



FRUIT AND VEGETABLES ON CHAIN MENUS

Tracking Report (2004-2005)



Methodology

- Data is compiled semi-annually by FoodBeat, Inc. to provide the food industry with menu analyses and related trend information from the top 200 restaurant chains.
- Menu trends focusing on fruit and vegetable usage were evaluated in Quick Service and Casual Dining Restaurants.



Methodology

- The previous methodology used by FoodBeat examined menus for *mentions of fruits and vegetables*, and counted all fruits and vegetables, regardless of whether it was a descriptor, flavoring, garnish, or actual food item.
- The new methodology recently implemented reports *mentions of servings of fruits and vegetables* and describes their application on the menu.



Methodology

- Examples and descriptions of menu items that mentioned servings of fruits and vegetables were based on analysis of new menu items in 2004 and 2005.

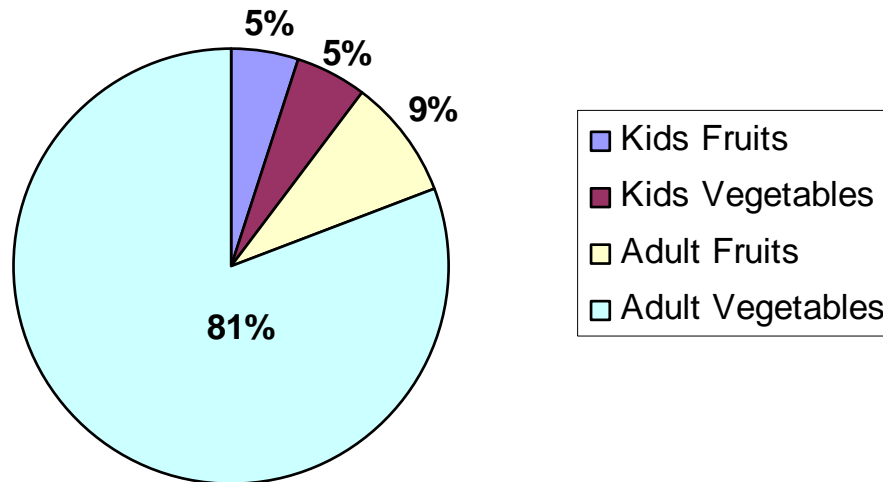


- When viewing charts and graphs, note that the scales are different for each. This may result in some distortion of the magnitude of change. Each graph stands alone and is not comparable with others.
- Data for each year are based on the average of the first and second half of each year.



Adult vs. Kids Mentions of Fruit and Vegetable Menu Servings - 2005

Fruit and Vegetable Servings in 2005



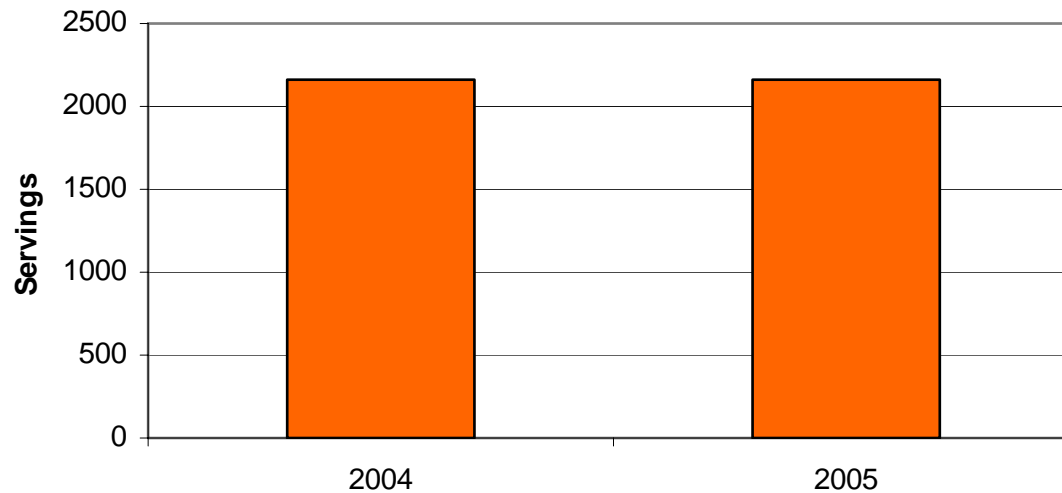
In 2005, adult vegetable servings comprised the majority of total fruit and vegetable servings and far outweighed adult fruit servings.

Servings of fruits and vegetables on Kids Menus were equal, at 5% each of total fruit and vegetable servings.



Menu mentions of Vegetable Servings

Total Vegetable Serving Mentions by Year

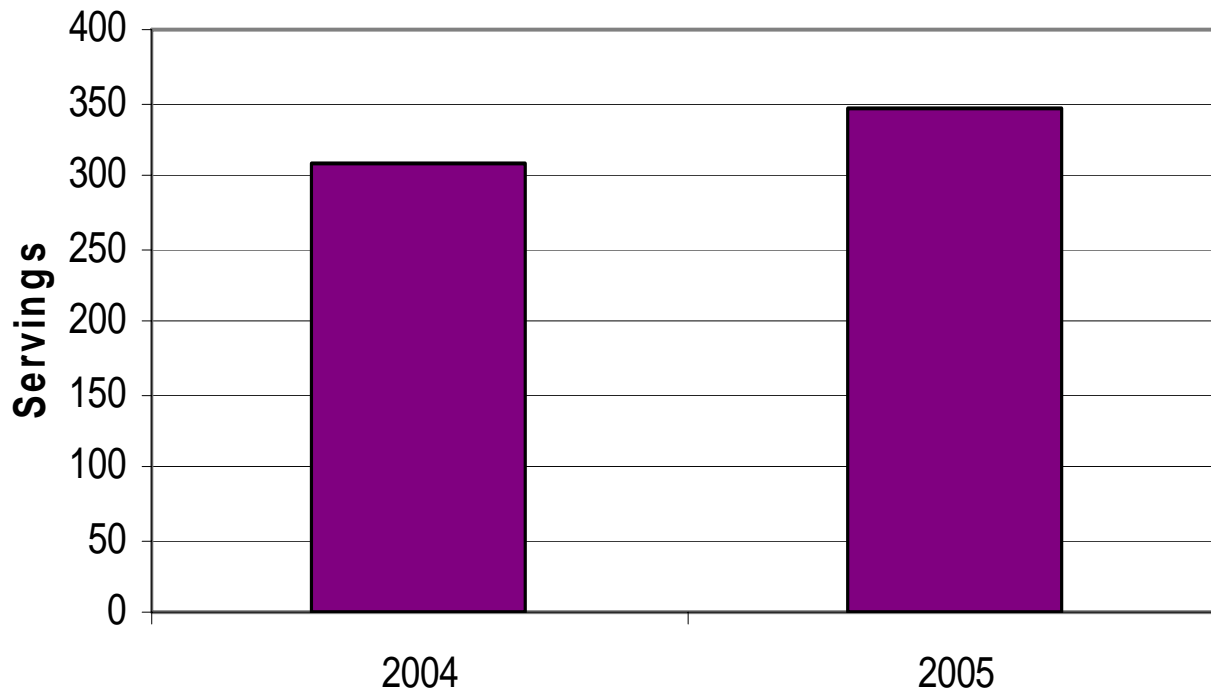


Trends indicate that mentions of vegetable servings on menus have remained virtually unchanged since 2004. However, changes are occurring in mentions of vegetable servings within different meal parts of menus, reflecting introduction of new items and removal of low selling items.



Menu Mentions of Fruit Servings

Total Fruit Serving Mentions by Year



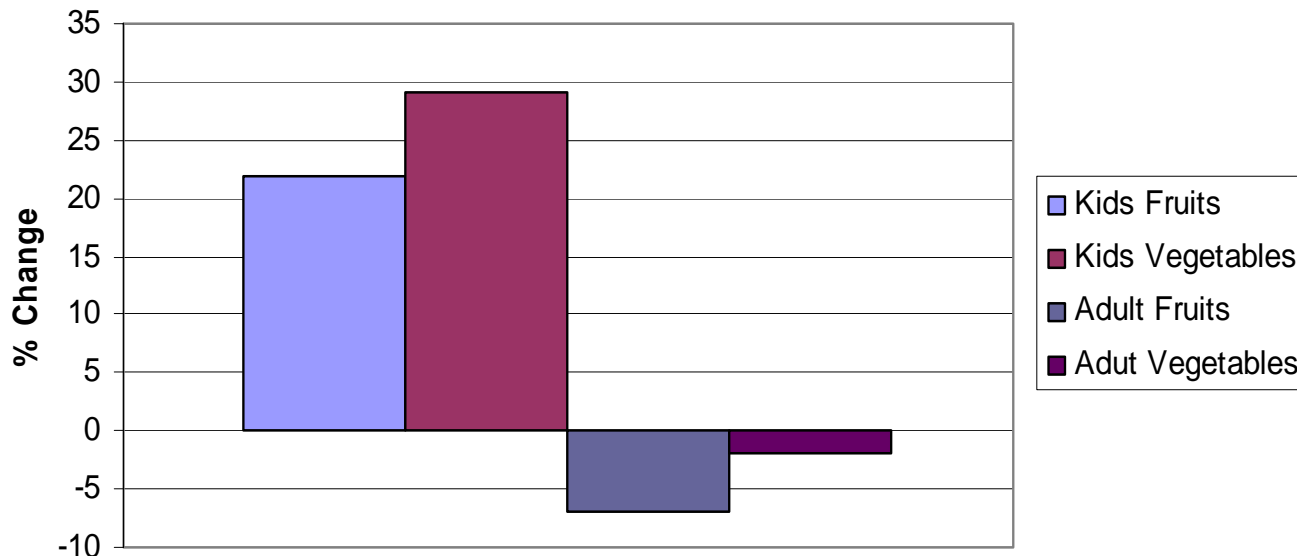
Mentions of servings of fruit have increased on menus between 2004 and 2005.

Although vegetables are featured more than 6 times more frequently than fruits, there was a 16% increase in mentions of fruit servings from 2004 to 2005.



Percent Change in F/V servings in Adult vs. Kids Menu – 2004 to 2005

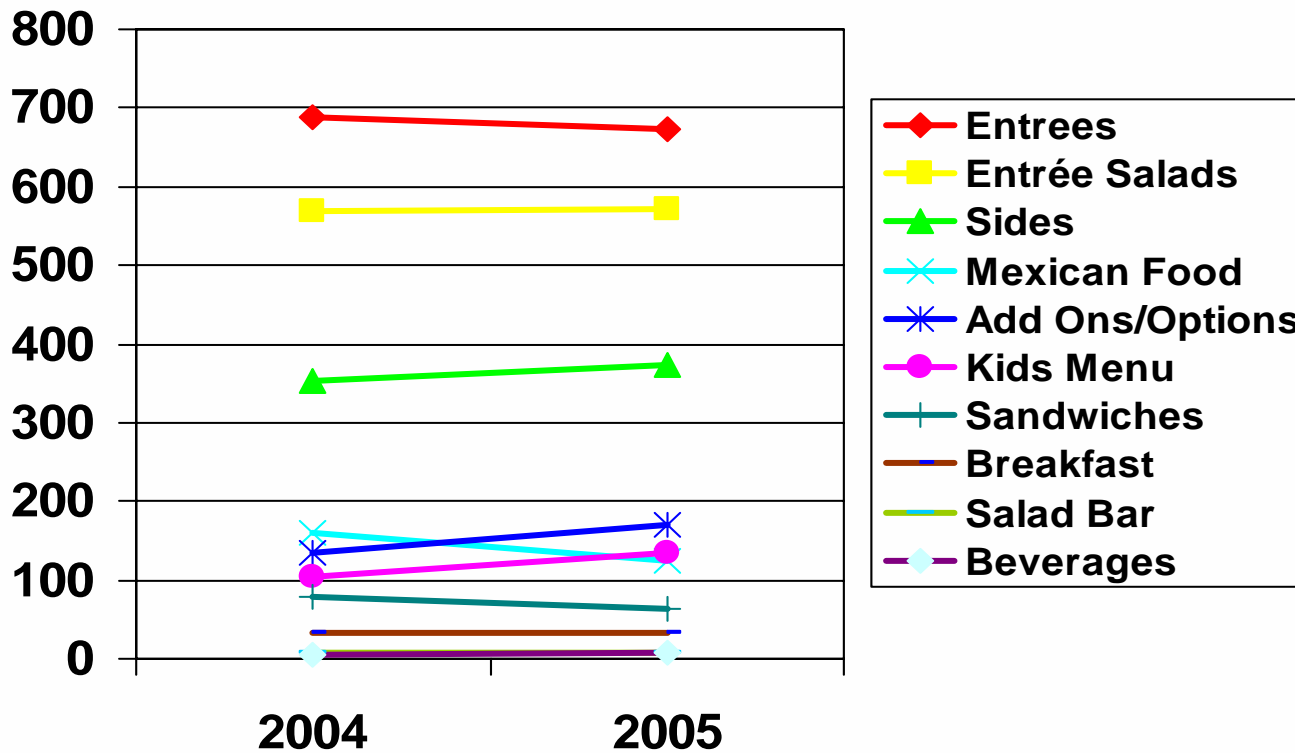
Percent Change of Fruit and Vegetable Servings,
2004-2005



The opportunity gap for fruit and vegetable servings on Kids Menus appears to be realized by the restaurant industry. The *29% increase* in fruit and vegetable servings on Kids Menus is high, while the percent change on adult menus is decreasing.



