

FALL 2018

FRESH INSIGHTS FOR FOODSERVICE

*Showcasing trends at restaurants,
retail, home delivery, and beyond*

FALL FOR APPLES

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CHAIN REPORT

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K-12 FOODSERVICE

Featuring interviews with K-12 decision-makers across the country on the produce options they are excited to menu this fall.



LETTER FROM THE EDITOR

Dear Reader,

On behalf of the Retail-Foodservice Board and United Fresh, welcome to the fall issue of *Fresh Insights for Foodservice*, powered by Datassential.

As the weather turns cooler once again, we check in on the latest trends in foodservice with our **“In Season”** look at two fall commodities: apples and butternut squash. We also dive into the latest trend data on a growing menu option with breakfast bowls. It’s never too early to think ahead, so our **“On the Horizon”** section looks at the spring menu trends you should prepare for in 2019, including a look at how radishes and honeydew are being showcased in foodservice today, plus a look at how entrée salads are showcasing fresh produce.

This quarter’s **“Chain Report”** covers a huge range of commodities being leveraged at major chains in the past few months, from late summer to early fall, including menu items featuring oranges, broccoli, and green beans.

Finally, our **“View From Above”** covers the K-12 school foodservice segment, high-volume foodservice buyers that are often referred to as “The Largest Restaurant in Town.” These customers can have a significant impact on the palates of the next generation of produce consumers. We asked school foodservice directors across the country which produce items they’re most excited to incorporate into their fall menus.

United Fresh is proud to bring you this issue of *Fresh Insights for Foodservice*, a valuable trend-tracking tool covering the latest fresh produce trends in foodservice. And it’s all powered by Datassential, the industry’s leading market research firm.

Enjoy this quarter’s report.

Keep it fresh!



Andrew Marshall
Director, Foodservice &
Foundation Partnerships
United Fresh Produce Association



MENU ADOPTION CYCLE

Datassential's Menu Adoption Cycle (MAC) follows trends through an established life cycle. In the pages ahead, you'll find everything from innovative new produce options just appearing on restaurant menus to well-established fruits and vegetables that are common across operators.

1

INCEPTION

Trends start here. The birth of a trend typically originates in fine dining or ethnic independents. Inception-stage trends exemplify originality in flavor, preparation, and presentation. Cutting-edge chefs operate in this realm, often giving way to the next trends.

EXAMPLES: Romanesco, yuzu, rilletes, venison.

2

ADOPTION

Casual dining and fast-casual independents expand the audience for fine dining trends by offering them at a lower cost and with simpler prep methods. Adoption-stage trends are still unique and differentiated, often characterized by premium ingredients, interesting prep, and creative plating.

EXAMPLES: Acai, duck, charcuterie, lobster rolls.

3

PROLIFERATION

Now it's mainstream, as casual dining, fast-casual, and sometimes QSR chains help popularize a trend for a mass audience. Proliferation-stage trends are adjusted to appeal to a broader population, often by combining them with popular applications (on a burger, pasta, etc).

EXAMPLES: Kale, grits, smoked cheeses.

4

UBIQUITY

Trends reach maturity, and are now common across the industry, with midscale restaurants generally acting last. While these trends are often altered to appeal to the mainstream, their roots are still recognizable. Ubiquity trends are well-suited for line extensions and to add a punch of creativity to old favorites.

EXAMPLES: Arugula, chipotle, tater tots.

WHAT'S FRESH FOR FALL?

It's that time of year again – the weather is getting colder, the days are getting shorter, and consumers are growing increasingly hungry for hearty comfort foods. With the dog days of summer behind us, chefs can start firing up the ovens again, roasting seasonal produce like beets, pumpkin, or cauliflower to add a punch of flavor to salads, soups, stews, and more. Over the next few pages, learn about how the quintessential apple can be used across the menu, and discover how chefs are leveraging fall favorite butternut squash to appeal to consumers with a variety of different dietary preferences. We'll also demonstrate how trendy breakfast bowls can feature virtually any type of fresh produce and take on almost any flavor, both savory and sweet.



APPLES

WHAT IT IS

“An apple a day keeps the doctor away,” or so the saying goes, but with the massive variety of apples out there, which one to choose? According to the University of Illinois Extension, there are an estimated 7,500 varieties of apples worldwide, with roughly a third of those being grown in the U.S. With such an array of apples out there, it might be hard to believe that the only apple that’s actually native to North America is the crab apple – other cultivars were first introduced to North America in the 17th century by European settlers. Today more than 100 apple varieties are available commercially in the U.S., but the U.S. Apple Association states that just 15 varieties account for almost 90% of production, including McIntosh, Fuji, and Golden Delicious. While different types of apples are better suited to different culinary applications, overall the fruit is considered to be a good source of fiber and antioxidants.

FOODSERVICE TODAY

With their wide range of flavors and textures, apples can be leveraged in literally any part of the menu, from appetizers to entrées to desserts and even cocktails. Operators who normally use prepared apple products should consider using fresh apples instead, both for flavor and to appeal to consumers’ desire to limit preservatives and additives. When incorporating fresh apples onto menus, operators may also benefit from highlighting exactly what kind they’re using, as calling out apple varieties on the menu is a growing trend – “Honeycrisp” mentions grew 125% in the past four years on menus, while “Red Delicious” grew 37%. While fall is peak apple season, with the fruit starring in ciders and stuffing and breads, apples can be added to dishes year-round, such as in breakfast bowls or smoothies, or as a sweet counterpoint to savory flavors in stews and roasts.



