



BLUEBERRIES

FRUITS | BERRY VARIETIES | BLUEBERRIES
AUGUST 2019

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KEY TAKEAWAYS

Among the top US restaurants, **fruit usage on side menus** is more common than on **appetizer menus**, while both provide an opportunity for growth.

Blueberry is on **one in four menus** and has grown 12% over the last four years and 93% over the last 14 years driven by the **QSR** and **casual segments**.

Blueberries, unlike the rest of berry types, are most often featured with a **breakfast starch** or **bakery item**.

Blueberries are growing across all menu parts with **beverages** leading in both menu penetration and four-year growth.

The three highest penetration blueberry pairings: **strawberry**, **lemon**, and **banana**, have continued to experience growth.



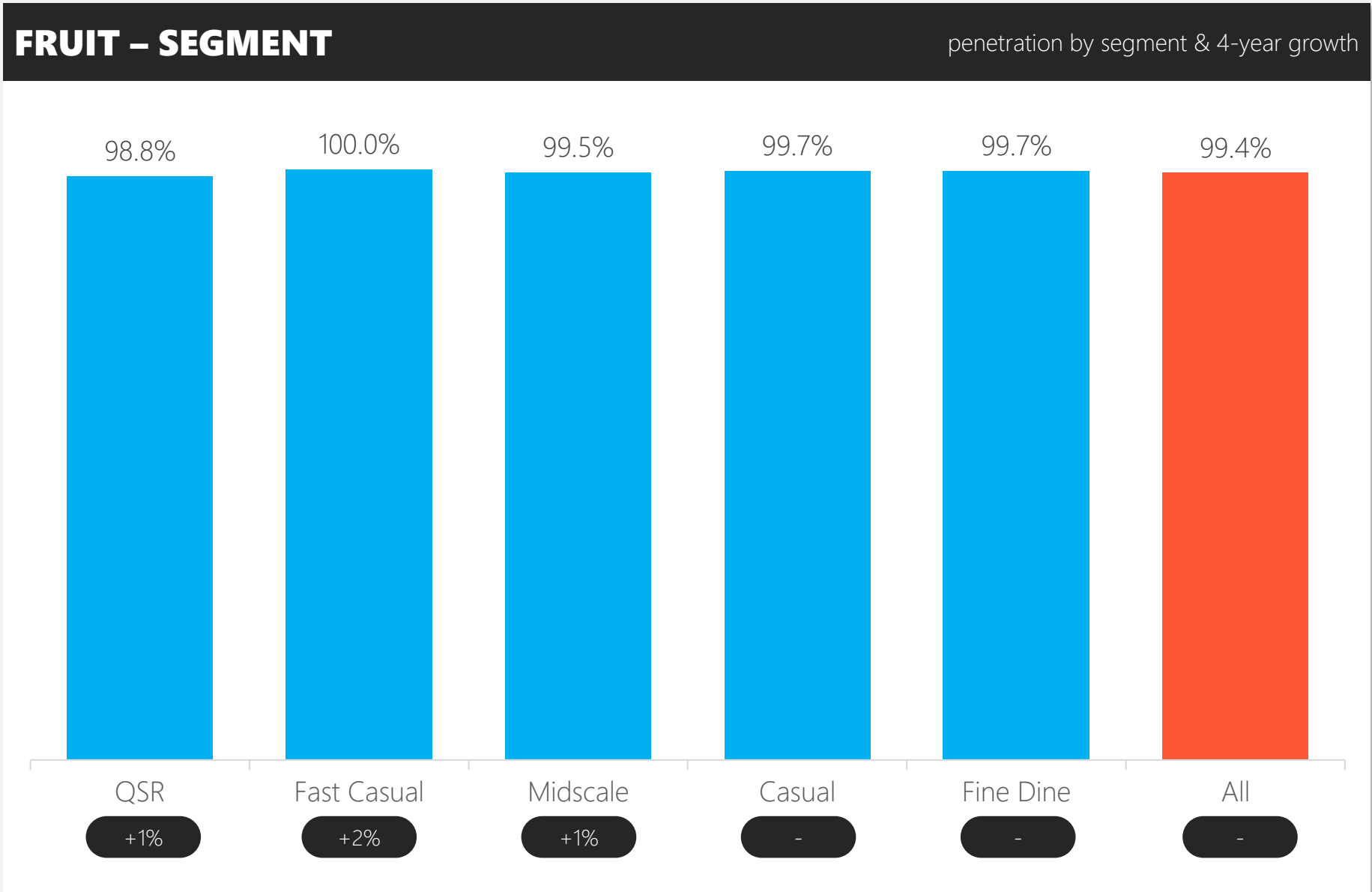
FRUIT OVERALL

FRUITS



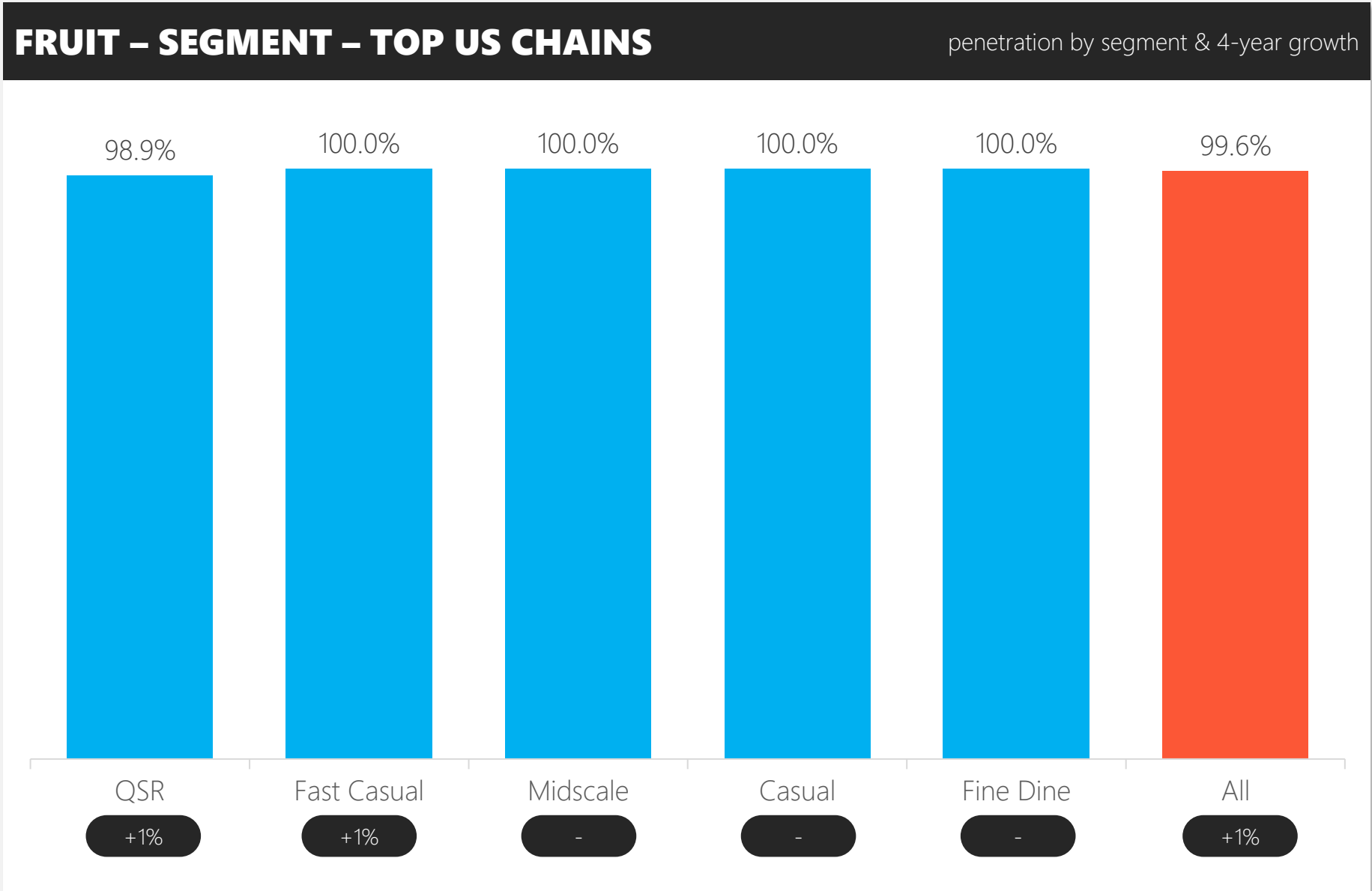
Fast casual had the strongest growth bringing menu penetration to 100%.

» Fruit has nearly 100% menu penetration across all segments and has remained flat over the last four years.



