

MUBG 2026 –

Franchise Industry Ownership Landscape

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Each year, FRANdata analyzes the ownership patterns that shape the U.S. franchise economy. For franchisees—whether you are an established multi-unit operator or a first-time owner planning your next move—understanding how your industry compares to the larger franchise landscape can inform expansion decisions, competitive positioning, and long-term strategy.

This year’s analysis covers **433,558 franchised units**, with **57% operated by multi-unit owners** and **43% by single-unit owners**.

Industry	SUO	MUO	Grand Total
QSR	24291	117790	142081
Health & Fitness	16456	14917	31,373
Lodging	23,712	7,206	30,918
Maintenance Services	21,047	3,903	24,950
Retail Stores	15159	6,960	22,119
Business-Related	10,470	11,067	21,537
Baked Goods	7,762	11,738	19,500
Real Estate	8,665	10,786	19,451
Beauty-Related	3,929	14,622	18,551
Automotive	6,272	9,217	15,489
Restaurants (Sit-Down)	4150	10,790	14,940
Frozen Desserts	5,740	6,847	12,587
Services-General	7160	4673	11833
Retail Food	4325	5,732	10,057
Child-Related	6,426	3,395	9,821
Travel	4229	144	4,373
Decorating & Home Design	3,140	841	3,981
Sports & Recreation	2141	1142	3283

Printing	2,336	593	2,929
Personnel Services	1593	1,118	2,711
Building & Construction	2,075	506	2,581
Pet-Related Products/Services	1,418	757	2,175
Clothing & Accessories	846	870	1,716
Computer Products and Services	706	600	1,306
Education-Related	852	443	1,295
Party-Related Goods/Services	559	260	819
Security-Related	414	128	542
Publications	455	48	503
Photographic Products/Services	129	8	137

Across the system, several industries stand out as clear top performers. **QSR continues to dominate**, with **142,081 units**, with an extraordinary **83% of locations operated by MUOs**. This reflects an industry increasingly shaped by scale, operational sophistication, and multi-brand ownership. Health & fitness and lodging also show significant strength, each surpassing **30,000 units** and supported by steady consumer demand and experienced regional and national operators. Automotive and Sit-Down Restaurants remain meaningful contributors, with room for continued consolidation and regional growth.

At the same time, several sectors remain smaller, more fragmented, or slower to scale. One clear example is the **Child-Related industry**, which encompasses **9,821 franchised units** nationwide, with nearly **two-thirds of all locations being** operated by single-unit owners. Because these businesses are highly local and relationship-driven, they tend to perform best when the owner is hands-on and closely connected to the community. The predominance of SUOs in child-related franchising also suggests that new entrants face competition from other local owners rather than large multi-brand groups. Education-related concepts follow similar patterns, creating an environment where growth tends to come from committed owner-operators rather than large consolidating groups. Categories such as **Travel (4,373 units)**, **Decorating & Home Design (3,981 units)** and **Printing (2,929 units)** represent niche segments dominated primarily by single-unit operators.

Publications (503 units) and **Photographic Products/Services (137 units)** reflect either highly specialized demand or are markets that have shrunk due to digital substitution and shifting consumer behavior.

As the franchise economy evolves, ownership composition will remain a key indicator of where scale is accelerating—and where independent operators continue to thrive.

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