Menu Forecast: 2020 and Beyond
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Lizzy Freier, Technomic, Inc.
Menus 2020: Introduction

Restaurateurs are bombarded by info, inputs

**Challenge:** Sort through hype and hoopla

**Opportunity:** Identify foods and flavors with appeal

**Objective:** Put trends to work in your operation for your customers and your bottom line
Menu Size Relatively Stable; Deeper Dive Reveals Volatility

Five-year item count change

- Add-On +32.5%
- Kids Menu +15.4%
- Adult Beverage 4.3%
- Nonalcohol Beverage +3.3%
- Side +3.2%
- Dessert -0.6%
- Entree -3.4%
- Appetizer -3.7%
- Senior Menu -12.2%

Overall -1.2%

Source: Technomic Ignite menu data
Action Shifts to LTOs, Specials and Add-Ons

23 Entree Categories
6 YOY

18 Appetizer Categories
3 YOY

Five-Year LTO Change
+63.9%

Source: Technomic Ignite menu data
Menus 2020

Agenda

Health

Asian

Middle Eastern

The Next Big Thing
Healthful: 2020 and Beyond

“I’m eating more food because of its specific nutritional benefits than I did two years ago.”

Source: Technomic 2018 Healthy Eating Consumer Trend Report
Trendy Diet Plans Fuel New Dishes

Options:
- Paleo
- Keto
- Whole 30
- Vegetarian
- Gluten-Free

38% of consumers would try Trendy Diet Plans.

Source: Technomic 2018 Healthy Eating Consumer Trend Report
Gluten-Free Still Trending? Yes, But So Are Good Grains

Panera reveals whole-grain content of breads

• Clarify **exact** whole-grain content

• Avoid misleading labeling

BBQ Chicken on Whole Grain Flatbread
Dining Law of Physics: Equal, Opposite Reaction

**Spaghetti Sandwich** Better Luck Tomorrow Austin, Texas

- Brunch Menu
- Spaghetti
- Burrata
- Parmesan-Crusted Texas Toast
Moo-Less Milks: Nuts, Grains, Vegetables…

Starbucks adds oat milk at Reserve, Princi locations
...And Everything but the Cow

Chocolate Hazelnut Truffle with cashew milk soft serve
16 Handles

Peanut Muscovado Milk Shooter
State Bird Provisions
San Francisco
Has Cauliflower Lost Its Mojo?

Signature Slinger blended burger
Sonic Drive-In

Mushroom Brûlée with ground porcinis
Timna
New York City

Earth Angel Cocktail with mushroom juice and garnish
Birds & Bees
Los Angeles
Update from the QSR Front: Cleaner Foods Initiatives

Wendy’s Announces Major Advancement in Beef Sourcing

• Cattle care
• Food safety
• Antibiotic use

37% of consumers say “USDA-certified” is the most appealing claim for beef

Source: Technomic 2019 Center of the Plate: Beef & Pork Consumer Trend Report
All Natural, All The Time

67% of consumers would be more likely to buy food or drink with functional benefits

32% would pay more for it

Source: Technomic 2018 Healthy Eating Consumer Trend Report
Physical, Mental and Emotional Health

Bikini Smoothie with collagen Protein Bar

Dandelion Herbal “Coffee” with chaga mushroom, ghee and MCT oil
Honey Hi
Los Angeles

Surf & Turf with CBD bearnaise
Adriaen Block
Astoria, N.Y.

Source: Technomic Ignite menu data
<table>
<thead>
<tr>
<th>Chocolate</th>
<th>Brown Sugar/Sugar</th>
<th>Butter</th>
<th>Pork</th>
<th>Beef</th>
<th>High ABV</th>
<th>Egg White</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carob</td>
<td>Panela/Plant-Based Sugar</td>
<td>Ghee</td>
<td>Jackfruit</td>
<td>Plant-Based Imitations</td>
<td>Low ABV/Nonalcohol</td>
<td>Aquafaba</td>
</tr>
</tbody>
</table>

**Tried and True**

**Healthful Tease**

Source: Technomic Predictive
Plant-Based Meat...

