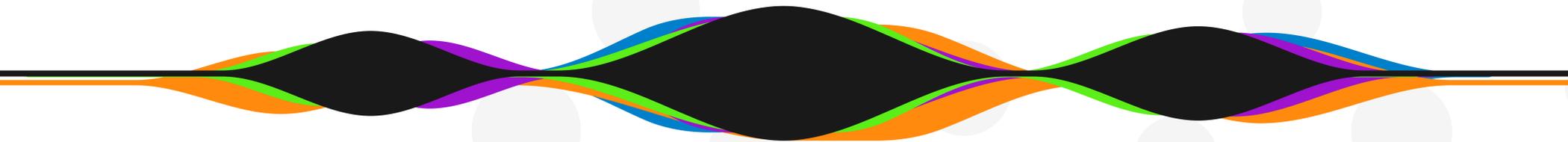




INDUSTRY REPORT

Restaurantology[®] 2026 Market Pulse

Verified brand movement and software adoption across
the restaurant industry



About this Report

The Restaurantology Market Pulse is an annual snapshot of measurable change across the restaurant industry, based on verified brand- and unit-level data from 2025.

This edition is organized into two sections. **Market Dynamics** examines brand growth, contraction, and movement across Enterprise, Mid-Market, SMB, and Independent tiers.

Software Adoption examines changes in restaurant technology adoption across the same segments.

About Restaurantology

Restaurantology is a market intelligence and go-to-market (GTM) platform that helps B2B restaurant technology companies grow with greater precision and confidence. We provide verified data on multi-unit restaurant brands and work directly with go-to-market teams to operationalize those insights across CRM, targeting, and forecasting workflows.

Learn more at restaurantology.io.

PART 1

Market Dynamics

How restaurant brands grew, contracted, and crossed segment thresholds in 2025.

Overview & Framing

At a market level, 2025 was defined by stability. Most multi-unit restaurant brands did not materially change their footprint year over year. Beneath that surface, however, unit-level movement was uneven, with expansion and contraction concentrated among a relatively small set of brands.

Methodology

All brand counts, unit totals, and segment assignments reflect verified multi-unit restaurant profiles. Restaurantology re-visits brand websites on a recurring monthly basis to confirm active locations and detect unit-level change.

Segment definitions

Brands are categorized by their unit count on January 1 and December 31:

- TOP: 2,000+ units
- ENT (Enterprise): 101–2,000 units
- MM (Mid-Market): 21–100 units
- SMB (Emerging): 6–20 units
- IND (Independent): 2–5 units

The pages that follow break down these dynamics across scale and segment, highlighting where growth concentrated, how brands moved between tiers, and which structural patterns held firm despite ongoing unit-level volatility.

2026 Structural Snapshot

How brand counts, footprint, and market composition shifted in 2025

Brand universe

16k Concepts

- Returning brands: 13,676
- New brands: 1,453
- Exited brands: 878



Roughly 16,000 multi-unit restaurant brands were active in 2025.

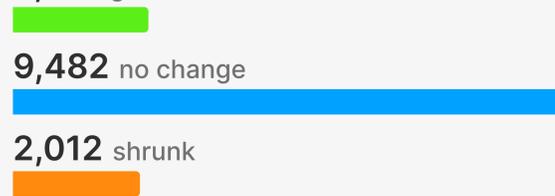
Brand outcomes

By year-end, most brands were unchanged, with expansion outweighing contraction.

2,182 grew

9,482 no change

2,012 shrunk

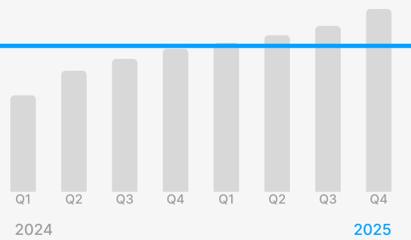


Market expansion

The multi-unit footprint expanded in 2025 on a like-for-like brand basis.

Year-end net growth

+7,021 units



Growth concentration

The 27 TOP brands accounted for 55% of the market's net multi-unit growth.



