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FOODBYTES

YOUR FREE DATASSENTIAL
TREND REPORT

PLUS

2023 FALL PREVIEW

The foods, flavors, and concepts
that will take over menus this fall.

SPRING

TREND

REPORT

IN THIS ISSUE

SEASONALITY REPORT

LIMITED-TIME OFFERS

THE HOT LIST

RETAIL TRENDS

HOLIDAYS



79%

OF CONSUMERS
ARE INTERESTED
IN LIMITED-TIME-OFFERS

**FEATURING
SEASONAL
INGREDIENTS**

In fact, seasonality is the number one attribute that consumers say should differentiate a limited-time offer (LTO), according to our Limited Time Offers Keynote Report.



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Favorite spring foods

While many families enjoy ham for spring (as you'll see on page pg. 6, ham is top-of-mind for many consumers during this season), we often celebrated spring holidays with lamb growing up. It's still one of my favorite proteins, whether it's mustard and rosemary on lamb chops or green onions and old school mint jelly with a lamb leg on the rotisserie. I also have newfound respect for lamb after recently taking a trip to Napa Valley to learn how sheep graze in the vineyards and keep grasses low, which helps prevent forest fires and helps cut back on pesticide use.

On the sweeter side, I wasn't much for jelly beans, cream eggs, or marshmallows in my Easter basket, but I did look forward to those overstuffed Reese's Easter Eggs and the mini egg-shaped pieces of gum in the plastic carton. As you'll see on pg. 7, though, today's kids have a lot more options to choose from.

Spring is always a time of fresh ideas, renewal, and growth. In fact, "spring" actually gets its name from the term "springing time," when plants were said to begin springing from the ground (before that, spring was called "Lent" in Old English). Over the years, the name was shortened to the "spring" that we know today.

That renewal is evident on menus and in new product launches across the country. Spring holidays provide plenty of inspiration for menu development, whether it's a Ramadan buffet to break the fast or an upscale brunch menu to celebrate Mother's Day. Fruits and veggies are indeed springing from the ground, with options like asparagus, rhubarb, strawberry, zucchini, carrots, cabbage, and peas all indexing higher on spring menus according to our 2023 Seasonality Report. In the pages ahead, you'll find plenty of floral flavors (including cherry blossom, one of our 2023 Flavors & Ingredients to Watch from our 2023 Annual Trends Report), retail candies, early spring menu launches, and more to inspire your own menu and product ideas.

Whether you are working on a last-minute launch or already thinking ahead to spring 2024, there are plenty of ideas in this issue to jumpstart innovation. Plus, any spring menu innovation work can carry over into summer. Options like flavored lemonades, pies, and salads are at home on menus well into August.

Speaking of August, any options that stick around that long will likely bump up against fall releases. Last year, most of the major chains released their first fall beverages in August, including lots of pumpkin and apple options. What's in store for this fall? Check out what we learned from last year and spark your innovation process with our 2023 Fall Trends Preview section in this issue, as well.

But in the meantime, happy spring!

Mike Kostyo,
Trendologist & Associate Director

SPRING HAS SPRUNG

FLORAL FLAVORS, FRESH FRUITS, AND HEALTHY-YET-INDULGENT ITEMS ARE DRIVING SPRING TRENDS



Dunkin' released **Cherry Blossom Donuts** at locations around the nation's capital to celebrate D.C.'s famous cherry blossom trees.

It's officially spring (as of March 20), which means seasonal menus and LTOs are warming up. Many chains introduced a range of corned beef and cabbage entrees, green desserts, and lots of beers (beer introductions are typically at their highest in March, according to our *Seasonality Report*) for St. Patrick's Day. In fact, the entire season is dominated by a number of holidays that impact menus and retail, including Ramadan, Passover, Easter, and Mother's Day (the latter two driving a number of brunch releases). These holidays give the season a split personality as consumers look for celebratory desserts and candies (flavors like limoncello, key lime pie, and truffle are all trending for the season), while at the same

time they want lighter options for the warm weather (salad and wrap releases always increase during spring). Floral flavors continue to drive trends — there isn't a single floral flavor that isn't growing on menus, with options like lavender, cherry blossom, elderflower, and hibiscus all growing. This year, as consumers still deal with high prices and inflation, value is more important than ever. In fact, value is second only to taste when consumers are deciding where to eat out, according to our latest *Table Stakes Report*. That doesn't necessarily mean going all-in on combo meals and price-driven menu options — it means showcasing why an option and brand is a good value overall, across a range of metrics.

