



SMART TECH, SMARTER SUPPLY

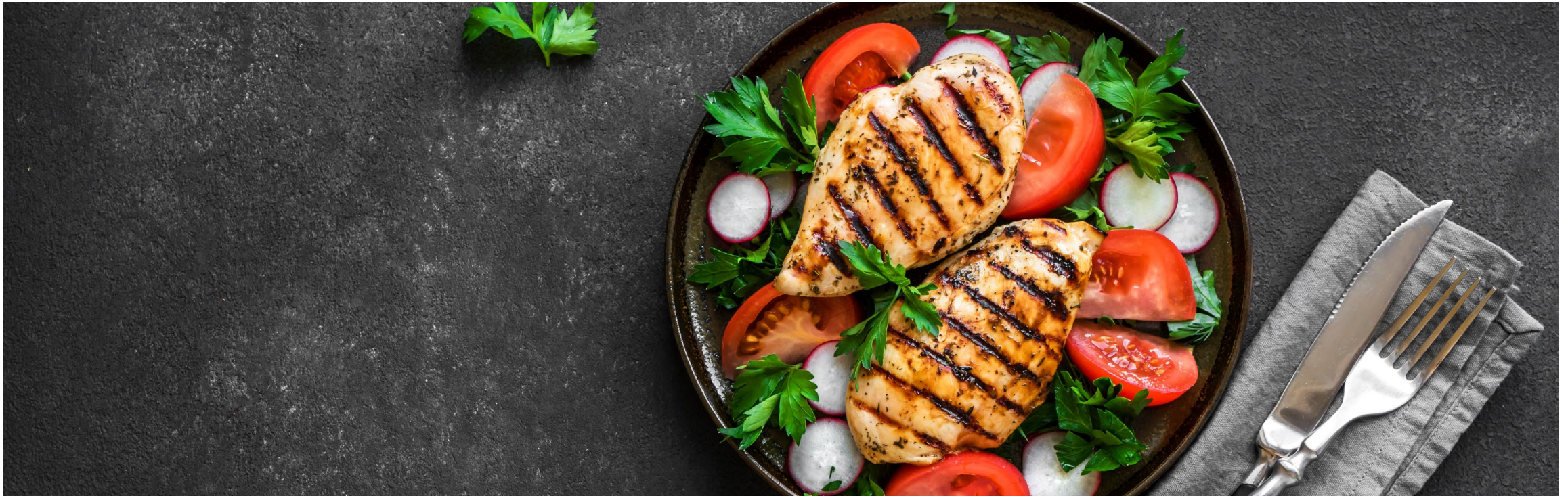
CHICKEN MARKETING SUMMIT

July 28-30, 2025

DeSoto Savannah
Savannah, Georgia

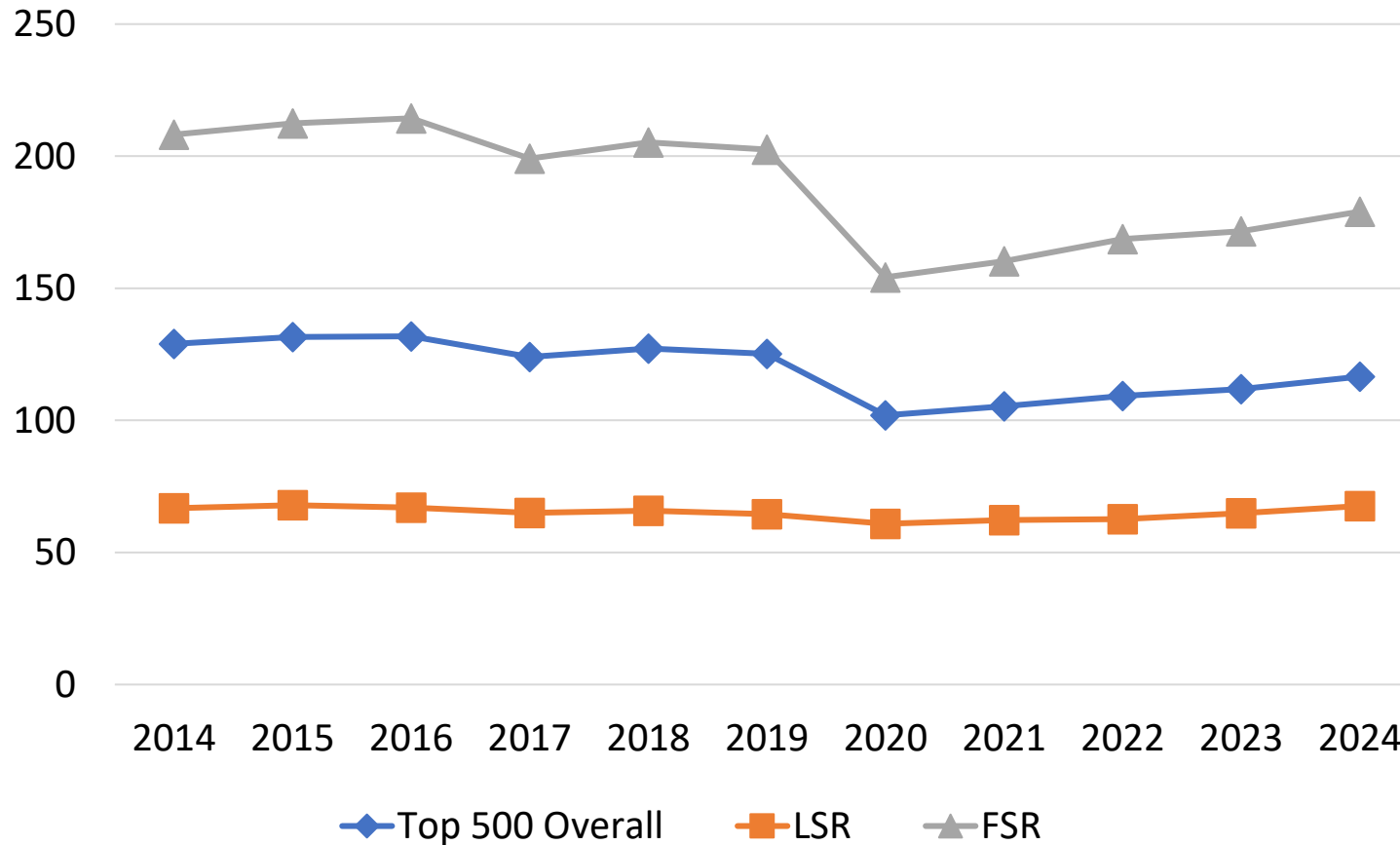
www.ChickenMarketingSummit.com • [#ChickenMarketingSummit](https://twitter.com/ChickenMarketingSummit)