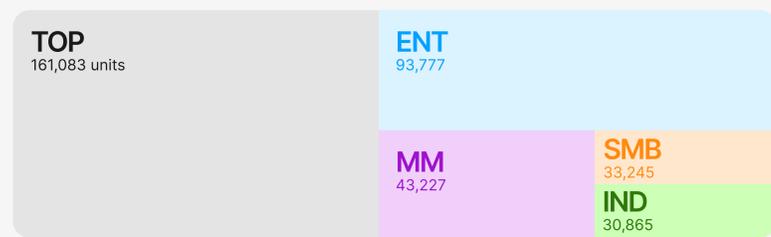
Brands by tier

Most multi-unit brands cluster in IND and SMB. Very few reach enterprise scale.



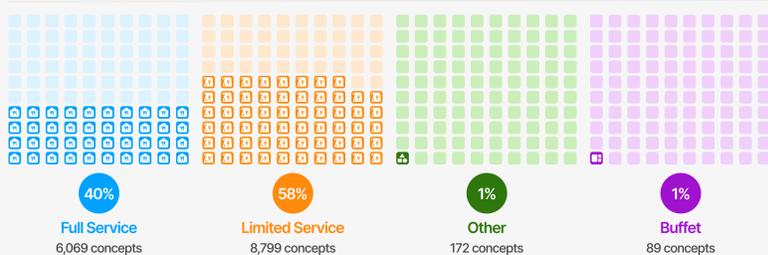
Units by tier

Enterprise and top brands control roughly 70 percent of all multi-unit locations.



Brands by service type

The multi-unit brand universe splits primarily between full service and limited service.



