

CONDIMENTS

menu adoption cycle | overall trends | QSR trends

DEC 2016

2 TERMS TO KNOW

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.

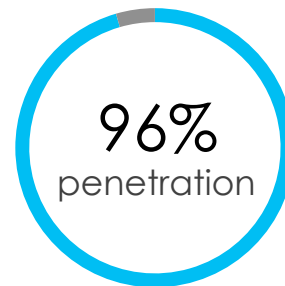
INCIDENCE

% 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.



EXAMPLE:
CHICKEN



chicken is found on **96% of all restaurant menus**, and is featured in **11% of those dishes**.

RESTAURANT SEGMENTS

Limited Service Restaurants (LSR)

Full Service Restaurants (FSR)

QSR

255,964 US units

counter service with no wait staff; focus on speed and food often served on disposables

Fast Casual (FC)

62,799 US units

counter service with focus on higher quality, fresh ingredients, and customization

Midscale (MDS)

117,590 US units

waiter service at a moderate price; often breakfast-focused, and generally no alcohol

Casual (CAS)

187,620 US units

waiter service at a higher price point than midscale, and often offering a full bar

Fine Dine

14,142 US units

high-end table service with chef-driven menu; most entrées priced \$25 or higher



Traditional Casual



Upper Casual



*unit counts include both chains and independents, Datassential Firefly 2016

MENU ADOPTION CYCLE (MAC)

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.

2. 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:

Fast-casual restaurants
Casual independents

AT RETAIL:

Specialty grocery stores
Gourmet food stores

1. INCEPTION

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

IN FOODSERVICE:

Fine dining
Ethnic independents

AT RETAIL:

Ethnic markets

3. PROLIFERATION

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

IN FOODSERVICE:

Casual chain restaurants
Quick service restaurants

AT RETAIL:

Traditional supermarkets
Mass merchandisers

4. UBIQUITY

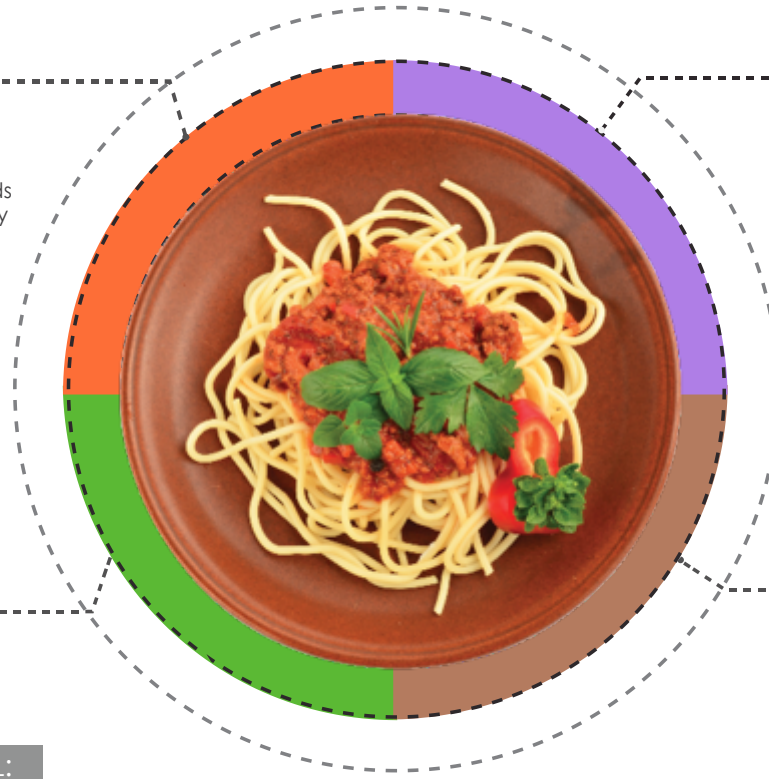
Ubiquity-stage trends have reached maturity, and can be found across all sectors of the food industry. Though often diluted by this point, their inception-stage roots are still recognizable.