King’s Oatmeal with coconut bacon
Sunrise Memphis
Memphis, Tenn.

That’s Not Bacon!

Impossible Nachos
Arooga’s Grille
House & Sports Bar

That’s Not Beef!

58% of consumers are more willing to buy items described as “plant-based”

Source: Technomic 2018 Healthy Eating Consumer Trend Report
...And Plant-Based Seafood, Egg and More

Just Pepper and Egg with mung bean egg
Clover Food Lab

Crab Cakes with hearts of palm
Gracias Madre
West Hollywood, Calif.

26% of consumers are willing to pay more for items that are “plant-based”

Source: Technomic 2018 Healthy Eating Consumer Trend Report
Mocktails Get Disguised

The Herbal with housemade spiced syrup
Nancy’s Hustle
Houston

Vegetal with Seedlip Garden
Corrida
Boulder, Colo.

Green Earth Farm with verjus
Cindy’s
Chicago

Source: Infegy
Menus 2020
Agenda
Health
Asian
Middle Eastern
The Next Big Thing
Asian: 2020 and Beyond

“Which best describes your attitude toward these cuisines?”

<table>
<thead>
<tr>
<th>Cuisine</th>
<th>Tried it and like it, and it is unique/exciting</th>
<th>Tried it and like it, but not unique/exciting</th>
<th>Haven't tried it, but would like to, sounds good</th>
<th>Don't like it or wouldn't consider trying it</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chinese</td>
<td>66%</td>
<td>20%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Japanese</td>
<td>50%</td>
<td>12%</td>
<td>25%</td>
<td>12%</td>
</tr>
<tr>
<td>Thai</td>
<td>43%</td>
<td>9%</td>
<td>30%</td>
<td>18%</td>
</tr>
<tr>
<td>Korean</td>
<td>36%</td>
<td>8%</td>
<td>36%</td>
<td>20%</td>
</tr>
<tr>
<td>Indian</td>
<td>34%</td>
<td>7%</td>
<td>33%</td>
<td>26%</td>
</tr>
<tr>
<td>Vietnamese</td>
<td>28%</td>
<td>6%</td>
<td>41%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Source: Technomic 2018 Ethnic Food & Beverage Consumer Trend Report
Trending Cuisines Are Ripe for Riffing

K-BBQ Burger with Kimcheese
Plan Check
Los Angeles

Ramen Burger with ramen noodle bun
Red Robin

General Tso’s Burger with General Tso’s sauce
Dogfish Alehouse
Fairfax, Va.
Korean Crossover: Kimchee Variations

Sister-in-Law Sandwich with dill kimchee
Steingold’s of Chicago
Chicago

BB Street Corn with kimchee remoulade
Ba Bellies
Peachtree Corners, Ga.

Source: Technomic Ignite menu data
And Creative Condiments

Korean Bibimbap Bowl with gochujang aioli
Levi’s Stadium
Santa Clara, Calif.

Koreatown Tacos with gochujang sauce
Veggie Grill
Kimchee Conquers Cocktail Menus

Kimchee Bloody Mary with kimchee brine and kimchee garnish
Insa
Brooklyn, N.Y.
Japanese Crossover: Emerging Spice Blends

Togarashi Edamame Beans
Lazy Dog Restaurant & Bar
Red chile, orange peel, sesame, ginger

Tokyo Supergreens Salad with furikake
Just Salad
Dried fish, sesame seeds, seaweed
And Creative Condiments

Seared Tuna Tataki Salad with wasabi vinaigrette
The Cheesecake Factory

Asia Pear Miso Salad with miso pear vinaigrette
The Peached Tortilla
Austin, Texas
Chinese Crossover: “General Tsoification”

General Tso FAQ

• American-made
• Hunan-influenced
• Sweet and spicy
• Has Facebook page and movie

General Tso Chicken Wings
Atlantic Social
Brooklyn, N.Y.