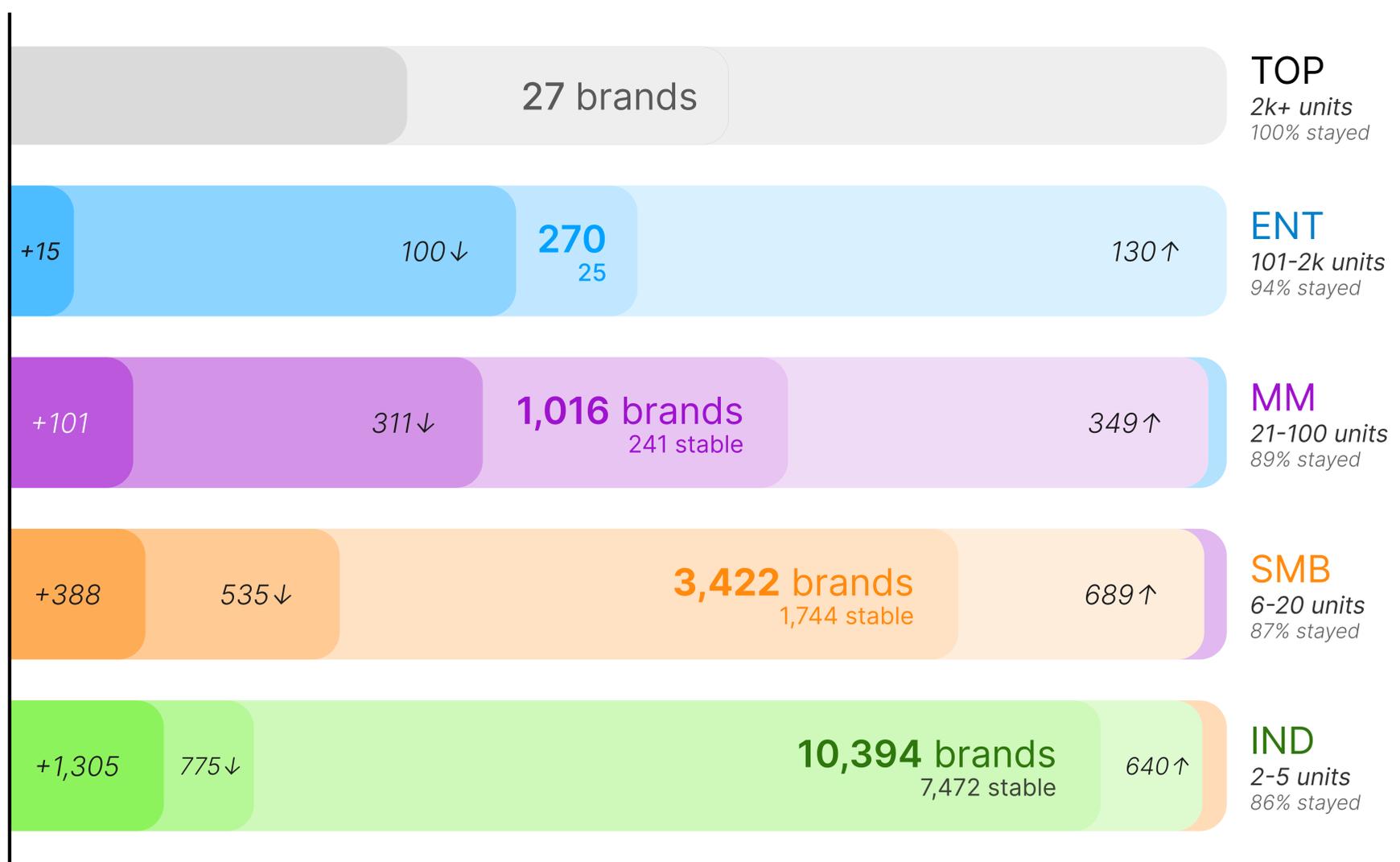
Units by service type

Limited service brands account for the vast majority of multi-unit locations.



Segment Composition & Change

Brands that finished 2025 in a particular segment did not always start there. While most remain in the same tier year over year, expansion and contraction within segments is common and materially shapes segment composition.



Entered Shrunk (↓) Grew (↑) Shrunk into

Note: "Entered" includes newly detected brands and upward movers; "shrunk-into" segments are colored by segment of origin.

Key takeaways

- **Macro stability, micro volatility:** Segments appear stable year over year, but meaningful expansion and contraction occur within those boundaries.
- **No segment is static in practice:** Growth and contraction affect every tier, requiring GTM strategies that adapt to in-segment change rather than fixed segment assumptions.

MARKET DYNAMICS

Segment Migration

Brands that crossed segment thresholds in 2025, ranked by unit change, selectively highlighted

MM ↑ ENT

-  **KPOT BBQ**
+75 units | +80%
-  **Shah's Halal Food**
+57 units | +88%
-  **Rosati's Pizza**
+48 units | +70%
-  **Hangry Joe's**
+43 units | +57%
-  **Nick The Greek**
+27 units | +36%
-  **Filiberto's Mexican**
+27 units | +28%

... of 15 total

Crossed 101+ units

SMB ↑ MM

-  **Lucky Strike**
+61 units | +321%
-  **MilkShake Factory**
+25 units | +125%
-  **Smalls Sliders**
+24 units | +126%
-  **The Fresh Monkee**
+20 units | +182%
-  **Jeff's Bagel Run**
+20 units | +125%
-  **Layne's Chicken**
+19 units | +136%

... of 101 total

Crossed 21+ units

IND ↑ SMB

-  **Beignets & Brew**
+15 units | +375%
-  **Beaming**
+10 units | +250%
-  **San Fernando Coffee**
+8 units | +400%
-  **Bikanervala**
+8 units | +160%
-  **Tabla Indian**
+7 units | +175%
-  **Roni's Mac Bar**
+7 units | +175%

... of 388 total

Crossed 6+ units

ENT ↓ MM

-  **Wahlburgers**
-78 units | -72%
-  **TGI Fridays**
-77 units | -48%
-  **Pieology Pizzeria**
-60 units | -58%
-  **On The Border**
-55 units | -49%

... of 14 total

MM ↓ SMB

-  **Genghis Grill**
-38 units | -78%
-  **I Heart Mac & Cheese**
-17 units | -61%
-  **Pinstripes**
-15 units | -68%
-  **Bertucci's**
-10 units | -45%

... of 66 total

SMB ↓ IND

-  **Sushirrito**
-6 units | -67%
-  **Margarita's Cafe**
-5 units | -50%
-  **Aussie Grill by Outback**
-5 units | -71%
-  **PT PHO Express**
-5 units | -56%