Winning With Chicken Foodservice



Industry Overview

Average # of Core Items Per Operator



**10-Year
Change**

-14%

-9%

+1%

**Five-Year
Change**

-12%

6%

+6%

**One-Year
Change**

+4%

+4%

+5%

Limited-Time Offer Launches

+33%

One-Year Change



+17 % LSRs

+51 % FSRs

+131%

Five-Year Change



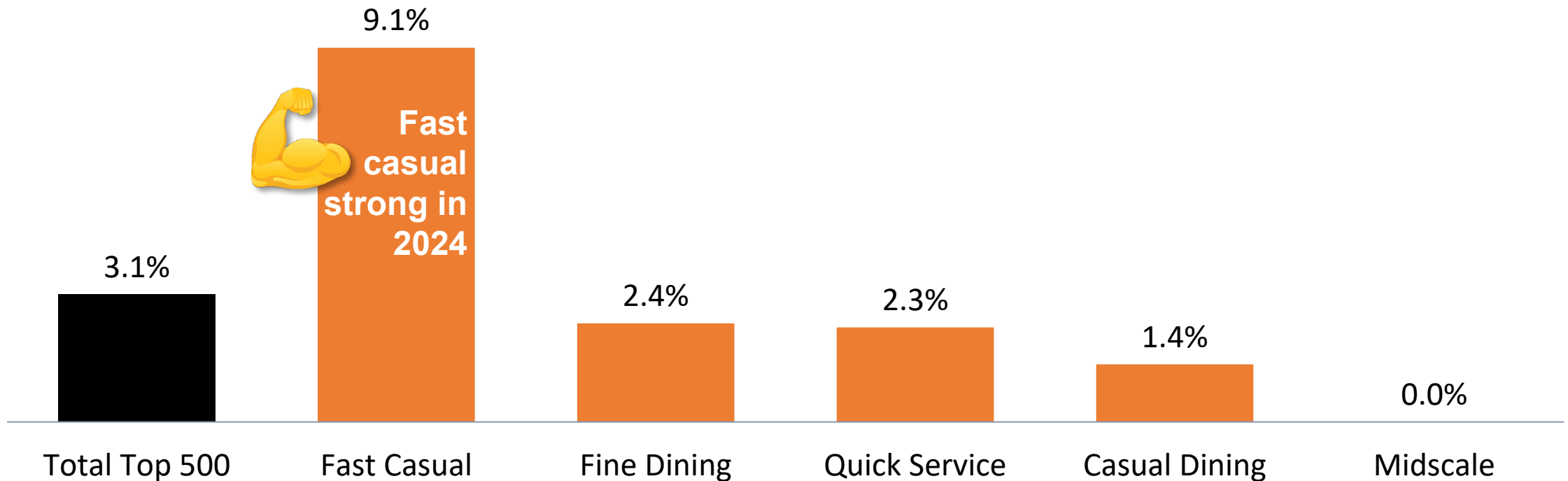
+220% LSRs

+86 % FSRs

Limited-time
offer launches
are surpassing
core item
initiatives

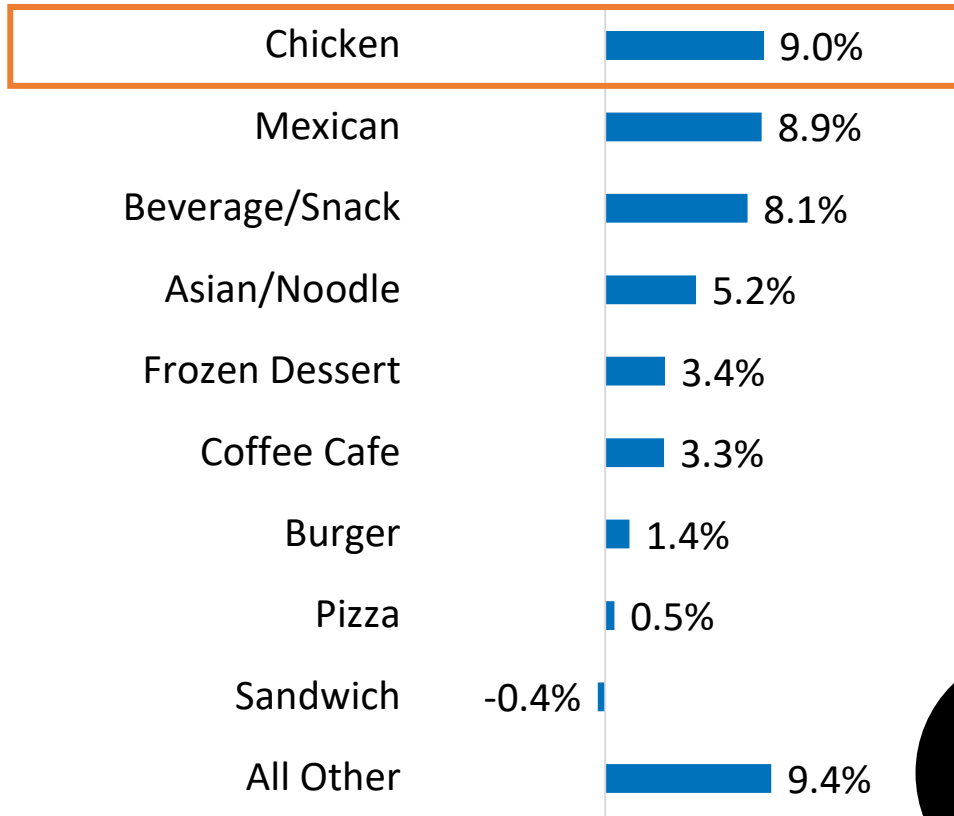
Top 500 Chains: 2024 Subsegment Sales Performance