Source: Technomic Ignite menu data; Bon Appetit Magazine
And Creative Kung Pao

Kung Pao FAQ

- American import
- Sichuan origin
- Hot and spicy
- Has peanuts

Kung Pao Dragon Rolls
P.F. Chang’s
Beyond 2020

Crossing Borders

Chinese/Japanese

Thai/Vietnamese

Korean

Indian

Southeast Asian
Condiments and Seasonings
Ripe for Crossover

Chile Crisp
Duck Meatballs
Gramercy Tavern
New York City

Gomashio
Japanese Fried Chicken
Eventide
Boston and Portland, Maine

Yuzukosho
Chicken Kushiyaki
Spoken English
Washington, D.C.

Source: Technomic Predictive

+63.6%
two-year predicted operator penetration growth
Ramen 2021: Mazemen

- No-broth ramen
- Customizable
- Year-round applications

Steak Mazemen
Niche
New York City

+14.3% two-year predicted operator penetration growth

Source: Technomic Predictive
Cocktails Go Asian

Ume

Ume Migos
The Brilliant Ox
Honolulu

Sea Veggies

Siren’s Call with squid ink and seaweed
Apotheke
New York City

Ube

Purple Drank
Irenia
Santa Ana, Calif.

Source: Technomic Ignite menu data
Japanese and Chinese Spirits

**Shochu**

Cardamom Grapefruit Spritz
Nunu
Philadelphia

**Baijiu**

Sichuan Spritz
Glady’s
Brooklyn, N.Y.

**Japanese Whiskey**

Chains are most likely to have added Japanese whiskey and flavored whiskey (both 59%) in the past year.

Source: Technomic Behind the Bar Insights
Menus 2020
Agenda

Health
Asian
Middle Eastern
The Next Big Thing
Middle Eastern: 2020 and Beyond

Look to **Levant**
- Chef advocates, influencers
- Craveable, healthful food
- Accessible ingredients
- Foodie buzz
- Geopolitics

Einat Admony
Alon Shaya
Michael Solomonov
Chickpeas Continue to Conquer U.S. Menus

Chickpea Ice Cream
Little Bean
Portland, Ore.

• Dairy-free
• Nut-free
• Gluten-free
Chickpeas 3.0: Just Add Chocolate

Chocolate Hummus
SAJJ Mediterranean

- Chickpeas
- Tahini
- Cocoa powder
- Chocolate-hazelnut spread
- Maple syrup
- Vanilla
- Cinnamon-chip dippers
In Toum with the Times: Versatile, Go-To Condiment

Fried Chicken Sandwich
Empellon Al Pastor
New York City

- Toum
- Labneh
- Cucumber
- Dill
Toum Ready for Its Consumer Closeup

Easy to Make, Easy to Like

• Garlic

• Lemon juice

• Olive oil

• Salt

Better Homes & Gardens
April 2019
Other Condiments
Lighten, Brighten Dishes

Baked Falafel
Pita with s’chug
Zoës Kitchen

Hot pepper, garlic, cilantro

Za’atar Chicken Salad
Starbucks

Green herbs, sesame, olive oil
Sticking with It: Kebabs a Win-Win-Win

Kebob Two Ways
Zov’s
Irvine, Calif.
• Angus beef tenderloin
• Marinated chicken breast
• Jasmine rice pilaf
• Tomato-cucumber salad
• Yogurt-mint sauce
And Now a Word About Israeli Salad

• Fresh vegetables
• Light, bright and versatile
• Breakfast through dinner
Looking Eastward

**Menemen**
Turkish egg and tomato dish

**Ezme**
Turkish tomato-based mezze

**Urfa**
Turkish dried chile pepper

**Muhammara**
Syrian dip

**Sekanjabin**
Iranian honey vinegar drink

**Hawaij**
Yemeni spice mixture
Heat, Spice and Everything Nice

- Urfa
  Eggplant Menemen
  Golda
  Brooklyn, N.Y

- Hawaij
  Kasata
  Balaboosta
  New York City

- Baharat
  Origin Story
  Saba
  New Orleans

+100% two-year predicted operator penetration growth

Source: Technomic Predictive
Familiar Flavors in New Formats

Muhammara
Egg Sandwich
Golda
Brooklyn, N.Y.