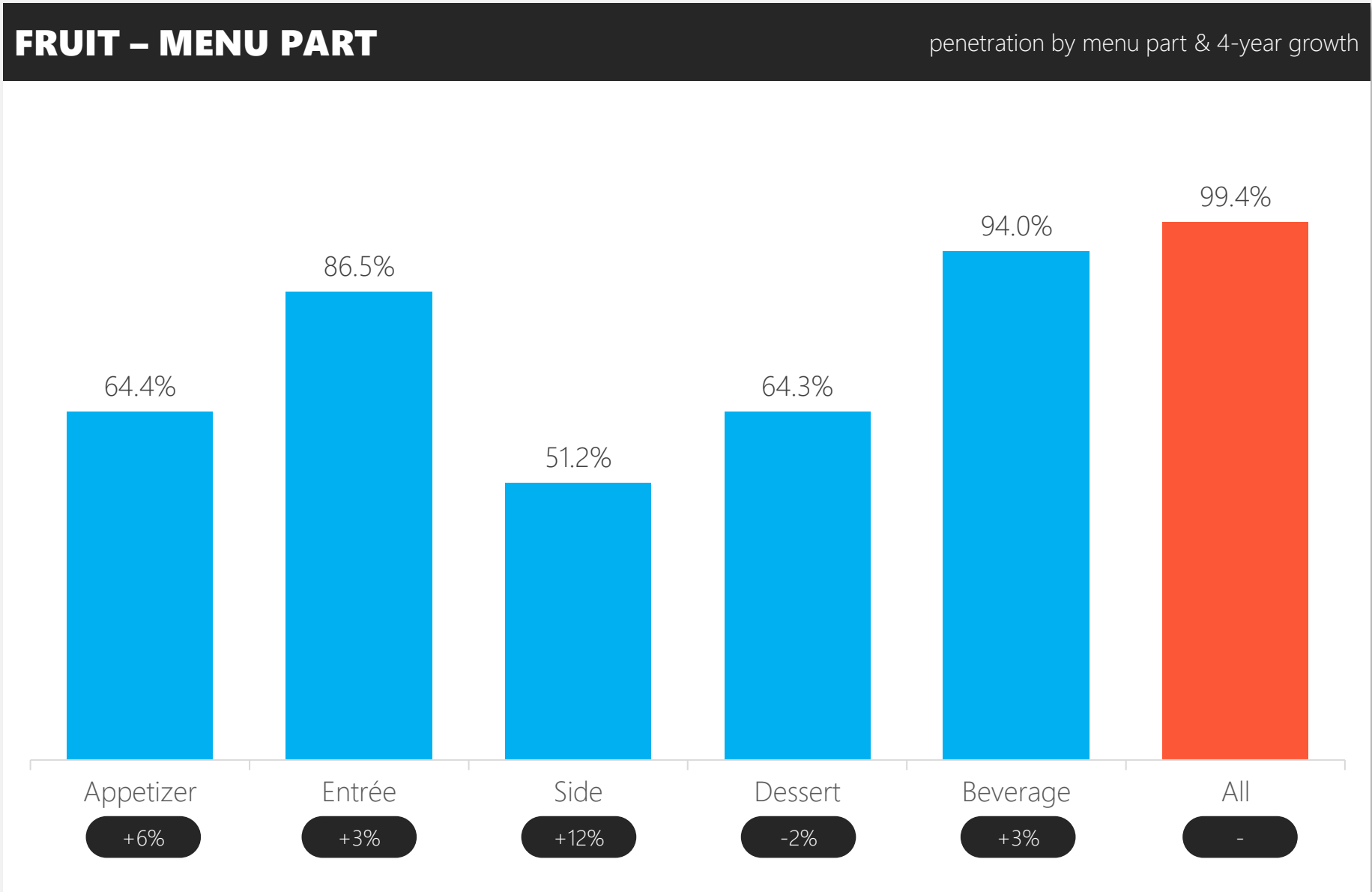
Fruit is a mainstay at all top chain restaurants except for a handful of QSR operators.

» There has been slight growth in the QSR and Fast Casual segments over the last four years.



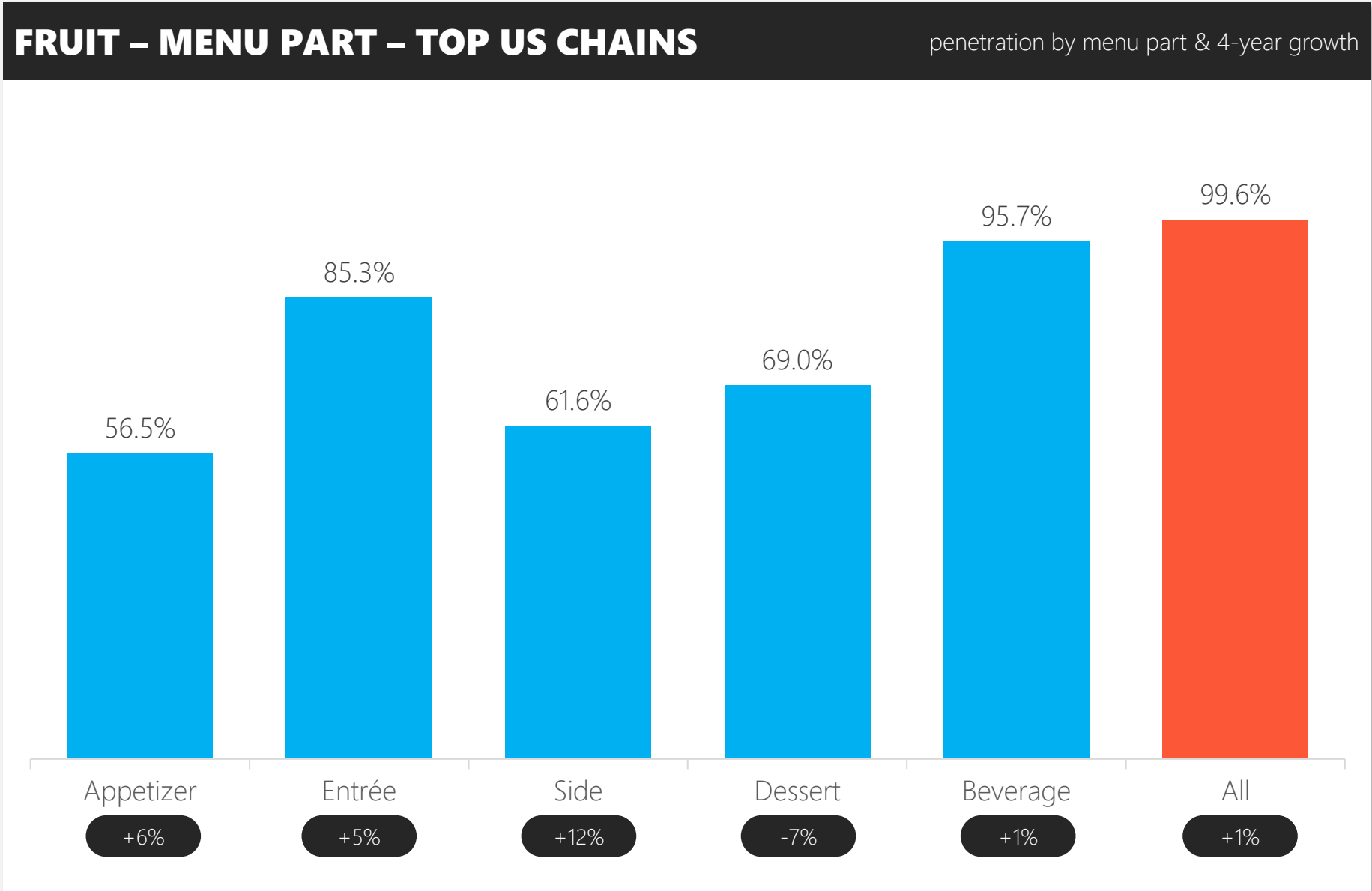
Entrees and beverages have the highest menu penetration for fruit and have grown 3% over the last four years.

- » Fruit is only featured on about half of side menus, but is a strong growth area.
- » In addition to sides, appetizers are also an opportunity for further growth in the fruit category.



Among the top US restaurants, fruit sides are more apparent than appetizers, while both provide an opportunity for growth.

» Appetizer growth has included salads featuring fruit-based dressings and avocado growing as a main ingredient beyond guacamole.



MOST MENUED FRUITS

	MENU PENETRATION	4 YEAR GROWTH
Orange	78.3%	+3%
Lemon	70.5%	+7%
Apple	60.6%	+2%
Pineapple	60.5%	+3%
Strawberry	52.7%	+9%
Lime	50.8%	+17%
Cranberry	47.9%	+5%
Avocado	47.6%	+16%
Raspberry	39.7%	+4%
Cherry	39.0%	+8%
Mango	38.4%	+15%
Coconut	37.6%	+15%
Banana	33.3%	-
Peach	32.2%	+13%
Grapefruit	27.5%	+19%
Blueberry	23.6%	+11%
Raisin	20.6%	-4%





