



FALL 2021

FRESH INSIGHTS FOR FOODSERVICE

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



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Explore how operators are leveraging fresh dates across menus.

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Discover how fan favorite nachos can be a platform for fresh produce. PAGE 23

K-12 SUPPLY CHAIN

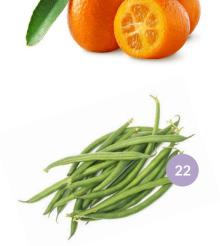
Uncover the challenges impacting K-12 operators and hear how fresh produce is one of the few items holding steady on school menus.



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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*, sponsored by Produce Alliance and powered by Datassential.

In this issue, you'll find "In Season" insights on the latest fall trends. Discover how fragrant garlic, a staple in many cuisines, and fresh dates can star in a variety of creative menu applications. Also uncover how nachos, a mainstay on many menus, can be leveraged as a vehicle for an array of fresh produce. Thinking ahead, the "On the Horizon" section reveals trends and data that will impact foodservice this spring, showcasing how leeks can be cross-utilized on menus and across dayparts, as well as how kumquat can add a pop of color and a citrusy tang to everything from seafood dishes to cocktails. Additionally, we shine a spotlight on pies and galettes, which can serve as platforms for both fresh fruit and vegetables. And as always, this quarter's "Chain Report" explores the latest national account introductions, while our "Kids' Table" section focuses on green beans and the role of fresh produce in side dishes on kids' menus.

Lastly, in our "View from Above," we explore supply chain disruptions impacting K-12 school foodservice and reveal how fresh produce has been a bright spot, with several K-12 operators from different parts of the country sharing that they have been able to receive produce deliveries and are still able to make fresh produce available to students daily.

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.

Stay fresh and healthy,



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.



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. Cuttingedge chefs operate in this realm, often giving way to the next trends.

EXAMPLES: Romanesco, yuzu, rilletes, venison.



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.



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.



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: Apples, chipotle, artichoke dip.



WHAT'S FRESH FOR FALL?

In this quarter's "In Season" section, discover how fragrant garlic can be used in an endless number of applications, as well as learn how to leverage black garlic, a fermented take that's trending on menus. Also uncover how fresh dates can star in both sweet and savory dishes and be used as a health-forward sugar replacement. Ahead of the winter Super Bowl, we also showcase how fan favorite nachos can be a vehicle for fresh produce.





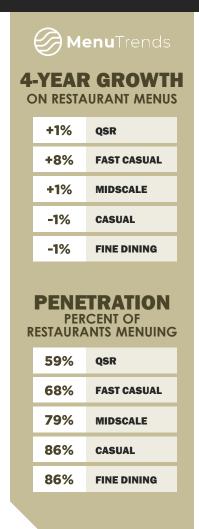
GARLIC

WHAT IT IS

Garlic, which is part of the lily family like onions and leeks, is a bulb that grows underground and has a papery skin. Peeling the papery skin off garlic exposes individual cloves, and the cloves are what typically star in culinary applications. Heads of garlic can have anywhere from 10 to 20 cloves. Garlic boasts a variety of health benefits: it's said to boost the immune system and be a source for antioxidants. Beyond its health benefits, garlic is also known for its pungent smell and flavor, which gets toned down when it's roasted or cooked. Garlic is a quintessential part of most cuisines (97% of consumers know what it is, according to Datassential FLAVOR), but it's widely believed to have originated in Central Asia.

FOODSERVICE TODAY

When it comes to garlic, there are a nearly endless number of applications for it. Garlic butters, aioli, and sauces are common applications for the vegetable, and recently, Sonic notably brought back its beloved Garlic Burger that features a garlic sauce. Fresh, whole garlic cloves also can add flavor to fan favorite pizzas, typically paired with other alliums. Roasted, fresh garlic can also star as a flavor for health-forward hummus, a Middle Eastern spread or dip that 68% of consumers who have tried it love or like (Datassential FLAVOR), and it's worth noting that garlic naan (a type of flatbread often served with hummus) was "one of the most popular foods ordered on Uber Eats" in 2021 (The Takeout). For a next-level take on ubiquitous garlic, there's on-trend fermented black garlic, which is indeed black and lends well not only to savory but also sweet dishes. Think everything from black garlic ice cream to black garlic cookies. VICE describes black garlic as "a true umami bomb," so consider using it where a punch of umami flavor might make sense and add interest. According to Datassential MenuTrends, the term "umami" has grown 24% on menus over the past 4 years.



*Due to the impact of COVID-19, menus shrank considerably over the past year, which MenuTrends data reflects, so some commodities and menu categories may see sharp declines in certain segments.



ANGRY GARLIC JIM'S RAZORBACK PIZZA **DELAROSA**

Angry Garlic Bites Blend of risotto, parmesan, onion, fresh garlic, and sautéed garlic, fried in a lightly seasoned Old Bay batter, served with garlic aioli.

Baldwinsville, NY

\$20.25

Fort Smith. AR

Mediterranean Pizza

Topped with olive oil, roasted

tomatoes, and feta cheese.

garlic, black olives, green olives,

red onions, smoked garlic chicken,

San Francisco, CA (HQ) Linguine alle Vongole

Manila clams, garlic, wine, chile, zucchini, parsley butter.

\$19.00

ON THE MENU

UN BIEN Seattle, WA (HQ)

Sautéed Prawn Sandwich Features six black tiger prawns sautéed in extra virgin olive oil with garlic tapenade.

\$12.95

\$9,00



GARL BY REGIO

WEST

74%

GROWTH

SOUTH

71% PENETRATION

MIDWEST

73%

NORTHEAST

PENETRATION: % of restaurants serving GROWTH: change in penetration from '17-'21



DID YOU KNOW?