4-YEAR GROWTH ON RESTAURANT MENUS

3%	QSR
13%	FAST CASUAL
2%	MIDSCALE
6%	CASUAL
-4%	FINE DINING

PENETRATION PERCENT OF RESTAURANTS MENUING

46%	QSR
62%	FAST CASUAL
61%	MIDSCALE
73%	CASUAL
79%	FINE DINING



ON THE MENU

2017 USDA
AVERAGE SHIPPING POINT WEEKLY COMMODITY PRICE
\$19.48

MCALISTER'S DELI

Dallas, TX
Applesauce
 Made from real apples, our applesauce has an intense flavor that’s sweet with a hint of tartness.
\$1.25

JUNIPER

Austin, TX
Buttermilk Pie
 Gala apple, parmesan, toasted milk.
\$9.00

DOMINO'S

Ann Arbor, MI (HQ)
Chicken Apple Pecan Salad
 Roasted white meat chicken, diced red and green apples, dried cranberries, praline pecans, and cheddar cheese with spring mix.
\$6.49

APPLES BY REGION



WEST	64% PENETRATION	4% GROWTH
SOUTH	64% PENETRATION	4% GROWTH
MIDWEST	63% PENETRATION	3% GROWTH
NORTHEAST	66% PENETRATION	5% GROWTH

PENETRATION: % of restaurants serving
GROWTH: change in penetration from '14-'18



DID YOU KNOW?

Apple cider vinegar, made by fermenting apple juice, has grown significantly on U.S. menus thanks to increased consumer interest in its functional benefits.



CUISINE ANALYSIS

PERCENT OF RESTAURANTS THAT MENU APPLES

89%	MIXED ETHNICITY
88%	OTHER EUROPEAN
88%	FRENCH
84%	AMERICAN
82%	STEAKHOUSE
78%	COFFEE/BAKERY

BREAKDOWN

PERCENT OF RESTAURANTS THAT MENU APPLES

65%	CHAINS (250+ UNITS)
64%	REGIONAL (3-249)
62%	INDEPENDENT (1-2)
19%	FOOD TRUCKS



"Apple" dessert with apple confit, brown butter mousse, and Armagnac sabayon at Le Bernardin in New York.



Roasted Winter Squash & Honeycrisp Apple Soup with goat cheese and spiced pepitas at Rootstock & Vine in Woodstock, GA.



Apple Crostada Pancakes made from scratch with caramelized Granny Smith apples, caramel, and whipped cream at Maggiano's Little Italy, based in Dallas, TX.



**4-YEAR GROWTH
ON RESTAURANT MENUS**

27%	QSR
28%	FAST CASUAL
12%	MIDSCALE
16%	CASUAL
-6%	FINE DINING

**PENETRATION
PERCENT OF
RESTAURANTS MENUING**

2%	QSR
9%	FAST CASUAL
6%	MIDSCALE
10%	CASUAL
24%	FINE DINING

BUTTERNUT SQUASH

WHAT IT IS

While butternut squash is technically a fruit, it's popularly considered a vegetable and is usually consumed cooked rather than raw. Its flesh resembles that of pumpkin, and has a similar sweet, nutty taste. Unlike pumpkin, butternut squash has a thin outer skin that can be easily peeled, although the skin itself is also edible. The most common variety of butternut squash, the Waltham Butternut, was first developed and introduced in the U.S. during the 1940s. The flesh of the squash is nutrient dense – it's high in vitamin A and C, fiber, potassium, and folate. Butternut squash seeds are also edible, and are touted for their high zinc content.

FOODSERVICE TODAY

The simplest way to prepare butternut squash is to roast it, but there are a slew of other ways to prepare the gourd as well: it can be sautéed, grilled, boiled, mashed, or puréed into a soup. With growing consumer interest in adopting a plant-forward diet, butternut squash can be used in place of meat to add a hearty component to soups and stews. For consumers looking for a keto-friendly alternative to traditional pastas, the squash can be spiralized and used to create veggie noodles. While many restaurant operators are using butternut squash in savory dishes, its natural sweetness also lends itself well to dessert and beverage applications – think smoothies, pies, breads, or even puddings. As it reaches its peak harvest during the fall, operators can leverage fresh butternut squash as a seasonal ingredient, menuing it as an accompaniment to center of the plate proteins or featuring it in baked goods.



PROLIFERATION

ON THE MENU

2017 USDA
**AVERAGE SHIPPING
POINT WEEKLY
COMMODITY PRICE**
\$10.41
FOR SQUASH

MOMOS
San Francisco, CA
Butternut Squash & Kale
Shallots, bourbon
cider glaze.
\$10.00

GREEN & TONIC
Cos Cob, CT
*Butternut Squash &
Quinoa Bowl*
Quinoa, vegetable stock,
butternut squash, white
beans, garlic, kale, almonds,
pecans, nutritional yeast.
\$10.49

RUTH'S DINER
Salt Lake City, UT (HQ)
Autumn Salad
Mixed greens, maple glazed
butternut squash, feta
cheese, bacon, roasted
pumpkin seeds, and
cranberries tossed in Dijon
vinaigrette.
\$11.49

BUTTERNUT SQUASH BY REGION



WEST	8% PENETRATION	14% GROWTH
SOUTH	6% PENETRATION	34% GROWTH
MIDWEST	8% PENETRATION	20% GROWTH
NORTHEAST	11% PENETRATION	27% GROWTH

*PENETRATION: % of restaurants serving
GROWTH: change in penetration from '14-'18*



DID YOU KNOW?

Whole butternut squash can last for a very long time – it can keep for over three months if stored properly in a cool, dark place.