... of 201 total

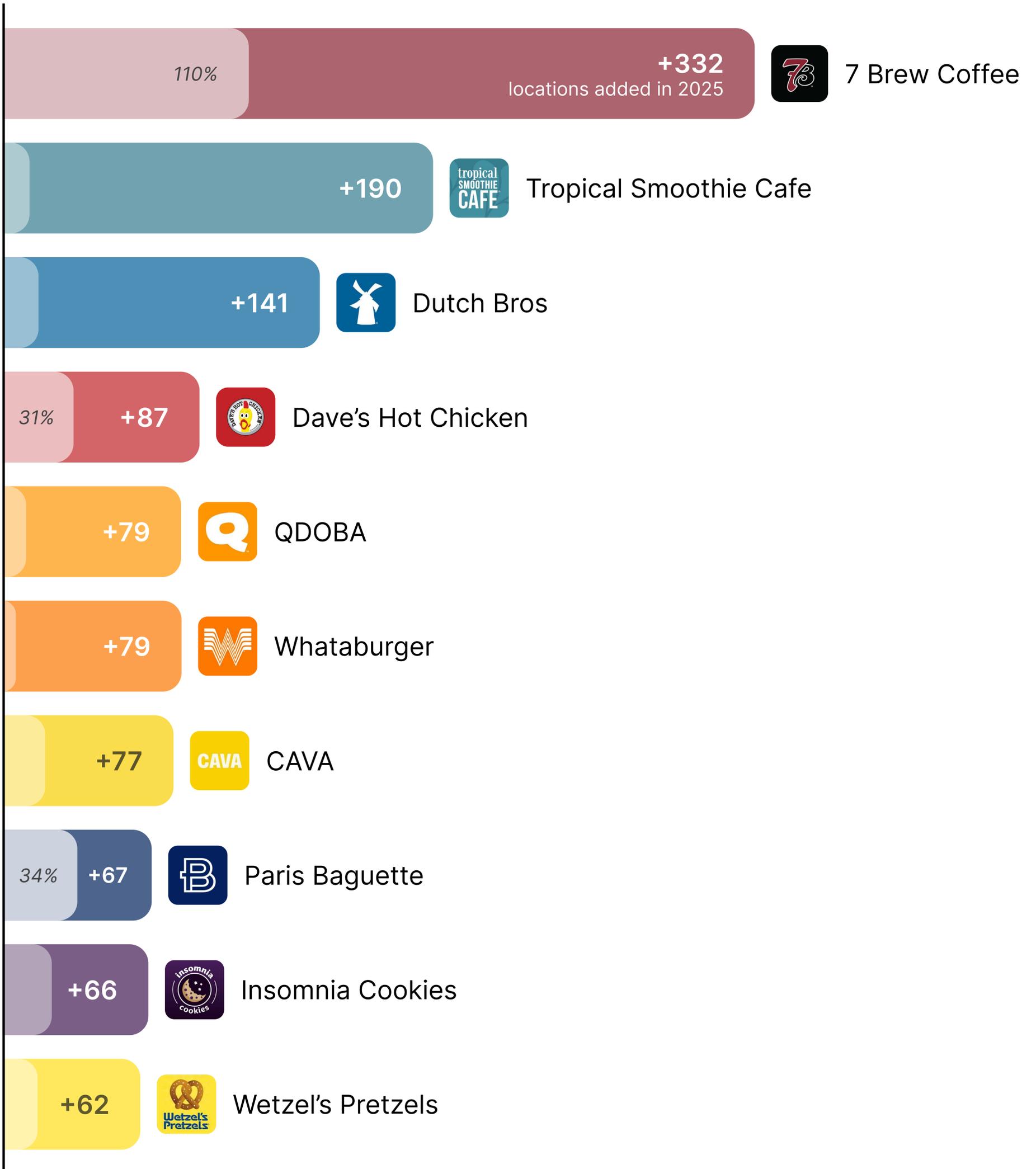
Exited

-  **Iron Hill Brewery**
-19 units
-  **K&W Cafeteria**
-11 units
-  **The Biscuit Bar**
-6 units
-  **Opa! Greek**
-5 units

MARKET DYNAMICS

ENT concepts by units opened

National brands with 101+ units on Jan 1 and Dec 31, ranked by absolute unit growth in 2025