On average, Americans consume around 2 pounds of garlic per year.

MenuTrends CUISINE **ANALYSIS** PERCENT OF RESTAURANTS THAT MENU GARLIC 99% PIZZA **THAI** 99% 97% **ITALIAN** 95% CHINESE 95% INDIAN 89% **MEDITERRANEAN** BREAKDOWN PERCENT OF RESTAURANTS THAT **MENU GARLIC CHAINS 52%** (250+ UNITS)

REGIONAL

INDEPENDENT

(3-249)

70%

82%



Smokebox Half Chicken featuring chicken with salsa verde, charred lemon, and garlic is served at King + Duke in Atlanta, GA. In San Francisco, CA, Beretta offers broccolini as an antipasti, served with Calabrese peppers, olive oil, and garlic.

Serious Pie, which has two locations in Seattle, WA, has offered special pizzas like the one pictured here, showcasing Genoa salami, Prosser kale raab, Taleggio, chiles, and roasted garlic.



DATES

WHAT IT IS

"Dates are among the sweetest fruits in the world," The Spruce Eats notes. Dates boast a caramellike taste and are native to the Middle East where they grow on date palms. While there are many varieties of dates, in the U.S., some of the most common types are Medjool and Deglet Noor. Medjool dates are typically brown or black and are chewier and sweeter than Deglet Noor dates, which are amber-colored and tend to be firmer with a nutty flavor. Fresh dates can be consumed as-is, but they're often featured as an ingredient in a variety of culinary applications, both sweet and savory. However, prior to consuming dates, the pit is removed by slicing the date in half and popping it out. It's worth noting that dates are nutrientpacked and can be a source for antioxidants, fiber, and potassium.

FOODSERVICE TODAY

Fresh dates have a wide range of applications. Slice them up and use them as a toast topping, dice them up and sprinkle them on ice cream, or for a classic, approachable format, serve fresh dates whole as an appetizer or bar bite wrapped in bacon for a sweet meets savory snack (according to Datassential FLAVOR, 82% of consumers love or like bacon, so you really can't go wrong with it). Pitted dates can also be stuffed with any array of ingredients – think everything from cheeses like ricotta to peanut butter or almond butter to Nutella for a dessert spin. Dates are also a quintessential part of various Middle Eastern cuisines and could be leveraged in traditional applications such as Moroccan tagine, a stew-like dish that could have a place on fall and winter menus and is named for the unique vessel it's cooked it. Due to their health benefits, dates are also frequently integrated into salads, smoothies, and energy balls, which are in line with the overarching functional foods trend. Dates can also serve as a sugar alternative by roasting and pulverizing them. Health-forward alternatives to traditional white sugar



4-YEAR GROWTH ON RESTAURANT MENUS

-7 %	QSR
-24%	FAST CASUAL
+21%	MIDSCALE
-7 %	CASUAL
-2%	FINE DINING

PENETRATION **PERCENT OF RESTAURANTS MENUING**

1%	QSR
4%	FAST CASUAL
3%	MIDSCALE
4%	CASUAL
9%	FINE DINING



SMOOTHIE KING Dallas, TX (HQ)

Coffee High Protein Vanilla Smoothie Cold brew coffee, almonds, 100% cocoa, dates, whey protein, dairy whey blend, non-fat milk.

\$5.95

NORTHSTAR CAFE Columbus, OH (HQ)

Townsfair Salad Roasted chicken, dates, avocado, legumes, onions, goat cheese, almonds, and croutons with Champagne vinaigrette.

\$14.50

PIES & PINTS Fayetteville, WV (HQ)

Date Night Pie Fig jam, applewood-smoked bacon, chopped dates, creamy goat cheese, walnuts, fresh thyme, and Mike's hot honey.

\$14.00

ON THE MENU

SQIRL Los Angeles, CA

Vegan Horchata Made with house-made almond milk and organic Medjool dates.

\$4.75



DATE: BY REGIO

WEST

PENETRATION

SOUTH

PENETRATION

MIDWEST

PENETRATION

NORTHEAST

PENETRATION: % of restaurants serving GROWTH: change in penetration from '17-'21



MenuTrends

CUISINE ANALYSIS

PERCENT OF RESTAURANTS THAT MENU DATES

11% **MEDITERRANEAN** 9% **MIXED ETHNICITY DESSERT &** 8% SNACK 6% **AMERICAN** 6% **ITALIAN**

BREAKDOWN

SANDWICH

3%

PERCENT OF RESTAURANTS THAT MENU DATES

CHAINS 2% (250+ UNITS) **REGIONAL** 3% (3-249)INDEPENDENT 4% (1-2)



Bacon-Wrapped Dates offered at The Cook and The Cork in Coral Springs, FL, featuring dates wrapped in Cook & Cork bacon and served with Manchego and orange-basil aioli.



Offered at Founding Farmers, headquartered in Washington, D.C., is a Farmers Salad, which combines mixed lettuce, avocado, dates, tomato, grapes, almonds, parmesan, olives, and Champagne and sherry vinaigrettes.



On the menu at Catania in La Jolla, CA, is Smoked Duck Liver Mousse, featuring dates, currants, almonds, pickled shallots, and parsley.





