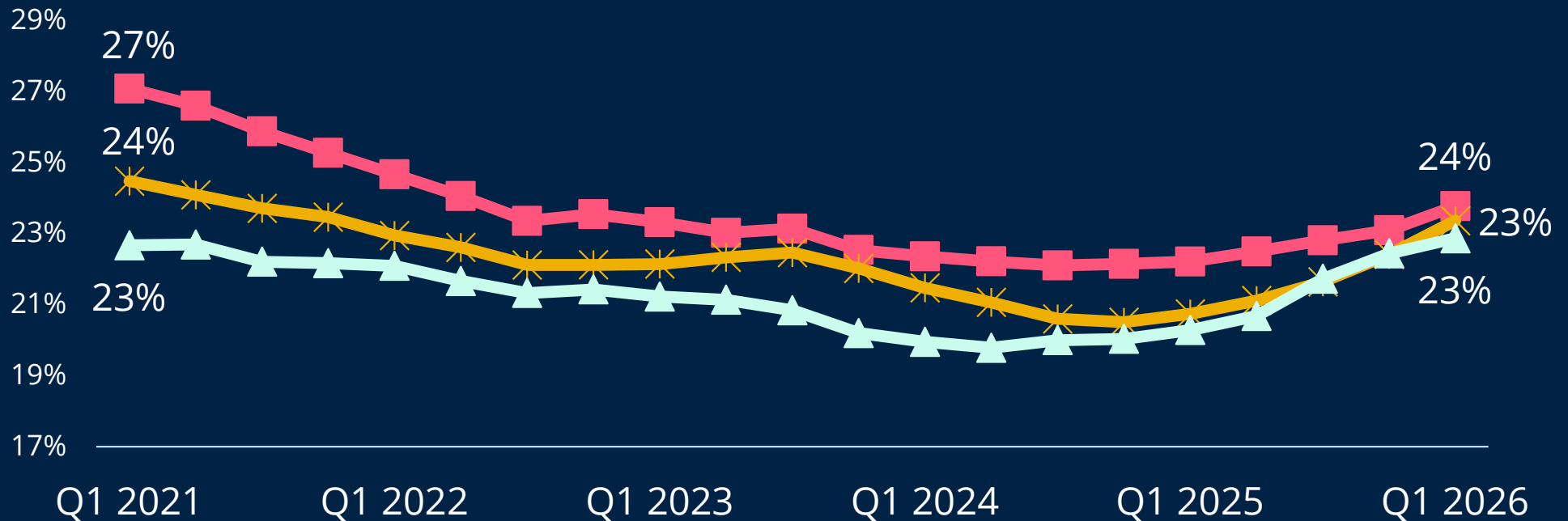
Technomic Trends/Forecasts



QSR is no longer the clear value leader

AFFORDABILITY

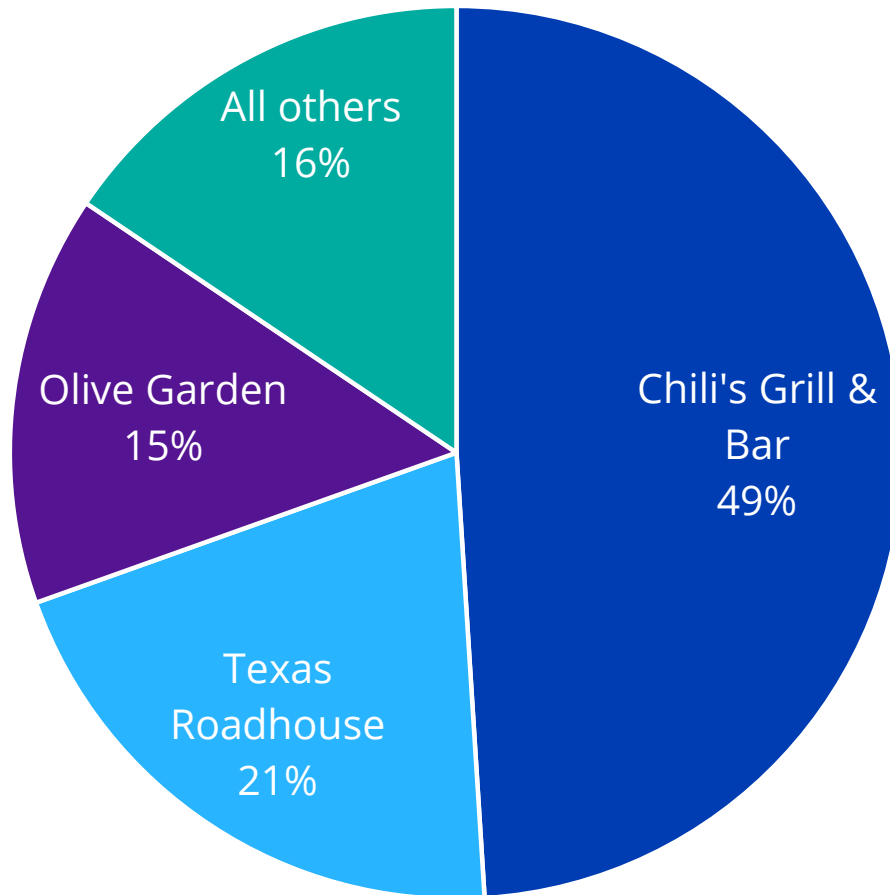
■ Quick service ✖ Fast casual ▲ Casual dining