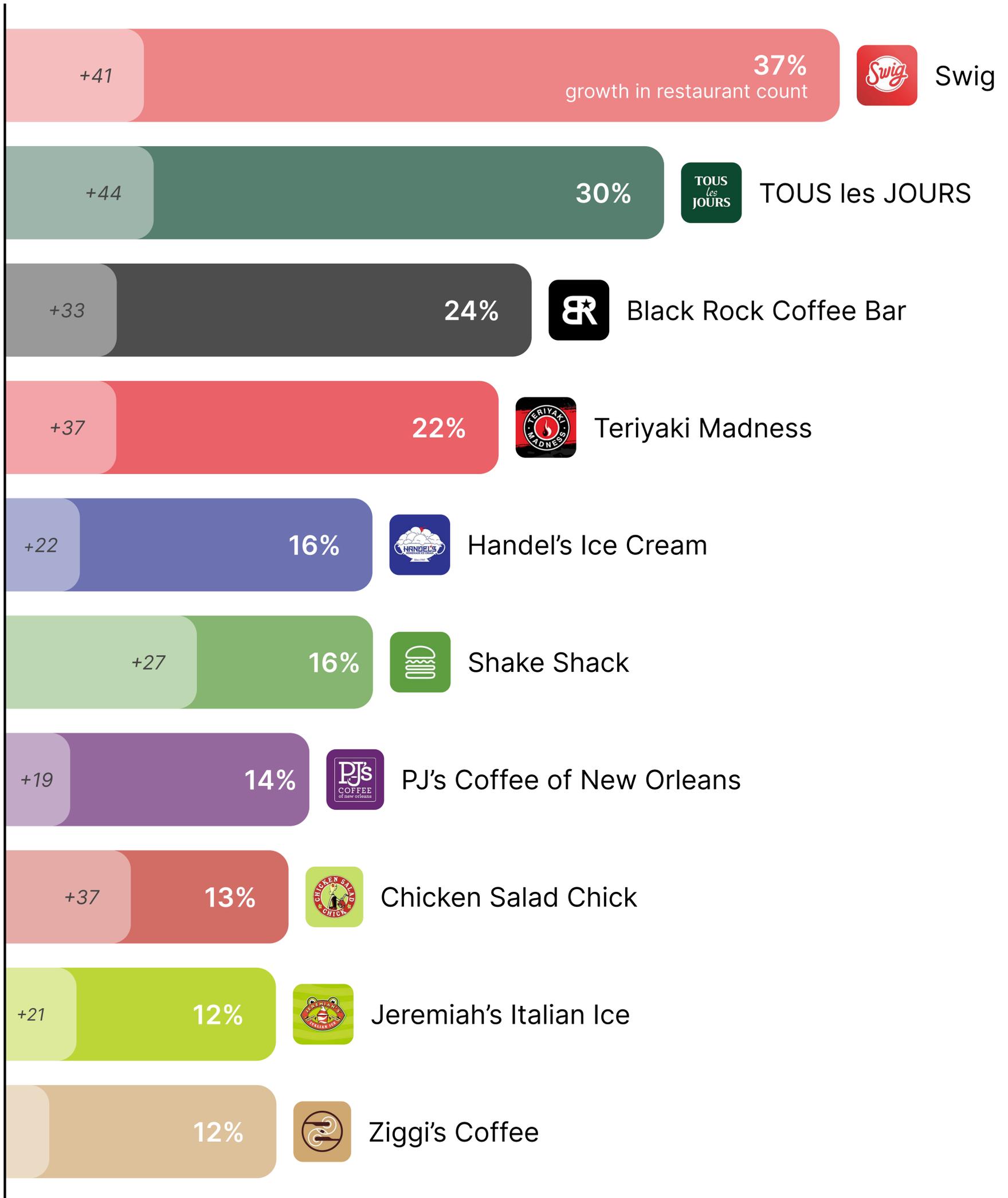


% growth New units opened

MARKET DYNAMICS

ENT concepts by unit % growth

National brands with 101+ units on Jan 1 and Dec 31, ranked by unit percent growth in 2025



New units opened % growth

Note: Brands from 'units opened' chart omitted to avoid duplication.