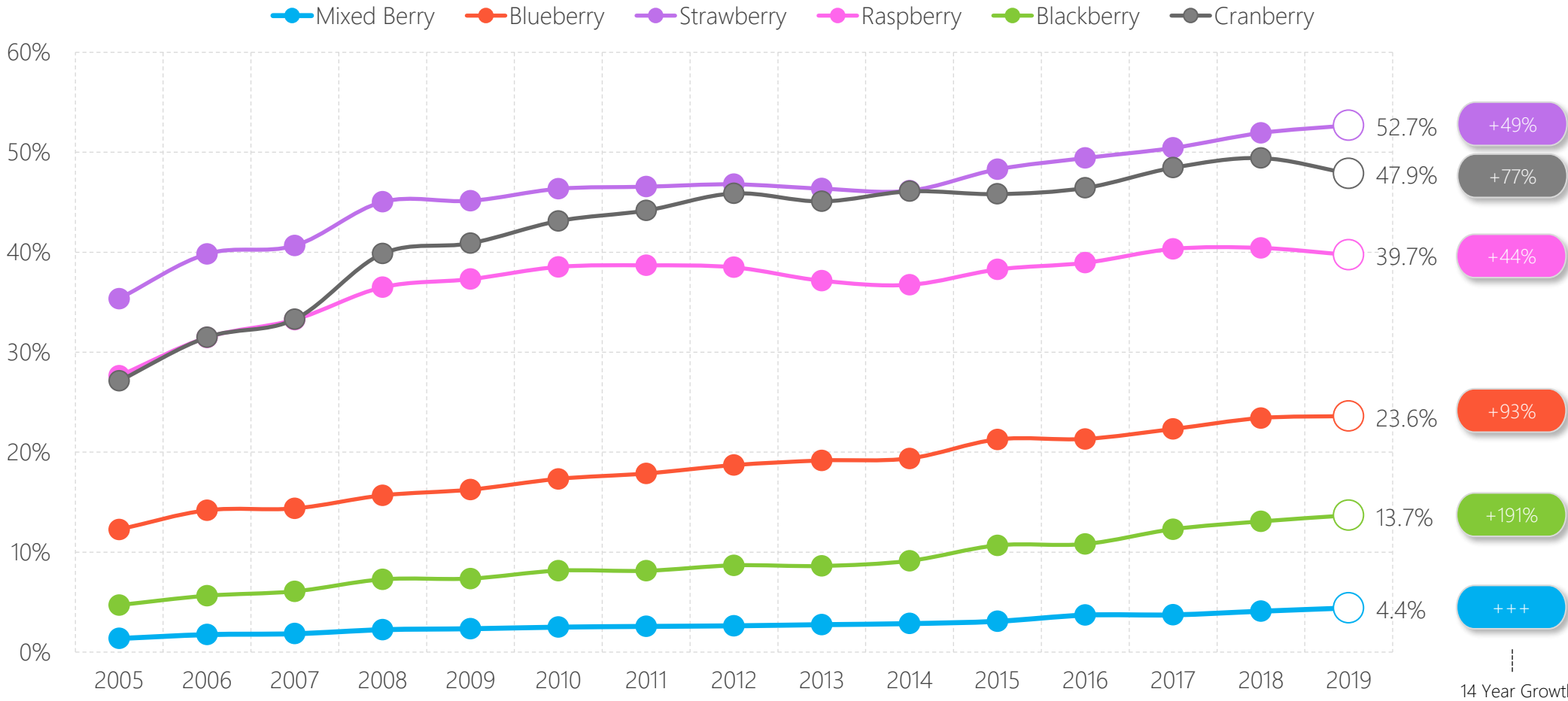
BERRIES OVERALL

Mixed berry, blackberry, and blueberry have experienced high growth over the long-term, but still have low menu penetration relative to strawberry, cranberry, and raspberry.

» Strawberries, blueberries, and blackberries have experienced an uptick over more recent years.

BERRY VARIETIES

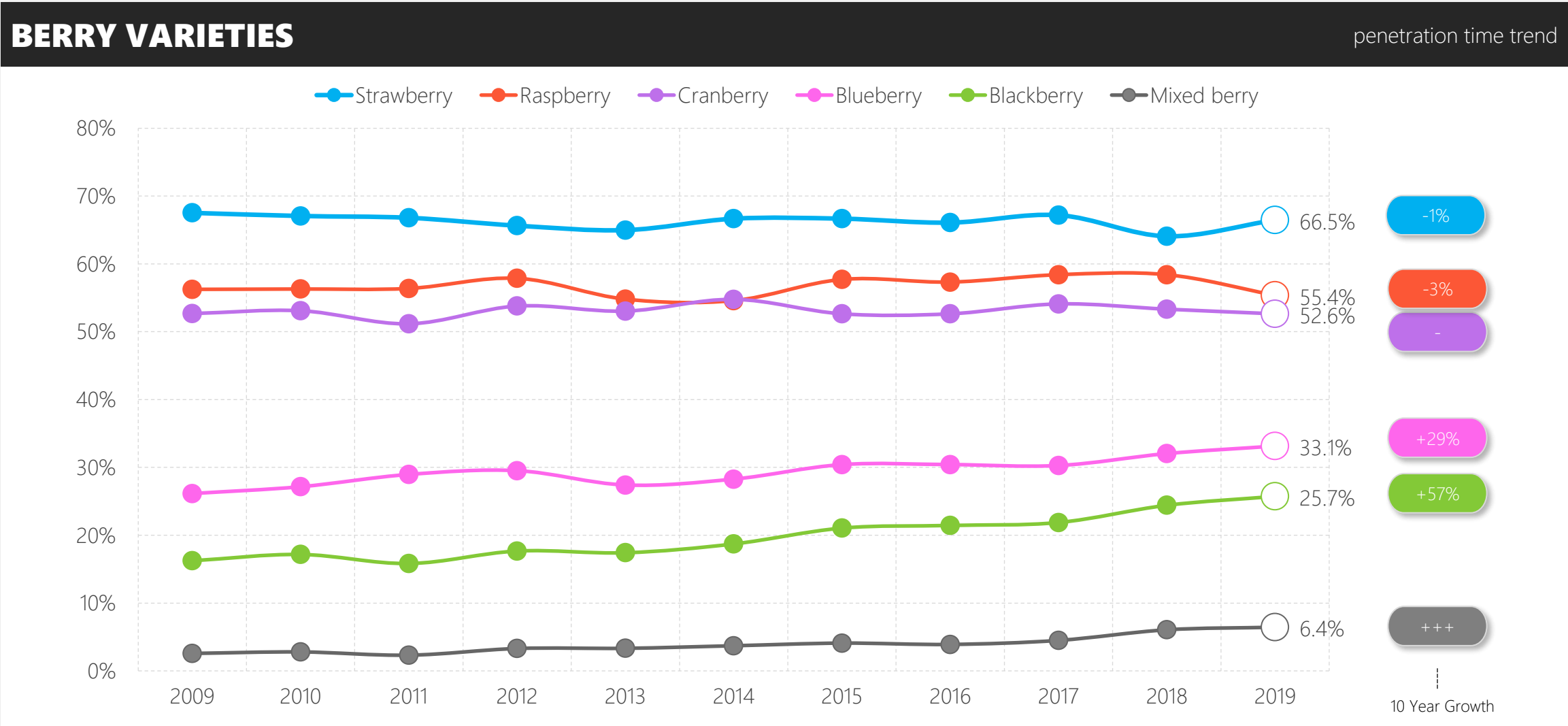
penetration time trend



+++% indicates growth over 200%

Mixed berry, blackberry, and blueberry have all experienced impressive growth over the last 10 years.

- » It is more common for menus to feature a specific berry rather than mixed berry.
- » Strawberry, blackberry, and cranberry all have high menu penetration, but have stabilized.



+++% indicates growth over 200%

MenuTrends 2019, PENETRATION: % of top restaurants that offer

Blueberries, unlike the rest of the berry types, are often featured with a breakfast starch or bakery item.

- » Smoothies are a key item for blueberries and strawberries.
- » Cranberry is used very differently than other berries being featured in a cocktail or on a salad.

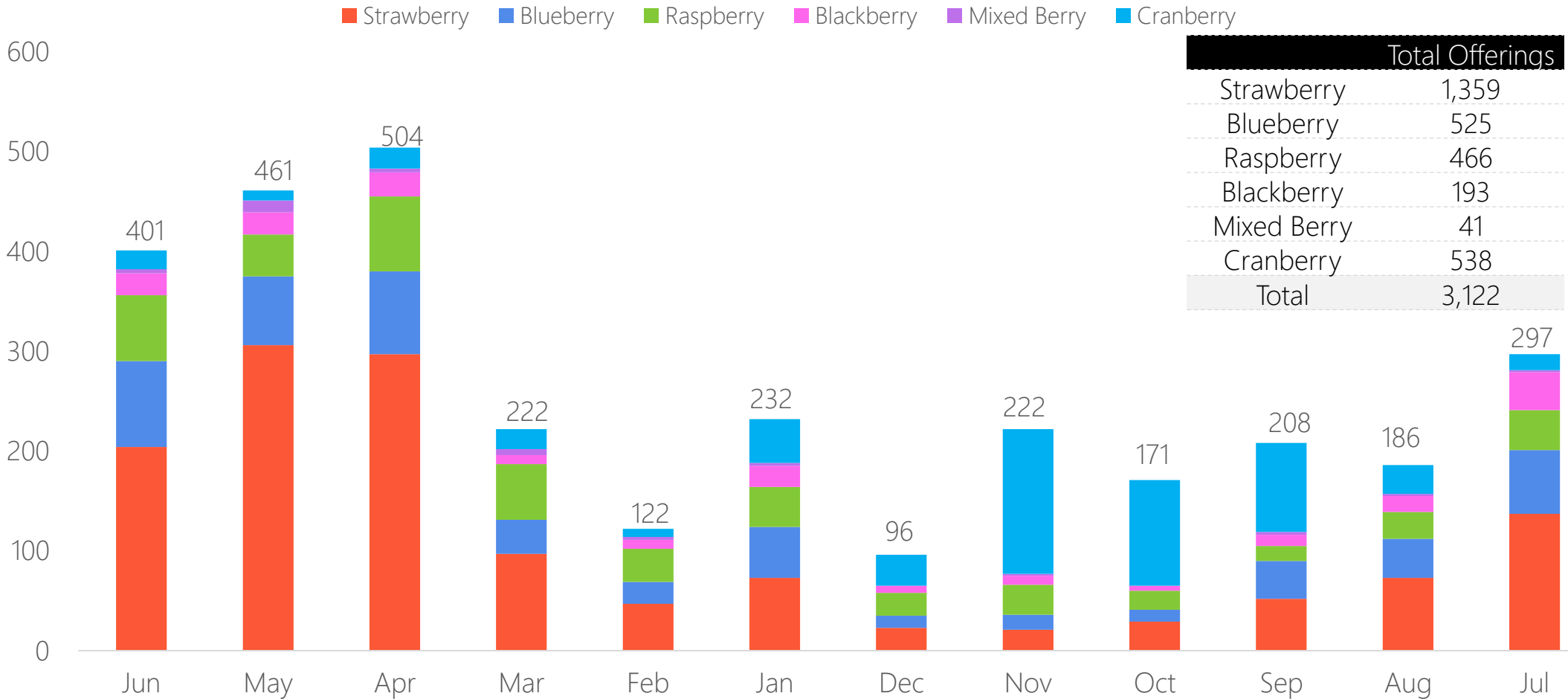
BERRY VARIETY ITEM TYPE DISTRIBUTION						
ranked by blueberry incidence distribution						
Item Type	Blueberry	Mixed Berry	Strawberry	Raspberry	Blackberry	Cranberry
Breakfast Starch	14.9%	13.4%	5.1%	1.3%	2.3%	0.3%
Blended Drink	11.1%	8.2%	17.8%	6.6%	4.4%	0.6%
Cocktail / Mixed Drink	9.5%	7.3%	12.0%	14.1%	33.0%	14.6%
Breakfast Bakery	7.2%	1.5%	0.9%	1.6%	1.1%	1.2%
Other Entree	5.6%	6.1%	2.5%	0.4%	1.5%	1.4%
Combos / Multi Protein	5.6%	8.2%	3.6%	3.4%	2.6%	5.8%
Pie	5.3%	5.5%	1.3%	2.5%	4.4%	0.3%
Frozen Treat	3.6%	4.0%	6.2%	6.5%	6.2%	0.3%
Fruit Side	2.9%	6.1%	1.7%	0.4%	0.6%	0.8%
Bread Side	2.9%	0.0%	0.3%	0.2%	0.5%	0.4%
Appetizer Salad	2.1%	0.9%	2.7%	4.5%	1.1%	10.9%
Cake	1.9%	3.6%	3.6%	4.6%	1.3%	0.3%
Salad Entree	1.9%	0.3%	2.7%	3.8%	0.7%	7.7%
Cheesecake	1.8%	3.3%	3.3%	2.6%	0.9%	0.1%
All Other	23.8%	31.6%	36.3%	47.4%	39.5%	55.3%

