

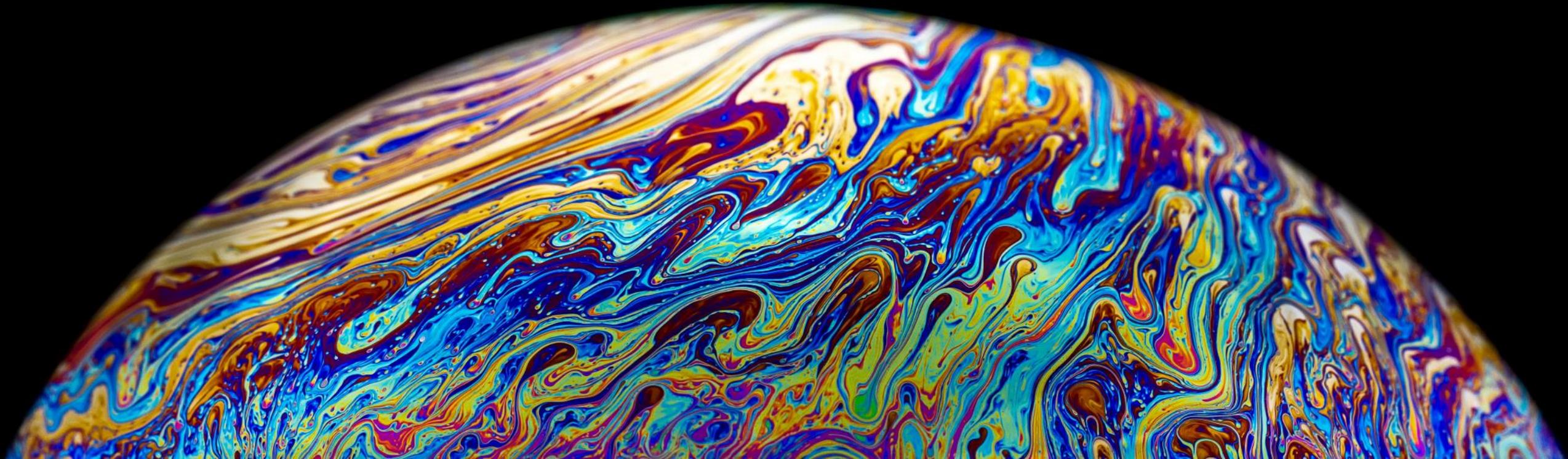
the world of

# BUILDING BLOCKS





# The Big Trends



# GLOBAL DISHES

## INCEPTION

Many top growing dishes happen to be plant based. These dishes can traditionally use meat in a minimal amount such as mapo tofu (newer versions replace it with mushrooms for a more traditional plant-based option). Other applications are from cultures where plants and pulses play a starring role in dishes. Lastly you can replace dairy-centric halloumi or paneer with tofu for a truly vegan offering, such as the tofu makhani (which uses not cream or butter as is traditional).

Mapo Tofu with king oyster mushrooms |  
Little Radio, Tacoma, WA



Gobhi Manchurian |  
Azitra, Bloomfield, CO



Paneer Chili | Little India Restaurant, Lakewood, CO



Tofu (Vegan) Makhani (also  
available as paneer) |  
Berry Nourish'n Organic  
Kitchen,  
Surrey, British Columbia,  
Canada



	Menu Penetration	12-Mo Growth	4-Year Growth
Ma Po Tofu	3.0%	+9%	+21%
Paneer Makhani	0.7%	+10%	+23%
Gobi Manchurian	0.6%	+7%	+137%
Dal Tadka	0.5%	+18%	+36%
Chilli Paneer	0.5%	+9%	+43%
Baingan Bharta	0.2%	+9%	+33%
Jeera Aloo	0.2%	+22%	+56%
Peas Pulao	0.2%	+25%	+24%
Paneer Dum Biryani	0.2%	+43%	+232%



Dal, a lentil-centric dish, is growing across all restaurant segments, including QSR.