MARKET DYNAMICS

MM concepts by units opened

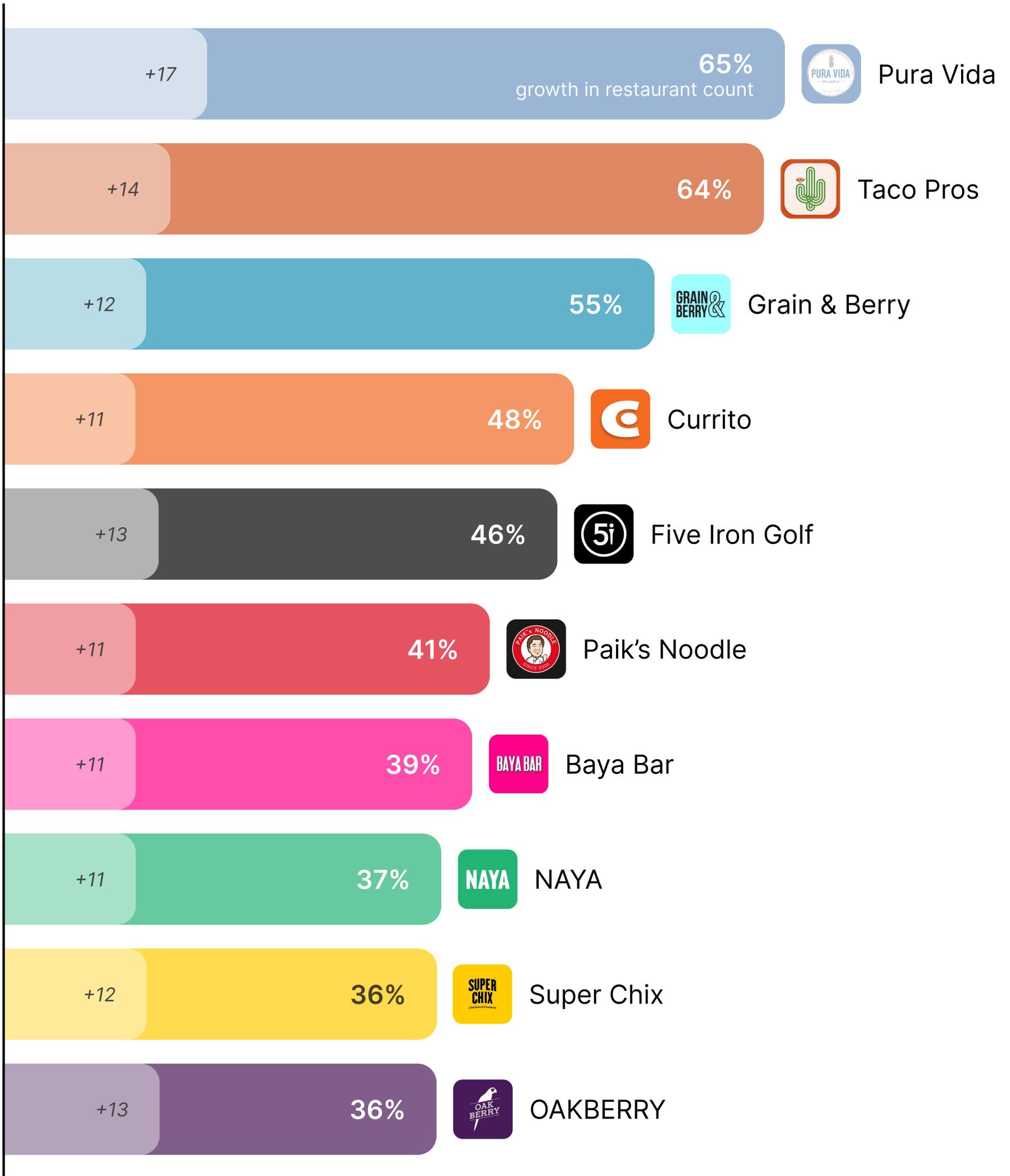
Regional brands with 21-100 units on Jan 1 and Dec 31, ranked by absolute unit growth in 2025