MenuTrends

4-YEAR GROWTH

ON RESTAURANT MENUS

+5%	QSR
+1%	FAST CASUAL
+2%	MIDSCALE
-3%	CASUAL
-30%	FINE DINING

PENETRATION

PERCENT OF RESTAURANTS MENUING

11%	QSR
15%	FAST CASUAL
16%	MIDSCALE
30%	CASUAL
4%	FINE DINING

OVERVIEW

For a simple dish, nachos have showcased a lot of innovation on menus in recent years. While classic nachos, topped with cheese and a wide range of veggies – from tomatoes to jalapenos to avocados – are still a menu mainstay (particularly at limited-service restaurants), today's operators are swapping in just about any ingredient you can imagine, focusing on premium proteins, upscale cheese blends, a wider range of peppers, and plethora of colorful toppers (think a trio of chopped bell peppers, fresh herbs, and roasted corn). Nachos can also exemplify just about any menu trend imaginable today: plantbased versions may incorporate veggie chips and produce like radishes and cauliflower, social media-worthy "nacho tables" cover an entire table or buffet in nachos, and nextlevel Mexican or Tex-Mex nachos may feature trending ingredients like chorizo and elotesstyle corn. But nachos can also go well beyond their Latin origins, featuring any cuisine imaginable. Asian-inspired nachos often feature wonton chips and scallions, Irish nachos built on potatoes are a St. Patrick's Day favorite, and Hawaiian-inspired poke nachos featuring raw seafood and ingredients like avocado and edamame are trending. And don't forget dessert nachos, which can feature sweet sauces and chopped fruits on cinnamon chips or waffle cone pieces.

TRENDING INGREDIENTS







CORN SALSA



ROASTED CORN



BELL PEPPER



PICO DE GALLO

ON THE MENU

FOOD & FIRE BBQ TAPHOUSE Johnson City, NY (HQ)

BBQ Jackfruit Nachos Crisp tortillas, black beans, cheddar, fresh jalapenos, scallions, roasted tomato salsa, BBQ jackfruit.

\$13.95

PETTY CASH TAQUERIA Los Angeles, CA Rainbow Cauliflower

Rainbow Cauliflow Nachos With poblano crema, kale, and jack cheese.

\$13.00

STACKED! Huntington Beach, CA

Ahi Poke Nachos
Ahi tuna tossed in poke sauce, avocado, green onion, red onion, sesame seeds, wasabi and sweet chili sriracha sauces.

\$14.25

NATIVE FOODS Chicago, IL (HQ)

Native Nachos
Fresh corn tortilla chips, black
beans, chipotle sauce, cashew
cheese, salsa fresca with
roasted corn, green onions,
cilantro, and fresh jalapenos.

\$6.75



NACHOS BY REGION

WEST

19% PENETRATION

-4% GROWTH

SOUTH

21% PENETRATION

-5% GROWTH

MIDWEST

20% PENETRATION

-3% GROWTH

NORTHEAST

17%

+2%

PENETRATION: % of restaurants serving GROWTH: change in penetration from '17-'21



Mongolian Chicken Nachos with pineapple, ginger, garlic, lemongrass, mint, and a fresh veggie Asian slaw at Pei Wi, based in Irving, TX.



Street Nachos with lime aioli, red onion, sweet peppers, jalapenos, corn kernels, chili sauce, guacamole, and chopped fresh cilantro at Rock & Brews based in Manhattan Beach, CA.

DID YOU KNOW?

POTATO GREW

15% IN NACHOS,

AS SOME

OPERATORS

OFFER "IRISH"

VARIETIES

TOP MENUED PRODUCE

PERCENT OF OPERATORS WITH NACHOS THAT FEATURE

51%

36%

28%

JALAPENO PEPPER TOMATO

ONION

20%

9%

6%

LETTUCE

GREEN ONION

SCALLION

TOP GROWING PRODUCE

4-YEAR GROWTH PERCENTAGE IN NACHOS

+59%

+40%

+28%

POBLANO

AVOCADO

GREEN PEPPER

+27%

+4%

+1%

RED PEPPER

CORN

RED ONION





PLANNING AHEAD FOR SPRING

In this "On the Horizon" section, discover how leeks can be cross-utilized across menus and dayparts, as well as uncover all the potential there is for menuing lesser-known kumquats, which look like oblong mini oranges. We also explore how pies and galettes can be leveraged beyond just dessert menus, with savory options like squash galette and breakfast galette taking the spotlight.





LEEKS

WHAT IT IS

Leeks, which look like larger shallots, featuring leafy tops and long not round bulbs, are a member of the onion family. They're native to the Middle East and eastern Mediterranean and boast a mild, slightly sweet flavor that can lend well to a wide range of culinary applications – they're often consumed raw in fresh salads and savory bowls. It's worth noting that ramps, which are trending and 45% of consumers who have tried them love or like them (Datassential FLAVOR), are a type of wild leek commonly foraged in the spring in the Appalachian region.

FOODSERVICE TODAY

Leeks can be cross-utilized across menus and dayparts and essentially be used in nearly any dish you might feature onions. For example, on breakfast menus, leeks can star in egg dishes like frittatas or savory takes on galette or guiche, while on lunch and dinner menus, comforting burgers and pizza can be leveraged as platforms for leeks. Leeks also fit into current trends like plant-forward eating. Today, operators are featuring leeks in a variety of plantforward mains and sides, including charred with brussels sprouts or with cauliflower "steak," which have grown 18% and 50% respectively on menus over the past 4 years (Datassential MenuTrends). Leeks can also pair well with onion in comforting soups like French onion soup or chowder, or star in sauces drizzled on seafood or meaty proteins. Leeks can also be a center of plate concept, usually charred and served with a vinaigrette, or for an ontrend take, hot honey, which has grown 216% on menus over the past 4 years.



4-YEAR GROWTH ON RESTAURANT MENUS

-17 %	QSR
-55%	FAST CASUAL
-12%	MIDSCALE
-22%	CASUAL
-38%	FINE DINING

PENETRATION PERCENT OF

RESTAURANTS MENUING 1% QSR

2%	FAST CASUAL
5%	MIDSCALE
7%	CASUAL
19%	FINE DINING



NATALEE THAI CUISINE Los Angeles, CA (HQ)

Beef in Oyster Sauce Sliced tender beef sautéed with onions, fresh mushrooms, bell peppers, and leeks in brown sauce.