SWEET FLAVORS FOR *Spring*



These sweet flavors and ingredients index higher on spring menus compared to other seasons. See how they're used, take inspiration for your own menus and product lines, and check out our full *Seasonality Report* for more data on seasonal trends, including savory options.

WHAT IT IS	HOW IT'S USED	TASTE IT IN ACTION
Acai	Healthy, colorful acai shows up in refreshing smoothies, drinks, and bowls in the spring, often alongside other fruit flavors.	Last May Starbucks introduced a Strawberry Acai Lemonade Refresher to the menu, featuring strawberry and acai flavors and real sliced strawberries in each drink.
Strawberry Pie	Strawberry is the go-to spring fruit flavor that often stays on menus well into summer, with many midscale chains releasing their strawberry pies each spring.	Josephine House, a Southern-focused restaurant in Austin, TX, takes their strawberry pie to the next level by using Texas strawberries and serving it with caramelized honey ice cream.
Lavender	There's not a single floral flavor that isn't growing on menus today. That includes lavender, up 42% in the past 4 years in items like drinks and desserts.	Dutch Bros Coffee went all-in on lavender this year, launching a range of lavender beverages in January, including a White Chocolate Lavender Cold Brew and Strawberry Lavender Lemonade.
Prickly Pear	Once found almost exclusively in the Southwest, prickly pear is growing on menus across the U.S., mostly in beverages.	Last April, California Pizza Kitchen introduced a Desert Pear Lemonade with pear and prickly pear flavors, while Del Taco introduced Purple Pear Poppers inspired by boba featuring prickly pear in the same month.
Cherry Blossom	One of our "2023 10 Flavors to Watch," cherry blossom or sakura is a hit in Japan and making its way to the U.S., often in cocktails or other beverages.	At Voodoo Tuna in Lakewood, OH, soy sauce is infused with cherry blossom for the Sakura Tuna Sashimi & Nigiri , served with crunchy fried rice.
Dragon Fruit	<i>Dragon fruit</i> is classified as "On Fire!" in our FLAVOR database because consumer awareness keeps increasing. Find it mainly in drinks and desserts.	Harvest Seasonal Grill & Wine, with locations mainly in Pennsylvania, features both fresh dragon fruit and dragon fruit syrup in a Brunch Punch with rum, coconut milk, and pineapple and lime juices.
Cotton Candy	This nostalgic flavor scores big with Gen Z, who will find it in a range of desserts like ice cream, donuts, and milkshakes (and it's also used to melt into cocktails).	The Cotton Candy Blizzard is a perennial favorite on the spring menu at Dairy Queen, where cotton candy ice cream is combined with cotton candy sprinkles for crunch.
Coconut Milk	Creamy coconut milk adds a lighter touch of richness to soups, sauces, drinks, and a wide range of Asian-inspired dishes each spring.	So Radish, a vegan restaurant and beer-focused concept in Arvada, CO, uses coconut milk as the base for their plant-based mac 'n' cheeze sauce , topping it all with cashew parmesan and parsley.
Strawberry Lemonade	A wide range of lemonade flavors are released in the spring and summer each year, but strawberry is the most common flavor.	To stand out, brands are offering next-level options like flavor combos (the Watermelon-Strawberry Lemonade at Charley's Philly Steaks) or frozen options (Frozen Strawberry Lemonade at Burger King).
Greek Yogurt	Like coconut milk, greek yogurt adds a healthier take on creamy flavors to menus in the spring. It's used in parfaits, sauces, smoothies, and dressings.	At Beatrix in Chicago, the Enlightened Caesar Salad features greek yogurt dressing with little gem lettuce, baby arugula, capers, croutons, and Grana Padano.



That's no yolk!

86%

OF OPERATORS HAVE NOTICED INCREASED EGG PRICES

From dyed eggs to deviled eggs on the spring brunch menu, eggs are always a symbol of the spring season and a menu mainstay. But, while prices have dropped somewhat, both consumers and operators still say it's the number one commodity where they are noticing high prices, according to last month's *Table Stakes Report*. That means they may be a little more scarce this spring — 37% of operators say they are coping by swapping in other ingredients, while 8% took eggs off the menu completely.



Dearborn, MI's **Ramadan Suhoor Festival** draws over 10,000 people each night who come to enjoy over 60 local vendors like Aya's Sweets.

BREAKING THE FAST

Ramadan, the Muslim holy month of fasting, began on March 22 and ends on April 20 this year, and foodservice operators across the country (including many college cafeterias) are extending hours and launching special menus for suhoor (the pre-dawn meal) and iftar (the post-dusk meal). 24-hour diners are popular spots in many cities during Ramadan, while halal taco shops, chicken concepts, pizzerias, and buffets often offer specials. At one IHOP location in Fullerton, CA, the Ramadan menu was so popular that diners were eating meals out of Styrofoam containers on the curb when they couldn't find a seat, owner Mohammed Ashraf told the *Los Angeles Times*. Ashraf worked with the corporate office for months to gain approval for the menu, which is now a year-round option.