CUISINE ANALYSIS

PERCENT OF RESTAURANTS THAT MENU BUTTERNUT SQUASH

27%	FRENCH
20%	MIXED ETHNICITY
19%	ITALIAN
15%	OTHER EUROPEAN
14%	AMERICAN
12%	SEAFOOD

BREAKDOWN

PERCENT OF RESTAURANTS THAT MENU BUTTERNUT SQUASH

2%	CHAINS (250+ UNITS)
7%	REGIONAL (3-249)
9%	INDEPENDENT (1-2)
2%	FOOD TRUCKS



Butternut Squash Pizza with caramelized onion, roasted garlic, kale, vegan almond ricotta, dried cranberry, and sage at True Food Kitchen, based in Phoenix, AZ.



Thai Red Beef Curry with butternut squash and bell pepper from Plated meal kit service.



Idle Hands cocktail with roasted butternut squash-infused rye, vermouth, and toasted pecan bitters at Idle Hour in Los Angeles, Ca.

CHECKING IN ON PRODUCE AND BREAKFAST BOWLS



4-YEAR GROWTH ON RESTAURANT MENUS

51%	QSR
65%	FAST CASUAL
24%	MIDSCALE
54%	CASUAL
43%	FINE DINING

PENETRATION PERCENT OF RESTAURANTS MENUING

18%	QSR
34%	FAST CASUAL
29%	MIDSCALE
14%	CASUAL
18%	FINE DINING

OVERVIEW

From poke to salads to Mediterranean food, the customizable bowl trend shows no sign of slowing down any time soon. Breakfast foods are yet another category that have been incorporated into the movement, with a growing number of operators now offering traditional morning eats like scrambled eggs, hash browns, bacon, and more in a bowl format, often with components made from fresh ingredients (think, for example, a Southwest-inspired bowl with sautéed fresh bell peppers and onions). Breakfast bowls aren't all savory, either – humble oatmeal and yogurt bowls are getting a makeover, with premium fresh fruit toppings ranging from traditional (blueberries, strawberries) to trend-forward (acai, mango). The main emphasis in modern breakfast bowls is the use of fresh ingredients as opposed to pre-made, giving dishes a health halo and also allowing operators to incorporate seasonal ingredients when they're at their peak quality. When it comes to menuing breakfast bowls, using fresh produce can help operators stand out from the competition and also add a premium spin to their offerings. With cuisines like Middle Eastern food becoming more well-known to consumers, globally-influenced breakfast bowls can also be perceived as being more authentic by consumers if they're made with fresh ingredients – think a shakshuka bowl with freshly-made tomato sauce, for example.

TRENDING INGREDIENTS



ALMOND
BUTTER



WATERMELON



KIWI



FARRO



CURRY

ON THE MENU

NAPA VALLEY GRILLE Los Angeles, CA

Quinoa & Vegetable Bowl

Red potatoes, squash, peppers, poached egg, crispy shallots, sesame vinaigrette.

\$12.00

FARMER BOYS Riverside, CA (HQ)

Farmhand Bowl

Farm fresh eggs, veggies, bacon, sausage, and ham, cooked to order.

\$8.13

VANDAL New York, NY

Acai Bowl

Granola, toasted coconut, strawberry, banana.

\$12.00

LEAN & GREEN La Jolla, CA (HQ)

Fit Bowl

Egg whites, broccoli, alfalfa sprouts, cheddar, avocado.

\$9.75

BREAKFAST BOWLS BY REGION



WEST	21% PENETRATION	47% GROWTH
SOUTH	19% PENETRATION	18% GROWTH
MIDWEST	18% PENETRATION	19% GROWTH
NORTHEAST	17% PENETRATION	44% GROWTH

PENETRATION: % of restaurants serving
GROWTH: change in penetration from '14-'18



Build-Your-Own Breakfast Bowl at Chop Chop Salad Shop in Pittsburgh.

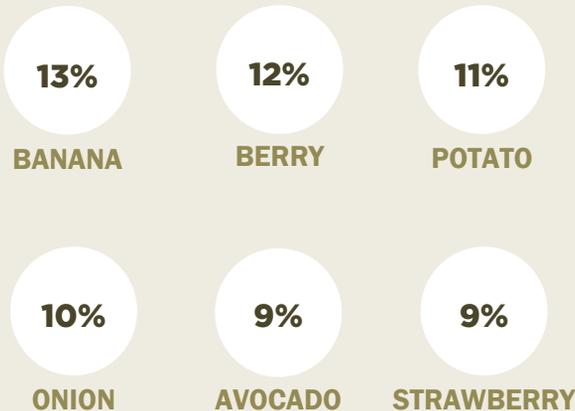


The A.M. Superfoods Bowl with bananas, berries, blackberry preserves, and granola over coconut milk chia seed pudding at First Watch.