\$13.50

FUTO BUTA Charlotte, NC (HQ)

Duck Confit + Pickled Carrot Bao Bun Five spice honey, pickled carrots, leeks, arugula.

\$11.00

BOCA

Cincinnati, OH Charred Leeks Anchovy, hazelnut vinaigrette.

\$16.00

ON THE MENU

CAFÉ NUOVO Providence, RI

Octopus Tagliatelle, leeks, serrano peppers, radish, bone marrow, pomodoro,

shaved parmesan.

\$29,00





WEST

-23%

SOUTH

PENETRATION

-27%

MIDWEST

NORTHEAST

-34%

PENETRATION: % of restaurants serving GROWTH: change in penetration from '17-'21



DID YOU KNOW?

The emperor Nero had the nickname "porrophagus," which means "leek eater," because he believed consuming leeks in large quantities would improve his singing voice.



CUISINE **ANALYSIS**

PERCENT OF RESTAURANTS THAT **MENU LEEKS**

37%	FRENCH
20%	OTHER EUROPEAN
10%	ITALIAN
9%	CHINESE
9%	SEAFOOD
9%	MIXED ETHNICITY

BREAKDOWN

PERCENT OF RESTAURANTS THAT **MENU LEEKS**

0%	CHAINS (250+ UNITS)
3%	REGIONAL (3-249)
8%	INDEPENDENT (1-2)



At Young Joni in Minneapolis, MN, diners can order Sausage & Onion Pizza showcasing fennel sausage, mozzarella, provolone, crème fraîche, leeks, scallions, caramelized onion, and fennel pollen.

Potato and Leek Frittata served at Watercourse Foods in Denver, CO, made with Gouda, dill, leek ash crème fraîche, and crispy leeks.

Kung Pao Brussel Sprouts featuring white shoyu, shishito peppers, leeks, ginger, and peanuts, served at Found Kitchen and Social House in Evanston, IL.



KUMQUAT

WHAT IT IS

Kumquats are native to Southeast Asia, and in fact, the name "kumquat" originated from a Cantonese word that means "golden orange." Though kumquats look like oranges and have a sweet-tart taste, they're much smaller than oranges, closer in size to an olive. And unlike oranges, kumquats are entirely edible, including the pith and peel, the latter of which is actually the sweetest part of the fruit. While there are a variety of kumquats, Nagami kumquats are the most commonly found in the U.S. Compared to the Meiwa kumquat, which primarily is found in China, Nagami kumquats are tarter. When it comes to health benefits, kumquats aren't lacking: they're rich in vitamin C and fiber.

FOODSERVICE TODAY

According to Datassential FLAVOR, nearly 50% of consumers who have tried kumquats love or like them, showing that there's untapped opportunity for operators to capitalize on the fruit. Kumquats can be eaten raw as a convenient snack, or sliced up with the peel on and added to healthforward salads, smoothies, and breakfast bowls for a pop of color. Due to their acidity, kumquats are often paired with meats like lamb and beef, as well as seafood. They also frequently are used to create house-made syrups or purée for cocktails, in addition to being leveraged as garnishes. For holiday flair, kumquats can be integrated into pie fillings or cranberry sauces, too. Cakes and breads can also serve as a platform for sliced kumquat, and it's not uncommon for operators to feature kumquat in house-made salsas and chutneys.



4-YEAR GROWTH ON RESTAURANT MENUS

-29%	QSR
-4%	FAST CASUAL
+608%	MIDSCALE
+57%	CASUAL
-39%	FINE DINING

PENETRATION

PERCENT OF RESTAURANTS MENUING

0.4%	QSR
0.3%	FAST CASUAL
1%	MIDSCALE
1%	CASUAL
4%	FINE DINING



DEUXAVE Boston, MA

Spring Salad
Potato basket of bibb lettuce,
whipped goat cheese, kumquat
vinaigrette, Persian cucumber,
radish, and spring vegetables.

\$18.00

BUNKER Brooklyn, NY

Bunker Toddy Cocktail Bourbon, lemon, star anise, ginger, kumquats, honey, cardamom.

\$13.00

FOREIGN CINEMA San Francisco, CA

Pacific Tuna Poke Avocado, kumquat, passion fruit, ponzu, jicama, fried taro and yams, lime, daikon.

\$20,00

ON THE MENU

BARON'S SINO KITCHEN & BAR Bellevue, WA

Kumquat Ribs
Pork spare ribs, homemade
kumquat sauce.

\$14.00



KUMQUAT BY REGION

WEST

1% **PENETRATION**

+9% **GROWTH**

SOUTH

1% **PENETRATION** +30% **GROWTH**

MIDWEST

0.4% **PENETRATION** +46% **GROWTH**

NORTHEAST

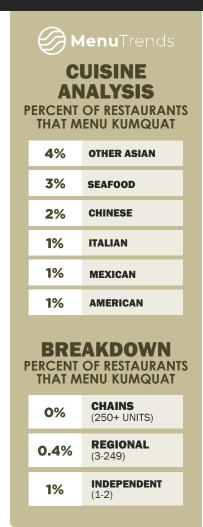
1% **PENETRATION** +21%

PENETRATION: % of restaurants serving GROWTH: change in penetration from '17-'21



DID YOU KNOW?

There's an annual Kumquat Festival that takes place in Dade City, FL, to celebrate the fruit.





Duck Sugo is on the menu at Mambo in Steamboat Springs, CO, featuring confit duck, tomato tagliatelle, English peas, wild mushrooms, kumquat, crispy duck skin, and microgreens.



The Charles in Dallas, TX, offers Hiramasa Crudo showcasing mint and kumquat.