Fall Preview

WHAT'S IN STORE FOR 2023?

FALL MENUS HAVE BEEN EVOLVING BEYOND PUMPKIN SPICE. WHAT DOES THAT MEAN FOR THIS YEAR'S AUTUMN MENUS?

As we noted in last year's *Midyear Trend Report*, **pumpkin spice** had been declining on menus in recent years. While it experienced a bit of a bump in 2022, today it often shows up in cold and frozen drinks, compound flavors (**pumpkin chai**, **pumpkin marshmallow**), and on the savory side of the menu (particularly in soups and pasta dishes). As major chains launch fall menus earlier, fruit flavors that perform well in cold drinks when the weather is still hot continue to drive fall menu trends. **Apple** is following a similar path to pumpkin, with many chains calling out specific apple flavors or types (**green apple**) or flavor mashups (**apple chai**, **apple cranberry**). Also expect **blood orange** to show up on even more menus this year.

Spicy flavors have also become fall menu mainstays, as brands introduce "scary hot" or **sweet and spicy** flavor profiles. Deep, rich sweet flavors like **toffee**, **brown sugar**, and **pecan** are also making a comeback on many menus. As Halloween candy sales continue to grow every year, many major chains are partnering with **candy brands** or adding a range of sweets to menu offerings for decadent menu items that celebrate trick-or-treating. **Oktoberfest** also drives many new menu items in the fall, including a number of **lager** and **stout** releases.



Brands have plenty of fun with their cocktails for Halloween. Last year saw major chains introduce options like the **Drunkin' Pumpkin** at Dave & Buster's, **Witch's Brew** at Ruby Tuesday, **Fang-tastic 'Rita** at Chili's (left), **Zombie Apocalypse** at World of Beer, **Ectocooler** at Old Chicago, and **Dracula's Juice** at Applebee's.

WHAT'S ON THE MENU?

HERE ARE SOME OF THE THEMES THAT SHOWED UP ACROSS MAJOR CHAIN MENUS IN FALL 2022:

GREEN APPLE

- *Green Apple Slurpee* (7-Eleven)
- *Freaky Frozen Green Apple & Grape Chiller* (Krispy Kreme)
- *Green Apple Sangria* (Uno Pizzeria)

BLOOD ORANGE

- *Blood Orange Snowbird* (Bar Louie)
- *Blood Orange Dunkin' Refresher* (Dunkin')
- *Blood Orange Margarita* (Seasons 52)
- *Blood Orange Mule* (Hard Rock Cafe)

SPICY FLAVORS

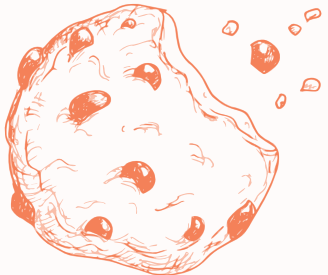
- *Hot Honey Thriller Pizza* (Old Chicago Pizza & Taproom)
- *Diablo Fries* (Arby's)
- *Ghost Pepper Whopper* (Burger King)
- *Iced Atomic Fire* (QuickChek)
- *Scorchin' Hot Wings* (Smashburger)
- *Spicy n' Spooky Ice Cream* (Baskin Robbins)
- *Hot Ones Burger* (Shake Shack)
- *Hatch Chile Margarita* (Taco Cabana)

"HARVEST"

- *50/50 Harvest Berry Lemonade* (Shake Shack)
- *Fall Harvest Sandwich* (Pret a Manger)
- *Harvest Chicken Salad* (Cheesecake Factory)

HALLOWEEN CANDY

- *Rainbow Blondie Bar with Skittles* (Little Caesar's)
- *Trick or Treat Creation* (Cold Stone Creamery)
- *Trick 'r Treat Mix* (Braum's)
- *Trick-or-Treat Bucket* (Tim Horton's)
- *Reese's Take 5 Pumpkin Concrete* (Rita's Ice)



A FEW FINAL TREND BITES

Spring is always a season of fresh ideas, so we hope we've given you some new foods, flavors, concepts, and stats to inspire your spring menu and product innovation. Whether you are still looking to launch an option this spring or you are already thinking ahead to 2024, there are plenty of spring trends that are resonating with consumers today. Here are a few final takeaways and ideas to put that spring in your step...