MARKET DYNAMICS

MM concepts by unit % growth

Regional brands with 21-100 units on Jan 1 and Dec 31, ranked by unit percent growth in 2025



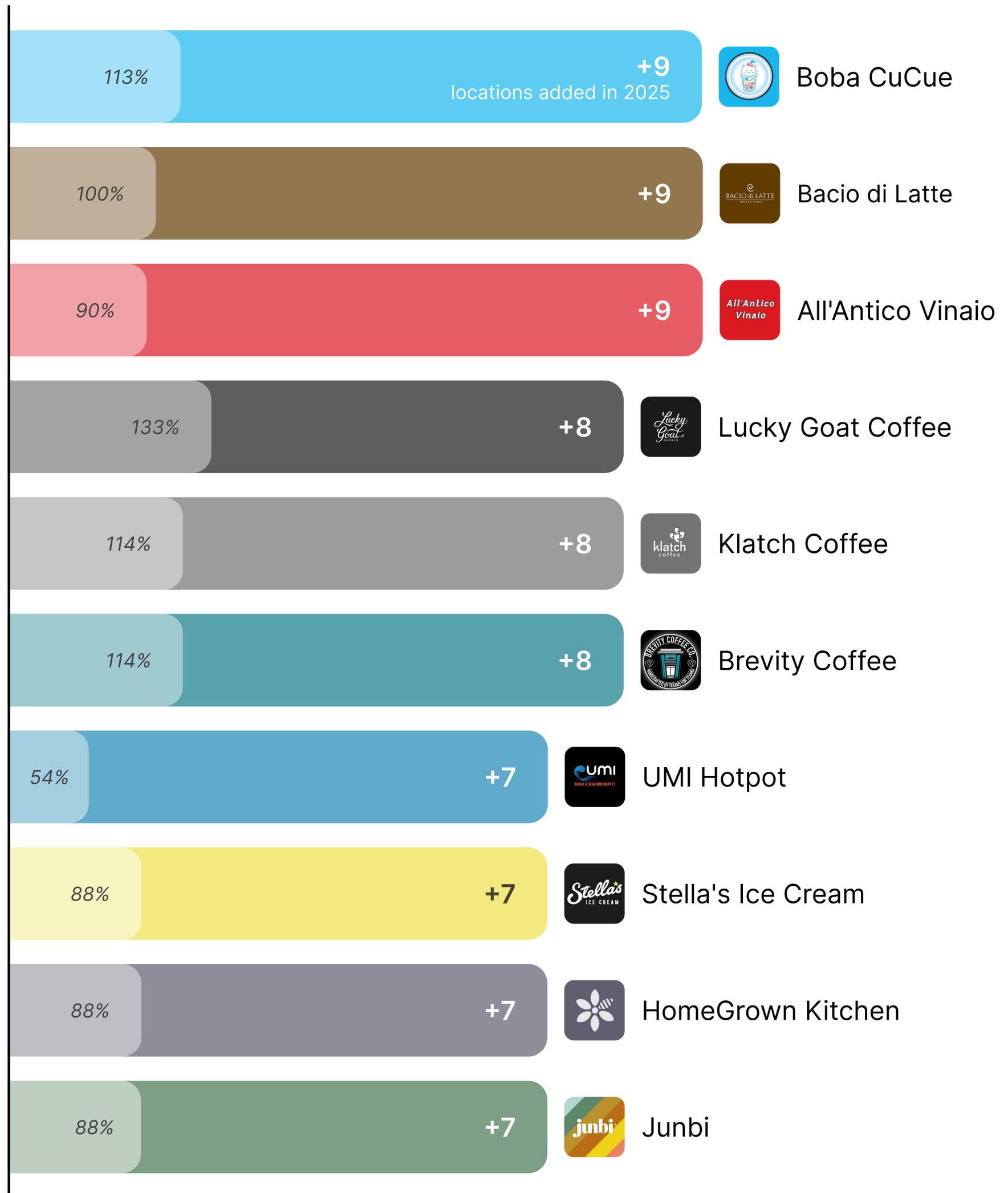
New units opened % growth

Note: Brands from 'units opened' chart omitted to avoid duplication.