Source: Technomic Ignite Consumer

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CASUAL-DINING SALES GROWTH



**Focused
chains are
leading the
way**

Three players make
up the bulk of CDR
sales growth

QSR is gaining on Fast Casual in many quality and service attributes

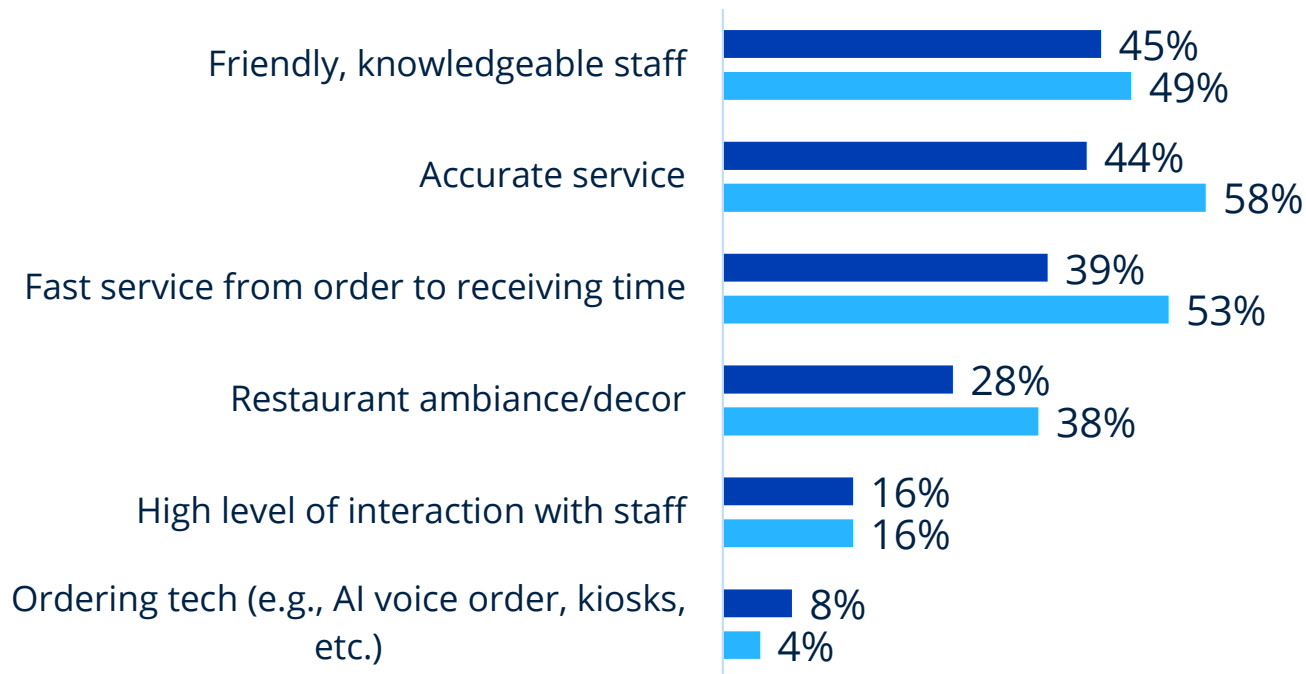
SEGMENT GUEST EXPERIENCE ATTRIBUTE PERFORMANCE

TOP BOX=% VERY GOOD/STRONGLY AGREE

Attribute	Segment	2021	2026 YTD
Welcoming and comfortable atmosphere	Quick service	46%	51%
	Fast casual	51%	53%
Food taste and flavor	Quick service	60%	62%
	Fast casual	66%	64%
Is a place I can trust	Quick service	33%	39%
	Fast casual	35%	40%
Unique items	Quick service	47%	51%
	Fast casual	48%	50%