Blue Apron, a meal kit company, sells a Crispy Catfish & Cracked Freekeh meal featuring kumquat, Thai basil, and a chile glaze.

MENU INTELLIGENCE: ON THE HORIZON



MenuTrends

4-YEAR GROWTH ON RESTAURANT MENUS

-14%	QSR
-12%	FAST CASUAL
-9%	MIDSCALE
-25%	CASUAL
-20%	FINE DINING

OVERVIEW

Pies are a classic dessert and a consumer favorite - 78% of consumers love or like pie - but they have been declining on menus in recent years, which means it's time for operators to start incorporating more creative flavors and concepts to keep this category exciting. Some operators are using creative crusts made with artisan grains and nuts, incorporating unique spices and flavors like chai in a pumpkin pie or bourbon caramel drizzled over a banana cream pie, and using next-level produce varieties like currants or boysenberries. Operators can also go beyond the traditional pie and consider related menu items, like the rustic French galette. Easier to make than an intensive lattice-topped pie, galettes use a single crust where the edges are simply folded over the filling. Like pies, they can incorporate just about any produce option imaginable, from traditional options (apple, berries) to more unique fillings like peaches with thyme or squash and onions. Indeed, savory pie and galette options showcase the wide range of veggies trending on menus today, including heirloom tomatoes, rustic squashes, and root vegetables. Operators can also think outside the circle, creating options like slab pies, handheld pies, pie "bowls," and individual pies and galettes, while pies can also be incorporated into other menu options, like pie-inspired milkshakes or pancakes.

PERCENT OF **RESTAURANTS MENUING**

12%	QSR
9%	FAST CASUAL
26%	MIDSCALE
24%	CASUAL
39%	FINE DINING

TRENDING INGREDIENTS





MIXED BERRY









CARAMEL APPLE

BROWN SUGAR

FIREWOOD Park City, UT

Apricot Galette With goat cheese semifreddo and honey crumble.

\$15.00

CHELO'S Cumberland, RI (HQ)

Banana Berry Pie Fresh strawberries and blueberries, sliced bananas, banana mousse, whipped cream.

\$7.59

TOMMY'S Cleveland Heights, OH

Escarole and Potato Pie Wheat dough stuffed with escarole, potatoes, onions, and Italian spices.

\$8,60

ON THE MENU

LAHAINA GRILL Maui, HI

Triple Berry Pie Raspberries, blackberries, and black currants nestled in a light, flaky crust.

\$19.00



PIES & GALETTES BY REGION

WEST

24% PENETRATION

-24% GROWTH

SOUTH

26% PENETRATION

-15%

MIDWEST

18% PENETRATION

-27% GROWTH

NORTHEAST

20% PENETRATION

-28%

PENETRATION: % of restaurants serving GROWTH: change in penetration from '17-'21



The Whole Fresh
Peach Pie at Coco's
Bakery, based in
Beaverton, OR,
features over two
pounds of fresh
peaches tossed in a
sweet glaze on a
fresh-baked crust.



The Spinach & Potato Galette at Dozen Bakery in Nashville, TN, features spinach, potatoes, cream cheese, parmesan, and mozzarella.

14%
IN PIE IN THE PAST YEAR

TOP MENUED PRODUCE

PERCENT OF OPERATORS WITH PIES & GALETTES THAT FEATURE

9% 8%

APPLE CHERRY BLUEBERRY

8% 6% 5%

BANANA STRAWBERRY PEACH

TOP GROWING PRODUCE

4-YEAR GROWTH PERCENTAGE IN PIES & GALETTES

+16% +14% +11%

LIME RHUBARB BERRY

+3% +2% +2%

GRANNY SMITH BOYSENBERRY APRICOT APPLE





TOP CHAIN TRENDS

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

OTHER KEY TRENDS LAST QUARTER:



SWEET POTATO

Sweet Potato appeared in a number of fall LTOs and specials recently, starring in everything from breakfast to entrees to sides. Le Pain Quotidien's limited-time Ricotta & Sweet Potato Toast featured roasted sweet potato with bacon, honey, walnuts, and rosemary on five-grain bread, while Church's Chicken released a large, shareable Sweet Potato Casserole loaded with sweet potatoes, creamy butter, sugar, cinnamon, nutmeg and other warming spices, and melted mini marshmallows. Sweet potatoes also starred as a riff on traditional fries at chains like Fleming's Prime Steakhouse, which topped a Petite Filet Mignon with sautéed spinach, garlic, and crispy sweet potato "hay." Kona Grill's Cuban Sandwich, which showcased braised pork, ham, Swiss, and pickles, also came with sweet potato fries on the side.



APPLES

Apples were featured in over two dozen new menu items and LTOs in the past two months, cross-utilized throughout the menu including in beverages, desserts, and entrees. Domino's offered customers a new Baked Apple Dip featuring sweet, gooey, oven-baked apples flavored with cinnamon, and they suggested pairing it with their Cinnamon Twists for an elevated dessert experience. Other sweet apple treats from top chains included the return of Subway's Caramel Apple Cookies showcasing chunks of apples blended in buttery dough; an Apple Cranberry Cheese Pie with sweet cinnamon apples, topped with a cranberry and crumb topping from Coco's Bakery; and a Caramel **Apple Danish** with caramel and fresh apple chunks from Le Madelene French Bakery. Ninety Nine Restaurant and Pub went the savory route with its returning Apple Cranberry Chicken Salad featuring fresh mixed greens, grilled chicken, green apples, cranberries, blue cheese, and sliced almonds with a creamy poppyseed dressing.