+16%

growth on all menus in the last 4 years

3.0%

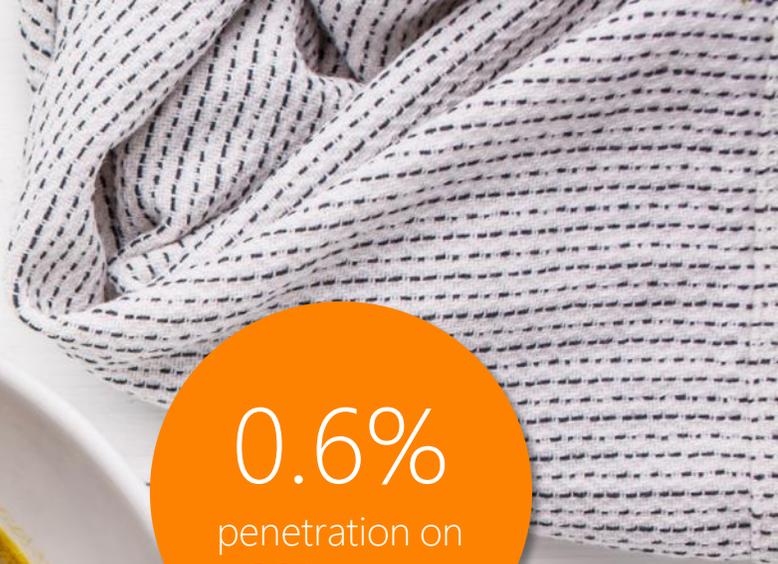
penetration on all menus

0.6%

penetration on QSR menus

+35%

growth on QSR menus in the last 4 years





Dal Makhani





# PULSES

## BROADEST APPEAL

what's most common on app, entrée, side menus

	Menu Penetration	12-Mo Growth	4-Yr Growth
Bean	63.6%	-3%	-6%
Black Bean	26.9%	-3%	-5%
Chickpea	14.9%	-6%	-2%
Edamame	10.1%	-4%	+3%
Lentil	7.5%	-6%	-14%
Pinto Bean	4.4%	-5%	-4%
White Bean	3.9%	-9%	-19%
Red Bean	3.2%	-7%	-16%
Soy Bean	2.6%	-9%	-19%
Kidney Bean	1.7%	-11%	-25%
Cannellini Bean	1.6%	-10%	-27%
Split Pea	1.2%	-22%	-37%
Yellow Lentil	1.0%	+9%	+21%
Black Eye Pea	1.0%	-18%	-37%
Fava Bean	1.0%	-21%	-36%
Black Lentil	0.9%	+10%	+2%
Lima Bean	0.7%	-13%	-19%
Mung Bean	0.7%	+3%	+10%
Red Lentil	0.6%	-7%	+15%
Butter Bean	0.4%	-26%	-20%



This frozen bowl from Healthy Choice is part of their Simply Steamers line and features lentils and chickpeas with Mediterranean veggies in a lemon herb sauce.



Harvest Snaps Crunchy Loops builds on their more well-known green pea snack crisps with red lentil crunchy loops. The crunchy loops come in three flavors BBQ, Sour Cream & Onion, and Tangy Sweet Chili.



# AS GROUND MEAT

ADOPTION

Lentils especially can be utilized to replicate the texture of ground meat in many applications, though other beans can also be utilized.

Millet & Lentil Sausage Pie |  
Ocean Organics, Toms River, NJ



Lentil Empanada |  
Desmond's Island Soul  
Grill, Virginia Beach, VA



That's (Almost) A Wrap! With lentil-walnut taco meat |  
Strong Hearts on the Hill, Syracuse, NY



Vegetarian Beluga Lentil Shepherds Pie |  
BellflowerYpsi, Ypsilanti, MI





Millet Lentil Sausage Roasted Portobello Pizza Pie  
Ocean Organics,  
Toms River, NJ

# APPLICATIONS

Pulses and more includes lentils, chickpea, edamame, hummus, and field peas, does not include green beans, string beans, wax beans, or long beans