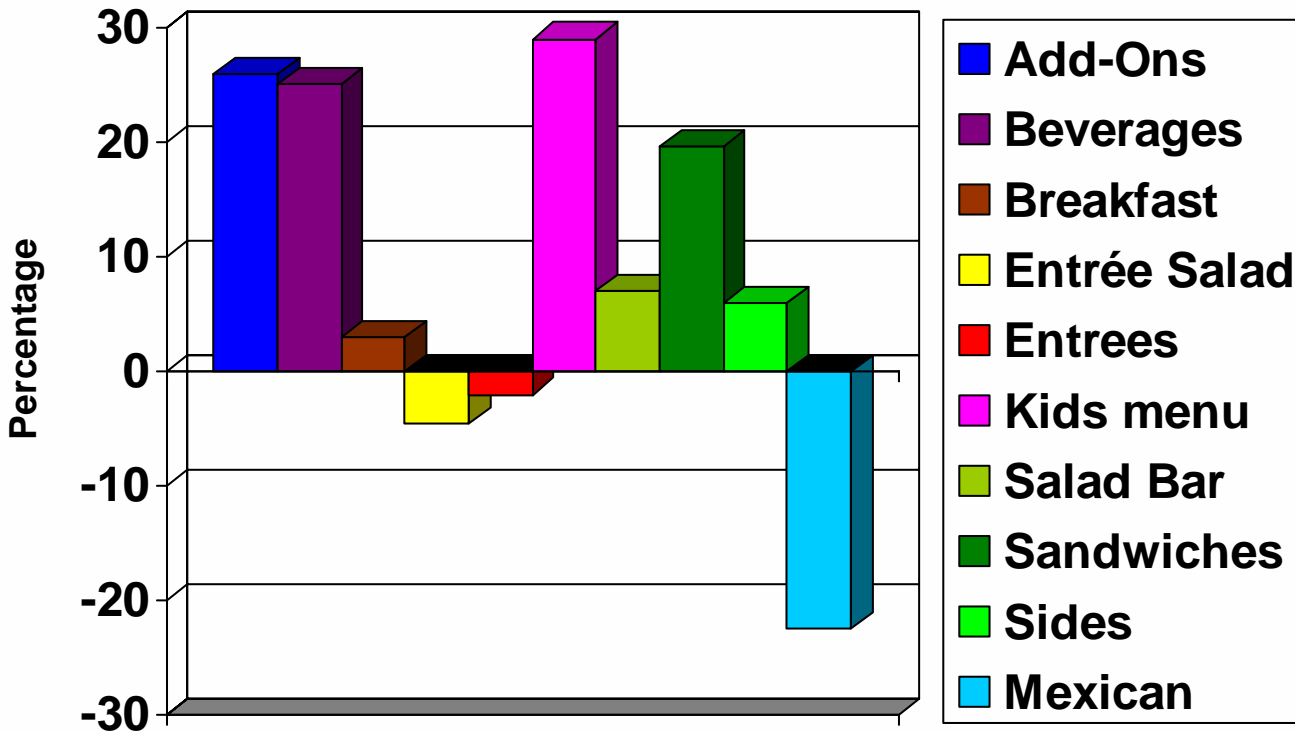
Mentions of Vegetable Servings by Meal Part



Mentions of vegetable servings are highest in the Entrées, Entrée Salads and Sides categories. However, Entrees, and Entrée Salads also had a slight decrease in mentions of vegetable servings, along with Mexican Food, and Sandwiches.



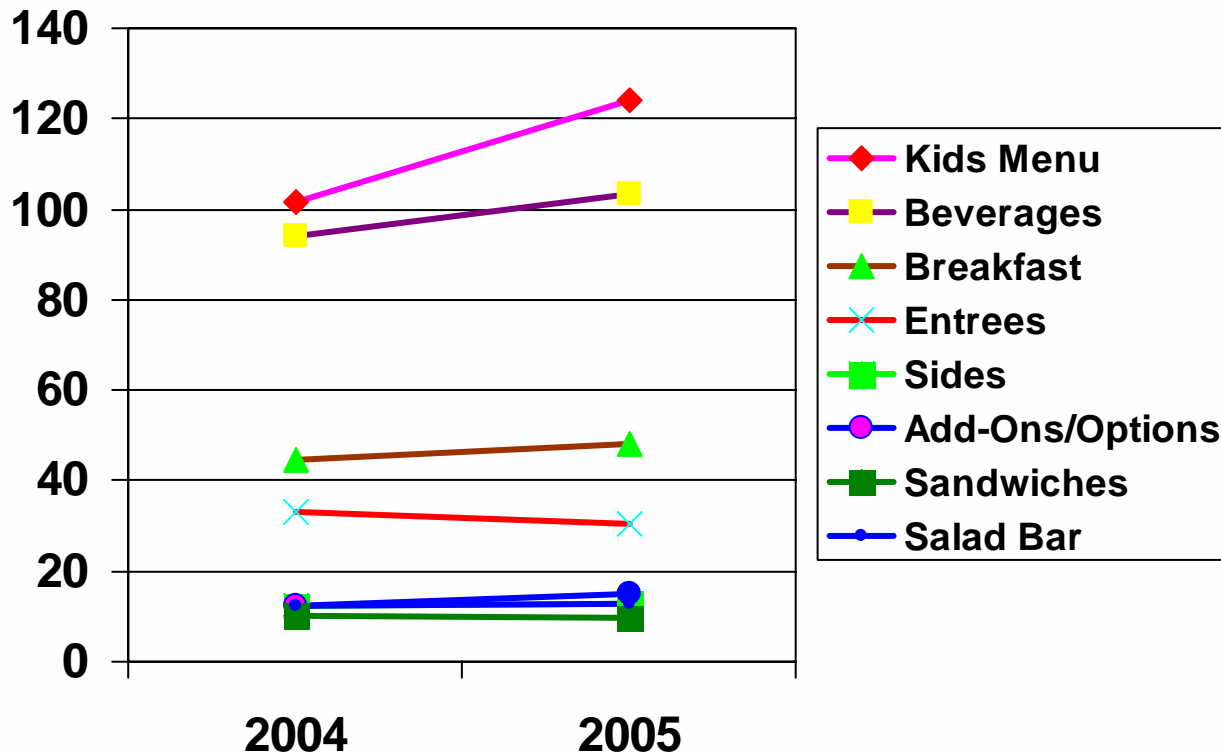
Percent Change in Menu Mentions of Vegetable Servings by Meal Part



The menu categories with the highest percent change in mentions of Vegetable servings are the Kids Menus, Beverages and Add-Ons categories: there was a greater than 20% increase in mentions of vegetable servings in each of these categories. Thus, changes in mentions of vegetable servings are occurring, despite no change in total mentions between 2004 and 2005.



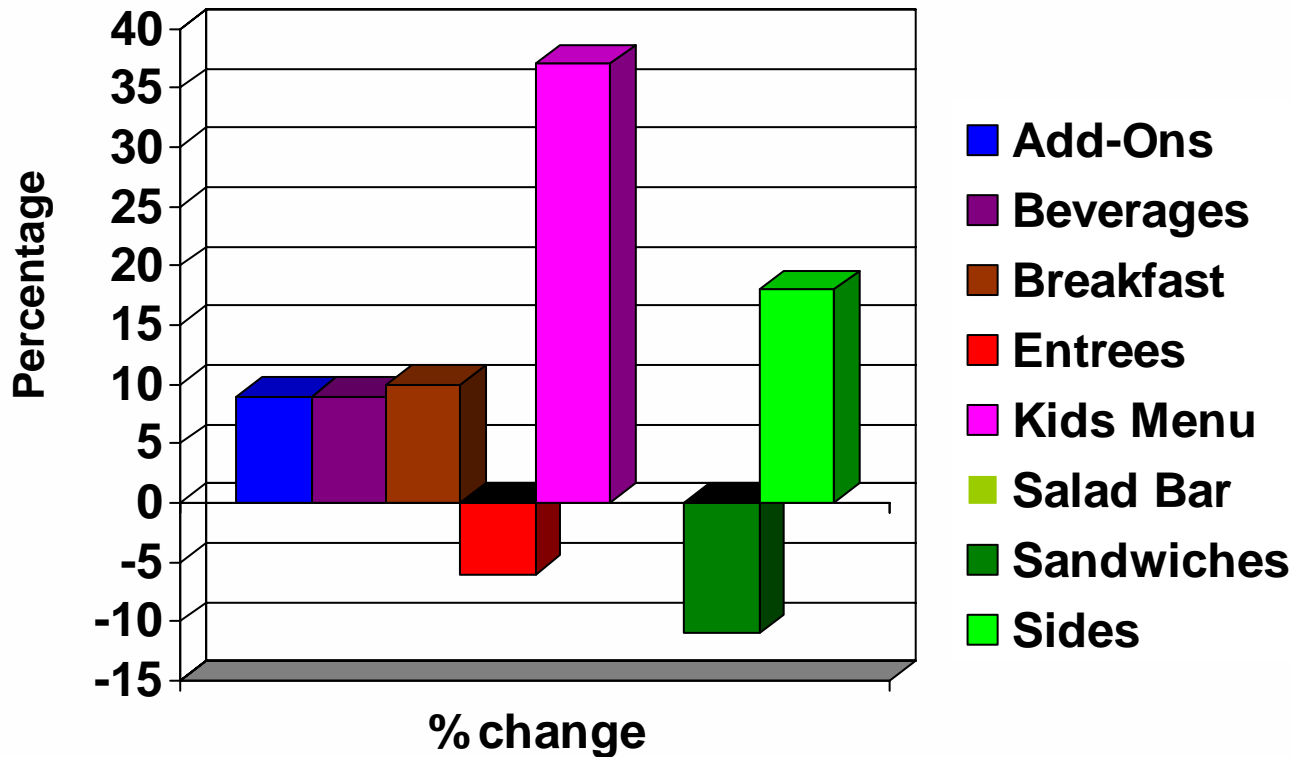
Mentions of Fruit Servings by Meal Part



Fruit servings have increased most notably on the Kids' Menu, in Beverages and in Add-Ons/Options.



Percent Change in Mentions of Fruit Servings by Meal Part



The percent change in mentions of fruit servings in each of the meal parts is lower than for vegetables, with the exception of those in Kids Menus.



Fruit and Vegetable Servings in Restaurant Segments

Trends for menu fruit and vegetable servings have varied for different segments of the restaurant industry. The segments analyzed in this report include:

Quick Service Restaurants (QSR):

Examples: Burger King, McDonald's, Carl's Jr.

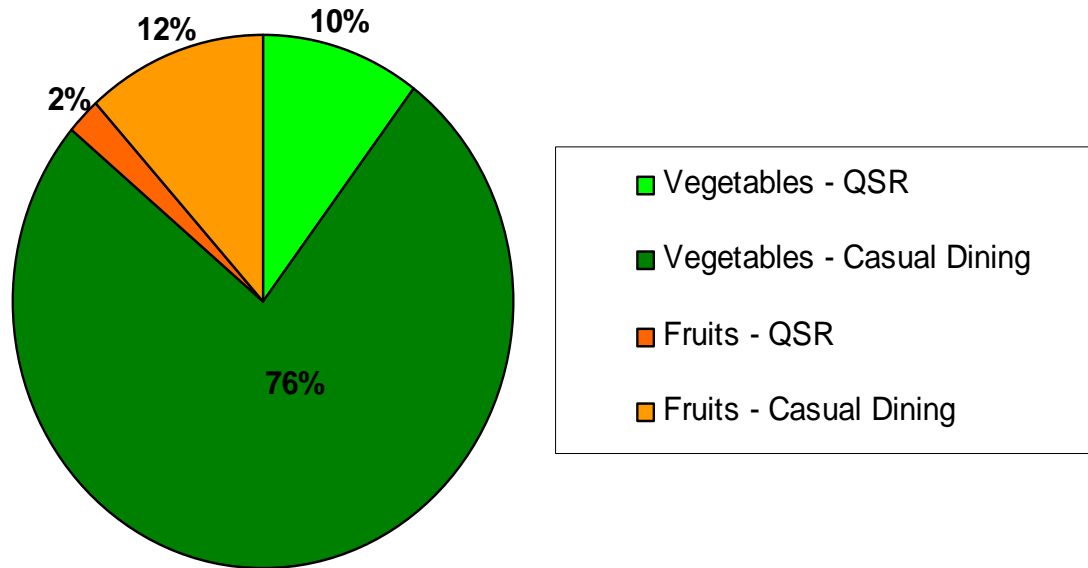
Casual Dining (CD):

Examples: Applebee's, Chili's, T.G.I. Friday's



Mentions of Fruit and Vegetable Servings by Segment

Fruit and Vegetable Servings by Segment



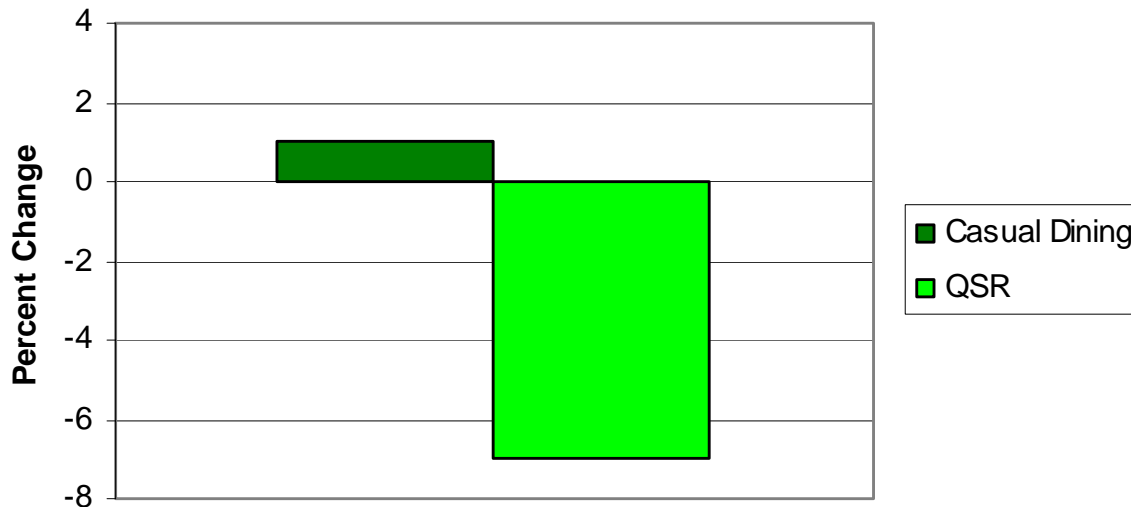
The majority of servings of fruits and vegetables are available in the Casual Dining (CD) segment compared to Quick Serve Restaurants (QSRs).