Annual Sales Change From 2023



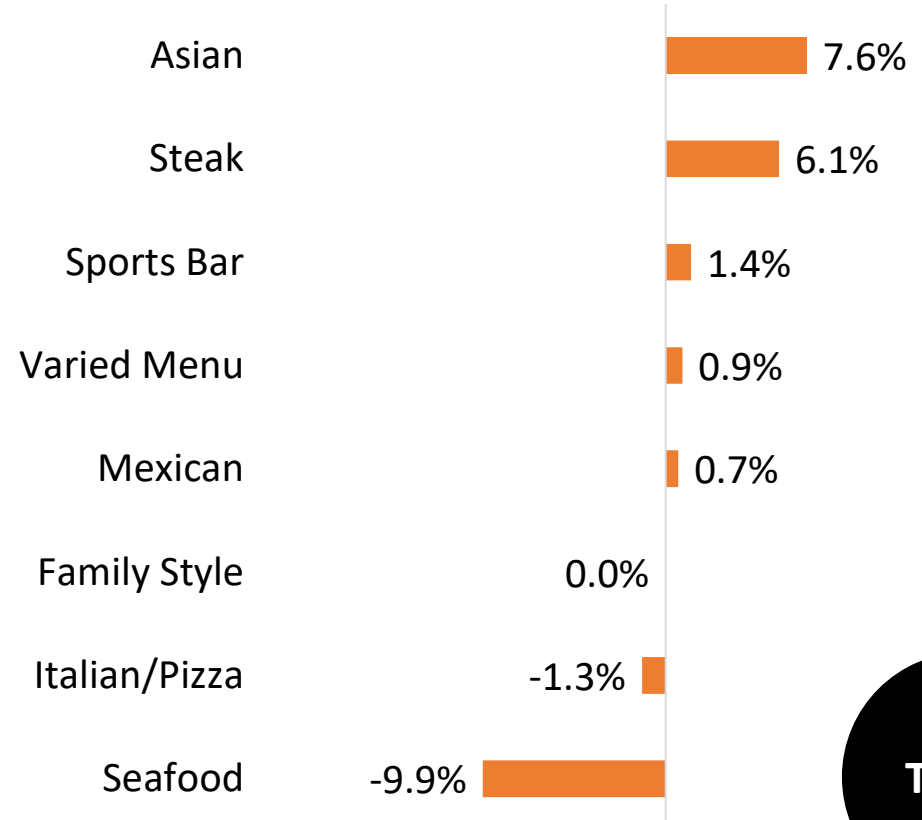
2024 Annual Sales Change

Limited Service



**LSR
TOTAL
3.6%**

Full Service



**FSR
TOTAL
1.1%**

Fastest-Growing Chains by Sales



+163%



+145%



+57%

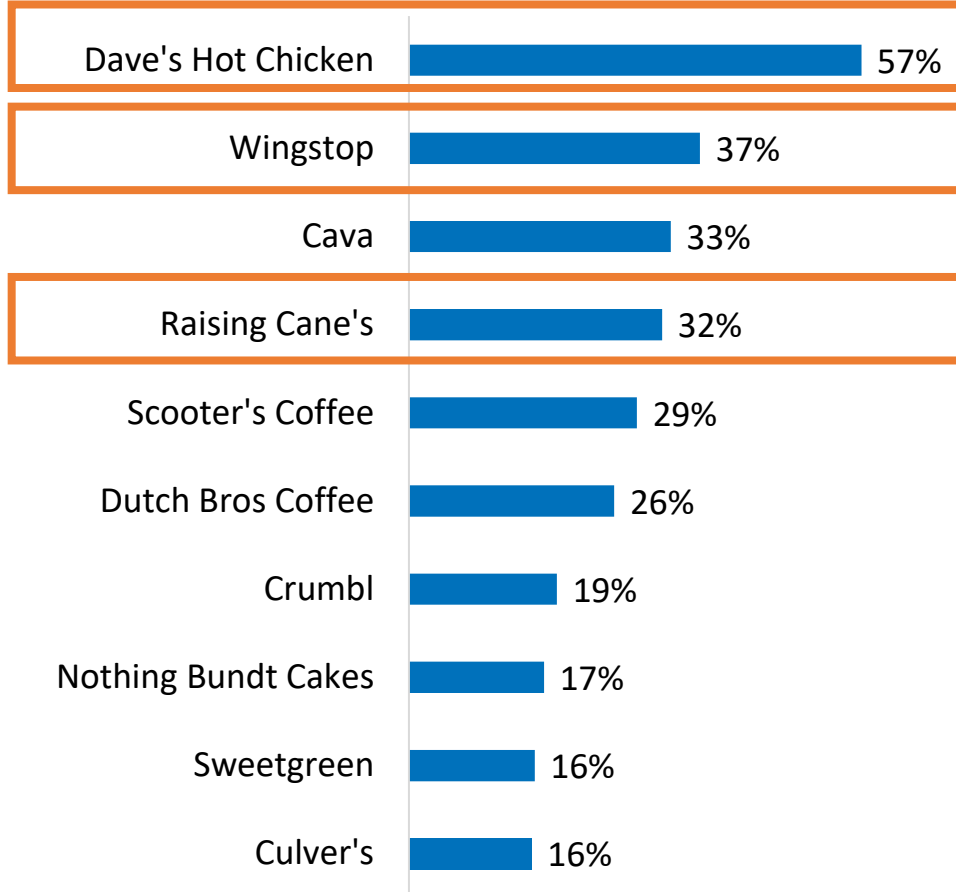


+53%



+52%

Chains Ranked #1-#100 Leaders by 2024 Sales Growth



Get to Know the Fastest-Growing Chains Ranked #1-#100

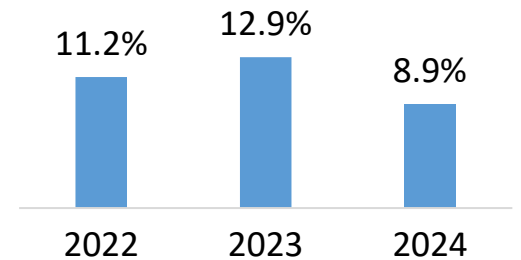
Chain Name	Chain Rank	Segment	Menu Type
Dave's Hot Chicken	89	Fast Casual	Chicken
Wingstop	24	Fast Casual	Chicken
Cava	63	Fast Casual	Mediterranean
Raising Cane's	18	Fast Casual	Chicken
Scooter's Coffee	77	Quick Service	Coffee Cafe
Dutch Bros Coffee	44	Quick Service	Coffee Cafe
Crumbl	53	Quick Service	Beverage/Snack
Nothing Bundt Cakes	64	Quick Service	Beverage/Snack
Sweetgreen	82	Fast Casual	Healthy/Salad
Culver's	29	Quick Service	Burger

Top 10 Limited-Service Chicken Chains by 2024 U.S. Sales

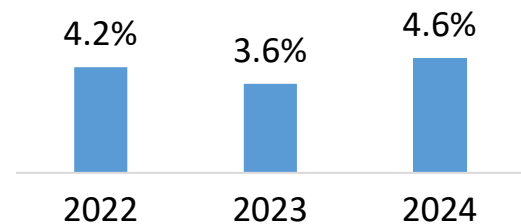
Chain Name	2024 U.S. Sales (\$M)	Change	2024 U.S. Units	Change
Chick-fil-A	\$22,746.1	5.4%	3,109	4.9%
Popeyes	\$5,726.0	3.9%	3,148	3.2%
Raising Cane's	\$4,960.0	32.0%	828	13.9%
KFC	\$4,907.3	-5.2%	3,669	-3.2%
Wingstop	\$4,391.6	36.8%	2,204	14.4%
Zaxbys	\$2,552.1	3.1%	960	2.0%
Bojangles	\$1,881.3	5.6%	840	3.3%
El Pollo Loco	\$1,095.7	4.3%	498	0.6%
Church's Texas Chicken	\$847.0	5.5%	761	-3.5%
Dave's Hot Chicken	\$616.6	57.2%	245	43.3%