Prime berry season is the spring with strawberries, blueberries, and raspberries at their peak on menu introductions.

- » Winter is not a fresh berry season with February and December being the low points.
- » January typically experiences a spike in berries during health centric resolutions being featured in parfaits, oatmeal, and smoothies.

BERRY VARIETIES – SEASONALITY

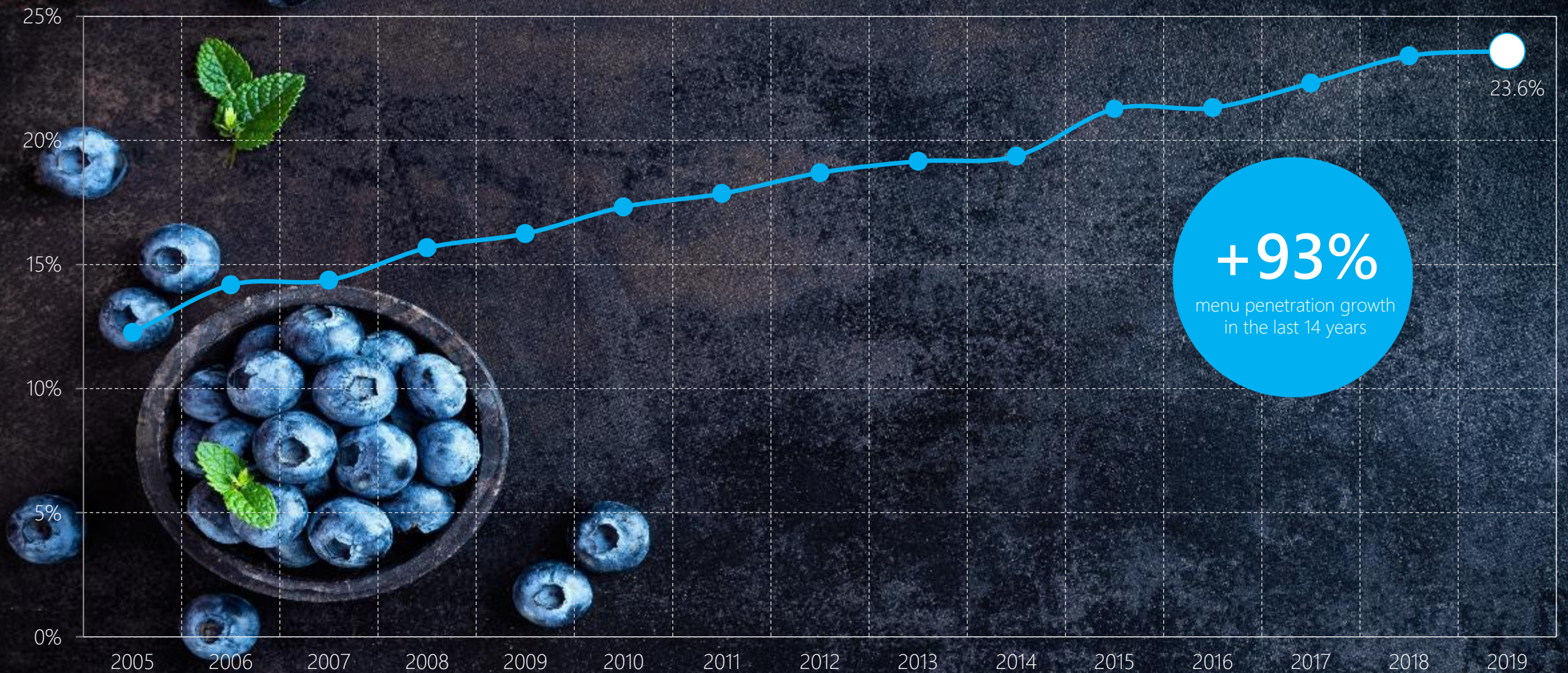
Jun 2012 – May 2019



A close-up photograph of a small wooden bowl filled with fresh blueberries. A sprig of green mint is placed on top of the berries. The bowl is set on a dark, textured surface. In the background, another similar bowl is visible but out of focus. The text "BLUEBERRIES OVERALL" is overlaid in white, bold, sans-serif capital letters across the center of the image.