## MOST POPULAR

what's most common paired with pulses and more on menus

	Menu Penetration	4-year Growth
Salad	46.2%	+2%
Rice	41.1%	+2%
Soup	22.6%	-9%
Hummus	21.4%	+15%
Taco	17.1%	+4%
Burrito	16.2%	+5%
Bowl	15.2%	+58%
Rice And Beans	14.7%	-4%
Sandwich	14.3%	+2%
Chili	14.0%	-
Nachos	13.8%	+4%
Refried Bean	12.1%	-4%
Burger	10.6%	+11%
Enchilada	10.6%	-10%
Fajita	9.8%	-5%
Wrap	9.4%	+12%
Quesadilla	8.7%	-1%
Tostada	8.7%	-8%
Huevos Rancheros	7.8%	+16%
Black Bean Sauce	7.4%	-10%

## TRENDING

what's growing fastest paired with pulses and more on menus

	Menu Penetration	4-year Growth
Poke	1.3%	+528%
Chicken Bowl	1.1%	+117%
Crudite	1.5%	+116%
Street Taco	1.3%	+91%
Quinoa Salad	1.2%	+79%
Kale Salad	1.5%	+75%
Tinga	1.3%	+70%
Taco Bar	3.1%	+63%
Bowl	15.2%	+58%
Rice Bowl	1.5%	+51%
Ramen	1.2%	+50%
Black Bean Burger	3.7%	+37%
Breakfast Burrito	3.3%	+33%
Cobb	1.3%	+32%
Caesar	5.8%	+32%
Chilaquiles	2.9%	+31%
Falafel	4.4%	+29%
Curry	6.0%	+28%
Slider	1.5%	+27%
Breakfast Taco	1.1%	+26%



## Bowl/Dish Base

Sep 2022 \$13.49

Twin Peaks

### CHICKEN STREET CORN SALAD



Grilled chicken, iceberg, charred corn, lentils, Billionaire's Bacon, roasted jalapeños, Parmesan, pico de gallo, green onions, cilantro, tortilla strips, creamy lime vinaigrette, chili lime salt.

Unbranded PI: 51% ★★★★★  
Branded PI: 58% ★★★★★  
Uniqueness: 49% ★★★★★  
Frequency: 14% ★  
Draw: 46% ★★★★★  
Value: 29% ★★

**SCORE**  
**49**

specialty appeal

## Dip/Spread

Sep 2021 \$10.50

Le Pain Quotidien

### VEGGIE BANH MI



Roasted shiitake & cremini mushrooms, black lentil pate, pickled daikon, carrot & fresno, plant-based harissa aioli on baguette.

Unbranded PI: 34% ★  
Branded PI: 61% ★★★★★  
Uniqueness: 53% ★★★★★  
Frequency: 17% ★★  
Draw: 48% ★★★★★  
Value: 27% ★★

**SCORE**  
**36**  
consider

## As Burrito or Taco Filling

May 2022 \$11.10

Chipotle

### GARLIC GUAJILLO STEAK BURRITO



Garlic Guajillo Steak wrapped in a warm flour tortilla with rice, beans, or fajita veggies, and topped with guac, salsa, queso blanco, sour cream or cheese.

Unbranded PI: 58% ★★★★★  
Branded PI: 54% ★★★★★  
Uniqueness: 45% ★★★★★  
Frequency: 22% ★★★★★  
Draw: 56% ★★★★★  
Value: 32% ★★

**SCORE**  
**64**  
volume driver

## Texture and Protein Addition to Rice Dishes

Nov 2021 \$16.00

P.F. Chang's

### SHORT RIB FRIED RICE



Braised beef short ribs stir-fried with rice, kimchi, mushrooms, edamame, eggs, wasabi mayonnaise and green onions

Unbranded PI: 48% ★★★★★  
Branded PI: 51% ★★★★★  
Uniqueness: 56% ★★★★★  
Frequency: 16% ★  
Draw: 49% ★★★★★  
Value: 31% ★★★★★