Chicken Sales Change



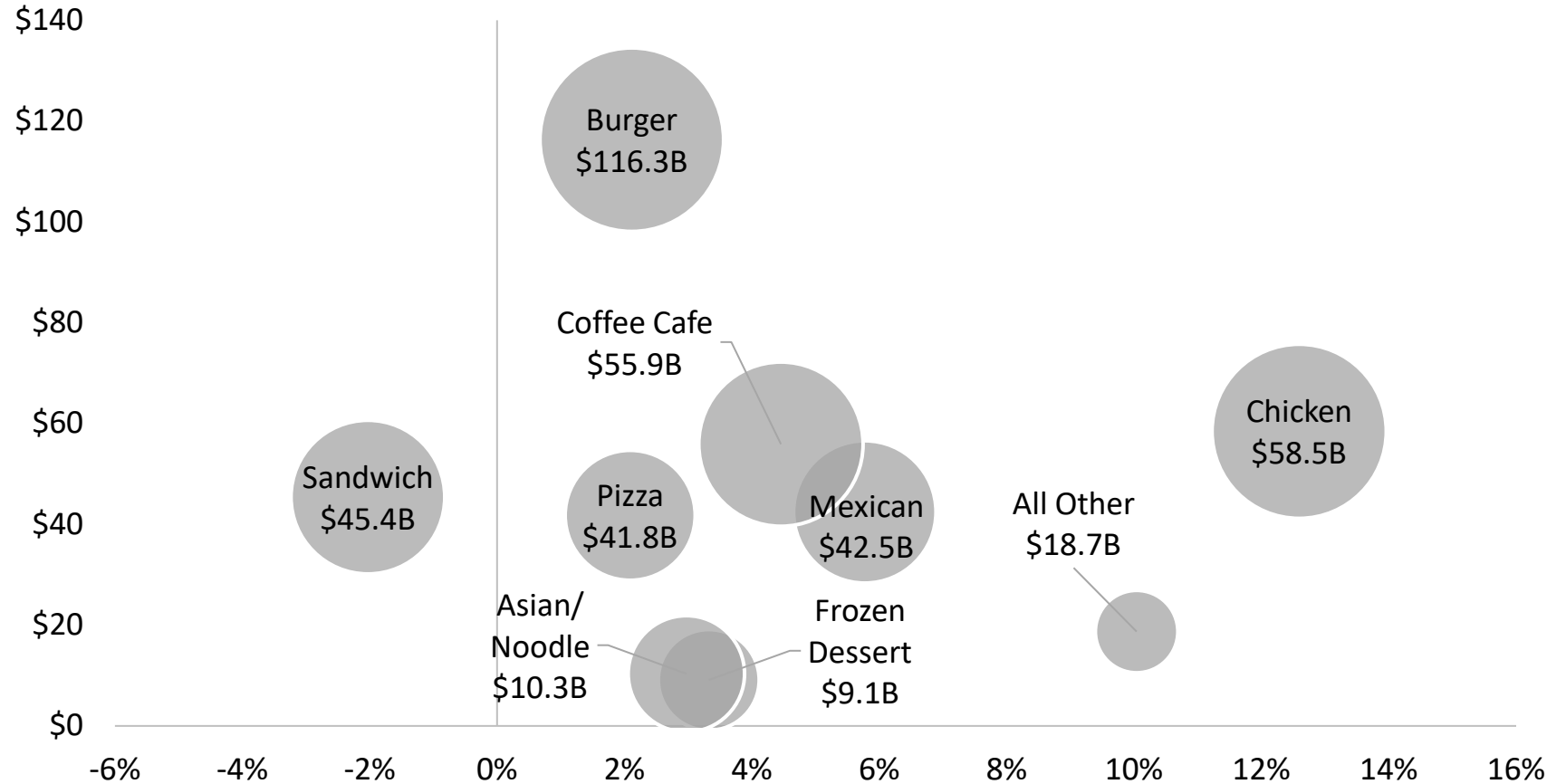
Chicken Unit Change



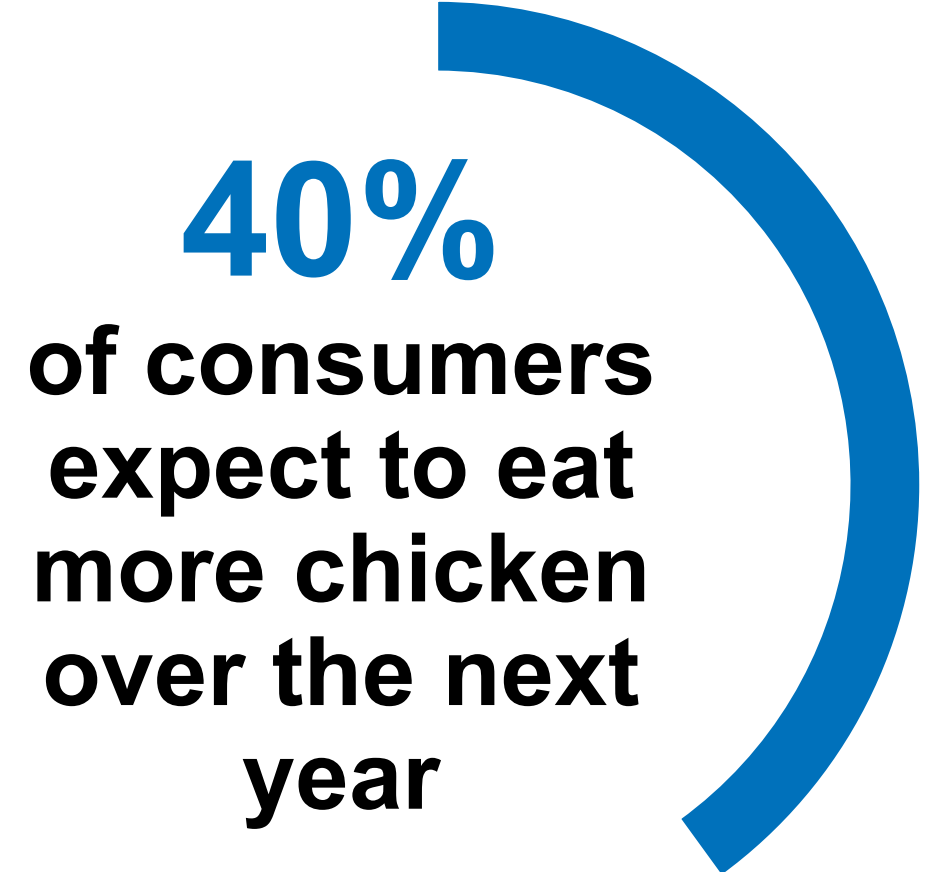
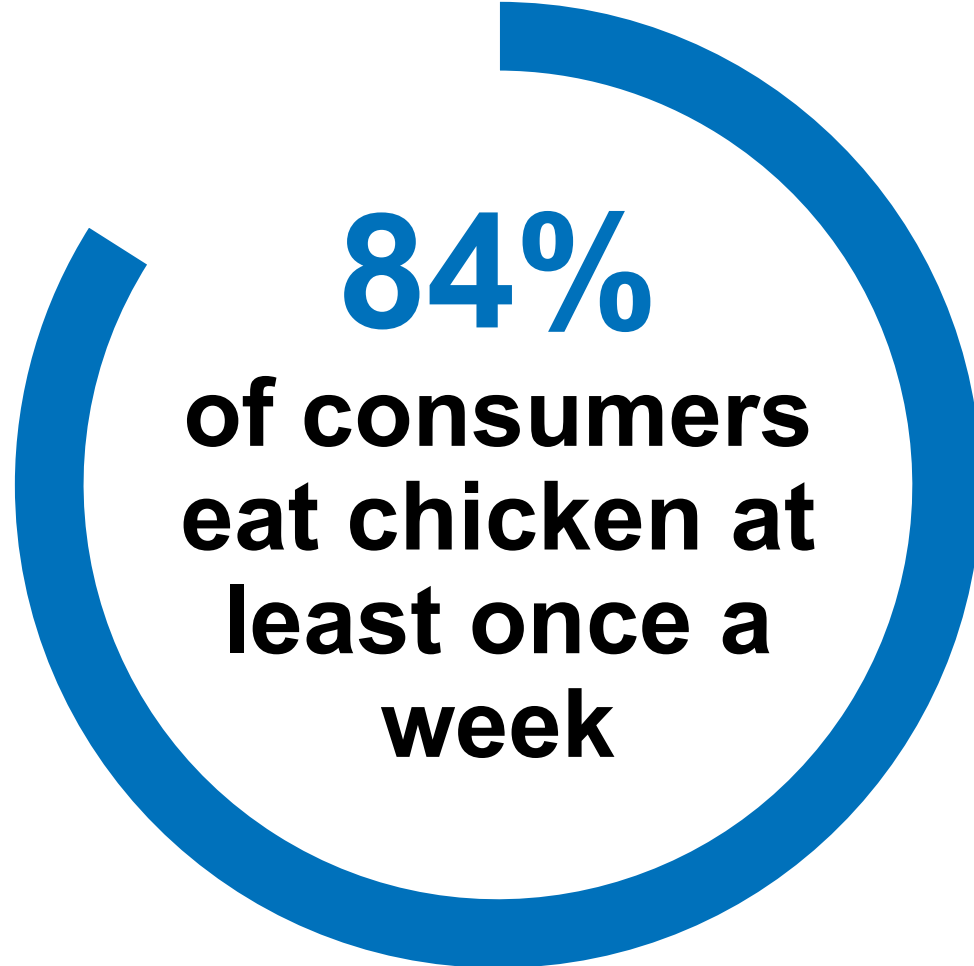
Limited-Service Restaurants 2024 U.S. Industry Sales