BASIL

Basil added fresh flair to a variety of new and returning items on fall menus. At Cotton Patch Café, basil was paired with ripe tomatoes in a smooth and creamy Tomato Basil Soup topped with parmesan cheese and homemade croutons. A returning item on Carrabba's Fall Harvest Features Menu was the Pollo Rosa Maria starring wood-grilled chicken stuffed with fontina cheese and prosciutto and topped with mushrooms and a basil-lemon butter sauce. Three new items at Newk's Eatery featured basil was well, including a Portabella Veggie Sandwich with portabella mushrooms, red and yellow peppers, Swiss cheese, and basil pesto on Parisian bread and a Supreme Pizza with pepperoni, Italian sausage, red onions, red and yellow bell peppers, and fresh basil. Rock Bottom Restaurant & Brewery added Chicken Carbonara to its New Core Menu. The dish features linguini, oven-roasted tomatoes, basil, arugula, and a sunny-side-up egg.



INTROS & LTOS

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



FRIENDLY'S



Friendly's introduced a variety of new comfort dishes, ranging from a Cajun Jazz Pasta with cavatappi pasta, cream sauce, grilled shrimp, chicken breast, corn, and red and green bell peppers to Awesomesauce Steak Tips with mushrooms, peppers, and onions, served with a fresh vegetable medley.

BRAVO! CUCINA ITALIANA



Bravo pulled out all the stops for several new brunch menu additions including a Garden Veggie Scrambler with roasted grape tomatoes, zucchini, spinach, and Grana Padana, served with breakfast potatoes; and a Sangria Rosa with raspberry vodka and fresh pineapples and strawberries on the rocks.

AU BON PAIN



New and returning LTOs at Au Bon Pain last month included a Greek Vanilla Yogurt & Strawberry Parfait with fresh strawberries and granola; The Good Egg Sandwich with two eggs, cheddar cheese, spinach, tomatoes, avocado, and lemon aioli on a baguette; and a Turkey Wild Rice Soup with kale and carrots.

RED ROBIN



Red Robin piled on the veggies and cheese last month with its Donatos Cauliflower Very Vegy Pizza that topped a cauliflower crust with freshcut Roma tomatoes, green peppers, onions, mushrooms, baby spinach, and green olives; and its Donatos Ultimate Grilled Cheese Pizza topped with bacon, Roma tomatoes, and breadcrumbs.

MILLER'S ALE HOUSE



Miller's Ale House released a variety of LTOs last month including an Andouille Sausage Mac 'N' Cheese with sautéed mushrooms, tomatoes, and scallions; and a Full Chicken Club Flatbread & Salad Duo featuring grilled chicken, bacon, tomatoes, and avocado ranch on flatbread, served with a side salad.

HARD ROCK CAFE



Hard Rock Café debuted a variety of LTOs last month for its Pinktober Menu including The Ultimate 'Pub' Burger with two steak burgers, shredded lettuce, shoestring onions, and vineripened tomatoes; and a Tropical Strawberry Margarita with fresh muddled strawberries, orange liqueur, tequila, and lime juice.

RUBIO'S



Rubio's brought back four menu items last month, including their Langostino Lobster Bowl starring wild-caught langostino lobster with citrus rice, black beans, and romaine, topped with guacamole and salsa fresca; and their Impossible Taco Salad made with Impossible meat, romaine, roasted corn, and sliced avocado.

CULVER'S



Culver's added a Southwest Avocado Salad to its menu last month. The limited-time salad featured fresh avocado, grape tomatoes, red onions, and a heritage lettuce blend topped with grilled chicken, crumbled feta cheese, tortilla chips, all served with a zesty avocado dressing.





ASSOCIATIONSM

The 7 Strategies

The International Fresh Produce Association is here to serve individuals and organizations in the produce and floral industry regardless of size or specialty. We are also here for our partners in the media, policymakers and thought leaders who are working on behalf of our industry as well.

In order to address the interests of our members and partners, we utilize 7 strategies to drive our work:

- Serve all sectors of the global fresh produce and floral supply chains, growing our global membership and participation.
- Conduct government advocacy and leadership to build and maintain a positive business climate in the United States and the North American market
- Engage with global bodies and allied organizations to promote free and fair trade, international harmonization of standards, and worldwide growth in consumption.
- Providing expertise and business solutions in food safety, new technology, supply chain management, sustainability, leadership and talent development, business operations, marketing and more.
- Bringing all sectors of our diverse supply chain together to better understand our interconnections and support efficiency and profitability throughout the chain.
- Enhance business-to-business sales and marketing connections across the produce and floral supply chains.
- Demand creation to inspire consumers to embrace produce and floral products as essential parts of their lives, while increasing profitable sales of members' products.





Cathy Burns and **Tom Stenzel**, Co-CEOs of the International Fresh Produce Association.

FOR MEMBERSHIP AND VOLUNTEER INFORMATION, VISIT WWW.THISISBETTERTOGETHER.COM

YOUR QUARTERLY GUIDE TO THE LATEST KIDS' MENU TRENDS

KIDS' MENU PRODUCE SPOTLIGHT

UNITED FRESH

GREEN BEANS

INCREASED 43% ON KIDS' MENUS IN THE PAST 4 YEARS

With the holiday season coming up, green beans will be in the spotlight all over again, but they have been a trending item on the kids' menu for a number of years. Operators that offer smaller versions of entrees like fried chicken will often include green beans as a side option, while other operators get creative and offer options like green bean dippers or fried green beans for crunch.



IN ACTION

MANGOZ GRILL Orlando, FL

Kids' Vegetable Noodle Bowl Pan-seared cabbage and kale, yakisoba noodles, tempura green beans, and carrots.

THE ROLE OF PRODUCE **IN KIDS' MENU SIDES**

Parents want to see healthier side options on the menu, and many operators are looking for new ways to deliver on that need.