BLUEBERRIES OVERALL

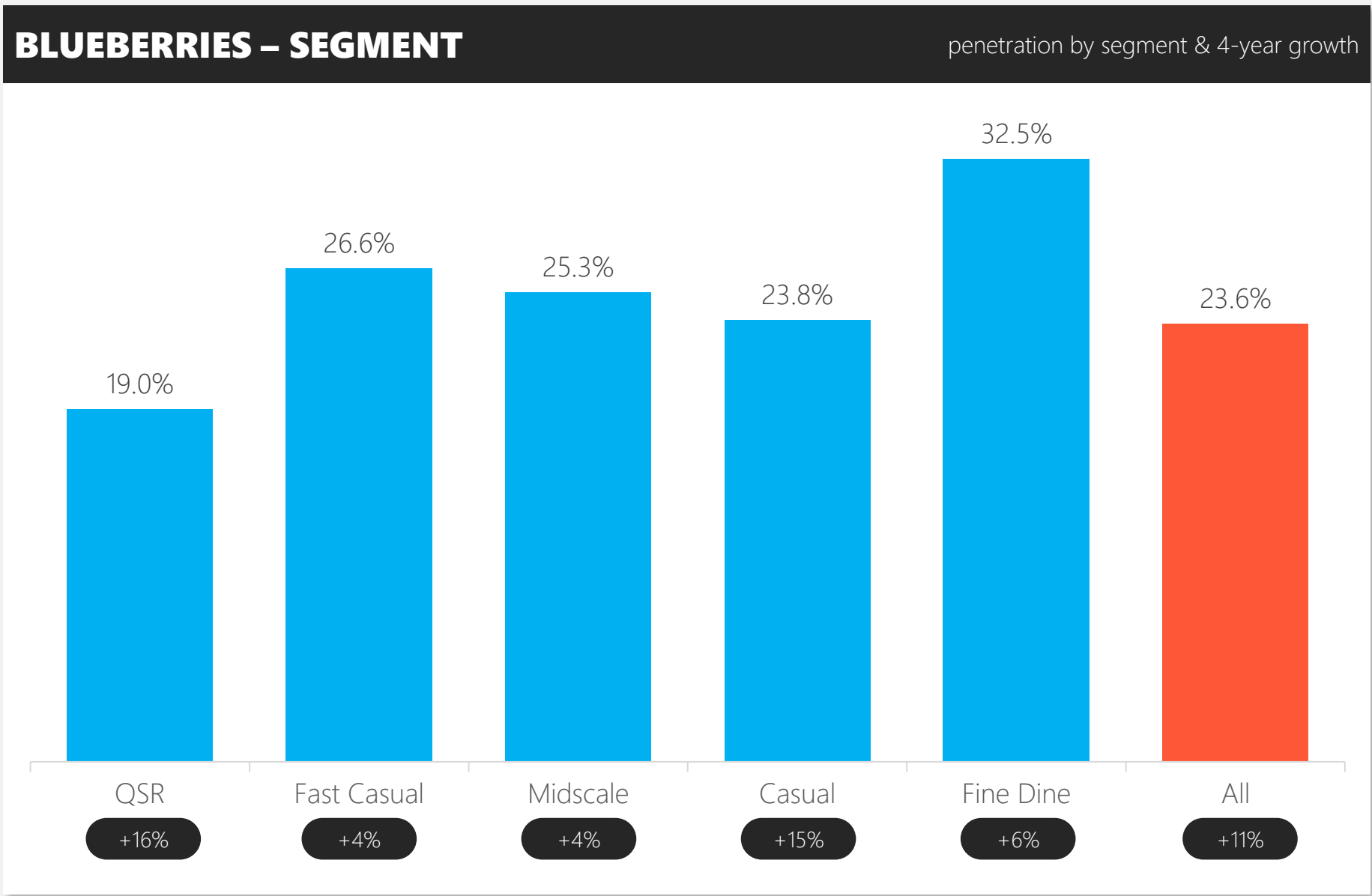
BLUEBERRIES



+93%
menu penetration growth
in the last 14 years

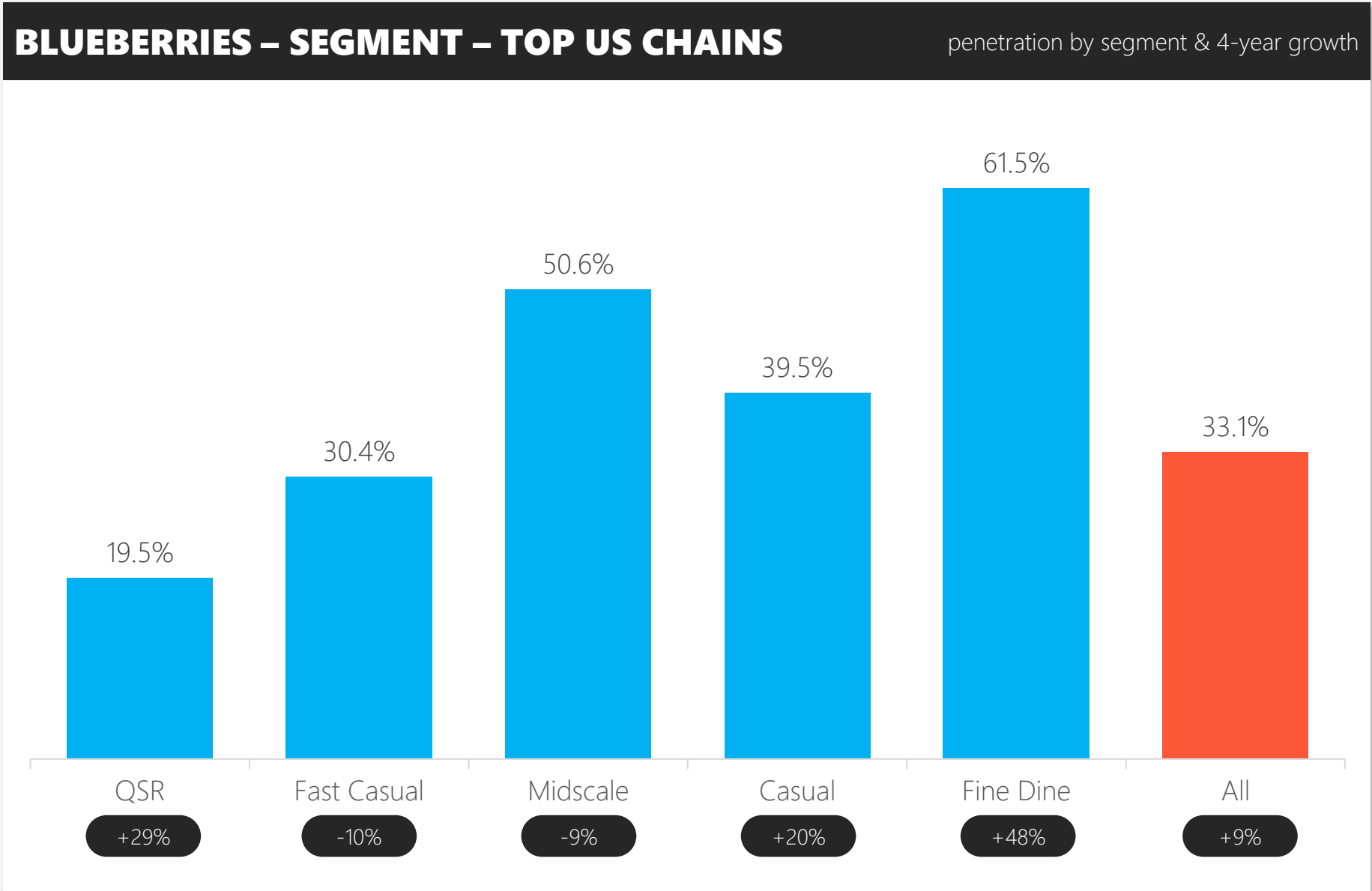
Overall, blueberries have had double digit growth over the last four years driven by the QSR and casual segments.

» QSR has experienced the most rapid growth and still has the lowest menu penetration offering an opportunity for growth for innovation outside of breakfast staples.



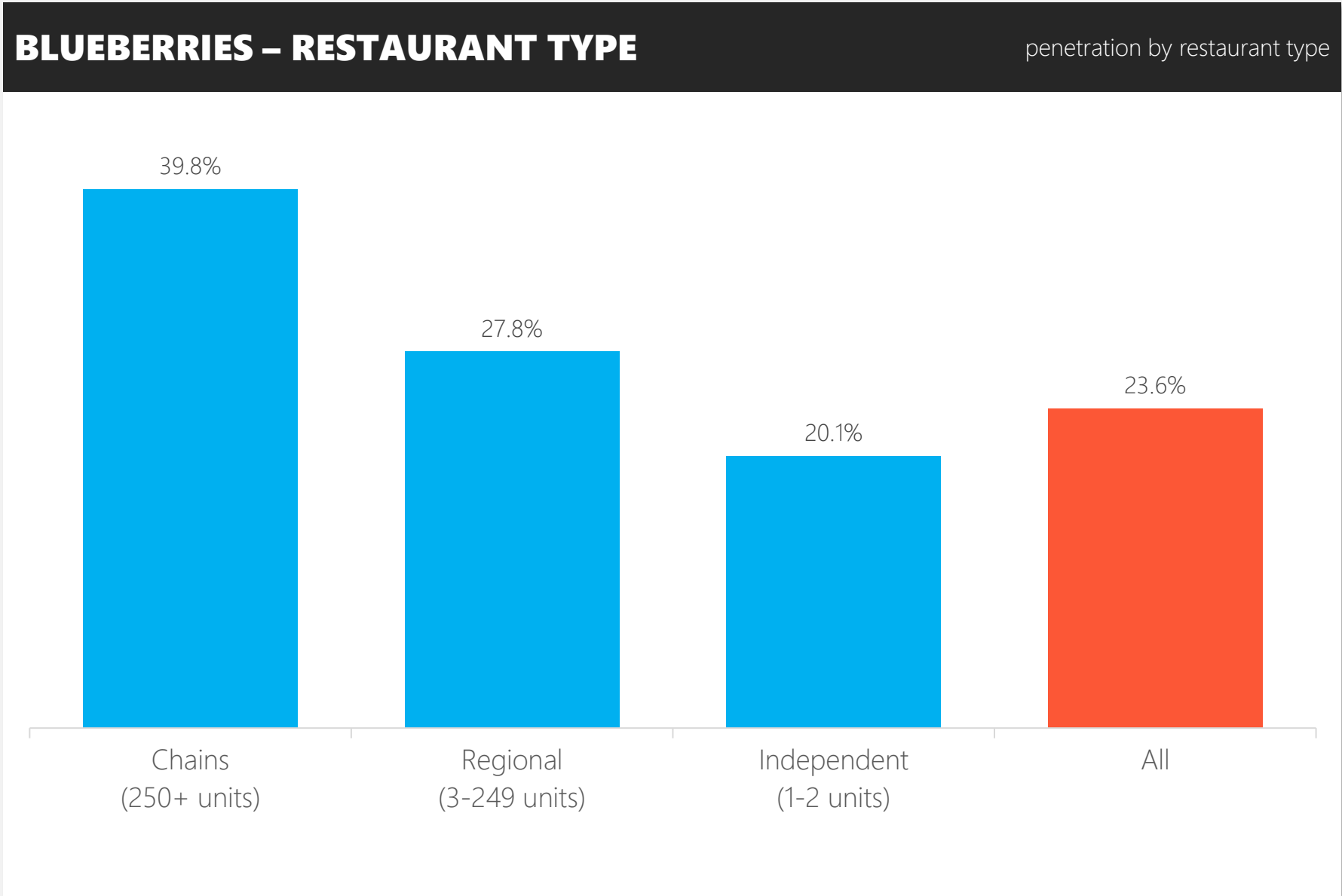
Among the top US chains, a third offer blueberries with 9% more menus featuring them than four years ago.

» Midscale has high menu penetration driven by high offering of key breakfast starches.