Segment	Sales (\$B)	Change
Burger	\$116.3	2.1%
Chicken	\$58.5	12.6%
Coffee Cafe	\$55.9	4.5%
Sandwich	\$45.4	-2.0%
Mexican	\$42.5	5.8%
Pizza	\$41.8	2.1%
Asian/ Noodle	\$10.3	3.0%
Frozen Dessert	\$9.1	3.3%
All Other	\$18.7	10.0%

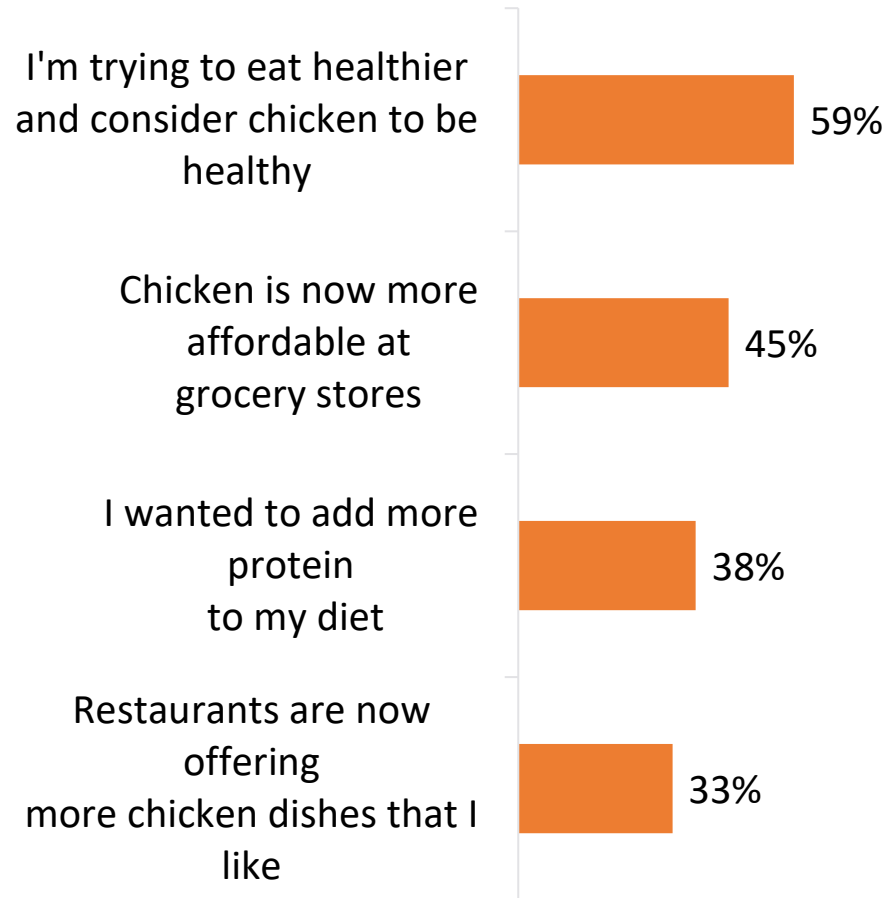
Limited-Service Restaurant Industry Menu Category Sizing & Performance



