



WINTER 2021

FRESH INSIGHTS FOR FOODSERVICE

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

UNCOVER TOP-OF-MIND
TRENDS IN OUR

HEALTH & IMMUNITY ISSUE

VOLUME
28

PAGE 6

LEMONS

Discover the plethora of
ways to leverage health-
forward, immune-
boosting lemons.

PAGE 10

DUMPLINGS

Learn how to utilize
globally-inspired
dumplings as a platform
for fresh produce.

PAGE 23

IMMUNE- BOOSTING CONCEPTS

Explore how operators are
using immune-boosting
produce on menus.



LEMONS



LEMONS

WHAT IT IS

Lemons, which are native to Asia, are a well-known fruit widely used in dishes across the world. Common lemon varieties found in the U.S. include Eureka and Lisbon (known for their tart, sour flavor and bright yellow, textured peel), as well as the Meyer lemon, which uniquely is a cross between a lemon and mandarin orange. The Meyer lemon stands out from other lemons with its smooth orange-yellow peel and sweeter taste. According to *Medical News Today*, lemons are rich in vitamin C, an antioxidant that can help boost immunity.

FOODSERVICE TODAY

Although they're in Ubiquity on the Menu Adoption Cycle, lemons continue to see growth on menus across segments. With the ongoing pandemic, operators can leverage highly-versatile lemons for their immune-boosting properties and call those out on menus. For example, lemons could star in applications ranging from immune-boosting juice shots to sweet or savory bowls (a concept that lends well to delivery and takeout) to cocktails for a healthy spin (health-forward alcoholic beverages are currently a trending platform). In fact, for an experiential element, mixologists could use fresh lemon to change the color of cocktails that have on-trend butterfly pea flower tea incorporated. Seafood dishes, which have a prominent place on menus leading up to and during Lent, also usually aren't complete without an accompanying fresh lemon slice, which may be squeezed over fish or shellfish to add depth of flavor.



UBIQUITY

2020 USDA
AVERAGE SHIPPING
POINT WEEKLY
COMMODITY PRICE

\$27.66

SPLIT-RAIL
Chicago, IL
Spicy Bloody Mary
House-made bloody
Mary mix, fresh lemon
juice, and Prairie vodka.
\$15.00

ZUCKERELLO'S
ITALIAN RESTAURANT
Fort Lauderdale, FL
Chicken Michael Angelo
Linguine, chicken, broccoli,
roasted peppers, diced
tomatoes, white wine, and
lemon butter sauce.
\$17.95

LEMON GRASS
Syracuse, NY
Thai Beef Salad
Charbroiled filet mignon,
tomatoes, red onion, cilantro,
and mint over greens with
fresh lemon vinaigrette.
\$15.00

ON THE MENU



4-YEAR GROWTH ON RESTAURANT MENUS

+12%	QSR
+11%	FAST CASUAL
+4%	MIDSCALE
+3%	CASUAL
+1%	FINE DINING

PENETRATION PERCENT OF RESTAURANTS MENUING

48%	QSR
65%	FAST CASUAL
70%	MIDSCALE
83%	CASUAL
96%	FINE DINING

LEMONS BY REGION



WEST	70% PENETRATION	+5% GROWTH
SOUTH	69% PENETRATION	+9% GROWTH
MIDWEST	66% PENETRATION	+5% GROWTH
NORTHEAST	75% PENETRATION	+8% GROWTH

PENETRATION: % of restaurants serving
GROWTH: change in penetration from '16-'20



DID YOU KNOW?
The top two lemon-producing U.S. states are California and Arizona.



CUISINE ANALYSIS

PERCENT OF RESTAURANTS THAT
MENU LEMONS

96%	MEDITERRANEAN
94%	FRENCH
92%	MIXED ETHNICITY
91%	OTHER EUROPEAN
91%	ITALIAN
90%	STEAKHOUSE

BREAKDOWN

PERCENT OF RESTAURANTS THAT
MENU LEMONS

57%	CHAINS (250+ UNITS)
65%	REGIONAL (3-249)
76%	INDEPENDENT (1-2)
24%	FOOD TRUCKS



A lobster roll filled with chilled Atlantic lobster, anugula, and lemon aioli that's served with a lemon slice at RegionAle, based in Ellicott City, MD.