MARKET DYNAMICS

SMB concepts by units opened

Emerging brands with 6-20 units on Jan 1 and Dec 31, ranked by absolute unit growth in 2025



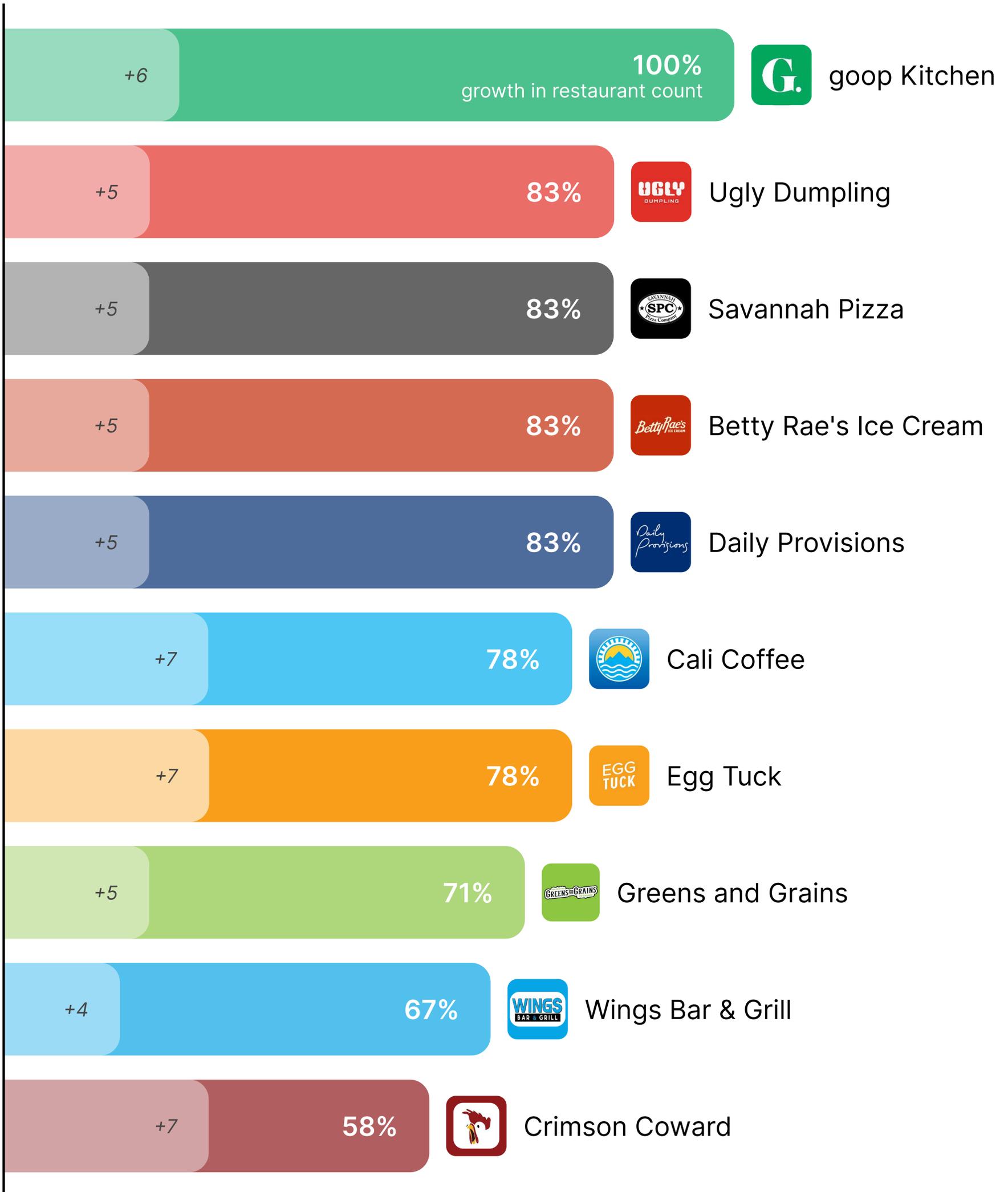
% growth

New units opened

MARKET DYNAMICS

SMB concepts by unit % growth

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New units opened % growth

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