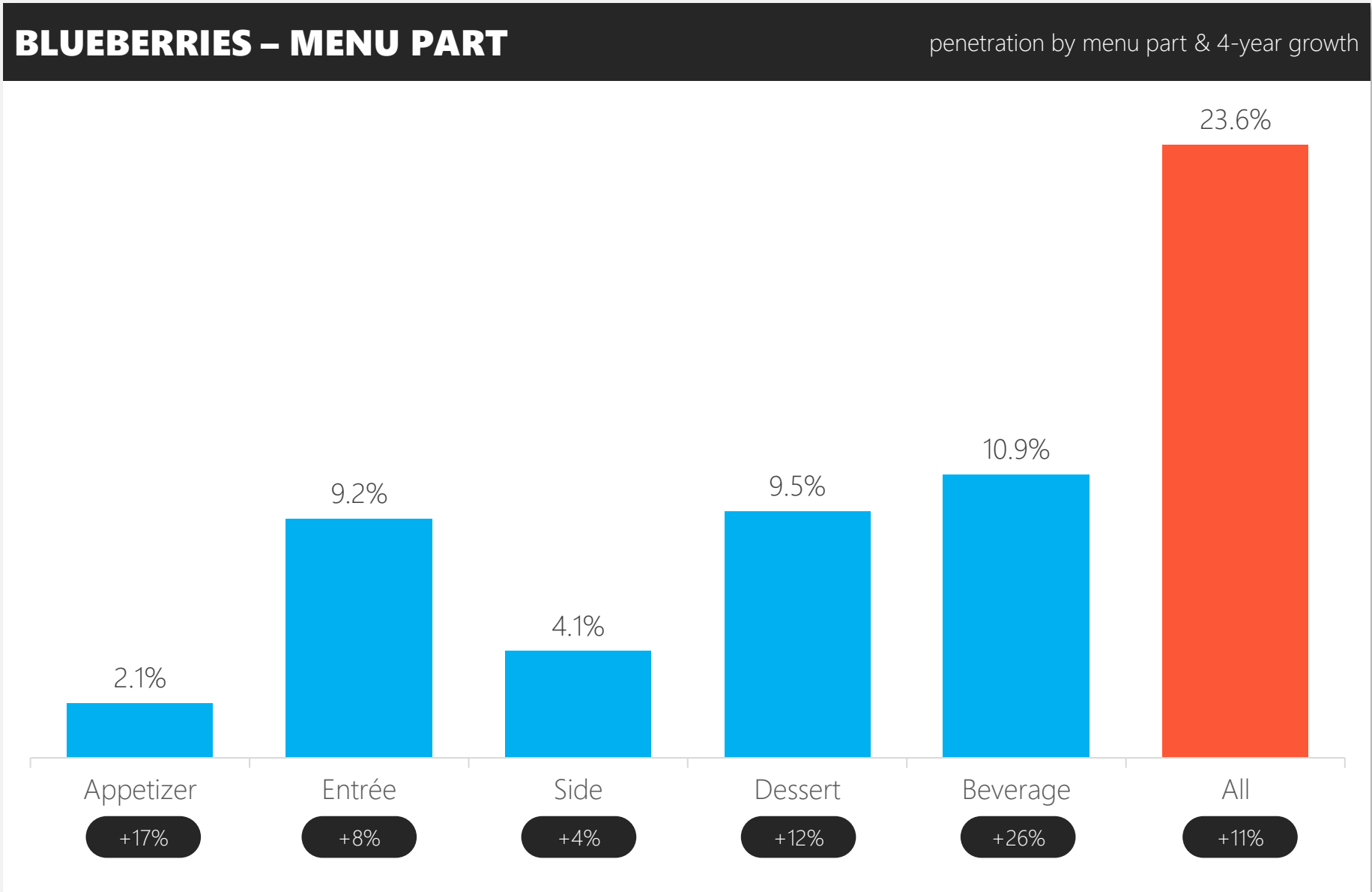
Chains have double the menu penetration rate as independents.

» The large chain segment includes many of the midscale breakfast staple restaurants and smoothie cafes where blueberries have a high menu penetration rate.



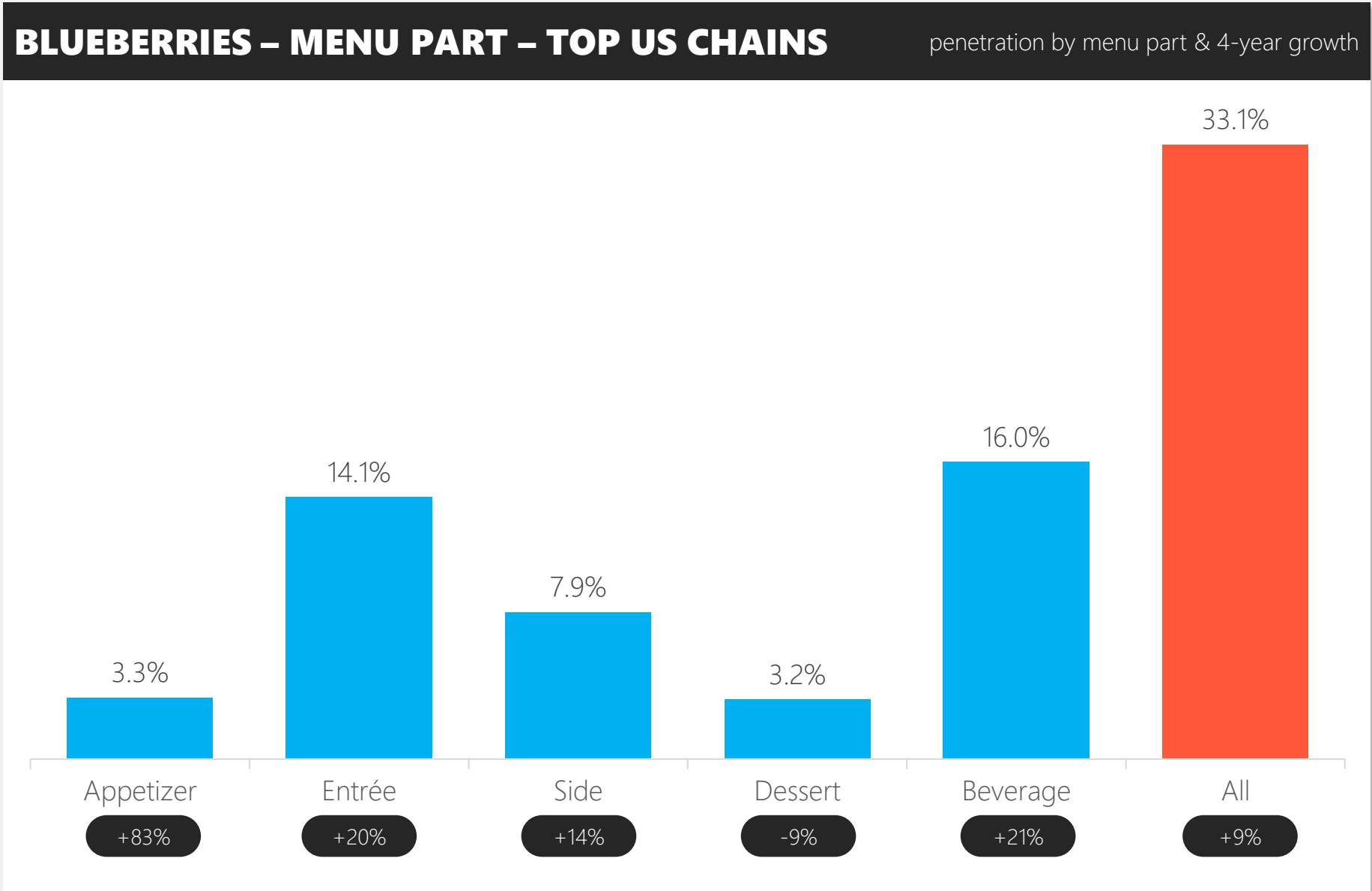
Blueberries are growing across all menu parts with beverages leading in both menu penetration and four-year growth.

» While blueberries have low penetration in apps, this menu part has had the second fastest growth over the last four years.



Entrees are on par with beverages in terms of menu penetration and growth when looking at the top US chains.

» Blueberries are just as likely to be offered on the appetizer menu as the dessert menu, but growth is strong on the appetizer menu, whereas desserts have been declining.



Blueberries are growing triple digits in BBQ cuisines typically as part of the beverage or dessert menu.

» Blueberries have also seen strong growth on the beverage and dessert menus at seafood and steakhouse operators.

BLUEBERRIES – CUISINE TYPE				ranked by penetration
Cuisine Type	Penetration %	1-Year Growth	4-Year Growth	
Dessert & Snack	73.3%	+3%	+9%	
Coffee & Bakery	66.7%	+5%	+2%	
American	44.6%	-2%	+7%	
Other European	40.5%	+1%	+4%	
Mixed Ethnicity	35.8%	-2%	-	
Seafood	32.8%	+19%	+56%	
Steakhouse	32.0%	+5%	+42%	
French	31.3%	-10%	-17%	
Sandwich	30.3%	+5%	+7%	
Burger	25.6%	-3%	+15%	
Italian	18.3%	+13%	+14%	
BBQ	17.8%	+12%	+165%	
Southern	15.7%	-18%	-19%	
Japanese	14.9%	+13%	+28%	

Beverages are a growth area for blueberries including milkshakes and smoothies (dessert beverages and blended drinks), lemonade, and innovative options such as mocktails, agua fresca, and limeade (other non-fizzy drink).

» Blueberries have also seen strong growth in other entrees including functional bowls (power, acai, smoothie), yogurt parfaits, and oatmeal.