Spaghetti with whipped lemon ricotta topped with fresh cracked black pepper offered at Gianni's Caf e's two locations in Palatine and Kildeer, IL.

Athenian Half Chicken drizzled with honey-lemon sauce and served with fries at GRKo Greek Street Food in Nashville, TN.





WHAT YOU NEED TO KNOW:

- Increasing penetration across every segment.
- Immunity is driving menuing – and now is the time to call it out.
- Key trending categories include immunity shots, cocktails, seafood, and dessert.
- Meyer lemon menuing has also been steadily growing.

which of the following foods / ingredients do you believe could help boost your immunity and / or strengthen your recovery in case you get sick?



which of the following nutrients do you believe could help boost your immunity and / or strengthen your recovery in case you get sick?



inception

adoption

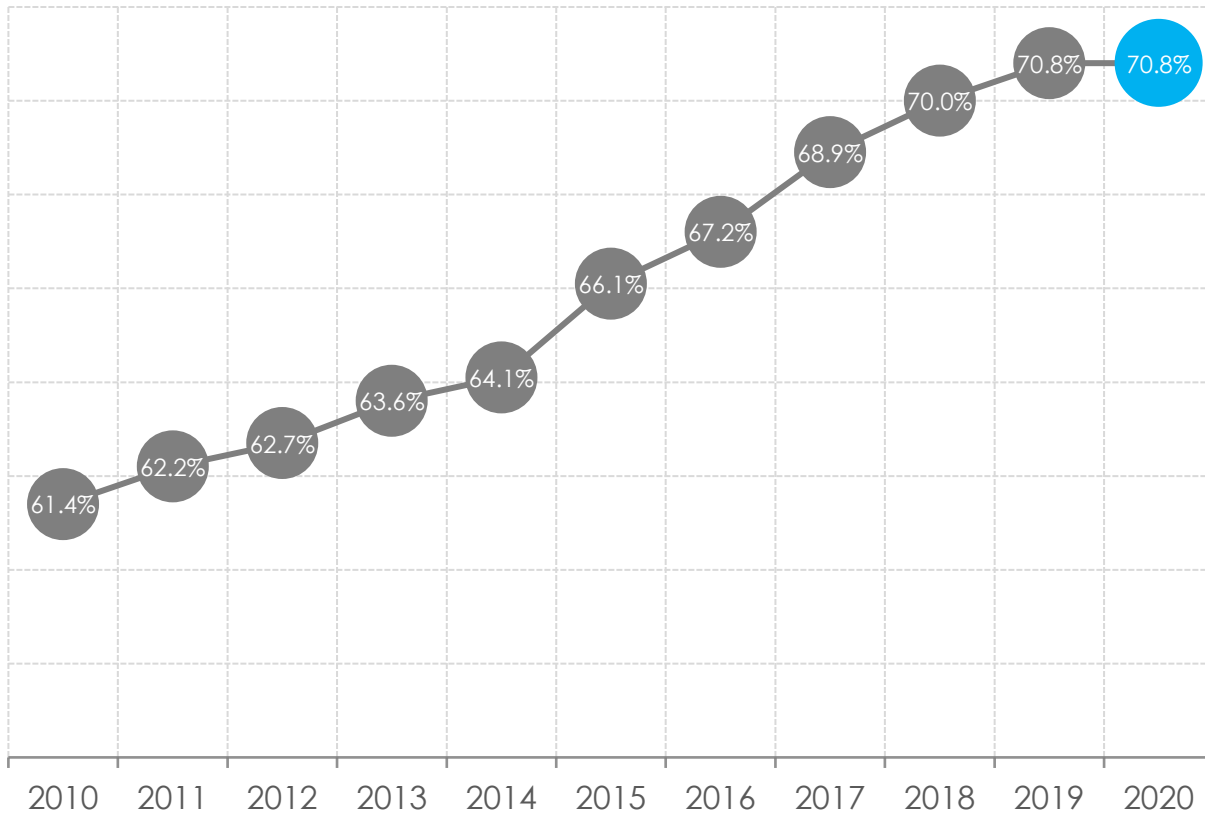
proliferation

ubiquity



HISTORIC MENU PENETRATION

% of US restaurant menus that feature



70.8% menu penetration

menu growth rate

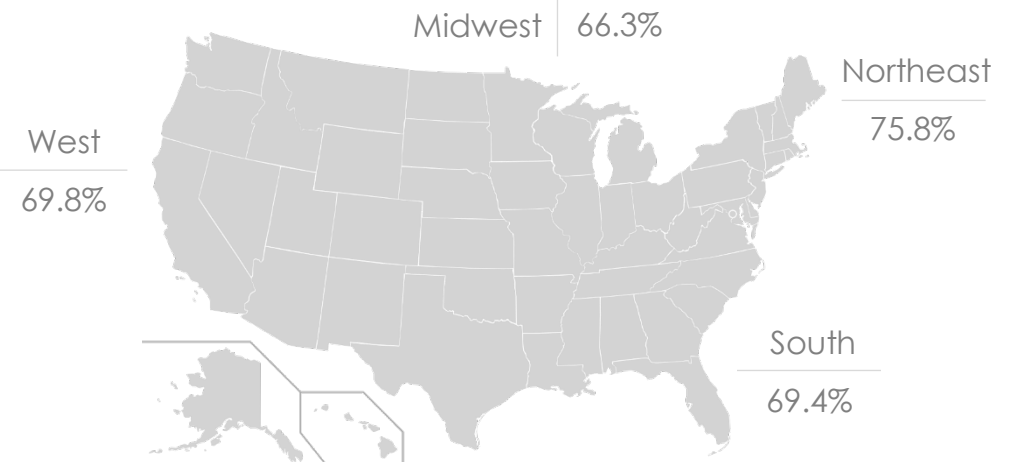
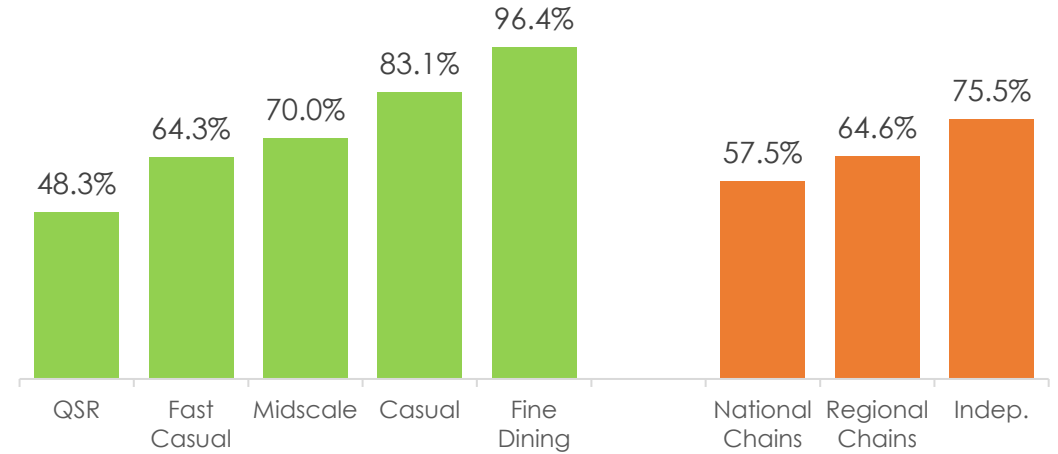
1 YEAR
+0%