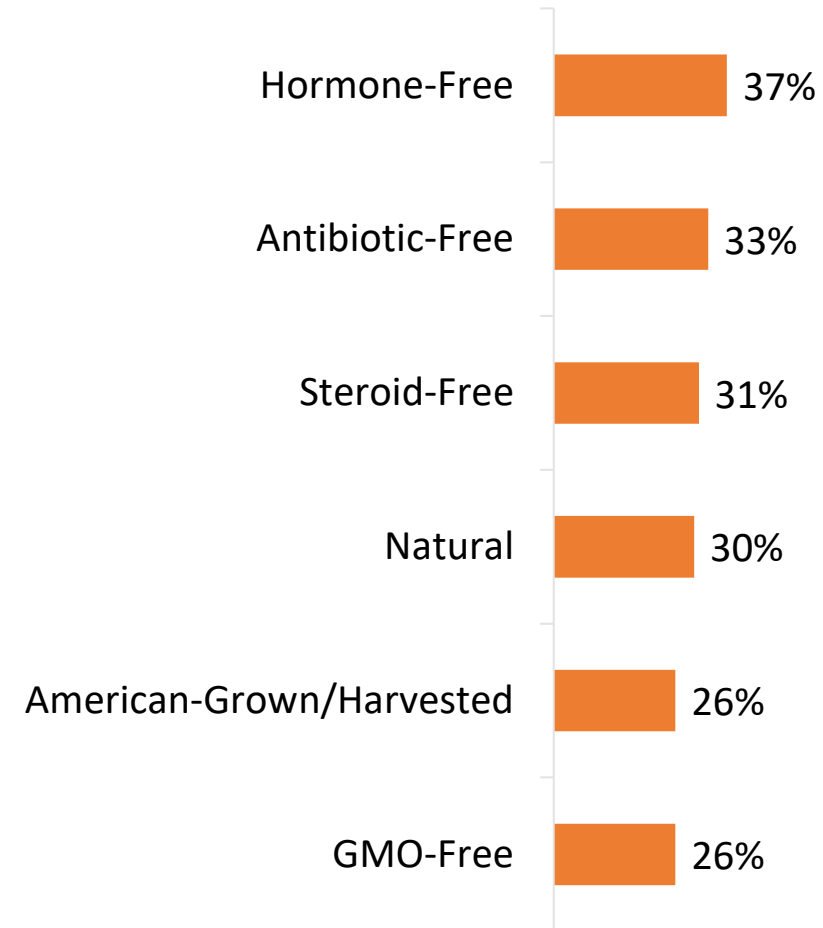
Menu Trends & Consumer Insights



Notable Drivers of Increased Chicken Consumption*



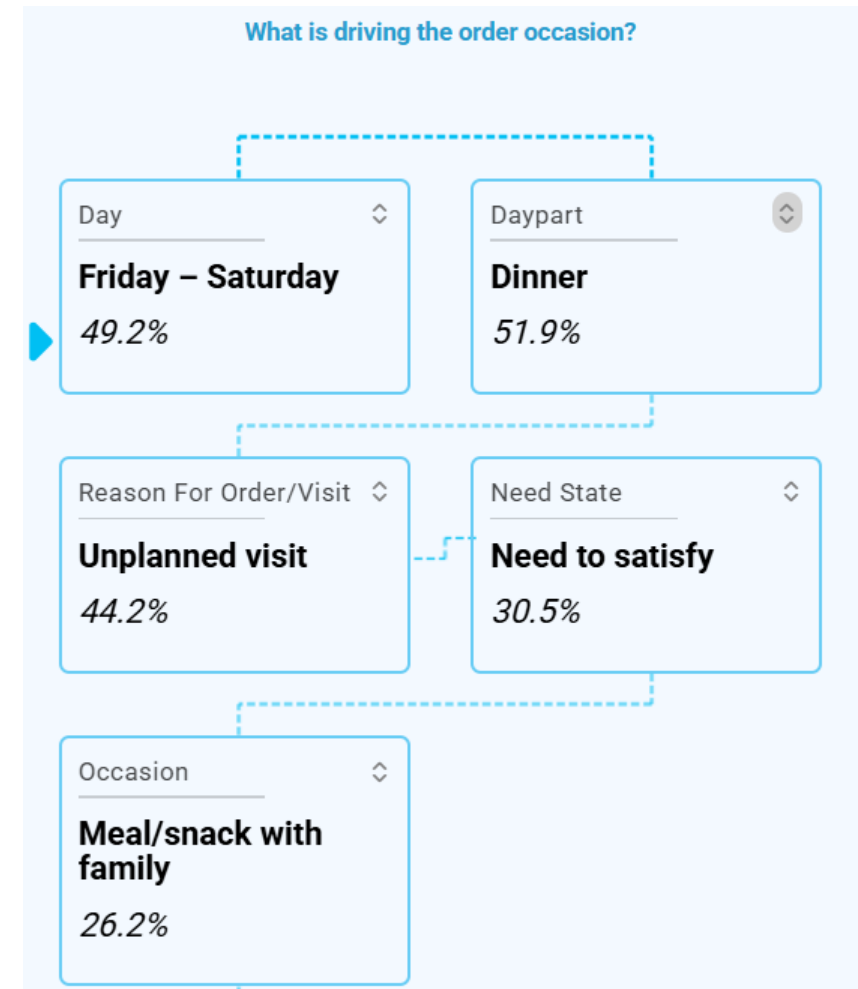
Important Chicken Attributes**



Consumer Order Insights

- Demographic Profile: Female Millennials
- Need State: Need to Satisfy
- Median Spend: \$25.00

Consumer Order Journey



Chicken Pricing Trends

Average Nationwide Pricing



Chicken Sandwich

LSR: \$6.89

FSR: \$13.52



Chicken Wings Entree

LSR: \$13.66

FSR: \$19.16

Chicken Strips/Nuggets

LSR: \$6.75

FSR: \$14.54



Chicken Salad

LSR: \$9.62

FSR: \$14.01



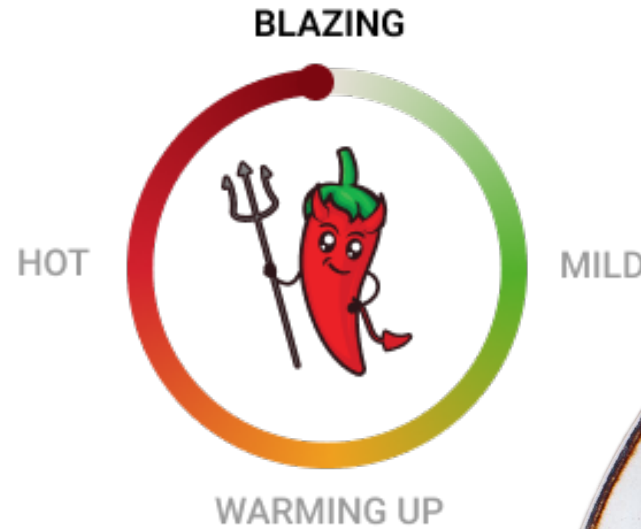
Top Dishes With Chicken

- Chicken Sandwich
- Chicken Wings Appetizer
- Chicken Salad Entree
- Kids Chicken Strips/Nuggets
- Grilled Chicken Entree



Fastest-Growing Dishes With Chicken

- Deviled Eggs +180.0%
- Kids Protein Side +76.0%
- Bao +57.1%
- Risotto Entree 44.4%
- Specialty Taco +31.9%



+5.7%
Growth of
Chicken on
Menus Year
Over Year



Top 10 LTOs With Chicken: **Purchase Intent**

- Crispy Classic Chicken Sandwich** (Pollo Tropical) 58%
- Grilled Chicken Fajita Wrap** (Jack in the Box) 57%
- Chicken Parmesan** (True Food Kitchen) 57%
- BBQ Chicken Bites** (Rally's) 56%
- 10 Piece Crispy Chicken Nuggets** (Taco Bell) 56%
- Roasted Chicken Breast Sub** (Jersey Mike's) 55%
- Smokehouse BBQ Bacon Sandwich** (Chick-fil-A) 55%
- Grilled Chicken Philly Sandwich** (Zaxby's) 55%
- Chicken Bacon Ranch Toasted Sandwich** (Jimmy John's) 55%
- Garlic Parmesan Boneless Chicken Bites** (Rubio's) 54%

**Crispy
Callouts,
Classic Dishes,
Preparation
Highlights**

**Purchase intent can
determine an item's
overall appeal**

Top 10 LTOs With Chicken: Draw

- Bone-In Korean Fried Chicken (P.F. Chang's) 76%
- Apple Pecan Salad with wood-grilled chicken (Bonefish Grill) 74%
- Maple Butter Chicken Waffle Taco (Huddle House) 72%
- Chicken and Waffles Sandwich (Peet's Coffee) 73%
- Scorpion Saucy Bone-In Wings (Red Robin) 73%
- Rainbow Bowl with grilled chicken (Rubio's) 73%
- Mango Habanero Saucy Nuggets (KFC) 73%
- Sausage Gravy Chicken Waffle Taco (Huddle House) 73%
- Shrimp and Chicken Pad Thai (Yard House) 72%
- Chicken Fajita Anytime Tacos (IHOP) 72%

Unique
Sauces, Global
Dishes,
Healthy
Balance

Draw can identify items
with the most potential to
drive incremental traffic

Top 10 LTOs With Chicken: **Uniqueness**

- BBQ Umami Crunch Bowl with braised chicken** (Just Salad) 73%
- Spicy Himalayan Pizza with tikka masala chicken** (Mountain Mike's Pizza) 72%
- Chicken and Eggo Waffles Pizza** (Cicis) 72%
- Autumn Harvest Bowl with blackened chicken** (Sweetgreen) 71%
- Curry Rice Croquettes with ground chicken** (Jinya Ramen Bar) 69%
- Chili Crisp Chicken Crunchy Taco** (Moe's Southwest Grill) 69%
- Maple Butter Chicken Waffle Taco** (Huddle House) 68%
- Chicken and Hummus Crunch Wrap** (Mendocino Farms) 67%
- Chicken Big Mac** (McDonald's) 67%
- Ian Jackson's Slam Dunk Caesar Salad with panko fried chicken** (Chopt) 66%

**Global
Flavors,
Revamped
Classics**

**Uniqueness can identify
items with the most
potential to differentiate
menus**

Top 10 LTOs With Chicken: Craveability

- Chicken Pot Pie** (Jack's Family Restaurants) 70%
- Mike's Favorite Pizza with spicy chicken sausage** (MOD Pizza) 69%
- Chicken and Waffles Sandwich** (Peet's Coffee) 69%
- Bone-In Korean Fried Chicken** (P.F. Chang's) 68%
- Lemon Pepper Wings** (Golden Chick) 67%
- Buffalo Chicken Ranch Mac and Cheese** (Noodles & Company) 66%
- Sausage Gravy Chicken Waffle Taco** (Huddle House) 66%
- Winter Orchard Salad with grilled marinated chicken** (P.J. Whelihan's Pub & Restaurant) 65%
- Korean Sweet Heat Traditional Chicken Wings** (Famous Dave's) 65%
- Chipotle Lime Grilled Chicken Street Tacos** (Taco Cabana) 65%

