

The Fresh Factor

Fresh will be a foremost factor in menu and restaurant concept development in upcoming years

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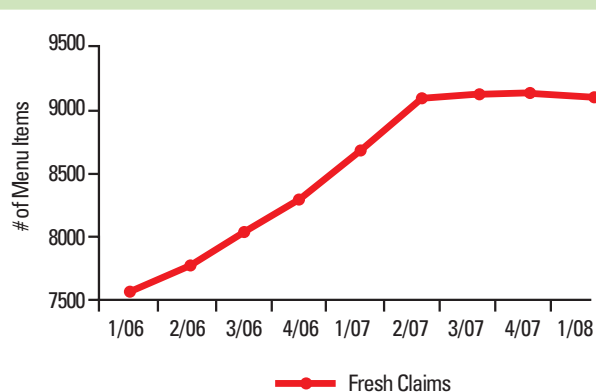
Julia Child once said: "You don't have to cook fancy or complicated masterpieces, just good food from fresh ingredients." Restaurants in the United States have finally acknowledged this message. In the past couple of years, the restaurant menu has been a canvas for colorful dishes with sometimes unpronounceable and unimaginable ingredients, flavor combinations and preparations. While scientific food movements such as molecular gastronomy are still popular, the newest menus are using and marketing "fresh" in both food and beverage.

Fresh

The popularity of the term fresh on the menu is apparent. According to Mintel Menu Insights, there has been a 21% increase in ingredients that claimed to be "fresh" between January 2006 and March 2008 (F-1). Restaurants are adding or switching to fresh ingredients every day. Additionally, restaurant marketing campaigns are differentiating restaurants based on freshness. Fresh will continue to be a strong influence on the menu in upcoming years.

Incidence of "fresh" claims on the menu

F-1



The fresh claim is typically associated with produce on the menu, because it carries the positive connotation of being nutritious and flavorful. There has been a 51% increase in fresh fruits, vegetables and herbs on the menu (January 2006–March 2008).

But produce is just one part of the fresh story. An increasing number of restaurants are switching to fresh meats and dairy. Good Times Restaurants Inc. made the conversion from frozen Coleman all-natural beef patties to an all-natural fresh beef product. Under the premise of "Fresh Never Frozen," Good Times continues to increase the variety of fresh ingredients used to meet their customers' needs.

Not only are restaurants featuring more fresh ingredients, they are also using more fresh preparations on those ingredients. Freshly-prepared ingredients let customers know that the food is made after they come in the door, not the night before. Preparations such as freshly grilled, fresh-baked, fresh-squeezed and freshly brewed are growing on the menu.

Along with adding fresh ingredients and preparations, restaurants are adjusting their philosophy to focus on fresh over other concerns (T-1). Fast casual Mexican restaurants take the lead in fresh philosophies. Baja Fresh bases its menu and restaurant concept around being the freshest. Baja Fresh's slogan says it all: "It's About Flavor, It's About Fresh, and ... It's About Time!" Likewise, Chipotle's mission is to "offer a simple menu of great food prepared fresh each day, using many of the same cooking techniques as gourmet restaurants." Other restaurants such as Subway, Season's 52, Jamba Juice, Ruby Tuesday's and Red Lobster have either been built around freshness or have changed their menus to focus on fresh.

Top marketing claims for restaurant segments (missing segments include casual dining and fine dining)

T-1

Rank	Midscale	QSR*	Fast casual
1	fresh	fresh	fresh
2	crispy	creamy	creamy
3	creamy	homemade	homemade
4	crisp	crispy	crisp
5	real	crisp	crispy
6	special	tender	tender
7	homemade	real	house
8	tender	golden	old-fashioned
9	original	special	rich
10	golden brown	golden brown	seasonal

*Quick Serve Restaurants

What's Hot restaurant items ranked by 1,282 chefs

T-2

Ranking	Item	Hot	Passe	Perennial Favorite
1	Bite-size desserts	83%	11%	6%
2	Locally grown produce	81%	5%	14%
3	Organic produce	75%	16%	9%
4	Small plates/tapas/mezze	73%	20%	8%
5	Specialty sandwiches	71%	14%	15%
6	Craft/artisan/microbrew beer	70%	17%	13%
7	Sustainable seafood	65%	21%	14%
8	Grass-fed items	65%	26%	9%
9	Energy drink cocktails	64%	31%	5%
10	Salts (e.g., sea, smoked, colored, kosher)	64%	20%	17%

Source: National Restaurant Association, 2007, What's Hot, What's Not Chef Survey

Factors Influencing Fresh: Organic, Natural and Local

Organic, natural and local ingredients are influencing the freshness of the menu. They also tie restaurant food service into today's "green living" mentality. Green living affects every part of Americans' lives from cars to clothing to food. The term "green living" represents a lifestyle intended to ensure that one's impact on the environment is as minimal (or as positive) as possible.

The restaurant industry has begun to recognize the importance of being "green." In fact, the National Restaurant Association (NRA) has started the Green Task Force to encourage the nation's 935,000 restaurant and food service outlets to adopt practices that benefit both business and the environment.

Organic, natural and local ingredients epitomize fresh and green on the menu. According to an NRA study, locally grown produce and organic produce were number

two and three, respectively, on the list of “What’s Hot” among 1,282 members of the American Culinary Federation (T-2).

While it is most common to see green claims such as organic, natural and local on fine dining menus, other restaurant segments are also making changes. Many restaurants have chosen to add organic and natural claims to their kids’ menus. Panera Bread, Jason’s Deli, Cheebo and Arby’s all added organic or all-natural ingredients to their children’s menus. This is an interesting place for natural and organic ingredients, because it influences the parent’s decision to select the restaurant and it also exposes children to these ingredients at a young age.

As carbon footprints become common vernacular, more restaurants are adding local ingredients to their menus. Many restaurants are listing the name of the farm that the local ingredient came from on the menu in order to bring awareness and help support local farmers. For example, Two’s menu includes caramel poached Frog Hollow Farm pears in puff pastry with caramel swirl ice cream. Farallon serves a Star Route Farms mixed greens salad with smoked golden trout, balsamic vinaigrette and roasted almonds. Currently, the use of local ingredients is limited to fine dining restaurants due to availability and sourcing.

“Fresh” on the menu is taking the science out of food and promoting its inherent goodness. Restaurants are beginning to say good-bye to overprocessed, over-frozen ingredients and hello to fresh, organic, natural and local ingredients.

Mintel Menu Insights tracks trends through data sourced from the 350 largest US chain restaurants and 150 independent restaurants. For more information, visit mintel.com or call 1-312-932-0600.

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