Fruit serving mentions available in QSRs, while increasing in number, are still only 2% of all servings of fruits and vegetables offered.



Percent Change of Mentions of Vegetable Servings by Segment

Percent Change of Vegetable Servings by Segment, 2004-2005

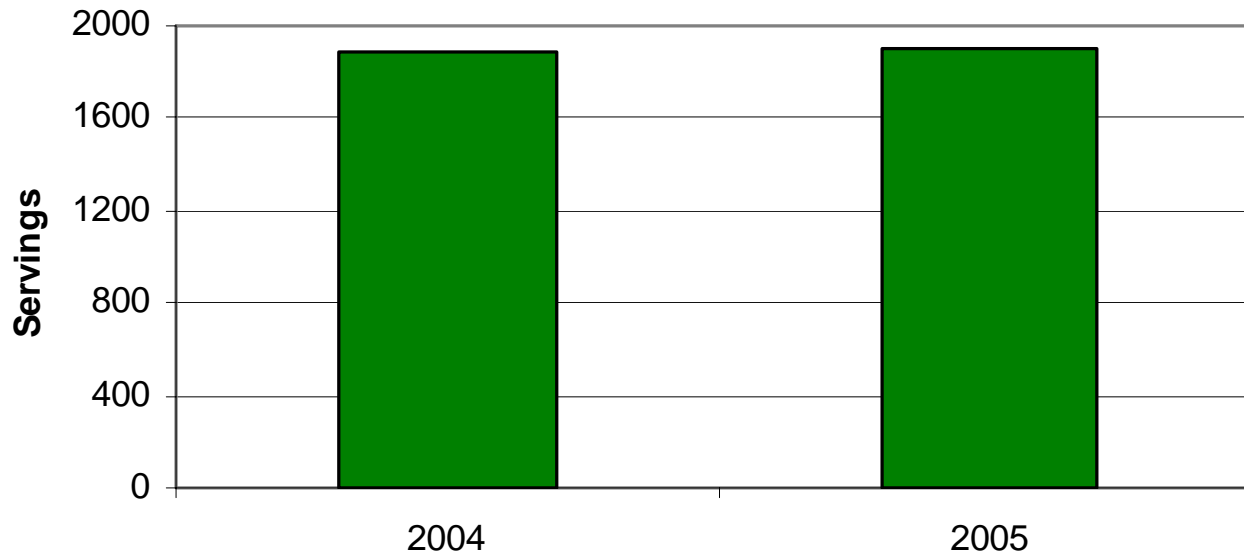


There has been essentially no change in mentions of vegetable servings offered in Casual Dining restaurants. The decrease seen in QSRs may be due to elimination of those salads that don't sell.



Mentions of Vegetable Servings in Casual Dining

**Vegetable Servings in Casual Dining
Restaurants**



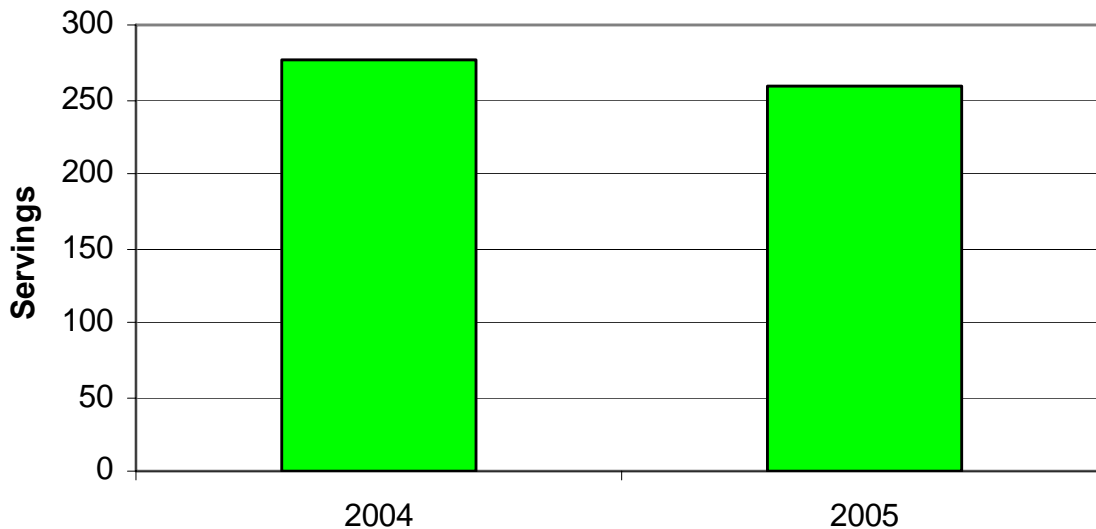
Mentions of vegetable servings in Casual Dining restaurants have not changed between 2004 and 2005.

Opportunities exist to increase vegetables offered during Breakfast, at the Salad Bar, as Sides and as Entrée Salads.



Mentions of Vegetable Servings in Quick Serve Restaurants

**Vegetable Servings in Quick Service
Restaurants**



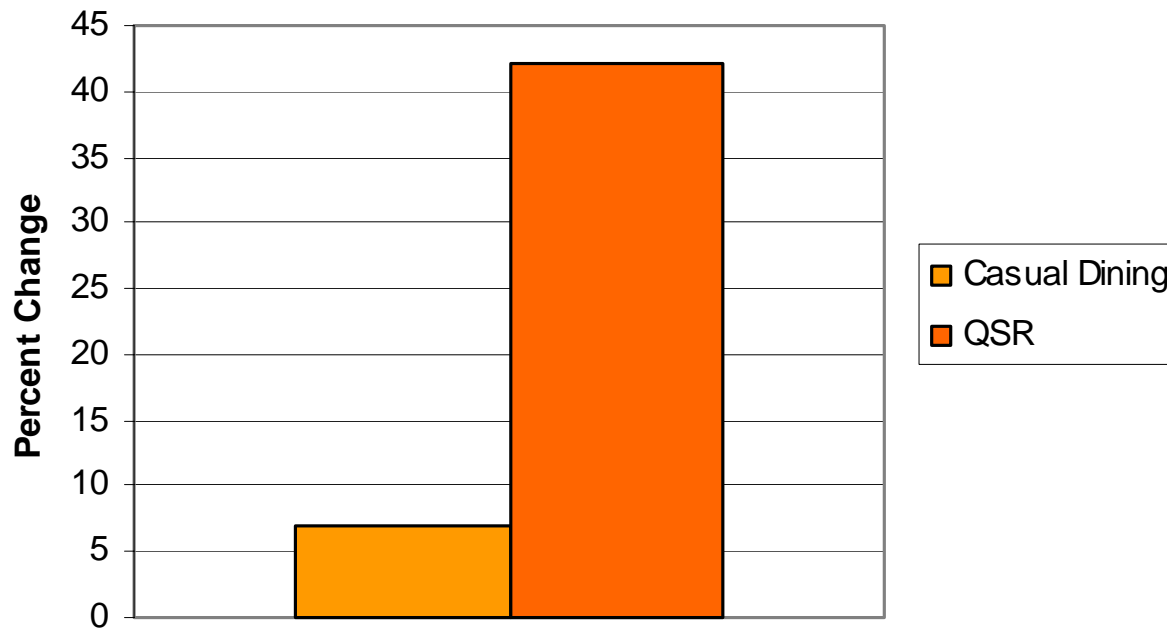
There has been a decrease in mentions of vegetable servings in QSRs.

Opportunities in QSRs include offering vegetables as a substitution for other side items in meals, and more salad options.



Percent Change in Mentions of Fruit Servings by Segment

Percent Change in Mentions of Fruit Servings by Segment, 2004-2005

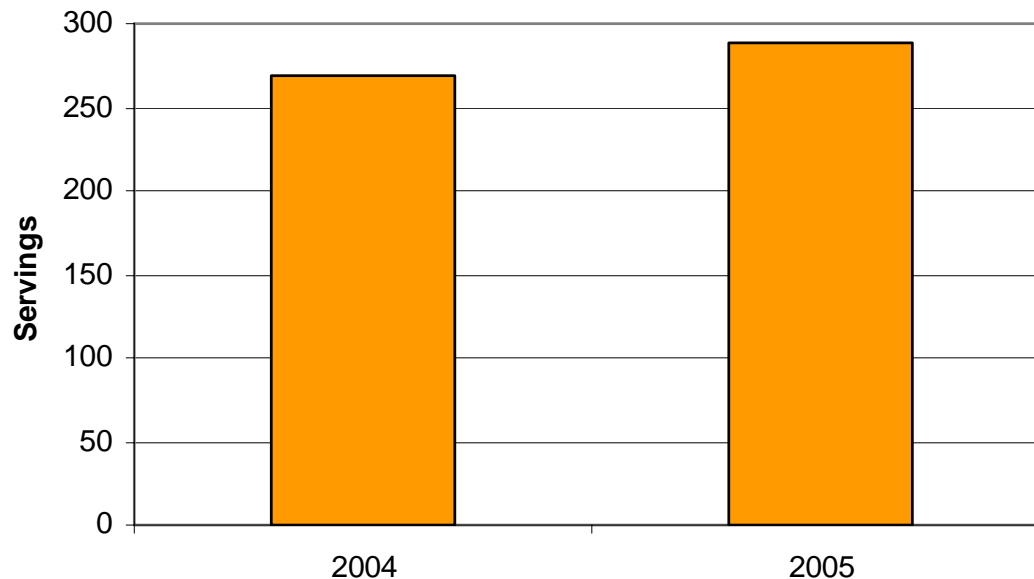


Mentions of fruit servings in QSRs have increased a great deal, while the change in Casual Dining is considerably smaller. However, as previously noted, mentions of fruit servings in Casual Dining are higher than for QSRs.



Mentions of Fruit Servings in Casual Dining

Fruit Servings in Casual Dining Restaurants

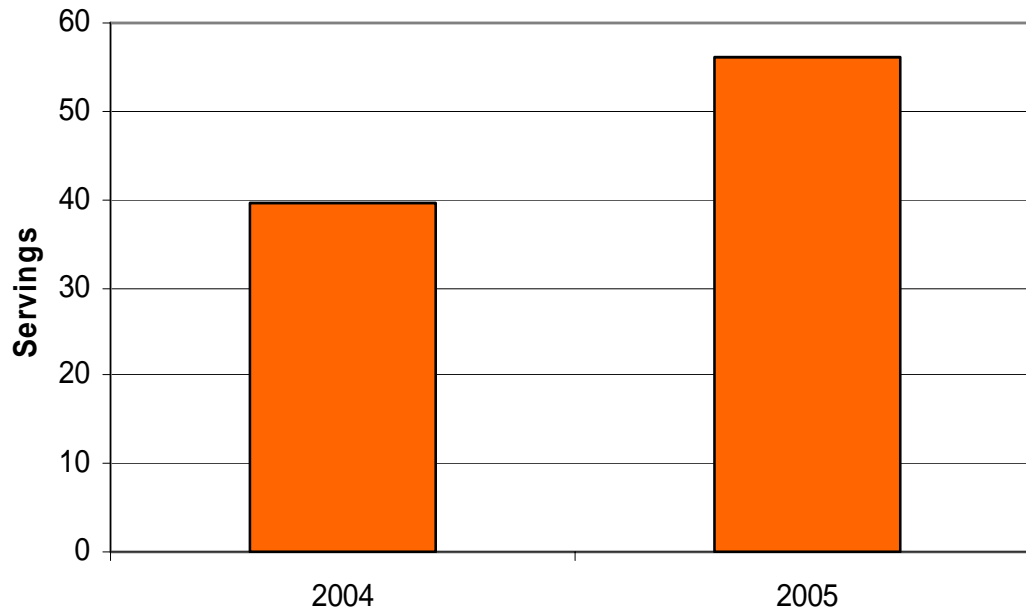


Mentions of fruit servings in Casual Dining Restaurants have increased. These increases are due primarily to increases in Kids Menus, Add-ons, and Beverages.