4 YEAR
+5%

SINCE 2010
+15%

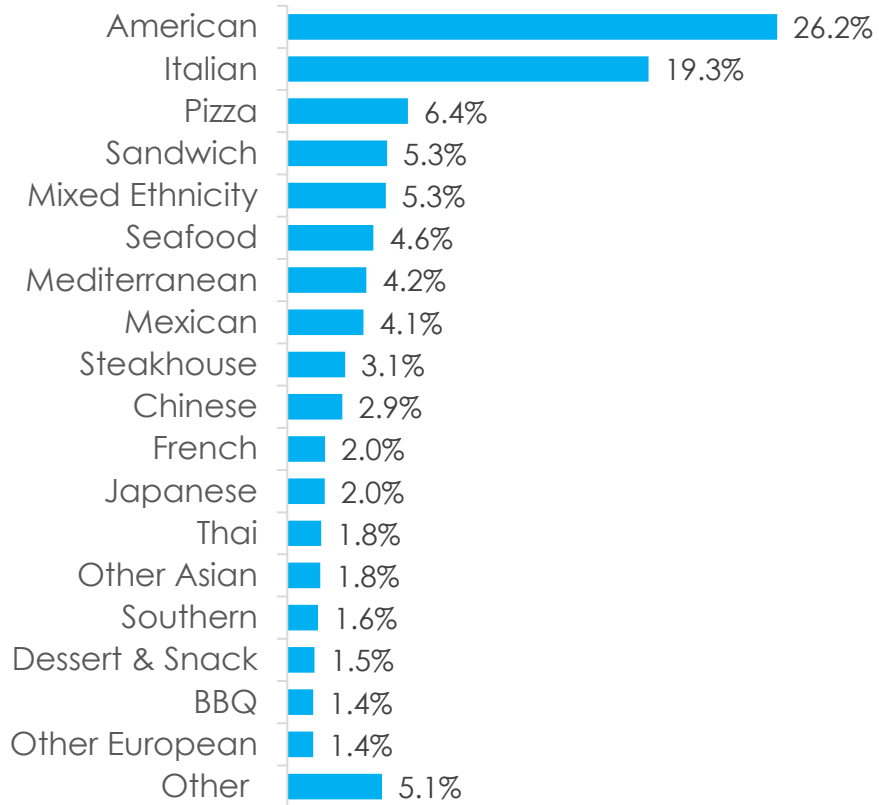
BY RESTAURANT TYPE

% of US restaurant menus that feature



FOUND ON MENU TYPES

share of
total incidences



ETHNIC MENUS

47.4%

NON ETHNIC MENUS

52.6%

menu
versatility
score

70

a high MENU VERSATILITY SCORE indicates an item that works well in many different cuisines

APPLICATIONS

share of
total incidences

Cocktail / Mixed Drink	20.9%
Chicken Main Entree	7.5%
Fish Main Entree	6.3%
Combos/ Multi Protein	6.0%
Appetizer Salad	4.3%
Non-Fried Protein App	3.6%
Shellfish Main Entree	3.3%
Salad Entree	2.9%
Martini	2.6%
Iced Tea	2.1%
CSD	2.0%
Beef Main Entree	2.0%
Other Non-Fizzy Drink	1.8%
Pasta	1.7%
Fried Protein App	1.6%
Cake	1.6%
Cold Sandwich	1.4%
Hot Sandwich	1.3%
Other	26.9%

food
versatility
score 100

a high FOOD VERSATILITY SCORE indicates an item that works well in many different applications.

PAIRED FLAVORS

overlap with
other items

Chicken	38.2%
Juice	31.8%
Salad	30.4%
Tomato	27.7%
Garlic	27.6%
Vodka	25.0%
Grilled	24.8%
Onion	24.0%
Pepper	23.4%
Wine	23.2%
Butter	21.9%
Lime	21.8%
Shrimp	21.8%
Roasted	19.7%
Tea	19.4%
Whiskey	18.7%
Soda	17.9%
Orange	17.8%
Cucumber	17.7%

among menu items with LEMON, % that also contain each of the above; use this to find flavors that go together



Spaghetti with whipped lemon ricotta
topped with fresh cracked black pepper