MINT GREW OVER
330%
IN BREAKFAST BOWLS IN JUST THE PAST YEAR

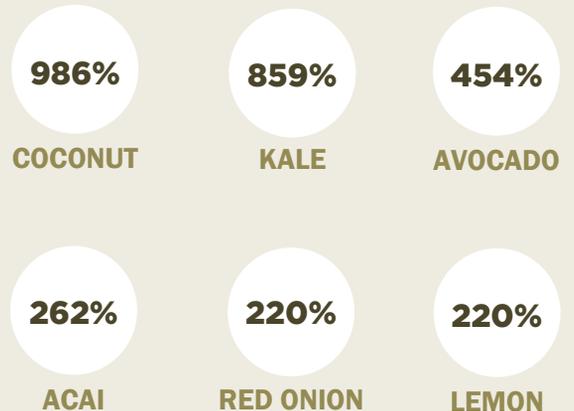
TOP MENUED PRODUCE

PERCENT OF OPERATORS WITH BREAKFAST BOWLS THAT FEATURE



TOP GROWING PRODUCE

4-YEAR GROWTH PERCENTAGE IN BREAKFAST BOWLS



PLANNING AHEAD FOR SPRING

It may feel like it will be a long time before we can say “spring has sprung” again, but it’s never too early to start considering new menu items and LTOs for the season. As the weather begins to warm up, savvy operators will be looking to go green with spring produce like pea shoots, fava beans, and ramps, highlighting their freshness and seasonality to consumers. Hearty soups and stews will also begin moving aside to make way for lighter options on the menu, with niche cuisines like Southeast Asian or Scandinavian continuing to pop up on menus. For this issue’s “On the Horizon,” we’ll be taking a look at how versatile, varied radishes can bring color and flavor to the plate. We’ll also explore out of the ordinary applications for sweet honeydew, and walk through the ways entrée salads can pair just about any protein with seasonal produce to create a light yet filling meal option.



RADISHES

WHAT IT IS

There are many varieties of radish that are consumed globally around the world, but probably the most recognizable in the U.S. is the Cherry Belle, which has a round shape, bright red exterior, and white interior. Radishes can be categorized according to the season in which they're grown – spring and summer radishes (the Cherry Belle is a summer radish) tend to be smaller in size, whereas winter radishes generally are larger (Japanese daikon, for example, is a type of winter radish). When eaten raw, radishes have a distinct peppery bite that comes from allyl isothiocyanates, compounds that are also present in mustard and horseradish. Cooking radishes mellows out this strong flavor, giving them a sweeter taste and tender texture.

FOODSERVICE TODAY

Radishes have long been used to add a pop of color and flavor to dishes, most often in salads, but operators are beginning to experiment not only with creative applications for the root vegetable but also new, previously underutilized varieties. Watermelon radish, for example, has recently taken social media by storm thanks to its eye-catching bright pink coloring and Instagrammability. Operators concerned with the strong flavor of raw radish can roast, grill, or braise the vegetable to bring out its sweetness. It can also be pickled and added to dishes like street tacos. Whole radishes, including the greens, are edible, making them an attractive ingredient for restaurants who tout sustainable or root-to-stem cooking practices.



4-YEAR GROWTH ON RESTAURANT MENUS

29%	QSR
52%	FAST CASUAL
29%	MIDSCALE
45%	CASUAL
23%	FINE DINING

PENETRATION PERCENT OF RESTAURANTS MENUING

6%	QSR
15%	FAST CASUAL
9%	MIDSCALE
22%	CASUAL
34%	FINE DINING



2017 USDA
AVERAGE SHIPPING
POINT WEEKLY
COMMODITY PRICE
\$9.24

VEDGE
Philadelphia, PA
Fancy Radishes
Smoked tamari, yuzu avocado,
pickled tofu, shishito.
\$12.00

LAGO EAST BANK
Cleveland, OH
Primavera
Zucchini noodles,
asparagus, pea, broccoli,
carrot, cherry tomato,
radish, herbs, aglio e olio.
\$19.00

HEIRLOOM MARKET BBQ
Atlanta, GA
Cucumber Radish Salad
Pickled salad with julienned
daikon, shaved cucumber,
and radish.
\$4.00

ON THE MENU

RADISHES BY REGION



WEST	15% PENETRATION	35% GROWTH
SOUTH	11% PENETRATION	33% GROWTH
MIDWEST	12% PENETRATION	47% GROWTH
NORTHEAST	16% PENETRATION	36% GROWTH

*PENETRATION: % of restaurants serving
GROWTH: change in penetration from '14-'18*



DID YOU KNOW?

Radishes can come in a wide range of colors: red, purple, pink, black, white, or even green.



CUISINE ANALYSIS

PERCENT OF RESTAURANTS THAT MENU RADISHES

41%	KOREAN
39%	FRENCH
37%	OTHER ASIAN
37%	JAPANESE
36%	MIXED ETHNICITY
24%	CENTRAL & S. AMERICA

BREAKDOWN

PERCENT OF RESTAURANTS THAT MENU RADISHES

3%	CHAINS (250+ UNITS)
11%	REGIONAL (3-249)
19%	INDEPENDENT (1-2)
4%	FOOD TRUCKS



Avocado Toast topped with crunchy radishes and microgreens at Glory Days Grill, based in Gaithersburg, MD.



"Mille Feuilles" with radishes, caraway, and yogurt hollandaise at Next in Chicago, IL.



Goat Cheese Toast with beets, grapes, radishes, and pickled mustard seeds at Bar Bantam in Rochester, NY.

HONEYDEW

WHAT IT IS

Also called the honeymelon, honeydew is a cultivar derived from the muskmelon. It's related to cantaloupes, winter melons, and also cucumbers, and is thought to have originated in the Middle East or western Asia. The melon was introduced to the U.S. by Christopher Columbus, who brought seeds over from Europe. It's believed that the fruit got its name due to its sweet green juice, which resembles a dew-like substance secreted by certain plants and insects. Honeydew grows best in warm, moist climates, and California is one of the leading producers of the fruit in the U.S.

FOODSERVICE TODAY

Honeydew is breaking out of the traditional fruit salad – it's beginning to show up as a flavor in cocktails and smoothies, and can also be used to balance intensely salty or savory flavors. Take prosciutto e melone, a classic Italian appetizer of prosciutto wrapped around slices of melon, which can be made with honeydew in place of the usual cantaloupe. The fruit can also feature as the star of a salad, too – just like how watermelon is increasingly being used in savory salads, fresh honeydew can be paired with lemon, cucumber, basil, or feta to create a complex and refreshing dish. Operators can even consider menuing honeydew as a cold soup similar to gazpacho, blending it with mint and honey for a sweet version or stock and ham for a savory spin.