Schmaltz
Sunchokes + Caviar
Hello Sailor
Cornelius, N.C.

Pomegranate Molasses
Scallop Crudo
Bavel
Los Angeles

Source: Technomic Predictive

+100% two-year predicted operator penetration growth
Beverage Inspirations

Sekanjabin

Sekanjabin Martini
Sofreh
Brooklyn, N.Y.

Jallab

Burnt Offerings
Saba
New Orleans
Balkan Flavors Seeing Momentum

Lovage
Roasted Oysters Bourguignon
Oran Mor
Nantucket, Mass.

Ajvar
Pide
Balkan Treat Box
Webster Groves, Mo.

Source: Technomic Predictive

+100% two-year predicted operator penetration growth
Menus 2020 Agenda

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Next Big Thing: 2020 and Beyond

Inside Voices:

Kids Menus Ready for Refresh

• 80% of Millennials will be parents by 2026

• Kids menu items jumped 15.4% in the past five years

• Key: not all kids are created equal
  – Age
  – Ethnicity
  – At-home habits
  – Parental attitudes

Sources: Technomic 2018 Generational Consumer Trend Report; Technomic Ignite menu data
McBetter Chicken: Reformulated McNuggets

McDonald’s Moved Out Ahead

• Removed antibiotics

• Removed artificial ingredients

• Debuted during 2016 Olympics
No Kidding Around With Picky Eaters

Fager’s Island Restaurant & Bar
Ocean City, Md.

• Appeals to kids

• And their parents
Honey, Who Shrunk Kids Menu Items?

- Chicken Broccoli Bowl
- Kid-Sized Spud
- Green Salad with Chicken
CBD Mania: Beverages in the Weeds

What Is It?
• Hemp-derived
• Relaxant, not hallucinogen
• Legality varies by state, city
• No research on effects
• Beverages likely point of entry
• #1 drink trend

CBD-Enhanced Coffees
Alfred
Los Angeles

Source: 2019 National Restaurant Association’s What’s Hot Survey
Dishes Going Up in Smoke: #2 Food Trend in 2019

Chocolate Birthday Cake Doughnut
Astro Doughnuts & Fried Chicken
  • CBD-infused buttercream frosting
  • 60 milligrams of CBD per doughnut

Source: 2019 National Restaurant Association’s What’s Hot Survey
CBD Presents Myriad Strategic Challenges

Impact on traffic
Impact on bar sales
Impact on liability
Impact on menu R&D
  • Procurement
  • Policing
Impact on image

Rocky Mountain High CheeseBurger Delight with CBD
Carl’s Jr. (Denver only)

Source: 2019 National Restaurant Association’s What’s Hot Survey
Beyond 2020

The Next…Rosé

Lambrusco Garden
Rossoblu
Los Angeles

Orange Natural Wine
Aldi
U.K. only

Source: Technomic Ignite menu data
The Next...Gochujang

Chamoy
Mexico

Pilacca
Italy

Filfel
Chuma
Libya

Jaew
Bong
Laos

Chile
Crisp
China

Palapa
Philippines
The Next…Avocado Toast

Katsu Egg Sando
Shake Shack

Iberico Katsu Sando
Ferris
New York City

Fried Chicken Katsu
Momonoki
Atlanta
The Next…Sparkle, Glitter and Rainbow

Butterfly Pea Flower

The Spirit Sage with butterfly pea flower gin
True Laurel
San Francisco
High Times Ahead…

Beyond CBD

Hi-Fi Hops
Lagunitas
California only

Carbonated THC-infused sparkling drinks
California Dreamin’
California only
Menus 2020 and Beyond: Big Finish

Menu changes reflect changing consumer demographics and demands

• Healthful, ethnic and social media are hot spots

Most operators address through LTOs and specials

• Allows for flexibility without disruption

Future menu changes are incremental

• Possible exception: CBD hubbub
As Always, Thanks For All Your Great Work!

Enjoy the National Restaurant Association Show 2019 and we’ll see you next year!
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