

There’s No Stopping Multi-Unit Ownership!

Insights into multi-unit franchise ownership growth

By **Ambika Oberoi**

The franchise landscape continues to evolve, and the latest FRANdata research shows just how dramatically multi-unit ownership (MUO) has reshaped the sector over the past 15 years. Updated 2025 data reveals widespread expansion across every MUO category, signaling a continued shift toward consolidation, scale, and increasingly sophisticated operators. Here’s a closer look at what the numbers tell us.

Multi-Unit Operator Category	Number of Multi-Unit Owners		Percentage Change
	Count as of 2010	Count as of 2025	
2–5 units	28,862	34,218	18.56%
6–10 units	3,411	4,199	23.10%
11–25 units	1,630	2,175	33.44%
26–50 units	397	615	54.91%
50+ units	162	504	211.11%

Consistent growth

Every segment of multi-unit ownership saw continued expansion from 2010 to 2025. The largest cohort—operators with **two to five units**—grew by **18.56%**, rising from 28,862 to 34,218. This steady growth underscores how small-scale multi-unit ownership remains an accessible and attractive pathway for franchisees entering the world of scaling.

Operators with **six to 10 units** grew **23.10%**, increasing from 3,411 to 4,199. This reflects the ongoing trend of early-stage multi-unit operators choosing to expand further as they gain operational confidence and access to capital.

Rapid expansion

Mid-sized operators continue to accelerate the fastest outside of the mega-operator segment. MUOs with **11–25 units** grew by **33.44%**, rising to 2,175 operators—evidence that more franchisees are leveraging economies of scale and deeper managerial experience to move into larger territory structures and multi-brand portfolios.

Even more notable, operators with **26–50 units** expanded by **54.91%**, increasing from 397 to 615. This segment represents operators with significant organizational infrastructure and the ability to manage complex, multi-market footprints—an increasingly common model across the industry.

Large operators

The most transformative shift appears at the top end of the MUO spectrum. Operators owning **50+ units** increased by **211.11%**, skyrocketing from 162 in 2010 to 504 in 2025. This explosive growth clearly signals the broader consolidation movement reshaping franchising. In 2010 the top multi-unit operator (NPC International) owned 1143 units and now its Flynn Group with more than 2,730 units across the US.

Large operators now hold substantial influence across numerous franchise systems—driving brand growth, reshaping territory strategies, and often serving as preferred partners for expansion due to their capital access, operational sophistication, and proven performance at scale.

The implications

The continued rise of multi-unit ownership—especially among large and upper-mid-tier operators—illustrates a franchise landscape that is maturing rapidly. While smaller MUOs remain an essential on-ramp for new franchisees, the fastest growth is concentrated among operators with the infrastructure to scale aggressively.

For franchisors, this shift impacts development planning, territory management, incentives, and the support models required to attract and sustain larger multi-unit partners. For franchisees, it reflects an environment where growth increasingly favors those who bring professional systems, strong teams, and capital depth.

FRANdata's updated analysis shows a sector moving steadily toward consolidation and sophistication. With meaningful growth across all MUO categories—and a surge in operators managing 50 or more units—the franchise industry is positioned for continued transformation, powered by experienced multi-unit owners who are reshaping what scale looks like in 2026 and beyond.

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