4-YEAR GROWTH ON RESTAURANT MENUS

15%	QSR
-14%	FAST CASUAL
50%	MIDSCALE
25%	CASUAL
-16%	FINE DINING

PENETRATION PERCENT OF RESTAURANTS MENUING

4%	QSR
3%	FAST CASUAL
6%	MIDSCALE
4%	CASUAL
5%	FINE DINING



PROLIFERATION

ON THE MENU

2017 USDA
AVERAGE SHIPPING
POINT WEEKLY
COMMODITY PRICE

\$7.62

MARKET TABLE

New York, NY
Honeydew Gazpacho
Blue crab, avocado, crunchy shallots.

\$17.00

MAX-A-MIA

Avon, CT
Burrata
Balsamic dressed arugula, fresh figs, burrata cheese, crispy prosciutto, honeydew melon.

\$11.00

P.F. CHANG'S

Scottsdale, AZ (HQ)
Walnut Shrimp with Melon
Citrus Asian aioli, warm candied walnuts, cool honeydew melon.

\$11.50

HONEYDEW BY REGION



WEST	4% PENETRATION	7% GROWTH
SOUTH	4% PENETRATION	37% GROWTH
MIDWEST	5% PENETRATION	28% GROWTH
NORTHEAST	5% PENETRATION	37% GROWTH

*PENETRATION: % of restaurants serving
GROWTH: change in penetration from '14-'18*



DID YOU KNOW?

Honeydew was considered a sacred fruit in ancient Egyptian culture, and was reserved for only the elite of society.



CUISINE ANALYSIS

PERCENT OF RESTAURANTS THAT MENU HONEYDEW

15%	OTHER ASIAN
10%	SANDWICH
9%	DESSERT & SNACK
9%	COFFEE & BAKERY
8%	THAI
8%	OTHER EUROPEAN

BREAKDOWN

PERCENT OF RESTAURANTS THAT MENU HONEYDEW

4%	CHAINS (250+ UNITS)
5%	REGIONAL (3-249)
4%	INDEPENDENT (1-2)
1%	FOOD TRUCKS



Each batch of St. Petersburg Brewing Co.'s **Morning Dew** is made with 28 pounds of honeydew.



Honeydew Popsicle from Steel City Pops based in Birmingham, AL.



Hakusai Salad with Napa cabbage, arugula, honeydew, asparagus, edamame, and carrots from Honeygrow based in Philadelphia.

CHECKING IN ON PRODUCE AND ENTRÉE SALADS



4-YEAR GROWTH ON RESTAURANT MENUS

-3%	QSR
8%	FAST CASUAL
2%	MIDSCALE
-4%	CASUAL
-7%	FINE DINING

PENETRATION PERCENT OF RESTAURANTS MENUING

63%	QSR
74%	FAST CASUAL
75%	MIDSCALE
72%	CASUAL
59%	FINE DINING

OVERVIEW

As consumers look to adopt more plant-forward diets, many are turning to salads as a lighter meal alternative to traditional meat-heavy entrées. Particularly during the lunch daypart, entrée salads are an attractive option for busy consumers who want something that's filling but also won't weigh them down later in the day. Entrée salads generally feature a wide range of fresh produce (lettuces, tomatoes, carrots, cucumbers, and other salad mainstays), but offerings are amped up with the addition of premium ingredients, such as grilled proteins like steak, chicken, shrimp, or salmon. Entrée salads are an effective way for operators to show off seasonal produce – during the spring, for instance, roasted vegetables like beets or artichokes can add a hearty component and even replace meat proteins altogether for a fully plant-based spin. Because many of the components of an entrée salad feature raw or minimally-cooked ingredients, using as many fresh ingredients as possible will help elevate the flavor of the overall dish. When menuing entrée salads, operators should think beyond traditional ingredients and consider offering a few trend-forward, globally-inspired, or seasonal topping options, which can broaden menu variety and keep consumers interested in coming back to see what's new.

TRENDING INGREDIENTS



BANANA PEPPER



SHALLOT



BABY ARUGULA



QUINOA



OCTOPUS

ON THE MENU

ART HOUSE CAFE

Tacoma, WA

Spring Cobb Salad

Roasted chicken, egg, peas, prosciutto, feta cheese, shaved radish, spring greens, berry vinaigrette.

\$14.00

B. GOOD

Boston, MA (HQ)

Shaved Brussels

Sprout Salad

Baby spinach, red grapes, apple, lentils, almond parmesan, sunflower seeds, roasted beet vinaigrette.

\$8.50

TED'S MONTANA GRILL

Atlanta, GA (HQ)

Farmhouse Salad

Kale, romaine, chicken, cucumber, vine-ripened tomato, gruyere, bacon, corn, pecans, basil, lemon vinaigrette.

\$14.00

FLAME

New York, NY

Papaya Avocado Salad

Baby spinach, papaya, avocado, red onions, mandarins, Italian dressing, choice of chicken or salmon.

\$17.95

ENTRÉE SALADS BY REGION



WEST	70% PENETRATION	-2% GROWTH
SOUTH	74% PENETRATION	-1% GROWTH
MIDWEST	71% PENETRATION	-1% GROWTH
NORTHEAST	66% PENETRATION	-1% GROWTH

PENETRATION: % of restaurants serving
GROWTH: change in penetration from '14-'18



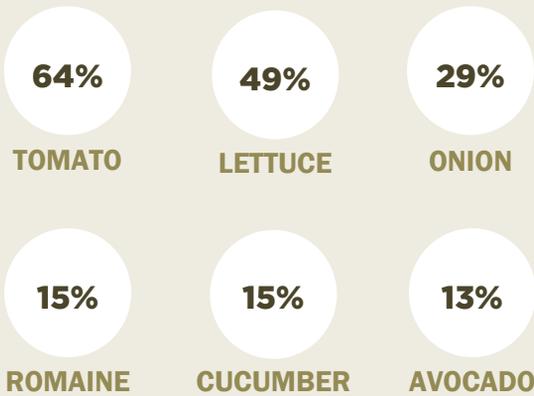
Oven-Roasted Chicken Caesar Salad with Little Gem lettuce and radicchio at New York-based Le Pain Quotidien.