Fruit Servings in QSR

Fruit Servings in Quick Service Restaurants

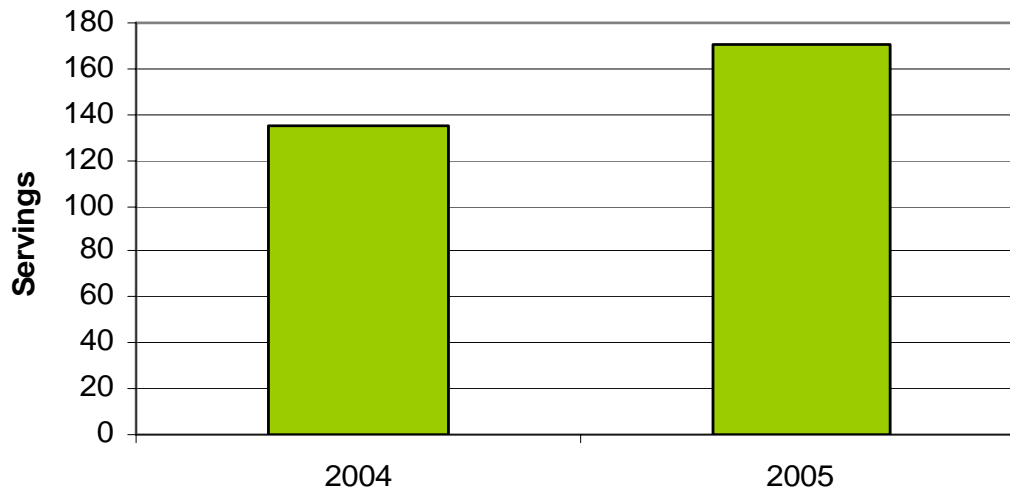


Trends show an increase in fruit servings offered at QSR. This increase is due to fresh fruit offered as a Side item and/or as Add-ons/Options.



Mentions of Vegetable Servings Add-Ons/Options

Vegetable Servings in Add-Ons/Options



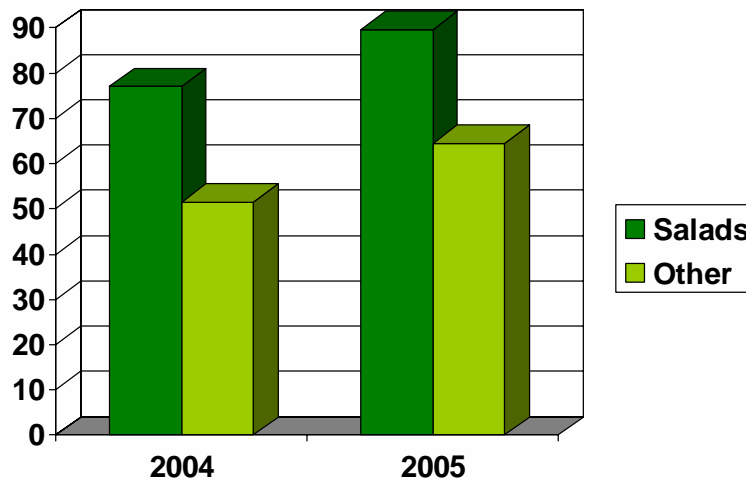
Total mentions of vegetable servings as Add-ons/Options have increased.

Examples of vegetable servings in this meal part include a side salad or cooked vegetables added to an entrée at a reduced cost compared to the a la carte price.

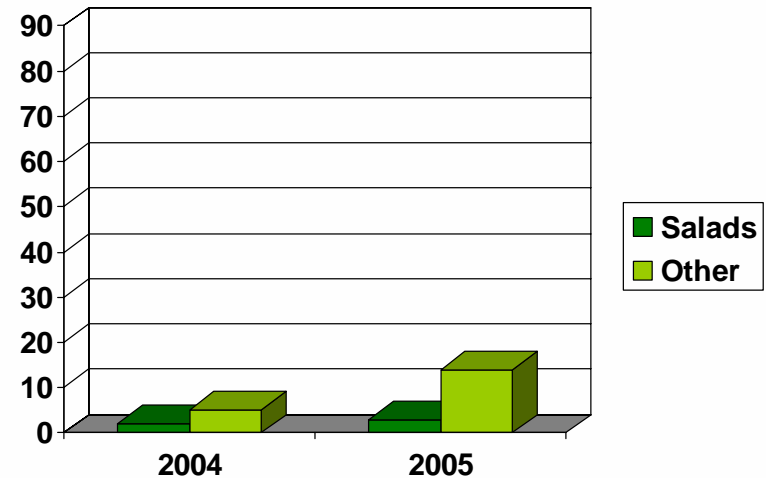


Application of Vegetables in Add-Ons by Segment

Casual Dining



QSR

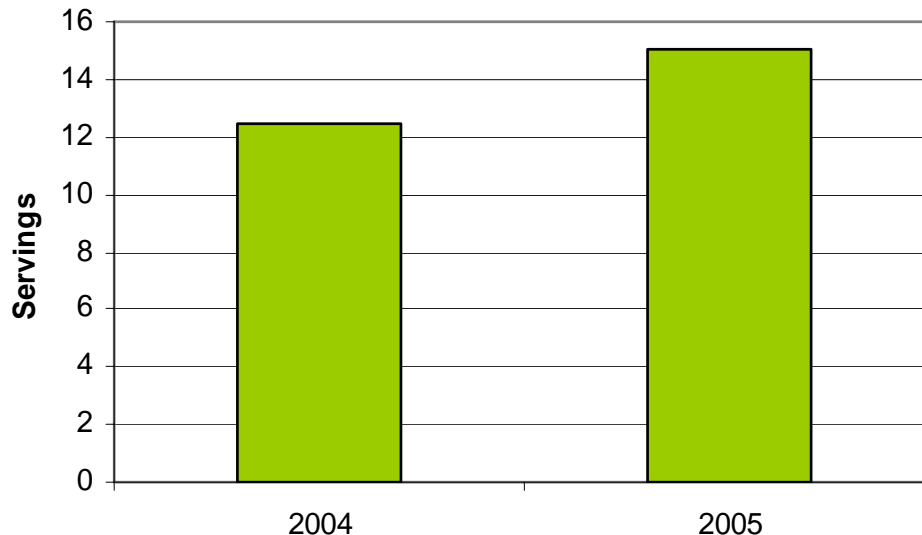


In Casual Dining restaurants, salads predominate as mentions of vegetable servings. The gap in mentions of vegetable servings between Casual Dining and QSRs is obvious, and the opportunity to increase mentions of vegetable servings is at hand, especially in the QSR segment.



Mentions of Fruit Servings – Add-Ons/Options

Fruit Servings in Add-Ons/Options



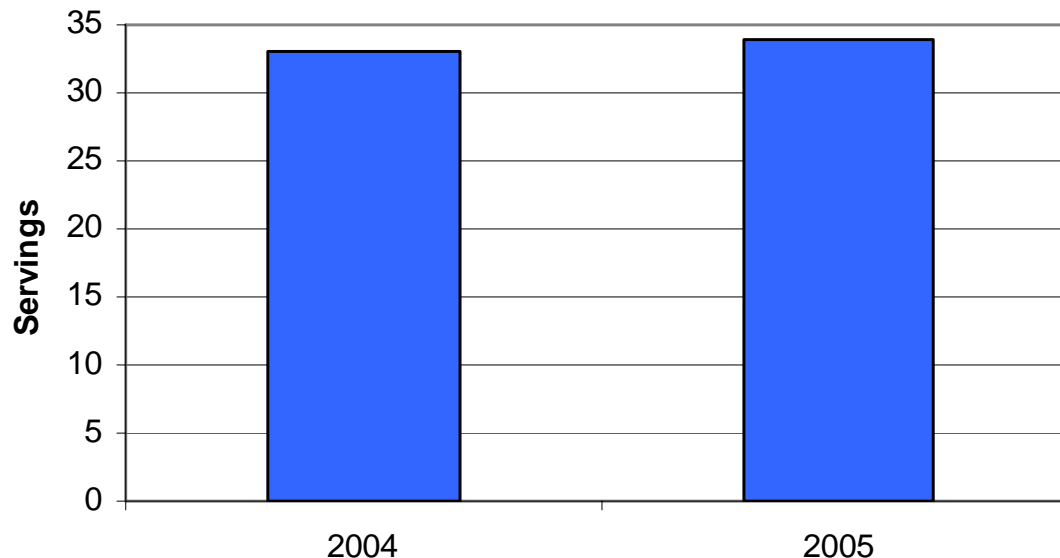
Mentions of fruit servings as Add-ons/Options have also increased.

Examples of fruits as an add-on/option include fruit salad and fresh fruit added to an entrée at a reduced cost compared to the price for a la carte.



Mentions of Vegetable Servings - Breakfast

Vegetable Servings in Breakfast



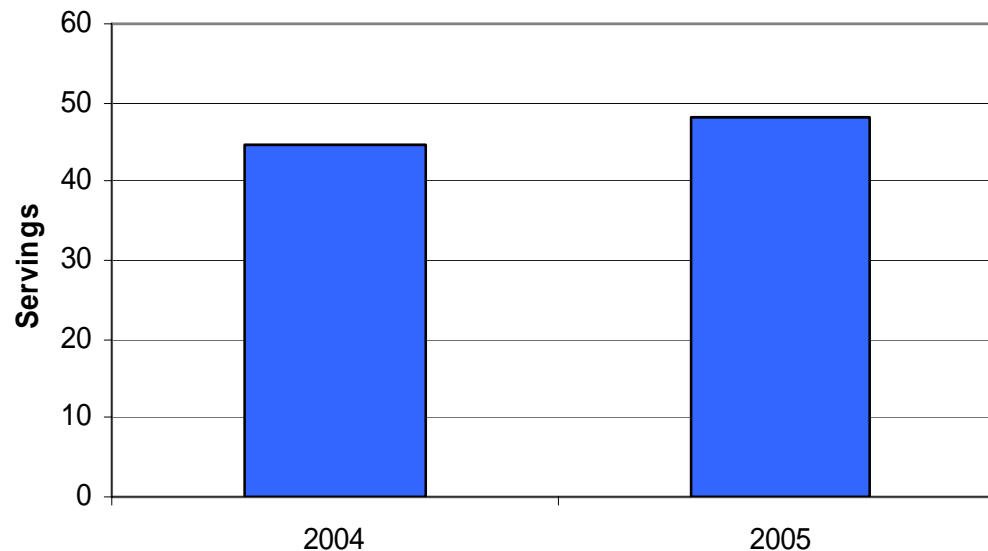
Mentions of vegetable servings at Breakfast have remained essentially the same between 2004 and 2005.

Vegetable servings at Breakfast are an accompaniment as part of an omelet, or as a side item such as tomatoes or potatoes.



Mentions of Fruit Servings - Breakfast

Fruit Servings in Breakfast



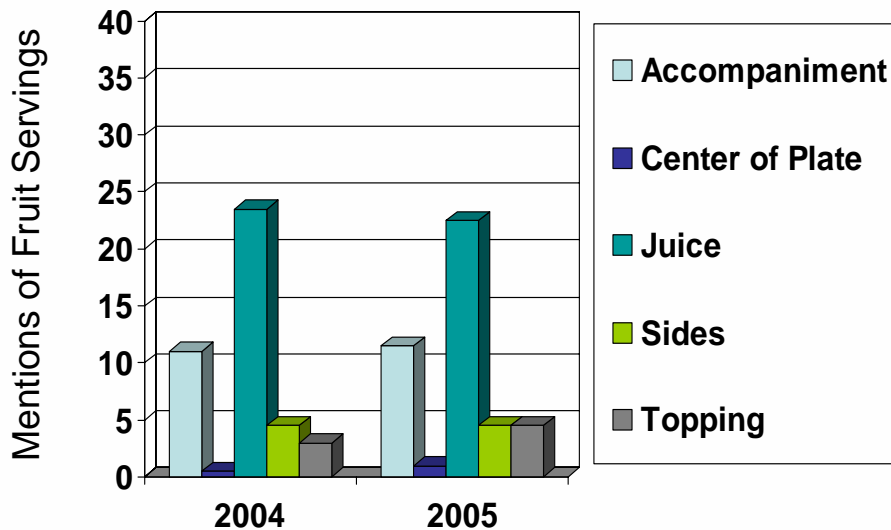
Mentions of Fruit servings at Breakfast have increased slightly.

Other research looking at both in-home and away from home eating shows that 44% of fruit servings are consumed at Breakfast. This suggests a potential opportunity for restaurants to increase fruit servings at Breakfast by offering a variety of creative fruit menu selections.

