# 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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