Thai-inspired Crunch Peanut Spice and Spring Carrot Salad at Girl & the Goat in Chicago, IL.



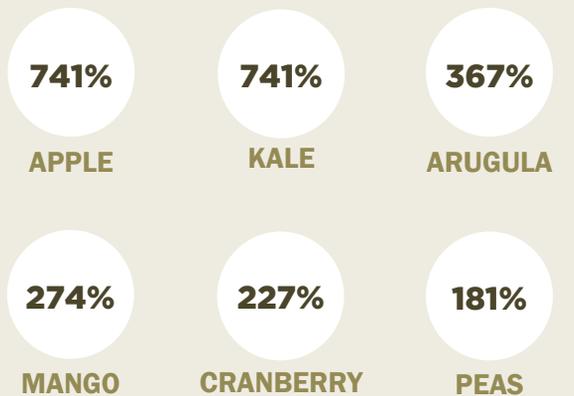
TOP MENUED PRODUCE

PERCENT OF OPERATORS WITH ENTRÉE SALADS THAT FEATURE



TOP GROWING PRODUCE

4-YEAR GROWTH PERCENTAGE IN ENTRÉE SALADS



TOP CHAIN TRENDS

Fruits and vegetables made their mark in these dishes and flavors in recent months.

OTHER KEY TRENDS LAST QUARTER:

Grilled, peaches, sweet, crispy, bacon, potatoes, and sandwiches.



Blood oranges have grown over 65% on menus in the past 4 years.



ORANGES

Cocktails have been serving as a way to showcase oranges recently, with Addison, TX-based Bar Louie capitalizing on warming flavors and offering a limited time **Cider Sangria** featuring Angry Orchard Rose hard cider, Skyy Apricot vodka, aperol, orange juice, soda water, and slices of orange. Carrabba's Italian Grill in Tampa, FL, also has menued an **Italian Old Fashioned** LTO that combines Maker's Mark bourbon, Disaronno Amaretto, and fresh orange slices and cherry; and the **Cinnamon Apple Sangria** is returning to the menu at Dallas-based Mimi's Café, starring Yellow Tail Red sangria, brandy, and a fruit medley that includes orange slices. Beyond beverages, chains like Los Angeles-based Tender Greens are leveraging oranges in monthly specials – this month, it's a **Grilled Salmon Salad** that pairs sustainably-sourced salmon with Southeast Asian flavors and green papaya, Asian mustard greens, fresh herbs, crushed peanuts, and mini oranges.



BROCCOLI

Nutrient-rich broccoli was leveraged by a wide range of operators in recent months to add a fresh, healthy note to salads, entrées, and more. Dallas-based TGI Friday's introduced a **Lemon & Garlic Shrimp Pasta** featuring shrimp, tomatoes, red peppers, spinach, and baby broccoli tossed in a lemon-butter sauce and served with grilled lemon, while Kona Grill in Scottsdale, AZ, recently menued fresh-caught grilled **Hawaiian Pomfret**, which comes topped with macadamia nut romesco sauce and a lemon arugula garnish and is served with garlic broccoli and spatzle. For a limited time, Mount Laurel, NJ-based Bertucci's Brick Oven Pizzeria is also offering **Tuscan Vegetables with Grilled Chicken** starring zucchini, artichokes, peppers, spinach, eggplant, garlic focaccia crumb-topped broccoli, pomodoro, pecorino romano, and fresh basil.



GREEN BEANS

In recent months green beans have been showcased in an array of applications at major chains, including Rosemead, CA-based Panda Express in their returning **Honey Sesame Chicken Breast** featuring strips of chicken tossed with fresh-cut string beans and yellow bell peppers in a honey sauce. A variety of chains menued green beans as a side for new items as well: Dallas-based La Madeleine French Bakery, for instance, added **Salmon & Dill** featuring a roasted salmon fillet over rice topped with dill sauce and served with green beans.

INTROS & LTOs

Other recent notable limited-time-offerings and menu introductions featuring fresh produce at top operators.

FUN FACT:

Over 70 items released last season included the word "fresh" in menu descriptions.

BAKER'S SQUARE



Baker's Square brought back its **Artisan Turkey Bacon Avocado Baguette Sandwich**, made with slow-roasted, hand-carved turkey, cherrywood-smoked bacon, fresh avocado, and chipotle mayo. The **Strawberry Bleu Cheese Salad** also made a comeback, featuring fresh strawberries, and bleu cheese crumbles over mixed greens.

CORNER BAKERY



Corner Bakery's Featured Fall Flavors menu included a **Chicken Apple Arugula Sandwich** that layers fresh diced apples and a house-made pesto mayo on parmesan-topped focaccia, while its **Glorious Morning Muffin** packed together fresh carrots, walnuts, raisins, coconut, diced apple, and a hint of warm fall spices.

EAT N' PARK



Apples were the star of the show in Eat n' Park's Fall Specials menu, appearing in an **Apple Waldorf Crunch Salad** made with herb-crusted or grilled chicken over mixed greens, fresh grapes, celery, and carrots. They also starred in the chain's **Cranberry Apple Chicken Salad Croissant**, with fresh tart Granny Smith apples.