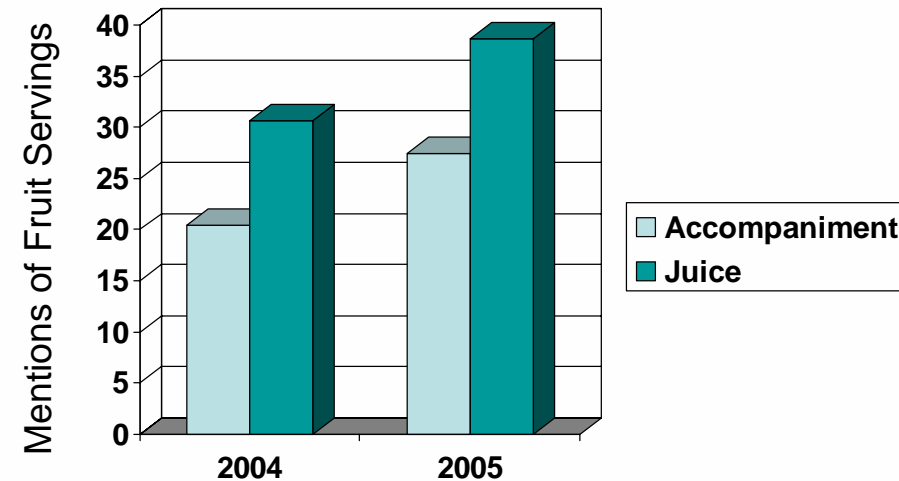


Application of Fruit Servings at Breakfast by Segment

Casual Dining



QSR

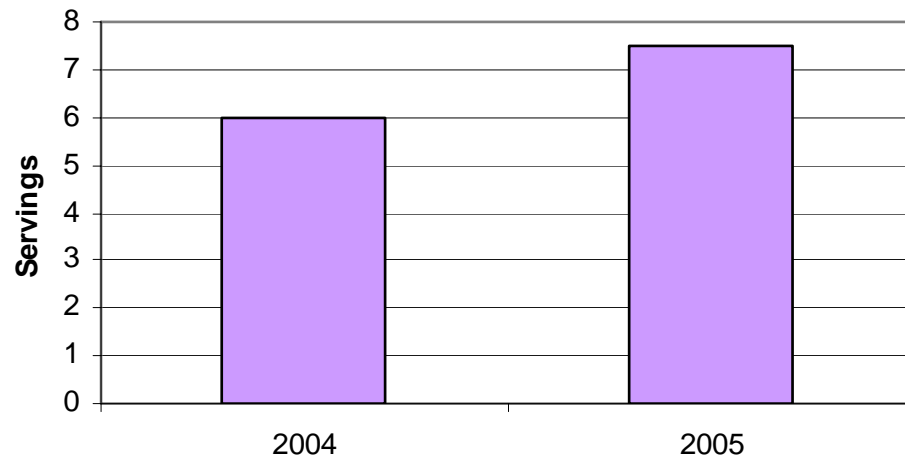


Fruit is used in more diverse ways in Casual Dining menus, compared to offerings at QSRs. However, as might be expected, mentions of fruit servings at Breakfast in both segments are predominantly as juice and as an accompaniment, such as slices of fruit on a plate with French toast.



Mentions of Vegetable Servings - Beverages

Vegetable Servings in Beverages



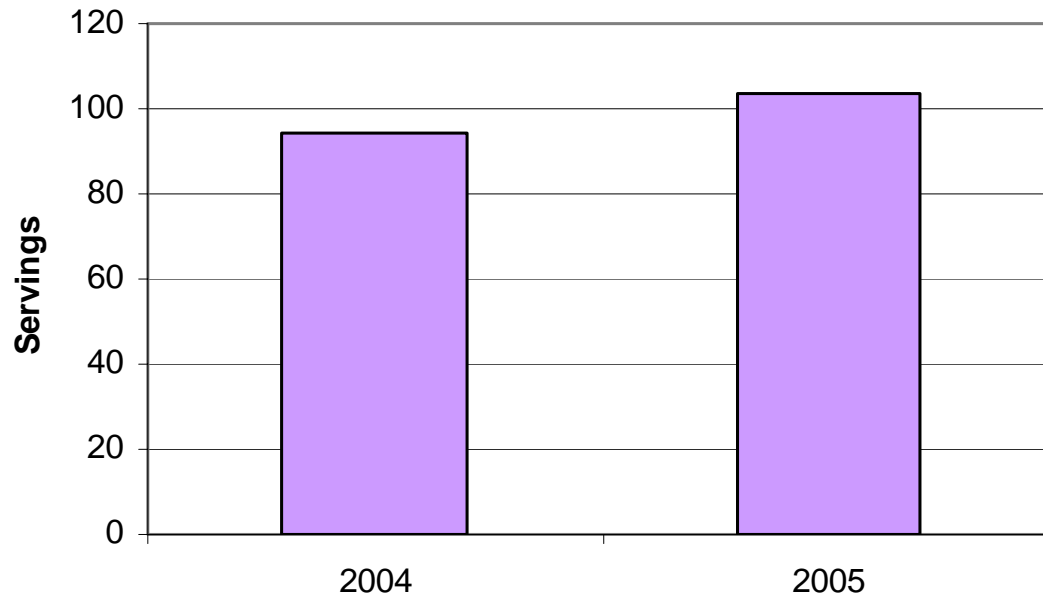
Mentions of vegetable servings in Beverages have increased slightly, although overall, this meal part does not include many vegetable offerings.

Examples of vegetable serving mentions in the Beverages category include tomato and carrot juice.



Mentions of Fruit Servings - Beverages

Fruit Servings in Beverages



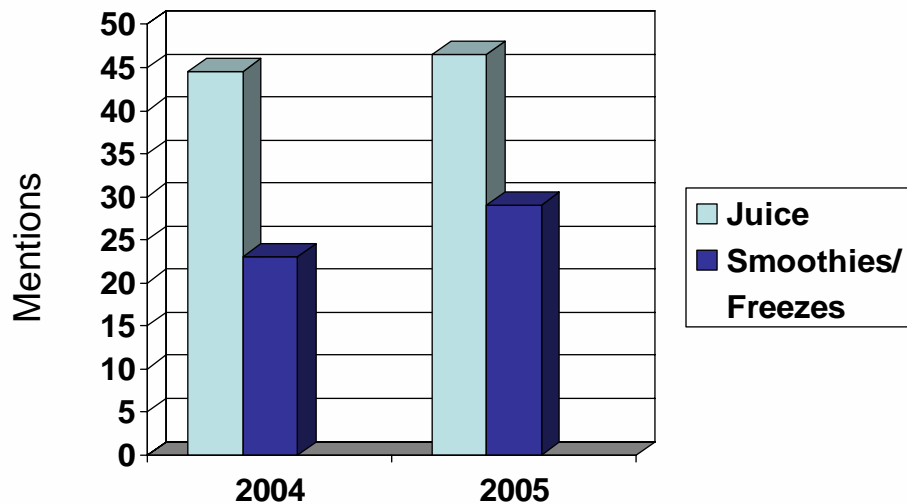
Mentions of fruit servings in Beverages have increased.

Fruit in Beverages is usually found in fruit smoothies, fruit drinks or fruit juice.

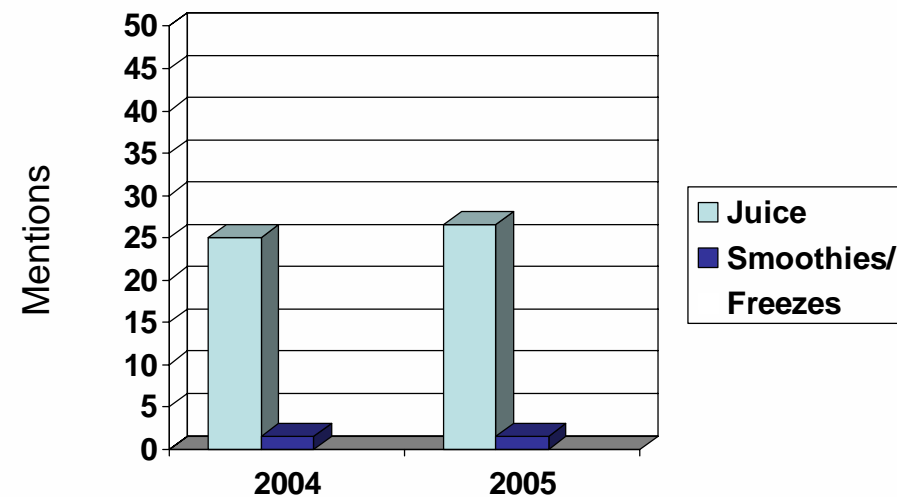


Application of Fruit Servings in Beverages by Segment

Casual Dining



QSR

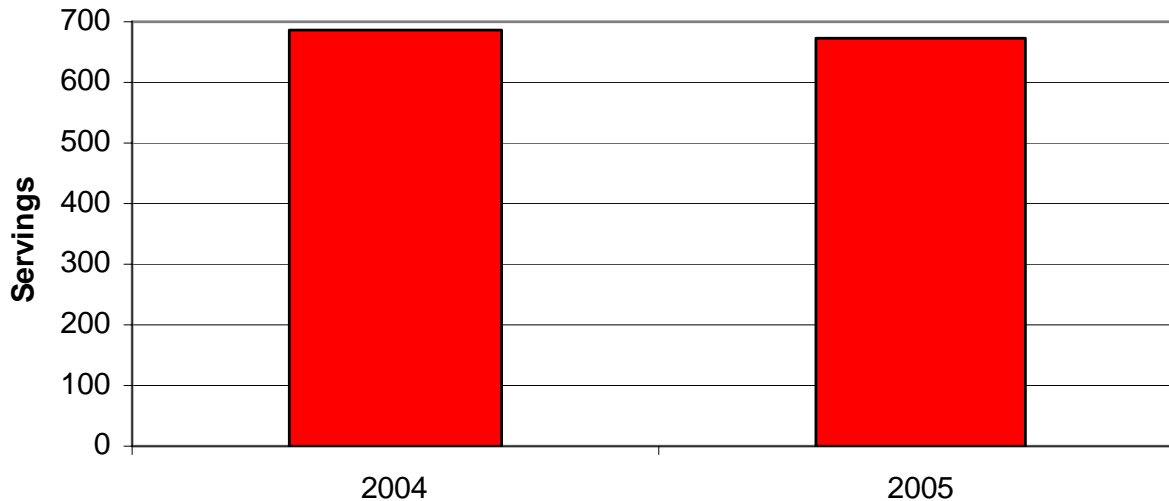


Mentions of fruit servings in Beverages are primarily as Juice. Smoothies and freezes are offered at some Casual Dining restaurants, but are almost non-existent at QSRs. This is a potential menu opportunity for the QSR segment.



Mentions of Vegetable Servings Entrées

Vegetable Servings in Entrées



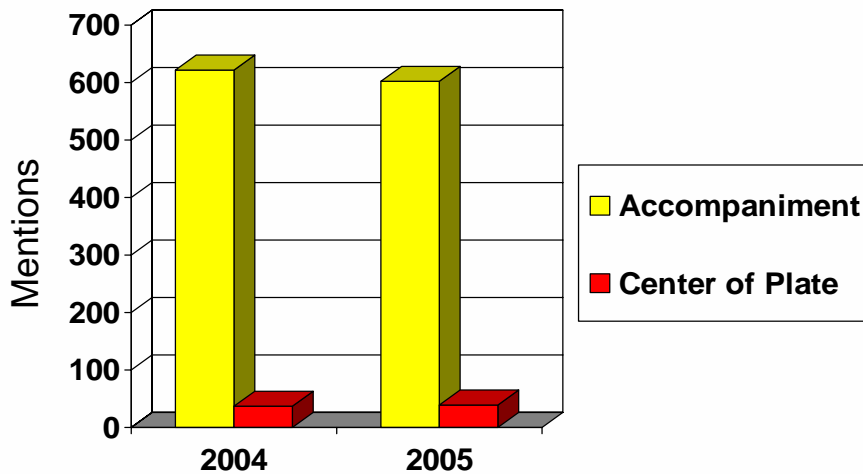
Mentions of vegetable servings in the Entrées category have decreased slightly, although the number of mentions in this category is high.

Most vegetables in Entrées are featured as accompaniments, such as sautéed vegetables, potatoes and beans.