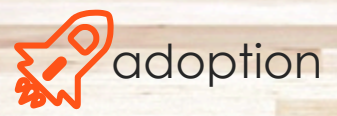
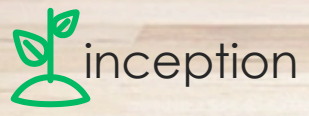
IN FOODSERVICE:

Family restaurants
School cafeterias

AT RETAIL:

Dollar stores
Drug stores





CONDIMENT TRENDS

Sweet & Savory

Savory Jams/Marmalades, Maple Glaze, Infused Butters

Reinvented/Upscale Classics

Sriracha Mayo, Jalapeno Ranch, Korean BBQ, Truffle, Flavored Aioli, Alcohol infusions

Next Generation Spicy

HOT chili varieties, Gochujang, Harissa



SWEET & SAVORY

- Maple, honey butter, and jam are served with savory menu items
- Additionally, reductions and interesting citrus flavors like blood orange add a sweet component

	2016 PENETRATION	GROWTH	
		1 YEAR	4 YEAR
Maple	15.6%	+5%	+39%
Citrus	15.6%	-	+29%
Brown Butter	5.6%	+8%	+55%
Balsamic Reduction	4.5%	-5%	+33%
Apple Cider	2.7%	+14%	+64%
Honey Butter	2.1%	+2%	+52%
Tomato Jam	1.9%	+21%	+155%
Blood Orange	1.6%	+39%	+56%
Bacon Jam	1.4%	+52%	+++%
Mostarda	1.2%	+4%	+128%
Onion Jam	1.2%	+7%	+107%
Apple Butter	1.2%	+4%	+54%
Fig Jam	1.1%	+23%	+184%
Red Onion Marmalade	0.5%	+16%	+100%
Bacon Marmalade	0.3%	-7%	+++%

+++% indicates growth over 300%

UPSCALE/ REINVENTED CLASSICS

- Pair interesting flavors with classic sauces like ranch, aioli, ketchup, and BBQ
- Korean BBQ, mustard seed, and jalapeno ranch are some of the fastest growing sauces over the past 4 years
- Allows for patron customization

	2016 PENETRATION	GROWTH	
		1 YEAR	4 YEAR
Truffle	11.6%	+10%	+45%
Whiskey	10.0%	+8%	+32%
Sea Salt	8.5%	+8%	+85%
Bourbon	7.4%	+11%	+40%
Balsamic Glaze	4.8%	+6%	+55%
Creme Fraiche	4.8%	+5%	+50%
Red Wine Vinaigrette	4.3%	-4%	+47%
Chipotle Ranch	4.1%	+2%	+32%
Smoky BBQ	3.3%	-7%	+6%
Spicy Mustard	2.9%	-2%	+5%
Buttermilk Ranch	2.7%	+6%	+26%
Whole Grain Mustard	2.5%	+6%	+59%
Chipotle BBQ	2.4%	+4%	+17%
BBQ Ranch	2.1%	+3%	+14%
Korean BBQ	1.8%	+24%	+153%
Mustard Seed	1.8%	+23%	+93%
Jalapeno Ranch	1.5%	+3%	+92%
Spicy Ranch	1.3%	-6%	+5%
Brown Mustard	1.2%	+2%	+34%
Truffle Butter	0.9%	+5%	+34%
Red Wine Reduction	0.9%	+2%	+52%
Wine Garlic Sauce	0.9%	+2%	+17%
Bourbon BBQ	0.9%	+10%	+45%
Thai BBQ	0.7%	-6%	+10%
Sherry Vinegar	0.6%	+7%	+55%
Chipotle Ketchup	0.5%	+16%	+16%
Sriracha Ketchup	0.3%	+128	N/A

FLAVORED AIOLI AND MAYO

- Aioli is featured on 23% of all menus and has grown +56% since 2012
- Due to aioli and mayo's mild flavor, they are easily paired with a wide range of bold flavors
- Served on sandwiches, burgers, with seafood, and as dipping sauce for sides and appetizers

AIOLI FLAVORS	2016 PENETRATION	4 YEAR GROWTH
Garlic Aioli	5.3%	+77%
Chipotle Aioli	3.4%	+60%
Pepper Aioli	2.5%	+48%
Lemon Aioli	2.5%	+52%
Spicy Aioli	1.6%	+111%
Sriracha Aioli	1.5%	+++%
Pesto Aioli	1.3%	+23%
Red Pepper Aioli	1.3%	+12%
Basil Aioli	1.3%	+24%
Tomato Aioli	1.1%	+13%
Mustard Aioli	1.1%	+64%
Wasabi Aioli	1.0%	+4%
Horseradish Aioli	0.8%	+90%
Truffle Aioli	0.8%	+135%
Jalapeno Aioli	0.6%	+200%
Cilantro Aioli	0.6%	+43%
Dijon Aioli	0.6%	+23%
Citrus Aioli	0.5%	+92%