RED LOBSTER



The fan favorite Endless Shrimp Menu returned to Red Lobster recently. Customers could order sides like buttered fresh asparagus to pair with any of the main entrées, and the seafood chain's **Crunchy Fiesta Shrimp** paired tortilla-crusted shrimp with a creamy three cheese blend and fresh pico de gallo.

TACO BELL



Taco Bell is currently testing a new **Tortada** menu item at select locations. It comes in two flavors, Avocado Ranch Chicken and Mango Habanero Chicken. Both flavors feature crispy chicken chips, red tortilla strips, cheese, and fresh lettuce and pico de gallo, all folded together and grilled to go.

PANERA BREAD



Fans of Panera Bread's **Mac & Cheese** can now customize their own bowls of the creamy comfort food, which comes with topping options like fresh avocado, fresh cilantro, and pico de gallo. For a limited time, the chain is also offering an **Ancient Grain & Arugula Salad** with chicken and fresh apple and cabbage slaw.

BAR LOUIE



Bar Louie celebrated one last huzzah for summer with limited-time cocktails, including a **Cucumber Gimlet** that blended Hendrick's, St. Germain, muddled cucumbers, lime juice, and fresh cut cucumber. Also available was the **Main Squeeze Martini**, made with Effen Blood Orange, Aperol, vanilla syrup, and fresh orange.

FIRST WATCH



First Watch heralded the start of fall with the return of its **Butternut Squash Bisque**, sweetened with carrot and garnished with sour cream and fresh herbs. For a limited time, the chain is also offering a **Truffled Wild Mushroom Frittata**, with truffle-roasted shiitake and crimini mushrooms and served with fresh fruit.

KEY STATS

MOST MENUED PRODUCE IN K-12



1. POTATOES

2. CARROTS

3. CORN

4. ORANGES

5. APPLES

Potatoes can be found on 94% of K-12 menus.

TOP-GROWING PRODUCE IN K-12

Beets grew over 1000% on K-12 menus in the past year.



1. YUCCA

2. PLANTAIN

3. BEETS

4. ANJOU PEAR

5. CLEMENTINE

Analyzing the role of produce in this top foodservice trend

K-12 FOODSERVICE

WHAT IT IS

K-12 foodservice has been evolving quickly in recent years as new laws and regulations go into effect, demographics change, and both parents and students who came of age at a time when it's cool to be a foodie expect a wider variety of options. Today many schools have re-installed cooking equipment and invested in culinary education to make meals fresh on the premises. K-12 foodservice is also often part of a larger health, wellness, and education initiative that may include school gardens, farm tours, and integration into the classroom curriculum itself. Feeding students has also stretched far beyond lunch and now often encompasses breakfast, after-school snacks, meals during summer breaks, etc.

ROLE OF PRODUCE

Schools, parents, government agencies, and organizations like United Fresh have been hard at work ensuring that modern school lunches improve children's eating habits, prevent obesity, and provide optimum nutrition, and a core part of that mission has been focusing on fresh produce. In fact, fresh produce may be the single most important part of today's school meal initiatives, with the USDA's MyPlate program recommending that half the plate be filled with fruits and vegetables. The key to this segment is balancing the unique needs of students (they may need smaller slices to hold and swallow, they may need to be introduced to unfamiliar options, they often like colorful foods) with the demands of culinary staff (who often prepare huge amounts of food with very limited time and resources).



MINNEAPOLIS PUBLIC SCHOOLS

Minneapolis Public Schools have not only prioritized access to fresh produce for the district's 35,000+ students with programs like a fresh-focused food truck, but they also connect students to the farmers that grow the produce through online videos and even farmer trading cards distributed at lunch.

ON THE MENU

SUNRISE MCMILLAN ELEMENTARY
Fort Worth, TX
Truffala Trees
Raw, multi-colored cauliflower.

E.B. KENNELLY ELEMENTARY SCHOOL
Hartford, CT
Crisp Cucumber Slices and Red Pepper Strips
Served with low-fat ranch dip.

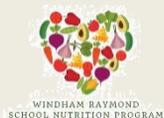
SYRACUSE JUNIOR HIGH
Syracuse, UT
Vegetarian Salad
Romaine, cherry tomatoes, baby carrots, cucumber slices, black beans, cheddar, mozzarella cheese.

HPHS ACADEMY OF ENGINEERING & GREEN TECHNOLOGY
Highland Park, IL
Butternut Squash
Oven-roasted with cinnamon.

INTERVIEWS

WE ASKED K-12 DECISION-MAKERS: WHAT PRODUCE ITEMS ARE YOU INCLUDING ON YOUR MENU THIS FALL?

“We served locally-grown delicata squash, roasted with parmesan, at all of our schools as part of our Maine Harvest Lunch Day. Additionally, we are serving sweet chili roasted brussels sprouts (with cleaned & ready to cook brussels sprouts that I saw at the United Fresh School Foodservice Forum). I was surprised to find that they were processed right here in Southern Maine!”



Jeanne Reilly, NDTR, SNS
Director of School Nutrition
Windham Raymond School Department
Windham, ME

“This fall we had locally-grown watermelons, honeydew, cantaloupe, pears, peaches, nectarines, Gator plums, Fall Fiesta plums, Gold Rush plums, and cherry tomatoes. We are also doing a fun Fruit Friday once a month this year offering things like figs and dragon fruit. This is in addition to participating in the Fresh Fruit and Vegetable program.”