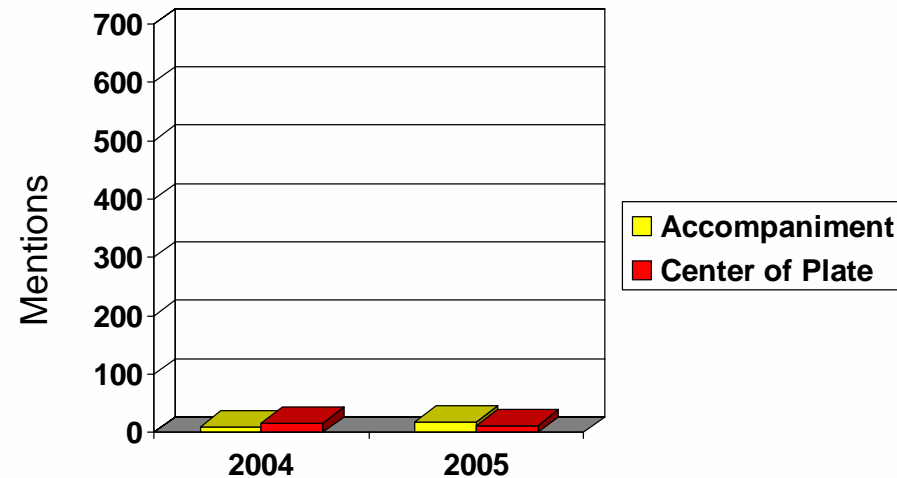


Applications of Vegetable Servings in Entrees by Segment

Casual Dining



QSR

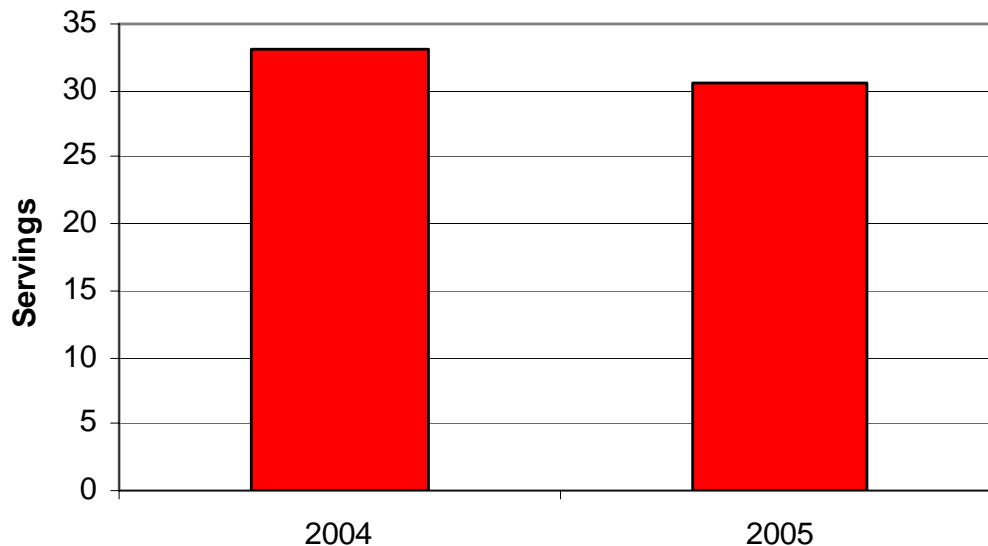


Mentions of vegetable servings in Entrees are primarily as an accompaniment item on the plate. Menu options that feature vegetables as the center of the plate have great potential to be expanded in both segments.



Mentions of Fruit Servings Entrées

Fruit Servings in Entrées



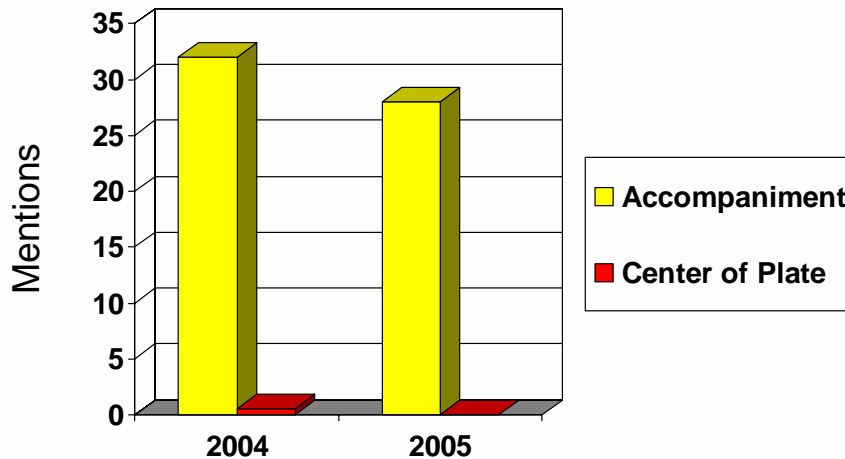
Mentions of fruit servings in Entrées have decreased slightly.

Examples of fruit in Entrées include fruit as an accompaniment (pineapple on chicken), fruit side items (baked apples, apple sauce), and salsa.

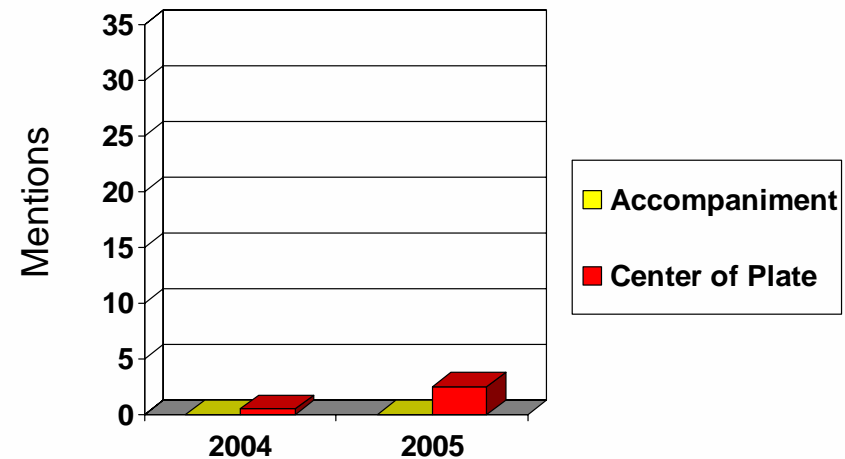


Applications of Fruit Servings in Entrees by Segment

Casual Dining



QSR

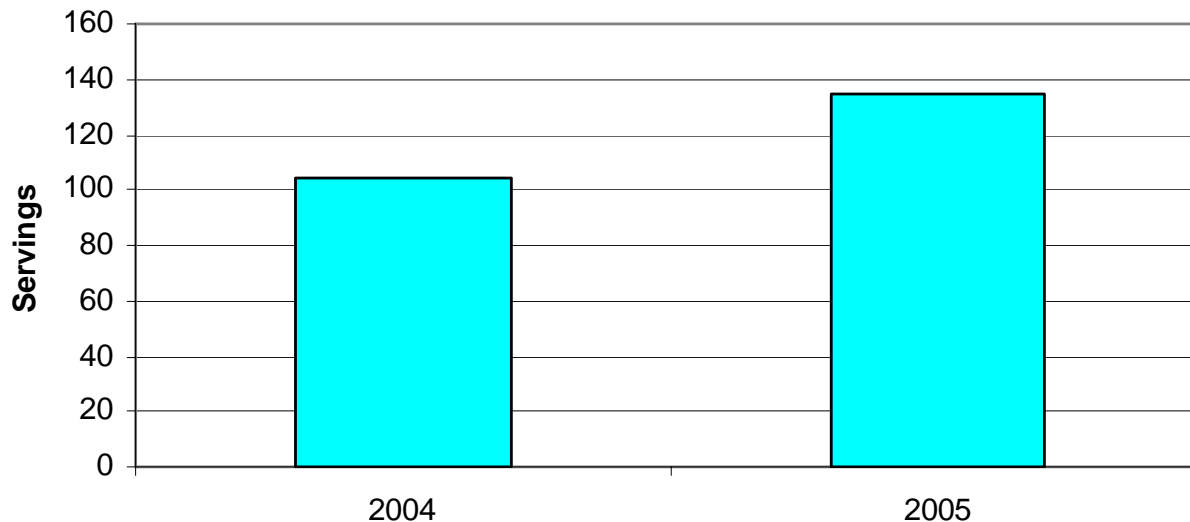


In Casual Dining, mentions of fruit servings in Entrees are as accompaniments, whereas in QSRs, fruit servings are not mentioned as accompaniments at all. Mentions of fruit servings as the center of the plate in QSRs probably reflects the introduction of fruit salads in several chain restaurants.



Mentions of Vegetable Servings Kids Meals

Vegetable Servings in Kids Menus



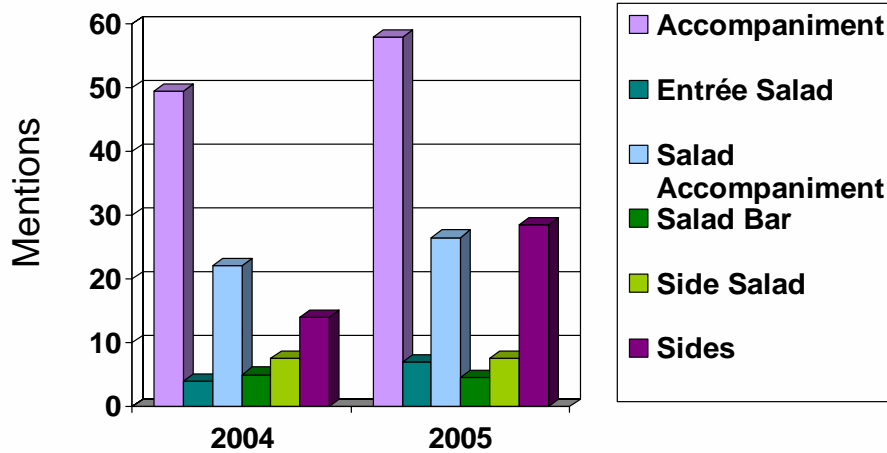
Trends indicate that mentions of vegetable servings in the Kids Menu category are increasing.

These increases can be seen in accompaniments, sides and salads such as baby carrots, steamed vegetables, and potato items.

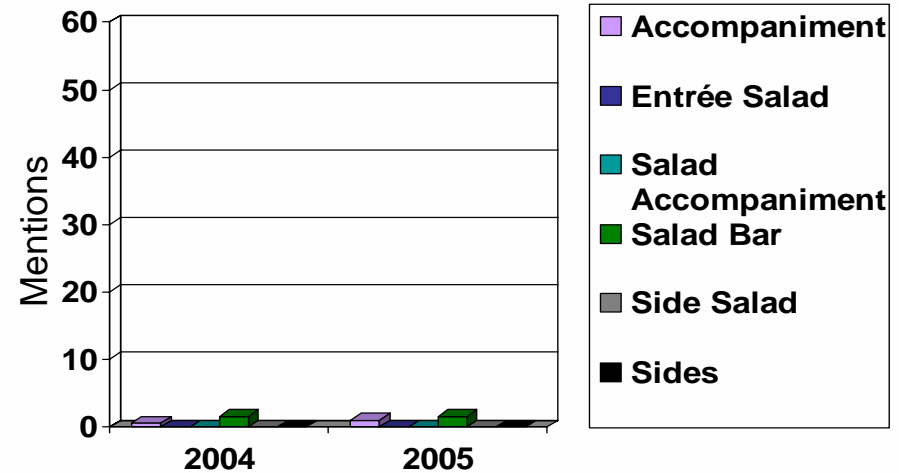


Applications of Vegetable Servings in Kids Meals by Segment

Casual Dining



QSR

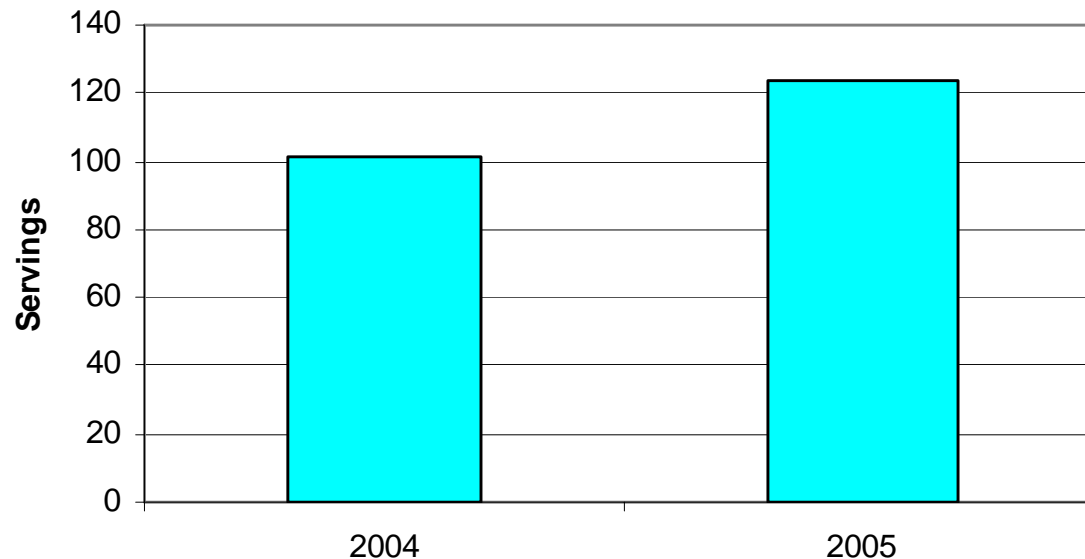


Mentions of vegetable servings by and large are found in the Casual Dining segment. Mentions of vegetable servings in Kids Meals are diverse, offering many options for children. In QSRs, there are virtually no mentions of vegetable servings, a need to be addressed and an opportunity to be utilized.