According to Datassential's Feeding Kids Keynote Report, over a third - 36% -- of parents wish restaurants had healthier side dish options on kids' menus. It's their second most-wanted offering after build-your-own kids' combos. That desire for more well-balanced meals on the kids' menu has prompted numerous changes in recent years, with many operators now offering fruits and veggies as side options. Apple slices, steamed veggies, and fruit salads are all common side dish offerings on the kids' menu today.

But some operators are going a step further, incorporating trending produce varieties and more globally-inspired sides on the kids' menu. Fried rice, often packed with veggies like carrots and peas, is one of the fastest-growing side dishes on kids' menus, growing 34% over the past 4 years (Datassential MenuTrends). Corn grew 17% as a side on kids' menus over the past 4 years, but it shows up in a much wider range of applications, including in corn fritters and elote (kids love to eat with their hands, after all). At Chai Pani, based in Asheville, NC, kids can order a side of roasted corn niblets cooked in ghee, a slightly-nutty clarified butter common in Indian cuisine.

The fastest-growing side dish on kids' menus - tater tots - are also a source of innovation, as operators swap-in veggie-focused versions like cauliflower or broccoli tots and serve them with fresh house-made dipping sauces. Similarly, sweet potatoes and sweet potato fries are also growing as side options on kids' menus, adding that all-important pop of color that gets kids excited to eat.

THE LATEST

INTROS & LTOS ON MENUS

FRIENDLY'S



This month Friendly's restaurants introduced a range of new kids' items, including a new Taco Pocket made with diced tomatoes and shredded lettuce; a Chicken & Rice Garden Bowl with pineapple tidbits, broccoli, cauliflower, and carrots; and a Green Machine Salad with freshly-chopped greens.

flip'd

IHOP debuted its fast casual spinoff, Flip'd by IHOP, in Lawrence, KS, in late September, which features a range of combos for kids. In addition to options like a burger and chicken strips, the signature Jr. Build Your Own Pancake Bowl lets kids choose options like fresh strawberries, blueberries, or bananas as bowl toppings.

FLIP'D BY IHOP



KEY STATS

51%

of K-12 operators say they are cautiously optimistic regarding their business in the midst of COVID and supply chain issues

SOME **TOP-GROWING**

PRODUCE IN K-12 OVER THE PAST YEAR

N/A RED CABBAGE

+1,305% **SAUTEED SPINACH**

CARA CARA +1,204%

BLOOD ORANGE 703%

N/A = infinite growth

Analyzing the role of produce with this key topic

K-12 SCHOOLS & SUPPLY CHAIN DISRUPTIONS

WHAT IT IS

K-12 has had to pivot almost constantly throughout the pandemic, from turning shared areas such as gyms into makeshift feeding areas to figuring out how to deliver meals to kids zooming into remote learning. Since August, schools have dealt with rising food costs as well as shortages and delays due to supply chain disruptions. Uncertainty over inventory means most kids aren't being served exactly what's advertised on menus, as meals are often changed on-the-fly. The USDA last month announced investments designed to help ease school food supply chain issues and relaxed restrictions so that schools can make last-minute purchases at grocery or bulk stores in order to meet student needs. As disruptions continue, schools are communicating changes and the need to be flexible to parents, with many outlining proactive steps taken to ensure kids are fed.

ROLE OF PRODUCE

Produce has so far been relatively unaffected by supply chain woes. Schools have reported a shortage of basic staples such as juice boxes, bread, and cutlery, but many operators have prioritized making fresh produce available to students, even if it means making last-minute changes and swapping out one item for another. Schools are also utilizing alternative means of procuring produce, whether it's harvesting more from on-site gardens or scouring local farms or grocery stores. As a welcome change from previous pandemic restrictions, some schools have also received the green light to start offering salad bars again. This more convenient self-serve format alleviates the crunch already felt from labor shortages and will ensure fresh produce is still at the forefront of student meals.



ON THE MENU

GREENWICH HIGH SCHOOL Greenwich, CT

Harvest Rice Bowl Roasted squash, caramelized onions, and kale salad with or without chicken.

PONCA ELEMENTARY Omaha, NE

Smoked Turkey and Mozzarella Sandwich Box C Comes with X-ray vision carrots, fresh grape tomatoes, an iced fruit cup, a chef salad with lettuce and spinach mix, and breadsticks.

DELHI HIGH SCHOOL Delhi, LA

Sweet Thai Chili Wrap Stuffed with chicken, diced tomatoes, shredded carrots, scallions, pickled jalapeno slices, and freshly-chopped cilantro.

INTERVIEWS

DESPITE CURRENT LABOR AND SUPPLY CHAIN CHALLENGES, BY AND LARGE, K-12 SCHOOL DISTRICTS HAVE BEEN ABLE TO RECEIVE FRESH PRODUCE DELIVERIES AND ARE MAKING THESE ITEMS AVAILABLE TO STUDENTS. BELOW ARE DIRECT QUOTES FROM K-12 OPERATORS:

"Salad and fruit bars are back this year! After consulting with our county Health Department, we got the 'go-ahead' to, once again, make self-serve salad bars available to students at our schools. So far produce has been the only thing we have not had any major issues with, given national supply chain challenges. Our meal program is therefore offering a variety of fruit, as well as veggies that meet the USDA's color sub-group requirements. During the recent Farm to School Month, our district hosted the Wisconsin Secretary of Agriculture who toured the greenhouse at our high school, where we are growing lettuce and herbs that make it into the salad bar, as well as our 85-tree apple orchard that will produce fruit next school year."