3 WAYS TO TAKE ACTION ON THIS ISSUE'S TRENDS

- **Balance health and indulgence.** Spring is a unique time for menu innovation. On the one hand, there are lots of holidays and celebrations that call for indulgent offerings — St. Patrick's Day, Easter, Mother's Day. On the other hand, as the weather warms up, consumers look for lighter dishes like salads and wraps to replace the heavy dishes associated with winter (plus, many consumers are looking ahead to swimsuit season). Make sure you are covering both bases with your menu or product line. You can offer up lighter versions of indulgent favorites (cauliflower wings, veggie pizzas) or offer a little bit of everything depending on the consumer or occasion (a healthier spring menu punctuated by more indulgent holiday LTOs).
- **Follow the floral flavor trends.** Floral flavors continue to grow on menus. Hibiscus, rose, lavender, orange blossom, cherry blossom, and elderflower are all up on menus, often used in drinks and desserts. If you aren't already incorporating them, at least have them on your radar for future innovation opportunities.
- **Get ready for fall.** With "Halfway to Halloween" celebrations on track for late April, the fall season will be here before you know it (and pumpkin spice drinks will pop up even sooner). It's never too early to start planning (and you may have already been planning for months). Get ready for more flavors like green apple and blood orange to show up on menus this fall, while spicy flavors will also make their mark again.

SPRING IN THE NAME

THERE ARE A FEW FOODS & INGREDIENTS THAT HAVE "SPRING" RIGHT IN THE NAME. HERE'S WHAT CONSUMERS THINK OF A FEW OF THEM ACCORDING TO FLAVOR.



70% OF CONSUMERS LOVE OR LIKE SPRING WATER, WHICH IS CALLED OUT ON 4% OF MENUS.



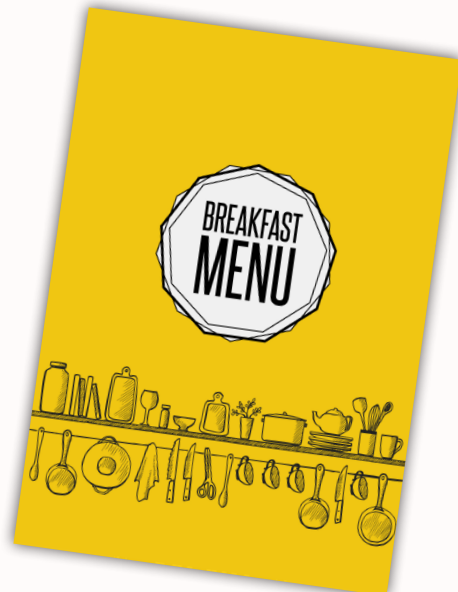
63% OF CONSUMERS LOVE OR LIKE SPRING ROLLS. THE YOUNGER THE CONSUMER, THE MORE LIKELY THEY ARE TO LOVE THEM — A THIRD OF GEN Z LOVES THEM.



HALF OF CONSUMERS LOVE OR LIKE SPRING MIX. FEMALE CONSUMERS ARE FAR MORE LIKELY TO LOVE IT THAN MALE CONSUMERS.

WHAT'S COMING UP NEXT?

What do consumers want from menu designs today? In next month's issue of *FoodBytes*, we dive into that ever-evolving topic. Are any of those old menu design concepts and rules still relevant? Should you still put a box around the options with high profit margins? Are photos essential or do they cheapen the look of a menu? In this issue we'll look at the latest menu design trends, dive into data from both consumers and operators on what they want in menu design, and we'll showcase some best-in-class examples of menus around the country and world.



HUNGRY FOR MORE TRENDS? Check out last month's Report Pro releases!



PULSE Industry Overview
PULSE: everything you need to know about operators today — what they need, want, are thinking about, etc.
Better understand operator needs and wants with our annual *PULSE Industry Overview*. This report features operation and decision maker profiles, information on products and services offered, operator objectives and needs, sourcing data, data on formats offered, what operators want from suppliers, and market sentiment data.




TW: Ultimate Swaps
Trend Watch featured over 25 smart swaps to help deal with high prices.
Do soaring wing prices, elusive eggs, and other swap-stacles have you running around like a chicken with its head cut off? Our *Ultimate Swaps Issue* has you covered, packed with more than 25 smart swaps and substitutions to know, from tri-tip for ribeye to avocados for eggs to surimi for shellfish.



CC: Packaging
In Creative Concepts, we looked at the packaging innovation that is driving foodservice and retail.
Get a peek at packaging innovations at restaurants and retail in this issue. See how augmented reality-enabled packaging is bringing eentertainment into consumers' homes, explore the role sustainability is playing in packaging innovation, and more.




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