Sandra Kemp, BS, SNS
Executive Director, Food & Nutrition Services
Albuquerque Public Schools
Albuquerque, NM



“We are locally sourcing white acre peas (a real Southern favorite), butter beans, and purple hull peas. A new favorite on our menu is yellow squash and squash casserole that is coming from a local farmer. Fall also brings out collards, cabbage, and sweet potatoes, all grown locally.”

Donna S. Martin, EdS, RDN, LD, SNS, FAND
Director, School Nutrition Program
Burke County Board of Education
Waynesboro, GA



“This September we focused on root veggies – sweet potatoes, rainbow carrots, beets, and jicama. October is pears! We've featured them fresh, roasted, and in a delicious fall-inspired pear crisp.”

Amy Droegemeir, SNS
Director of Nutrition Services
USD 231 Gardner Edgerton
Gardner, KS



“San Diego Unified is serving Asian pears, apples, oranges, and kiwis as our fresh fruit options this fall. Vegetable sides include baby carrots, celery sticks, broccoli florets, and cucumber slices. Our Harvest of the Month for September was Black Splendor plums, for October is Red Flame grapes, and for November and December will be organic Fuyu persimmons.”

Gary Petill
Director Food & Nutrition Services
San Diego Unified School District
San Diego, CA



LITTLE ROCK SCHOOL DISTRICT

“In addition to apples, oranges, bananas, and grapes, we are serving cantaloupe, honeydew melons, pears, grape tomatoes, and baking sweet potatoes. We are also using fresh strawberries in our breakfast smoothies!”

Stephanie Walker Hynes, M.Ed., SNS
Director of Child Nutrition
Little Rock School District
Little Rock, AR

INTERVIEWS

WE ASKED K-12 DECISION-MAKERS: WHAT PRODUCE ITEMS ARE YOU INCLUDING ON YOUR MENU THIS FALL?

“We love to roast our fall veggies! Students are enjoying roasted brussels sprouts, three different varieties of squash (butternut, delicata and spaghetti), ‘beets & sweets’ (red beets and sweet potatoes), and more! Some produce items that we are excited to feature on our salad bars this fall include: purple daikon and Beauty Heart radishes, kohlrabi, rainbow carrots, and Carmen red peppers.”



Kate Seybold
Farm to School Coordinator
Minneapolis Public Schools
Minneapolis, MN

“In our Fresh Fruit and Vegetable Program this fall, we are serving a variety of fruit including bosc, comice and Asian pears, honeycrisp and Jonagold apples, persimmon, petite and red bananas, clementines, pomelos, grapefruit, kiwi, and blood oranges on Halloween. For vegetables, we will have jicama sticks, sugar snap peas, spiral zucchini, and beet sticks.”



Robert Cuellar, Jr., MPH
Child Nutrition Program Director
Laredo Independent School District
Laredo, TX



“We are excited to serve our new harvest side salad this fall, which contains a blend of seven superfood vegetables including golden beets, broccoli stalks, kohlrabi, brussels sprouts, carrots, kale, and radicchio, and will be paired with a mustard vinaigrette dressing which we make from scratch. We are also excited to celebrate Pennsylvania Preferred Day in October, where we will be featuring local produce from Pennsylvania farmers including apples, a hydro bibb side salad, and a local roasted potato. We also have several seasonal fruits and vegetables on our menu that are reminiscent of fall including fresh apples and pears, cherry tomatoes, and sliced bell peppers.”

Lauren McCabe, MS, RD, LDN
Manager, Food Services
School District of Philadelphia
Philadelphia, PA



“We’ve added diced butternut squash and fresh mushrooms for our made-from-scratch beef pot roast, and we have plans to add more fresh veggie sides in the year ahead, such as roasted glazed carrots, parmesan roasted cauliflower, and a green bean and corn medley.”

Lora Gilbert, MS, RD, SNS
Senior Director,
Food & Nutrition Services
Orange County Public Schools
Orlando, FL



“We menued local produce every day in October for Farm to School Month. We are serving a variety of Michigan-grown apples, butternut squash, local sweet corn, peas, carrots, green beans, as well as peppers and tomatoes from our own gardens.”

Kevin C. Frank, SNS, BSBA
District Chef
Detroit Public Schools
Detroit, MI



“We use tons of apples and pears this time of year. We have also used butternut squash and pumpkins for recipes and a staff pumpkin carving contest. We also do a holiday dinner every year and are hoping to get fingerling potatoes or Yukons this year to make it even more special.”

Lisa Kendall, SNS
Director, Nutrition Services
Thompson School District
Loveland, CO



FreshStart

2019

January 15-17, 2019
La Quinta Resort & Club
La Quinta, CA

FreshStart 2019 is the United Fresh Start Foundation's annual conference, golf tournament and gala dinner that brings the industry together to increase kids' access to fresh produce.

This year's event will feature

- Silent and live *Bid For Kids* auction
- Golf tournament
- Half-day education program
- Annual Gala Dinner recognizing United Fresh's 2019 Lifetime Achievement Award honoree
- United Fresh's traditional volunteer leader meetings
- And more!

Start the year off right by joining your peers to increase children's access to fresh fruits and vegetables.

Together, we can ensure kids everywhere are ***growing up fresh!***

Registration
at www.unitedfreshstart.org

For more information contact

Kate Olender, Senior Director, Health & Wellness

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United Fresh Produce Association brings together companies across every segment of the fresh produce supply chain. We empower industry leaders to shape sound government policy. We deliver the resources and expertise companies need to succeed in managing complex business and technical issues. We provide the training and development individuals need to advance their careers in produce. And we unite our industry with a common purpose – to build long-term value for our members and grow produce consumption. For more information about the resources available to our foodservice members, visit unitedfresh.org or contact Andrew Marshall, Director of Foodservice & Foundation Partnerships, at amarshall@unitedfresh.org.



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