**SCORE**  
**52**  
specialty appeal

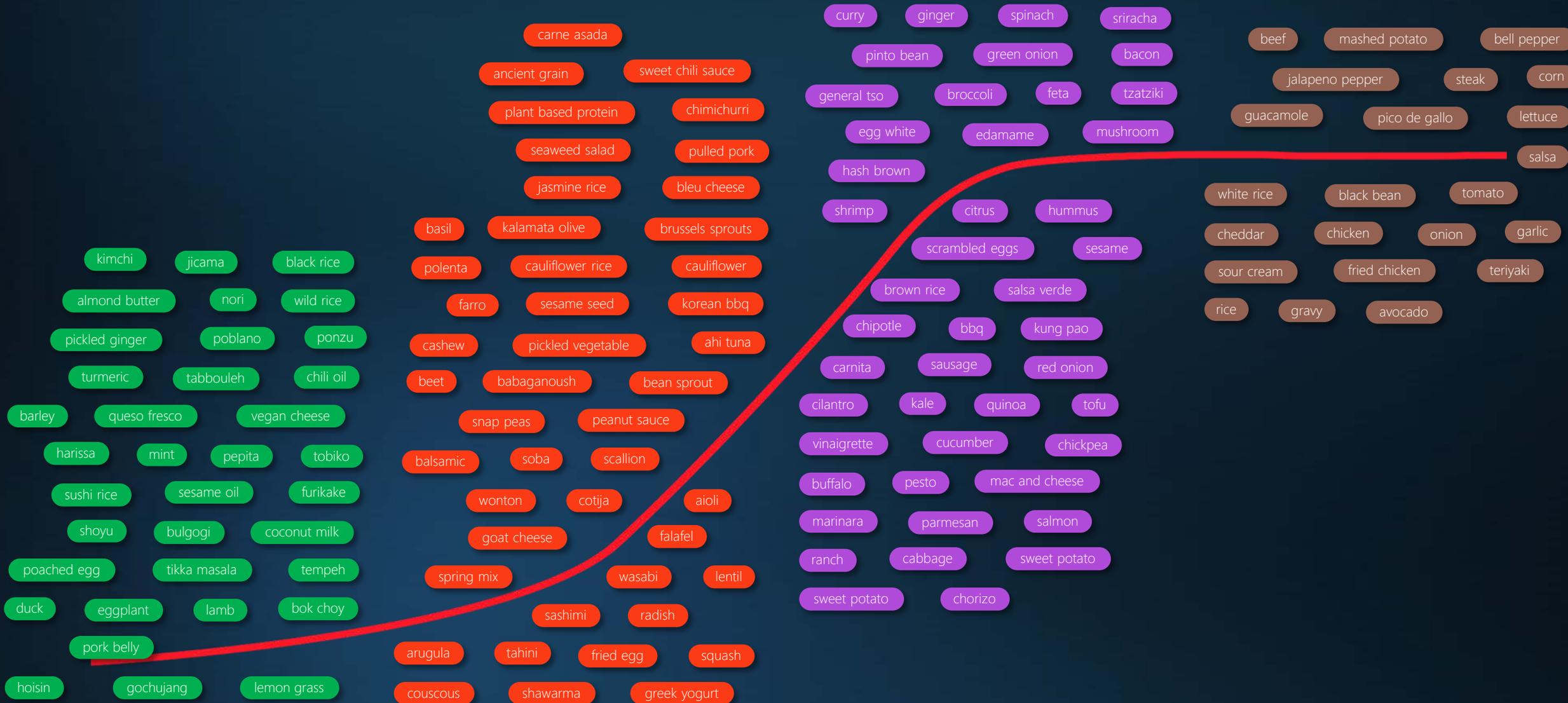


# Trending Terms Paired with Lentils on Menus

ranked on 4-year menu penetration growth

	MENU PENETRATION	4-YEAR GROWTH
Tofu	3.4%	+255%
Harissa	2.9%	+204%
Scallion	2.7%	+179%
Lemon Juice	3.1%	+164%
Moroccan	3.6%	+154%
Sweet Potato	5.3%	+148%
Bowl	6.8%	+137%
Saffron	3.4%	+137%
Turmeric	3.4%	+137%
Cherry Tomato	2.7%	+123%
Red Pepper	4.4%	+103%
Soy Sauce	2.4%	+103%
Mango	2.4%	+103%
Pumpkin	2.4%	+103%
Almond	5.6%	+94%
Tahini	4.1%	+92%
Protein	2.7%	+86%
Scallop	2.7%	+86%
Cauliflower	6.8%	+78%
Sesame	3.4%	+78%