BLUEBERRIES – ITEM TYPES

TOP ranked by penetration		PENETRATION	1 YEAR GROWTH	4 YEAR GROWTH	TRENDING ranked by 4-year growth		PENETRATION	1 YEAR GROWTH	4 YEAR GROWTH
Breakfast Starch		26.9%	-4%	-5%	Other Non-Fizzy Drink		2.4%	+16%	+++%
Breakfast Bakery		17.2%	-2%	+15%	Iced Tea		0.8%	-6%	+95%
Blended Drink		16.4%	+8%	+20%	Bottled Water		0.3%	-9%	+94%
Cocktail / Mixed Drink		10.8%	+2%	+29%	Dessert Beverage		3.0%	+21%	+88%
Pie		7.6%	+3%	-1%	Lemonade		1.0%	+16%	+62%
Fruit Side		5.4%	+11%	+25%	Condiment / Topping		0.6%	+9%	+56%
Cobbler / Crisp		5.2%	-5%	-11%	Deli Salad Side		0.9%	-7%	+55%
Other Entree		4.6%	+8%	+49%	Cake		2.2%	+39%	+52%
Martini		4.5%	-12%	-15%	Other Entree		4.6%	+8%	+49%
Other Dessert		4.1%	+2%	+17%	CSD		0.8%	-	+29%
Cheesecake		3.3%	-4%	+22%	Cocktail / Mixed Drink		10.8%	+2%	+29%
Dessert Beverage		3.0%	+21%	+88%	Other App		0.8%	+5%	+28%
Frozen Treat		2.8%	+16%	+26%	Frozen Treat		2.8%	+16%	+26%
Bread Side		2.7%	+1%	-34%	Fruit Side		5.4%	+11%	+25%

+++% indicates growth over 200%

The three highest penetration blueberry pairings: strawberry, lemon, and banana, have continued to see solid growth.

- » Chocolate sauce is being paired on both breakfast dishes and desserts generating strong growth.
- » Strong demand for dairy alternatives has boosted growth of almond milk which is being used in smoothies and power bowls.

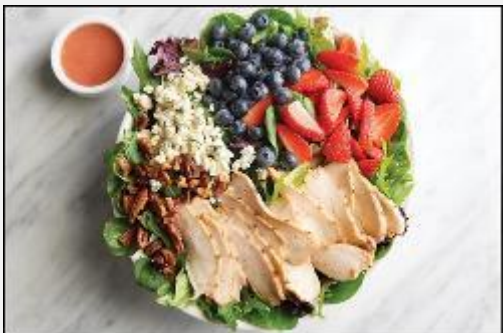
BLUEBERRIES – INGREDIENT PAIRINGS

TOP ranked by penetration	PENETRATION	1 YEAR GROWTH	4 YEAR GROWTH	TRENDING ranked by 4-year growth	PENETRATION	1 YEAR GROWTH	4 YEAR GROWTH
Strawberry	31.5%	+2%	+10%	Chocolate Sauce	1.0%	+98%	+++%
Lemon	20.5%	+4%	+27%	Almond Milk	2.0%	+9%	+++%
Banana	20.5%	+8%	+16%	Avocado	3.0%	+16%	+178%
Cheese	20.4%	+2%	-2%	Chia	1.9%	+21%	+147%
Raspberry	16.5%	-	-3%	Kale	3.3%	-6%	+144%
Syrup	14.7%	+5%	+14%	Simple Syrup	3.3%	+40%	+144%
Chocolate	13.8%	+4%	+5%	Nutella	1.1%	+43%	+134%
Vodka	12.6%	-6%	+4%	Key Lime	1.1%	+29%	+134%
Apple	12.0%	-4%	-9%	Ginger Beer	1.6%	-6%	+131%
Yogurt	11.5%	+2%	+3%	Pear	2.0%	+4%	+130%
Vanilla	11.2%	+3%	+2%	Bitters	1.0%	+19%	+116%
Granola	9.5%	-2%	+38%	Ginger	5.4%	+14%	+115%
Sugar	9.5%	+9%	+18%	Arugula	2.1%	+19%	+96%
Almond	9.3%	+6%	+13%	Quinoa	2.0%	-1%	+88%
Lime	8.9%	-1%	+43%	Balsamic	2.9%	-7%	+86%

+++% indicates growth over 200%



DATE	RESTAURANT	ITEM NAME	DESCRIPTION
Jun 2019	Cosi	Blueberry Smash Lemonade	Blueberries, lemonade, mint, lime.
Jun 2019	Houlihan's	Blueberry Rosemary Lemonade	Stoli Blueberi Vodka, muddled fresh blueberries + rosemary sprig, housemade lemonade.
Jun 2019	Jamba Juice	Vanilla Blue Sky Smoothie Bowl	Bananas, Pineapples, Unsweetened Almondmilk, Vanilla Coconutmilk, Blue Spirulina Powder // Toppings: Organic Granola, Strawberries, Blueberries, Coconut Chips, Dried Goji Berries, Almonds.
Jun 2019	Le Pain Quotidien	Flower Power Bowl	Coconut yogurt, flowerola, cashew butter, watermelon, pineapple and blueberries.
Jun 2019	Newk's Eatery	Red, White & Blueberry Salad	All-natural chicken breast, feta cheese, strawberries, blueberries and watermelon on top of a bed of fresh spinach with Newk's house-made raspberry vinaigrette.
Jun 2019	Pret A Manger	Summer Harvest Salad	Grilled chicken, strawberries, blueberries, gorgonzola, and almonds over a bed of mesclun and arugula.
Jun 2019	Pret A Manger	Summer Berries Pot	A sweet pot of strawberries, blueberries, and blackberries.



DATE	RESTAURANT	ITEM NAME	DESCRIPTION
Jun 2019	Pret A Manger	Lemon Ricotta & Berries Tartine	Delicious spread of ricotta, lemon curd, strawberries and blueberries on gluten-free bread.
Jun 2019	Starbucks	Iced Blueberry Black Tea Lemonade	This boldly flavored and refreshing iced tea is made with a combination of our blueberry-flavored fruit juice blend, Teavana iced black tea and lemonade, then sweetened with liquid cane sugar and hand-shaken with ice.
Jun 2019	The Habit Burger Grill	Fresh Berry & Chargrilled Chicken Salad	A perfectly seasoned, chargrilled chicken breast, fresh strawberries and blueberries atop a bed of garden greens. Topped with toasted almonds and feta cheese tossed in our house-made strawberry balsamic dressing.
Jun 2019	The Habit Burger Grill	Blueberry Citrus Mint Agua Fresca	Cool down at the Habit with our refreshing Blueberry Citrus Mint Agua Fresca! Handmade daily with blueberry and citrus juices with a hint of garden mint, it's sure to be your new favorite this summer.
Jun 2019	Wendy's	Berry Burst Chicken Salad	It's not summer without our Berry Burst Chicken Salad and, well, it's officially summer. Our signature lettuce blend topped with herb-marinated chicken, overflowing with hand-cut strawberries, blueberries, roasted almonds, feta cheese, and tangy-sweet Marzetti Simply Dressed Raspberry Vinaigrette has returned.
May 2019	Corner Bakery	Berry Pecan Salad	Grilled chicken, strawberry, blueberry, bleu cheese and candied pecans on mixed greens with strawberry vinaigrette.
May 2019	Dairy Queen	Summer Berry Cheesecake Blizzard	Made with blueberries, raspberries, blackberries, and cheesecake pieces blended with our famous vanilla soft serve ice cream.



DATE	RESTAURANT	ITEM NAME	DESCRIPTION
May 2019	Eat'n Park	Mixed Berry Waffle	Our homemade Belgian waffle with fresh strawberries and warm blueberry topping. The finishing touch? Cream cheese drizzle. Yum! Served with your choice of three pieces of bacon, sausage, or turkey sausage.
May 2019	Shari's	Blueberry Lemon Sour Cream Pie	Smooth and bright, the vibrant lemon zest custard and real sour cream blend together perfectly in this flavor-packed pie. Topped with Shari's whipped cream and fresh blueberries, this award-winning pie attributes it's goodness to fresh and real ingredients.
Apr 2019	Au Bon Pain	Blueberry Scone	Freshly baked traditional scone with real blueberries and topped with sugar.
Apr 2019	Bj's	Enlightened Farmhouse Grain Salad	Baby field greens, romaine, Peruvian quinoa + brown rice, avocado, pickled red onions, sweet corn, red bell peppers, carrots, cucumbers, fresh blueberries, black beans, dried cranberries, bruschetta vinaigrette.
Apr 2019	Bj's	Enlightened Turkey, Berry & Brie Salad	Baby field greens, romaine, creamy brie cheese, slow-roasted herb turkey breast, strawberries, fresh blueberries, candied pecans, carrots, crispy wonton strips, honey ginger dressing
Apr 2019	Culver's	Lemon Ice	Inspired by Italian ice shops in NYC, our Lemon Ice is wonderfully tart and, oh, so sweet. It starts with real lemonade, frozen slowly into tiny ice crystals for a creamy smooth texture. Enjoy it all summer long, as is or with your choice of fruit topping (Strawberries, Blackberries, Blueberries, Peaches or Cherries).
Apr 2019	Culver's	Lemon Ice Cooler	A sunshiny combination of Culver's creamy Lemon Ice, made with slow-frozen real Lemonade, and your choice of fruit topping blended to sweet perfection. So what'll it be—strawberry, mango, strawberry-mango, blackberry, blueberry or red raspberry?