MAYO FLAVORS	2016 PENETRATION	4 YEAR GROWTH
Chipotle Mayo	6.6%	+27%
Spicy Mayo	4.2%	+41%
Pesto Mayo	2.9%	-4%
Garlic Mayo	2.1%	+15%
Wasabi Mayo	1.6%	+55%
Horseradish Mayo	1.4%	-3%
Sriracha Mayo	1.3%	+++%
Herb Mayo	1.2%	+27%
Pepper Mayo	1.2%	-19%
Basil Mayo	0.7%	-13%
Cilantro Mayo	0.5%	+57%
Jalapeno Mayo	0.5%	+20%
Truffle Mayo	0.3%	+220%
Dill Mayo	0.3%	+27%

+++% indicates growth over 300%

NEXT GENERATION SPICY

- Spicy flavors are not only trendy, but can be a way to stand out from other menu options
- Utilizing spicy globally-influenced flavors can help to appeal to more adventurous consumers



	2016 PENETRATION	GROWTH	
		1 YEAR	4 YEAR
Jalapeno Pepper	52.1%	+1%	+11%
Chipotle	26.3%	+2%	+20%
Curry	19.1%	-	+1%
Wasabi	9.7%	+2%	+7%
Sriracha	9.4%	+37%	+++%
Poblano	8.7%	+1%	+27%
Banana Pepper	7.3%	+8%	+18%
Salsa Verde	6.3%	+7%	+46%
Habanero Pepper	5.6%	+10%	+79%
Ancho	4.0%	-1%	+23%
Thai Chili	3.9%	+7%	+31%
Serrano Pepper	3.8%	+8%	+49%
Harissa	2.3%	+10%	+76%
Chili Oil	2.2%	+11%	+69%
Guajillo Pepper	2.2%	+11%	+104%
Shishito Pepper	2.1%	+5%	+203%
Calabrian	1.7%	+47%	+++%
Chili Lime	1.7%	+6%	+55%
Togarashi	1.5%	+17%	+204%
Aji Pepper	1.3%	+14%	+60%
Arrabiata	1.2%	-	+20%
Ghost Pepper	0.9%	+39%	+++%
Gochujang	0.7%	+59%	+++%

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QSR TRENDS

Top sauces and flavors at QSR experiencing growth include **chipotle, cilantro, and balsamic**. Spicy flavors and aiolis are among the fastest growing flavors at QSR.

MOST POPULAR & FASTEST SAUCES & FLAVORS AT QSR

ranked by penetration & 4-year growth

MOST POPULAR	2016 PENETRATION	4 YEAR GROWTH
Bbq	62.5%	-
Garlic	59.8%	+3%
Jalapeno Pepper	52.8%	+14%
Mayo	49.8%	+7%
Ranch	47.5%	+9%
Mustard	45.2%	+3%
Red Sauce	41.3%	+3%
Caesar	41.3%	-2%
Buffalo	38.9%	+12%
Butter	35.7%	+7%
Oil	31.9%	+8%
Basil	28.0%	+12%
Vinaigrette	27.0%	+22%
Sour Cream	26.0%	-2%
Salsa	25.4%	-5%
Honey Mustard	24.2%	-1%
Pesto	22.1%	+10%
Balsamic	20.6%	+25%
Cilantro	19.0%	+32%
Chipotle	18.6%	+49%

FASTEST GROWING	2016 PENETRATION	4 YEAR GROWTH
Apple Cider	1.2%	+++%
Garlic Aioli	2.2%	+267%
Sweet Chili Sauce	1.9%	+260%
Balsamic Glaze	2.1%	+215%
Parmesan Garlic	1.2%	+215%
Jalapeno Ranch	1.3%	+197%
Chimichurri	1.0%	+173%
Garlic Parmesan	3.7%	+140%
Cumin	1.6%	+133%
Greek Vinaigrette	1.3%	+123%
Cayenne	1.3%	+123%
Sea Salt	4.0%	+118%
Remoulade	1.6%	+110%
Nutella	1.2%	+110%
Korean Bbq	1.1%	+110%
Habanero Pepper	2.3%	+103%
Aioli	7.1%	+99%
Corn Salsa	1.2%	+97%
Truffle Oil	1.2%	+97%
Bourbon	3.2%	+95%

+++% indicates growth over 300%

DATASSENTIAL **INNOVATION TOOLS**

MenuTrends

The industry's most accurate system for identifying, tracking, and predicting flavor trends

FS

CPG

10x

larger than other menu and flavor databases

15 million

menu examples from more than 100k menus

LTOs

new and limited-time items updated weekly