

SALES

for top 500 chains

\$274B 4.0%

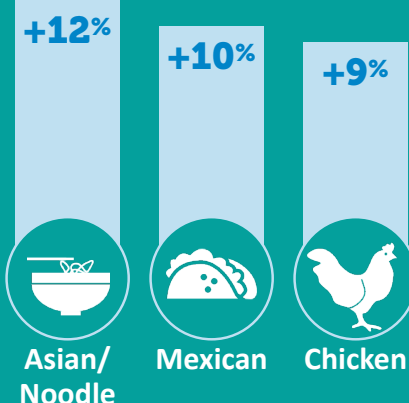
2015 Technomic TOP 500 U.S. Chain Restaurant Report

BY SEGMENT

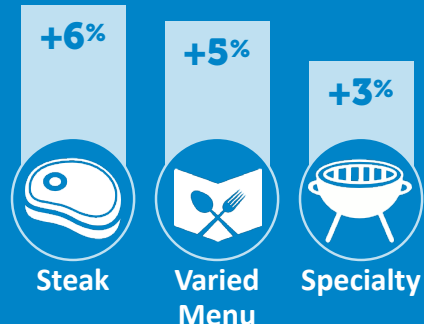
LSR 4.2%
\$200B

FSR 3.6%
\$74B

LSR GROWTH SEGMENTS



FSR GROWTH SEGMENTS



4 out of the top 5 struggle

1. McDonald's

-1.1%



2. Starbucks

+8.2%



Starbucks moves up to #2 U.S. chain

3. Subway

-3.3%



4. Burger King

+1.6%

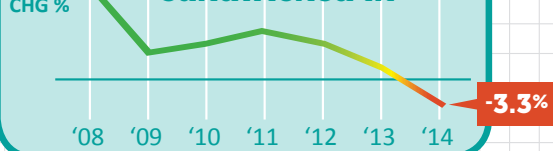


5. Wendy's

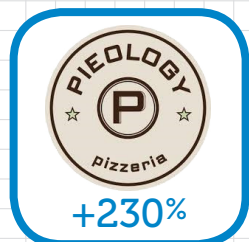
-0.4%



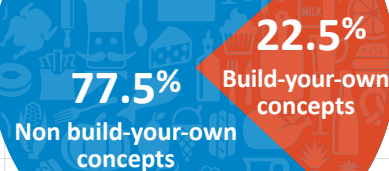
Subway gets "Sandwiched in"



Fast-growing chains by sales



Build-your-own concepts are the sweet spot for fast-casual



22.3% GROWTH

10.7% GROWTH

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