DATE	RESTAURANT	ITEM NAME	DESCRIPTION
Apr 2019	Dickey's Barbecue Pit	Double Berry Cobbler	A Rich Butter Cookie Crust with a Combination of Blueberry and Raspberry Preserve and Whole Blackberries.
Apr 2019	Houlihan's	Cuban Mojito	Bacardi Rum, mint, sugar, fresh lime, soda. Choose from traditional, blueberry, mango, pomegranate, raspberry or strawberry.
Apr 2019	Joe's Crab Shack	Berry & Bliss	Your choice of strawberry or blueberry flavor, sweet and sour, lemonade, sprite, served in a Joe's light up projector glass. Non-alcoholic.
Apr 2019	Joe's Crab Shack	Hibiscus Headliner	Milagro silver tequila, real blueberry puree, DeKuyper blue curacao, sweet and sour, Monin hibiscus syrup.
Apr 2019	La Madeleine	Blueberry Lemon Scone	A buttery flaky scone filled with tart blueberries. Lightly coated with a sweet lemon glaze.
Apr 2019	Mcalister's Deli	Pecanberry Salad	Our fan-favorite salad is back! With fresh strawberries and blueberries, candied pecans and grilled chicken, served with Fat-Free Raspberry-Pecan Vinaigrette dressing.
Apr 2019	Mod Pizza	Blueberry Milkshake	Featuring ice cream, milk and blueberry flavoring.



DATE	RESTAURANT	ITEM NAME	DESCRIPTION
Apr 2019	Ninety Nine Restaurant & Pub	Strawberry Blueberry Chicken Salad	A seasonal favorite. Fresh greens tossed in poppyseed dressing and topped with fresh, ripe strawberries, blueberries, grilled chicken, bleu cheese crumbles and sliced almonds.
Apr 2019	Ninety Nine Restaurant & Pub	Rosé Sangria	A handcrafted blend of Dark Horse Rose?, Ketel One Vodka, Peach Schnapps and a splash of Ocean Spray Cranberry juice. Served chilled over ice with fresh strawberries and blueberries.
Apr 2019	Panera Bread	Strawberry Poppyseed Salad with Chicken	Chicken raised without antibiotics, romaine, mandarin oranges and fresh strawberries, blueberries and pineapple tossed in poppyseed dressing and topped with toasted pecan pieces.
Apr 2019	Ruth's Chris Steak House	Blueberry Crumb Cheesecake	-
Apr 2019	Wendy's	Wildberry Lemonade	Our all-natural lemonade mixed with real strawberries and purees from blackberries, blueberries and raspberries.

APPENDIX



Food trends follow a predictable life cycle.

The MAC helps you determine a trend's current life stage, as well as its potential for future advancement.



inception

Trends start here. Inception-stage trends exemplify originality in flavor, preparation, and presentation.

IN FOODSERVICE

Ethnic Indies
Fine Dining

AT RETAIL

Ethnic Markets
Farmers Markets
(Rare Elsewhere)

adoption

Adoption-stage trends grow their base via lower price points and simpler prep methods. Still differentiated, these trends often feature premium and/or generally authentic ingredients.

IN FOODSERVICE

Gastro Pubs
Upper Casual
Fast-Casual
Food Trucks

AT RETAIL

Specialty Grocery
Gourmet Food Shops
Food Hall

proliferation

Proliferation-stage trends are adjusted for mainstream appeal. Often combined with popular applications (on a burger, pasta, etc.).

IN FOODSERVICE

Casual Chains
QSR Chains
Progressive C-Stores
Colleges

AT RETAIL

Mainline Grocery
Mass Merchant
Club Stores

ubiquity

Ubiquity-stage trends have reached maturity, and can be found across all sectors of the food industry. Though often diluted by this point, their inception-stage roots are still recognizable.

IN FOODSERVICE

Family Restaurants
Traditional C-Stores
K-12
Healthcare

AT RETAIL

Drug Stores
Dollar Stores

excitement

volume

MENUTRENDS **METRICS**

MenuTrends is the industry's most accurate system for tracking trends at commercial and non-commercial restaurants. The primary U.S. Chains & Independents database is comprised of 4,800 restaurants which are balanced to the U.S. restaurant landscape. Data is reported using **two key metrics**:

PENETRATION

% of RESTAURANTS that serve that food, flavor, or ingredient.

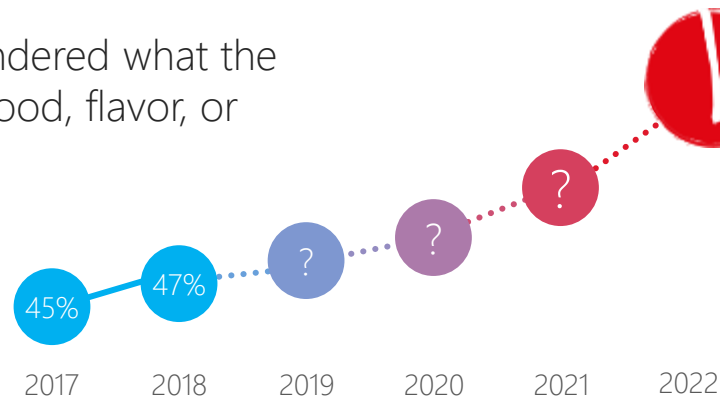
This is a measure of adoption. Increases in penetration indicate that more restaurants are adding the item to their menu. Penetration is the most important statistic and the best indicator of trend movement.

INCIDENCE

% of MENU ITEMS that feature that food, flavor, or ingredient.

This is a measure of versatility. A restaurant adding yet another chicken dish to its menu will result in an increase in incidence. Incidence is a supporting statistic, to be used as a complement to penetration.

Have you ever wondered what the future holds for a food, flavor, or ingredient?

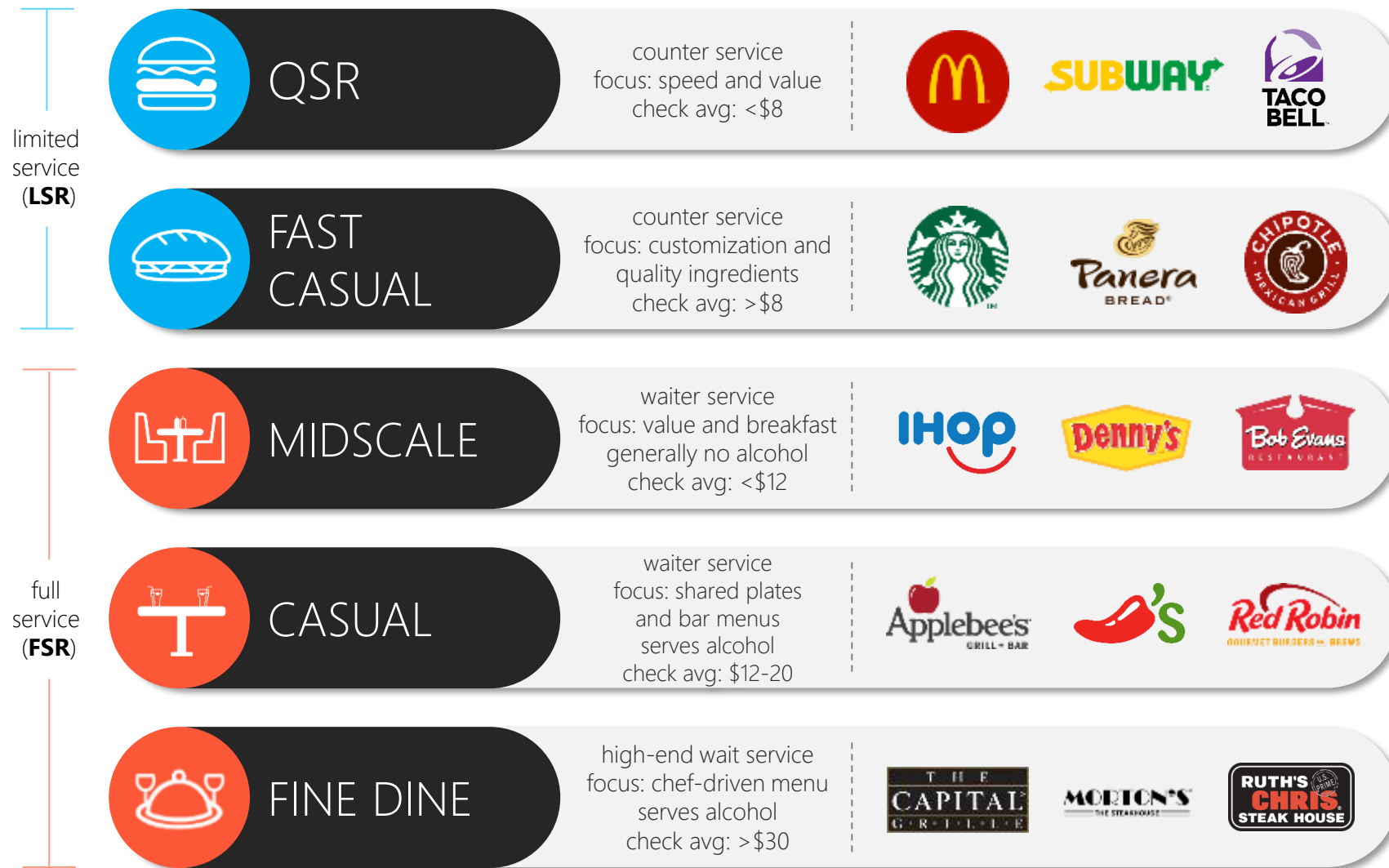


AIKU

Datassential's machine learning platform

Haiku analyzes MenuTrends' historic library of millions of menu items to identify patterns. Those patterns are used to forecast future trends for any term in the database. Haiku can predict an item's menu penetration up to 4-years in the future with a directional accuracy of 97%.

RESTAURANT SEGMENTS





FOOD WITH A STORY™

Datassential is your best source for food industry insights; from the latest menu trends to the products shoppers want at the grocery store.

DATASSENTIAL