Michael Gasper Nutrition Services Supervisor School District of Holmen Holmen, WI



Doug Wordell, RD Director of Nutrition Services Spokane Public Schools Spokane, WA "Since the start of school, we've had a few instances where certain produce items were cut from our order, or not enough product was delivered, although we have been able to find ways to offer fresh fruit and veggies, such as grab-and-go salads at our middle and high schools and other options at the elementary level. It's essential that our vendor partners collaborate with schools and make fresh choices available, since the reality is that many kids, in our community and across the nation, rely on school meals for the majority of their weekday calories."

"We continue to offer the USDA Fresh Fruit and Vegetable Program (FFVP) as an in-class, mid-day snack for students at 15 of our elementary school sites. We have also returned to offering fresh salad bars, where students can pick and choose from multiple fruit and vegetable options when they come to our cafeterias. This year, we are seeing more students come through our lines to get meals, and we are stretched thin on staffing. The self-serve bars help to alleviate some of these issues. Also, the current labor and supply chain challenges, both internally and with our vendors, has elevated the importance of communication to an entirely new level. Overcommunication is good communication."



Kelly Orton

Director, Child Nutrition

Salt Lake City School District
Salt Lake City, UT

INTERVIEWS



"After a very difficult year, our new food truck is a bright spot that's bringing hope, excitement, and a great deal of attention to what school meals can and should be: fresh, healthy, and delicious. We plan to feature entrees for middle and high school students that include freshly made breakfast burritos and birria-style tacos, topped with pickled onions, roasted corn, and creamy jalapeno aioli. However, the current labor and supply chain challenges are causing us to pivot or delay some of these plans. Where we have seen some success in terms of getting access to greater produce variety has been with the USDA-DoD Fresh Program. We will use all programs and partnerships at our disposal to provide quality meals to our students."



Diana Flores
Executive Director, Central Kitchen & Warehouse,
Nutrition Services
Sacramento City Unified School District

Sacramento, CA



Jackie DeRoma Coordinator of Child Nutrition Orono Schools ISD #278 Orono, MN "With the current supply chain issues, produce has been the least of our worries. We are continuing to offer local, Minnesota-grown veggies as part of our Harvest of the Month program, like mini bell peppers and delicata squash. We have also been able to start up a 'Farm Fresh Fridays' promotion, offering creative produce-centric recipes, such as a French carrot salad. We might not be capable of offering some of the students' favorites due to supply chain issues, but this has given us an opportunity to make a larger impact on our students by using a variety of fresh produce."



INTERVIEWS CONTINUED

"For our pre-K students, we've just begun a new Harvest of the Month Program, where we source an in-season, local fruit or vegetable, and highlight that item with kids in their classroom and on their lunch menu. Additionally, we've returned to offering salad bars. All middle and high schools are once again using self-serve salad bars to offer a variety of fresh choices, and students at the elementary level have similar options, but with staff assistance to save on time. The supply chain challenges have caused some last minute scrambling with a number of menu items, although we've still been able to make fresh produce available to students daily.



Lauren Couchois

Culinary Specialist, Food and
Nutrition Services

Greenville County Schools

Greenville, SC



"We are thankfully not having trouble getting produce at the moment! We offer a variety of choices each week and emphasize local Texasgrown or fresh student-grown produce from our school gardens. We encourage students to 'eat the rainbow' by offering items like red cherry tomatoes, orange sweet potatoes, green cucumbers, garden salads, and purple grapes. We love to keep our students' minds and mouths open by appealing to their sense of adventure, understanding of nutrition, and joy in delicious, fresh food."



Alicia Braun, RD, LD

Coordinator of Child Nutrition

Coppell Independent School District

Coppell, TX

"Our commitment to offering a variety of fresh produce options has not waivered during the current schoolyear. We communicate often with our distributor and have also been able to continue efforts to source local produce from them. Fresh produce remains a priority, and despite supply chain issues mainly impacting breads and disposable paper and plastic products, our students are getting fresh meals. Some examples have included a chicken veggie stir-fry with zucchini, red peppers, and snap peas, as well as buffalo cauliflower, pear salsa, cantaloupe, and honeydew fruit cups, multi-colored cherry tomatoes, and a variety of apples to celebrate National Apple Month this October."



Amanda Muniz Food Service Director Chelsea Public Schools Chelsea, MA

"Throughout last schoolyear, and now with students back to in-class learning, we have always made it a priority to provide students with a variety of fresh fruit and vegetable choices. We leaned heavily on produce purchases using the USDA-DoD Fresh Program, and this year is no different. We have currently budgeted over \$3 million and are hopeful that the program will provide additional funds to spend on Florida favorites such as strawberries, blueberries, and peaches. We could potentially increase our produce purchases for SY22, which is especially important now that all of our students are eligible to receive no-cost meals, due to this year's USDA flexibilities."



Karena Bozarth

Procurement Manager, Food and
Nutrition Services

Orange County Public Schools

Orlando, FL



INTERVIEWS CONTINUED

"To start off the schoolyear, we are offering a chef salad, Caesar, and other composed salad options for our two middle and high schools. These are self-serve, grab-and-go options that have been extremely popular. We have put an emphasis on food presentation in our program and our staff does such a great job that the salads practically sell themselves! We also offer plenty of other fresh fruit and veggie options on our menu. The current supply chain issues haven't impacted this aspect of our menus, aside from minor adjustments to substitute one produce item for another."



Sharon Schaefer, SNS **Director, Food and Nutrition Services** Gretna Public Schools Gretna, NE













Produce Alliance, LLC. specializes in providing fresh produce procurement and distribution services to food service clients across North America, the Caribbean and beyond. Managing an alliance of 50+ independently-owned specialty distributors with deep roots and decades of success in serving customer needs for fresh produce. Each member commits to compliance with audited distribution, food safety & quality assurance, purchasing, and category management programs designed for client success with combined produce sales of over \$6 billion dollars annually.



WWW.PRODUCEALLIANCE.COM





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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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