**Comfort
Foods,
Revamped
Classics**

**Craveable LTOs can
drive incremental sales
due to impulse buys**

The Secret's in the Sauce

Fastest-Growing Sauces Paired With Chicken



Global/Regional

- Adobo Sauce +33.3%
- Yum Yum Sauce +29.2%
- Peri Peri Sauce +18.3%
- White Barbecue Sauce +17.0%



Spicy

- Chile Glaze +84.0%
- Chile-Garlic Sauce +17.1%

Flavor Fusions

- Honey-Chile Sauce +121.2%
- Hot Honey +22.5%



Herbal/Citrusy

- Citrus Marinade +26.5%
- Cilantro Sauce +22.2%



Chicken Wars Expand



Source: [Wendy's website](#)



Source: [Popeyes Instagram](#)

Action From Nonchicken Chains



Source: [Taco Bell website](#)



Source: [Sheetz website](#)

Factors for Success

Texture, with an emphasis on crunch

Unique, bold flavors

Quality cues

+11.5%
Growth of
“Crispy”
Preparations on
Menus Year
Over Year



What's Now & What's Next

INTRODUCTION

Choice of Protein Quesadilla
Entree 3.2%
Loaded Fries Appetizer 2.7%
Chicken/Country Fried Steak
2.3%
Choice of Protein Salad Entree
1.8%
Barbecue Platter 1.4%
Gumbo Appetizer 1.4%
Slider Entree 1.4%
Tasting Menu 1.4%

GROWTH

Roasted Chicken 21.4%
Chicken Piccata 12.2%
Wedge Salad Appetizer 11.2%
Lemon Chicken 10.2%
Protein Lettuce Wrap Appetizer
9.2%
Chicken and Seafood 8.2%
Satay/Kabob Appetizer 8.2%
Chopped Salad Appetizer 7.1%
Fried Rice Entree 7.1%

MAINSTREAM

Caesar Salad Appetizer 17.3%
Garden/House Salad Appetizer
16.9%
Chicken Taco 13.9%
Chicken Nachos Appetizer
12.6%
Build-Your-Own Combo 11.0%
Chopped Salad Entree 10.7%
Mediterranean Salad Entree
10.5%
Mostaccioli/Penne 9.7%

MATURE

Chicken Sandwich 65.8%
Chicken Wings Appetizer
37.4%
Chicken Strips/Nuggets Entree
34.9%
Chicken Salad Entree 34.4%
Caesar Salad Entree 30.7%
Salad Topping 21.8%
Buffalo Chicken Sandwich
21.4%
Protein Topping 21.4%

Elevated Handhelds

Salted Egg Yolk Chicken Sandwich—dried shrimp and brioche (Double Chicken Please in New York City)

Signature Southern Fried Chicken Sandwich—harissa hot honey and cucumber (Melba's in New York City)



Global Inspirations

Moroccan Fried Chicken for Two—beghrir and lemon labneh (Zou Zou in New York City)

Berbere Spiced Chicken Yassa-braised Vidalia onion, yassa sauce and frisee herb salad (Mawa's Kitchen in Aspen, Colo.)



Protein Swaps

Philly Cheesesteak Bao—
onion, chicken breast,
cheddar cheese (Ninja Bao
in Philadelphia)

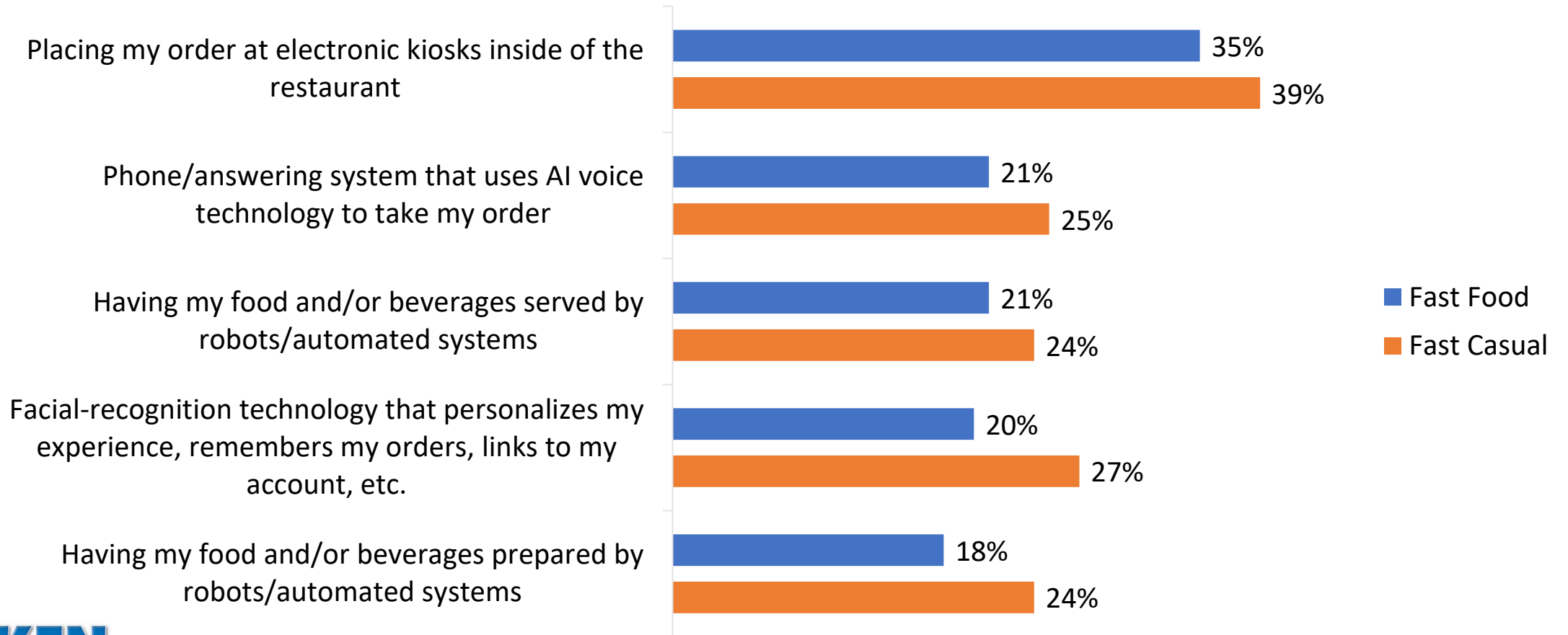
Char Siu Chicken (Ethel's
Grill in Honolulu)