WHICH ARE IMPORTANT WHEN CHOOSING A RESTAURANT? SELECT ALL THAT APPLY

■ Consumer average ■ 14- to 17-Year-Olds



Source: Technomic 2024 Generational Differences Consumer Trend Report
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**Youngest
consumer
group is
prioritizing
service over
tech**

Global Chains Post Impressive Growth

Philippines



+17%

South Korea



+40%



+41%



+25%

Guatemala



+14%

Taiwan



+8%

International Chains Leverage Familiar Foods



BAKED GOODS

Chocolate Hazelnut Cruffin with Nutella

Paris Baguette

Image Source: [Paris Baguette website](#)



FRIED CHICKEN

Campero Fried and Roasted Chicken

Pollo Campero

Image Source: [Pollo Campero website](#)



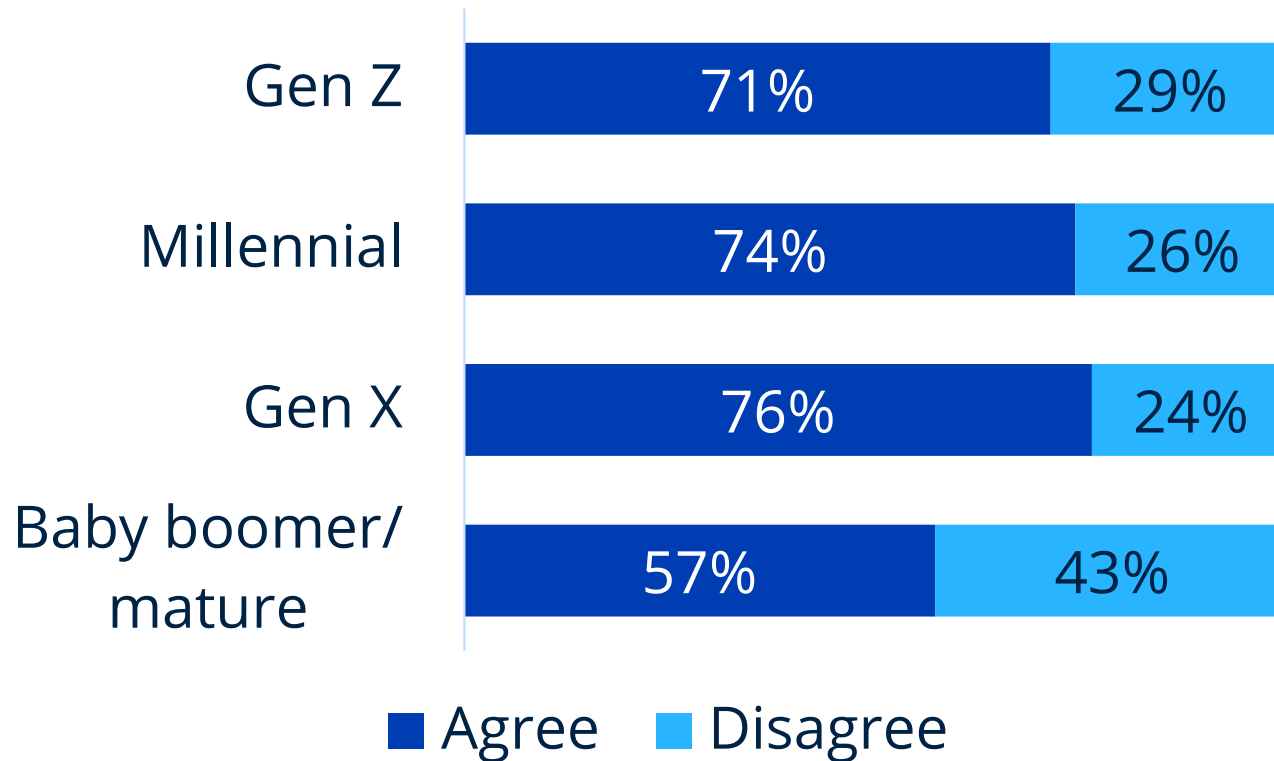
BURGERS

Angus Cheeseburger

Jollibee

Image Source: [Jollibee website](#)

**“MORE LIKELY TO TRY A NEW/UNIQUE FLAVOR IF
SHOWCASED IN TRADITIONAL/FAMILIAR WAY.”**



Base: 734 consumers ages 18+
Source: Technomic 2025 Flavor Consumer Trend Report

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**Familiar
formats
encourage
new flavor
trial**

Thank You

For any questions, or for further detail
on any topics, please email

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