Mentions of Fruit Servings Kids Meals

Fruit Servings in Kids Menus

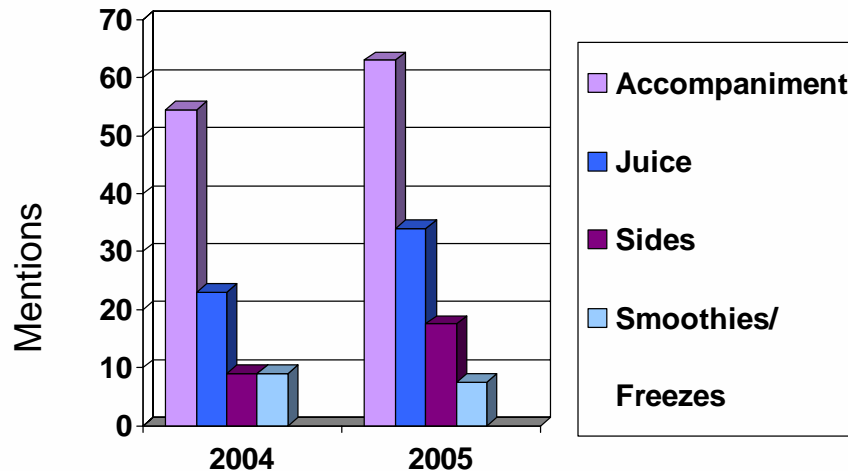


There was a large increase in total mentions of fruit servings on Kids Menus.

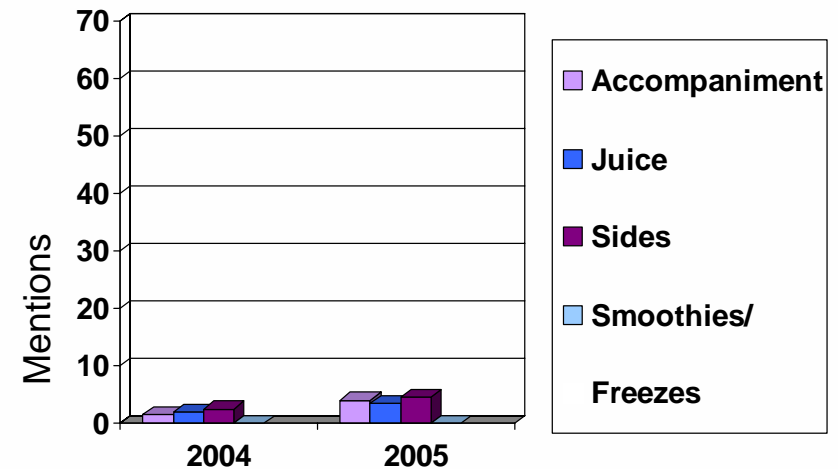


Application of Fruit Servings in Kids Meals

Casual Dining



QSR

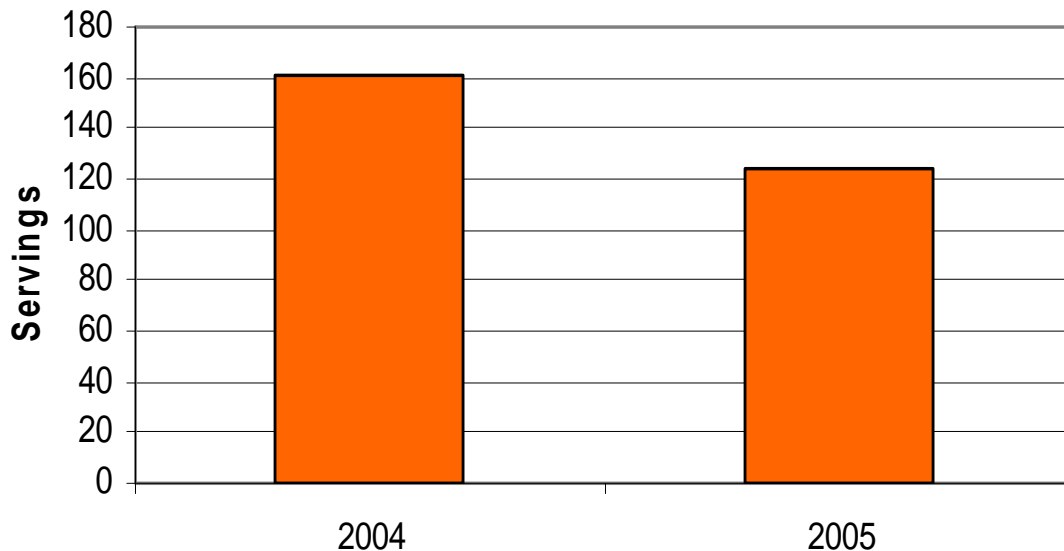


Most of the mentions of fruit servings on the Kids Menu are found in Casual Dining restaurants as accompaniments, juice, sides or smoothies/freezes. Although there has been a very slight increase in mentions of fruit servings on the Kids Menu at QSRs, the number of mentions in this segment is very low. There is clearly room for growth.



Vegetable Servings in Certain Types of Mexican Food

Vegetable Servings in Certain Types of Mexican Food



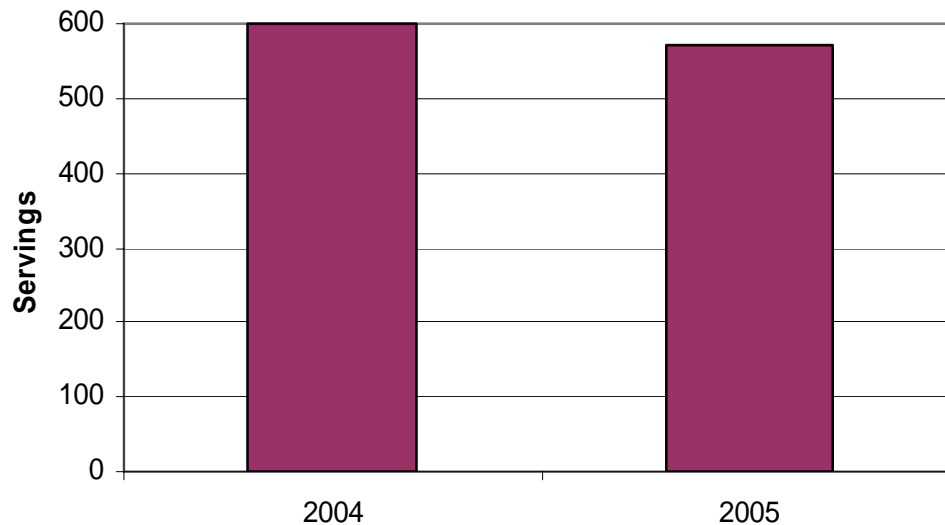
There was a large decrease in mentions of vegetable servings in the Mexican food category. This decrease appears to have occurred secondary to menu changes in several QSRs, and the closing of one Casual Dining Mexican restaurant during the reporting period.

Foods included in this meal part include tacos, burritos, enchiladas, fajitas, and tamales. Given the popularity of Mexican food and the compatibility of vegetables with these menu items, the decrease is somewhat surprising.



Mentions of Vegetable Servings Entrée Salads

Vegetable Servings in Entrée Salads

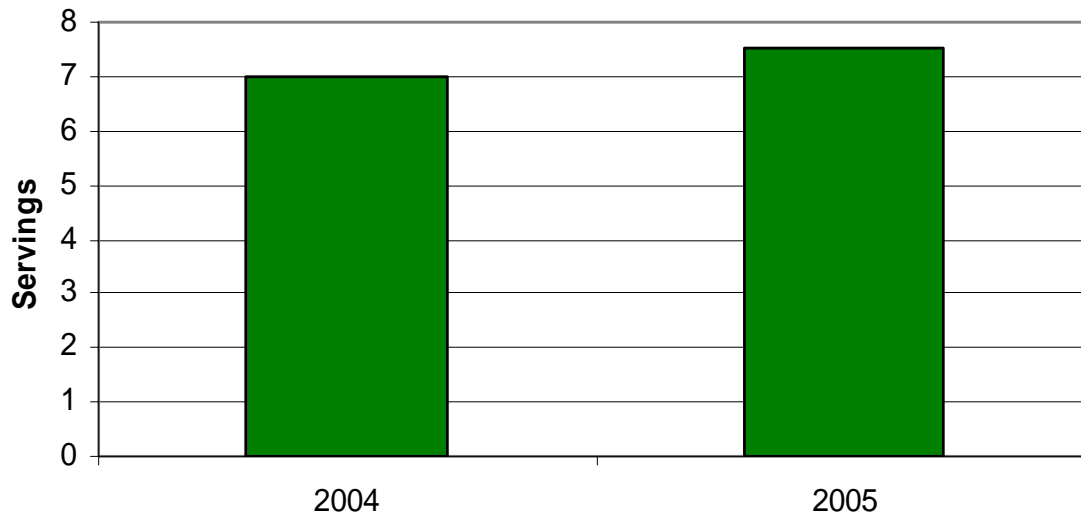


There has been a slight decrease in mentions of vegetables in the Entrée Salads category. Nevertheless, there are numerous offerings that provide the opportunity to focus on salad as a main dish.



Mentions of Vegetable Servings – Salad Bar

Vegetable Servings in Salad Bars



There has been essentially no change in mentions of vegetable servings at Salad Bars.

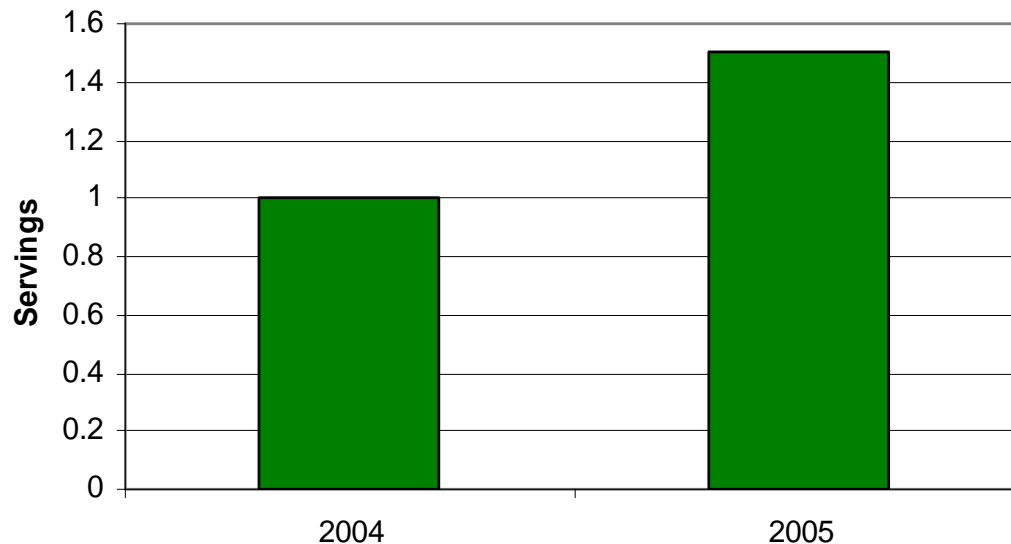
Examples of vegetables offered include greens, and other fresh vegetables such as broccoli, shredded carrots and peas.

Clearly, Salad Bars are ideal for offering the many different types of vegetables to increase variety of intake.



Mentions of Fruit Servings Salad Bar

Fruit Servings in Salad Bars



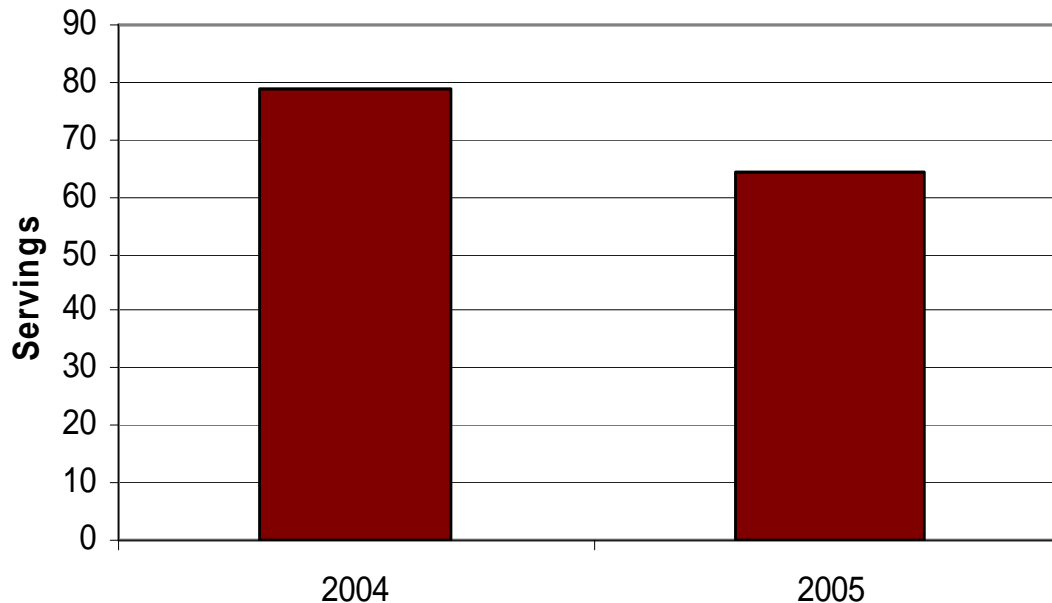
Mentions of fruit servings at Salad Bars is very low, but have increased.

Fruit servings available at Salad Bars include fresh, dried and canned fruit.