Looking Ahead

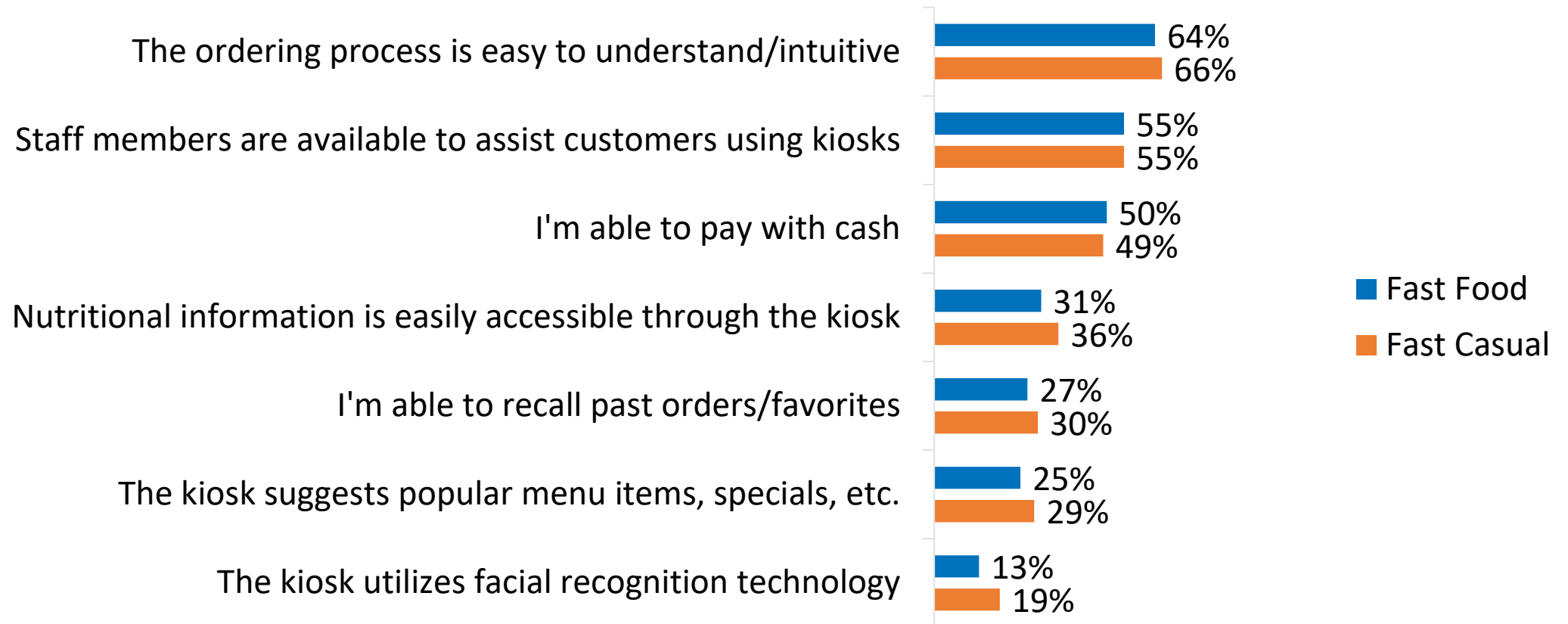
Appeal of Restaurant Technologies

% Appealing/Very Appealing

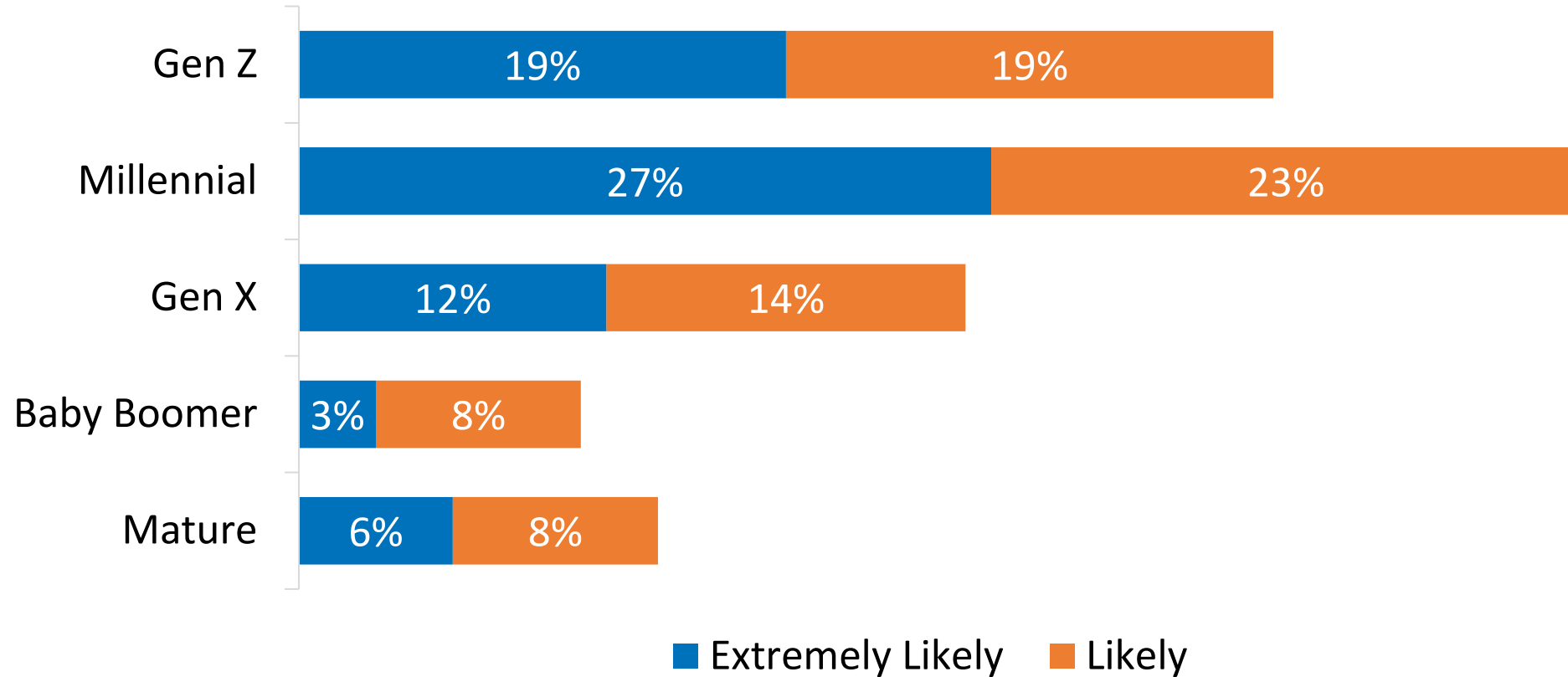


Importance of Electronic Kiosk Amenities

% Important/Extremely Important



Likelihood to Order Chicken From Ghost Kitchens



Chicken Chains & Tech

A Fast-Growing Chicken Chain Uses AI in Quest to Become a Household Name

Slim Chickens' new chief marketing officer wants to play up its made-to-order Southern food with technology—and a music studio

Source: [The Wall Street Journal](#)

Restaurant Chain PDQ Exec on Using (Labor-Saving) Self-Ordering Kiosks to Drive Sales

Kiosk technology boosts average order size, improves efficiencies, and more, says Bryan Groc, Senior Vice President of Data Analytics for the fast-casual chicken chain.

Source: [U.S. Chamber of Commerce website](#)

SoundHound AI Supports Church's Texas Chicken® to Power Voice AI Ordering at the Drive-Thru

Popular Chicken Chain Pilots SoundHound's Award-Winning Voice AI Ordering System at the Drive-Thru to Streamline Orders, Reduce Wait Times, and Empower Staff

Source: [SoundHound website](#)

Tech Not Always King



Source: [KFC vs AI website](#)

Social Media



Key Takeaways

- Chicken is booming—take advantage of increased sales and interest
- Lean into versatility with exciting flavors and preparations
- Technology will remain key for chicken players going forward—but a balance is necessary

Questions?



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