**inception**  
fine dining, mixology, earliest stage

**adoption**  
trendy restaurants + specialty grocers

**proliferation**  
chain restaurants + mainstream grocery

**ubiquity**  
find it just about anywhere



# MEGA TRENDS

the big stuff you need to know

NEW GRAINS

INCEPTION

DIET SPECIFIC

INCEPTION

INDIAN

INCEPTION

POKE

ADOPTION

MIDDLE EASTERN

ADOPTION

CRUNCH

ADOPTION

DRIZZLES

ADOPTION

MAC & CHEESE

PROLIFERATION

MED-ITERRANEAN

PROLIFERATION

RICE BOWLS

PROLIFERATION

MEXICAN

UBIQUITY

SOUTHERN COMFORT

UBIQUITY

# HERO INGREDIENTS

what's most common on pm bowl menus

	Menu Penetration	4-year Growth
Chicken	52.2%	-3%
Cheese	33.9%	-13%
Bean	33.4%	+18%
Sauce	33.2%	+5%
Onion	32.3%	+17%
Tomato	30.8%	-4%
Vegetable	27.4%	+8%
Avocado	25.8%	+118%
Beef	25.2%	-8%
Pepper	20.5%	+26%
Black Bean	19.9%	+36%
Shrimp	18.8%	+23%
Lettuce	18.4%	-22%
Cilantro	17.8%	+62%
Carrot	17.5%	+35%
Salsa	16.6%	+13%
Tortilla	16.2%	-19%
Cucumber	16.1%	+77%
Corn	15.4%	+51%
Grilled Chicken	15.3%	+8%

# FOOD-FORWARD

what's growing fastest on pm bowl menus

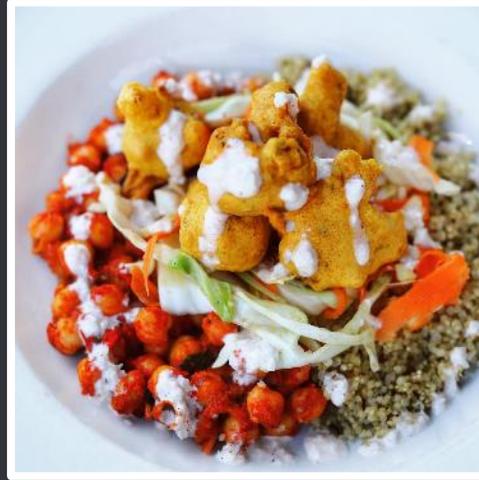
	Menu Penetration	4-year Growth
Ponzu	1.7%	+1166%
Turmeric	1.6%	+1026%
Toasted Sesame Seed	1.5%	+955%
Poke	7.4%	+791%
Masago	1.2%	+744%
Lime Vinaigrette	1.2%	+744%
Broccolini	1.2%	+744%
Jicama	1.1%	+674%
Grape Tomato	2.0%	+639%
Crema	3.5%	+533%
Brussels Sprouts	3.9%	+463%
Chimichurri	1.6%	+463%
Ginger Dressing	1.6%	+463%
Pickled Red Onion	2.2%	+439%
Pickled Ginger	1.5%	+428%
Chia	1.5%	+428%
Sweet Potato	6.2%	+400%
Sunflower Seed	1.4%	+392%
Cotija	1.9%	+369%
Sweet Soy	1.3%	+357%

# INDIAN

## INCEPTION

Any cuisine that uses rice as a base for many dishes can act as inspiration for bowl innovation. Indian cuisine is poised to continue to trend with several dishes trending on overall menus, but not yet common in bowls.

Indian Pakora Buddha Bowl | Plates on the Square, Carrollton, GA



Tandoori Veggie Bowl | The Little Food Cafe, Bayonne, NJ



Veggie Croquette Perfect Balance Bowl with yellow lentil daal | Choolaah, Pittsburgh, PA



Chicken Tikka Masala Bowl | World Wrapps, Multiple Locations, CA



Bowls are growing at QSR, and lentils are trending within bowls.