Mentions of Vegetable Servings Sandwiches

Vegetable Servings in Sandwiches



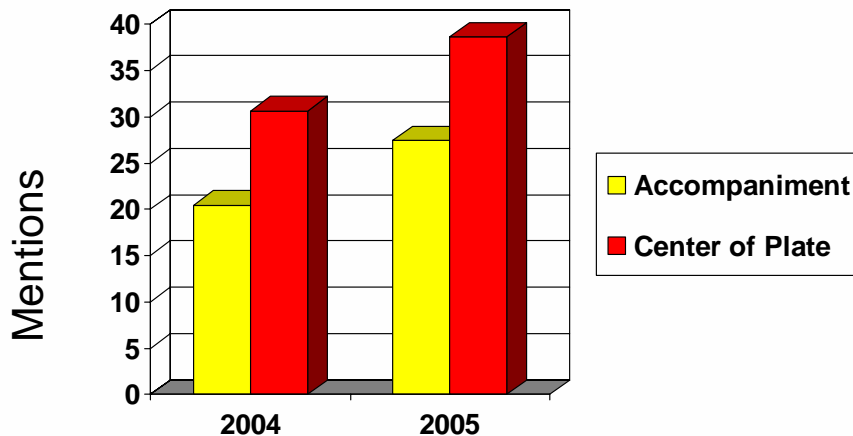
There has been a decrease in mentions of vegetable servings in Sandwiches.

Vegetables in Sandwiches may be included as an accompaniment, such as lettuce and tomato, or as center of the plate, such as grilled vegetables or eggplant parmesan.

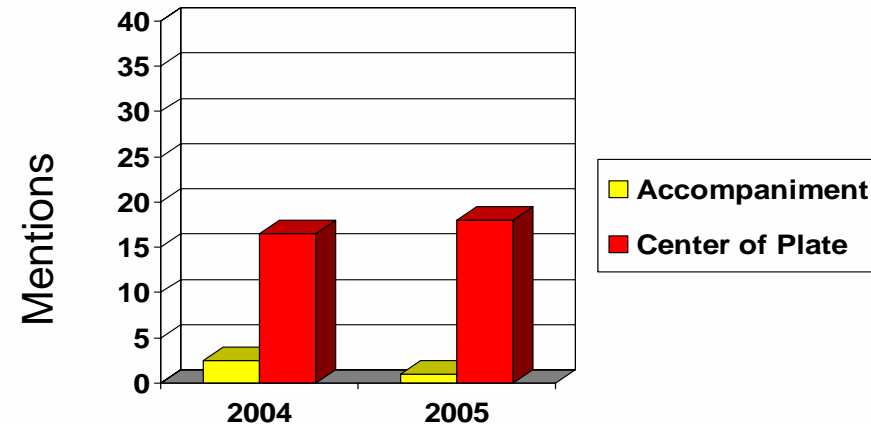


Applications of Vegetable Servings in Sandwiches by Segment

Casual Dining



QSR

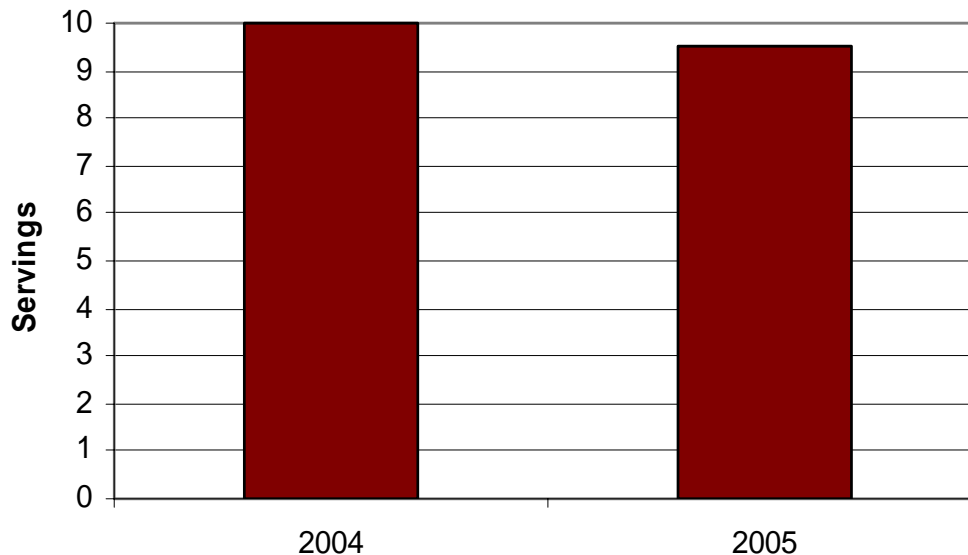


In the Sandwiches category, mentions of vegetable servings as a center of the plate item are growing, especially in the Casual Dining segment. The low number of mentions of vegetable servings as an accompaniment at QSRs is probably because most items are a la carte, or that vegetable servings in 'combos' are counted as Sides or as Add-Ons.



Mentions of Fruit Servings Sandwiches

Fruit Servings in Sandwiches



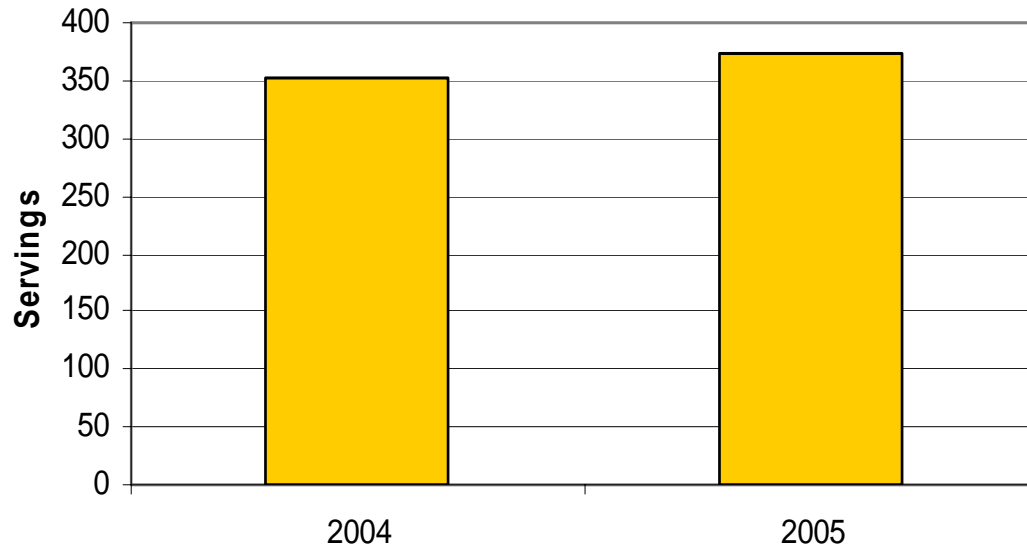
Overall, mentions of fruit servings in Sandwiches are very low, and have decreased slightly.

Fruit in the Sandwiches category is most often found as an accompaniment, such as fruit salad or fresh fruit slices.



Mentions of Vegetable Servings Sides

Vegetable Servings in Sides



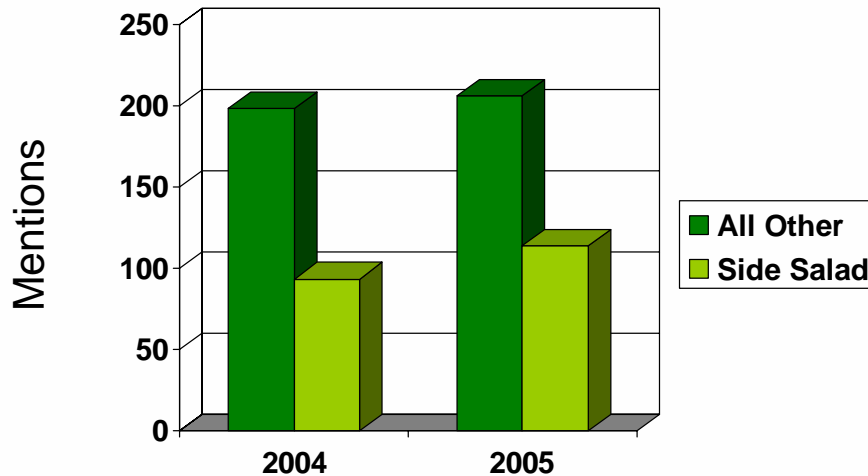
Mentions of vegetables servings as Sides has increased.

Examples of vegetables as sides include potatoes, corn, broccoli, sautéed vegetables, and other fresh vegetables.

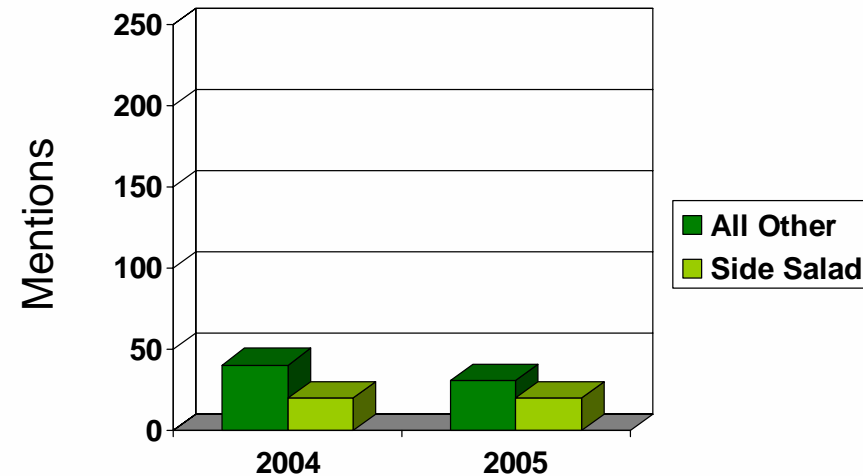


Application of Vegetable Servings in Sides by Segment

Casual Dining



QSR

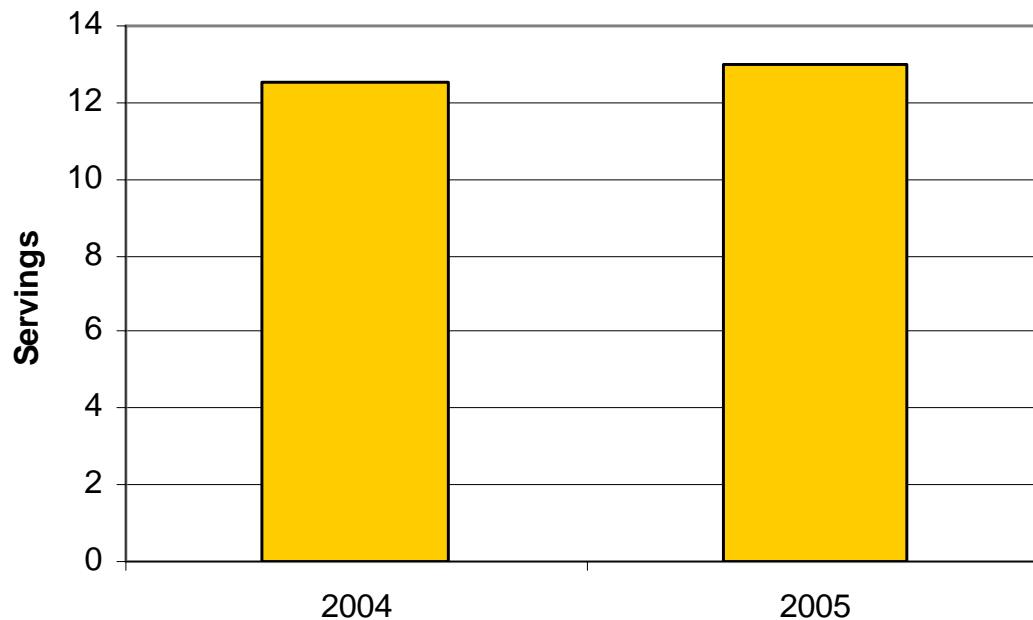


Mentions of vegetable servings as Sides slightly increased in Casual Dining, and decreased in QSRs. Some of the change in QSRs may be related to an increase in mentions of vegetable servings in Add-Ons/Options, which also occurred in Casual Dining. Clearly, there is an opportunity to increase mentions of vegetable servings at QSRs, taking into consideration possible obstacles to including vegetables that exist for these restaurants.



Mentions of Fruit Servings Sides

Fruit Servings in Sides



Mentions of fruit servings as Sides has increased slightly. Examples of common fruit side items include fresh fruit cups, fruit salads, or apple slices.



Summary

- \$ Opportunities to increase mentions of servings of fruits and vegetables on restaurant menus are at large.



Summary

\$\$

Although mentions of vegetable servings are high, there is still potential to increase mentions in several meal parts in both Casual Dining and QSRs, particularly as Center of the Plate in Entrees, and in Sandwiches. Creative ways of including vegetables at Breakfast also have many possibilities.



Summary

\$\$\$ In QSRs, there is clearly an opportunity to increase the availability of both vegetable and fruit servings as Add-Ons/Options, Sides, and on Kids Menus.



Summary

\$\$\$\$

Overall, mentions of fruit servings are low in both Casual Dining and QSRs. There is considerable potential and opportunity to ‘think out of the box’ to add new menu items that include fruits in all meal categories, and thereby increase mentions of fruit servings on menus.



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