**+229%**

growth of **lentils within bowls** in the past 10 years



**+41%**

growth of **bowls at QSR** in the past 10 years

# TOP BOWLS

Classic steak and potato bowls have the top scores, but bowls with Mexican and Southwest influence or Mediterranean influence also offer high scores and can help draw in new loyal consumers that may not have other items they love on your menu.

Nov 2021 \$9.99

Moes Southwest Grill

### LOADED STEAK & POTATO BOWL



Steak, seasoned potatoes, bacon, queso, shredded cheese and sour cream in a bowl.

Unbranded PI: 57%	★★★★★	<b>SCORE</b> <b>95</b> superstar
Branded PI: 66%	★★★★★	
Uniqueness: 52%	★★★★★	
Frequency: 25%	★★★★★	
Draw: 55%	★★★★★	
Value: 44%	★★★★★	

Jun 2022 \$12.75

Qdoba

### SURF & TURF BOWL



Double the protein, double the flavor with new Citrus Lime Shrimp and grilled steak with hand-crafted guacamole, chile crema, pico de gallo, cotija cheese, cilantro lime rice and black beans served in a bowl.

Unbranded PI: 56%	★★★★★	<b>SCORE</b> <b>92</b> superstar
Branded PI: 62%	★★★★★	
Uniqueness: 55%	★★★★★	
Frequency: 22%	★★★★★	
Draw: 57%	★★★★★	
Value: 47%	★★★★★	

Jan 2022 \$10.00

Bj's

### ENLIGHTENED MEDITERRANEAN CHICKEN BOWL



Unbranded PI: 53%	★★★★★	<b>SCORE</b> <b>70</b> consider
Branded PI: 59%	★★★★★	
Uniqueness: 44%	★★★☆☆	
Frequency: 18%	★★★☆☆	
Draw: 53%	★★★★★	
Value: 49%	★★★★★	

# TOP SALADS

Top salads demonstrate the need for textural contrast from crunchy tortilla strips (or even add ons like taquitos) to juicy fruits like mango. The Buffalo Ranch Chicken Salad shows how options of protein or other add-ons can bump up uniqueness and purchase intent on a more familiar favorite.

Dec 2021 \$8.49

El Pollo Loco

## CHICKEN TAQUITO DOS LOCOS SALAD



Savor handmade chicken taquitos served on crisp super greens, lettuce, and topped with a double portion of our chopped fire-grilled chicken, handmade guacamole, queso fresco, and pico de gallo. Includes creamy cilantro dressing.

Unbranded PI: 58% ★★★★★  
 Branded PI: 64% ★★★★★  
 Uniqueness: 54% ★★★★★  
 Frequency: 24% ★★★★★  
 Draw: 53% ★★★★★  
 Value: 44% ★★★★★

**SCORE**  
**99**  
 superstar

Jan 2022 \$8.79

Whataburger

## BUFFALO RANCH CHICKEN SALAD



The Buffalo Ranch Chicken Salad comes with your choice of Grilled Chicken, Whatachick'n or Spicy Chicken filet on a bed of Red Roma lettuce blend with three strips of crispy, smokey bacon, shredded carrots, grape tomatoes and Blue Cheese crumbles. It's topped with a drizzle of Whataburger's one-of-a-kind Buffalo Sauce for a kick of heat and served with a side of zesty Buttermilk Ranch dressing.

Unbranded PI: 54% ★★★★★  
 Branded PI: 57% ★★★★★  
 Uniqueness: 50% ★★★★★  
 Frequency: 25% ★★★★★  
 Draw: 57% ★★★★★  
 Value: 48% ★★★★★

**SCORE**  
**99**  
 superstar

Jun 2022 \$9.00

Cotton Patch Cafe

## SIZZLIN' MANGO SALAD



Grilled chicken, spring mix, shredded cheese, diced mangos, topped with pico de gallo, served with warm, crunchy tortilla strips.

Unbranded PI: 51% ★★★★★  
 Branded PI: 76% ★★★★★  
 Uniqueness: 56% ★★★★★  
 Frequency: 22% ★★★★★  
 Draw: 50% ★★★★★  
 Value: 46% ★★★★★

**SCORE**  
**99**  
 superstar

 **D**ATASSENTIAL

