

Quarterly Insights Q2'26

ECONOMIC UPDATES
GENERATIONAL AFFINITY
AVOCADOS ON MENUS



HASS
AVOCADO
BOARD



 **DATASSENTIAL**

Table of Contents

Quarterly Shifts **3**

Consumer Affinity **4**

Avocados On Menus **17**

Health & Wellness on the Menu **31**

Metrics **40**

Key Findings: What Moved This Quarter

1

Gen Z warms up to avocado. Trial and affinity both climbed among Gen Z (70%→73% tried it; 55%→59% love/like it) even as “know it” held flat — the strongest positive shift in consumer sentiment this wave.

2

Regional menu-penetration growth is decelerating. Projected growth for other regions catching up to the West eased from +15%/+7% last wave to +13%/+6% now — the category is still expanding, just more slowly.

3

Breakout dishes cool from their highs. Lettuce Wrap’s 4-year growth eased from +159% to +117% (1-year growth nearly halved). Street Taco, Steak Salad, BBQ and BLTA fell out of the top-15 trending list, replaced by Turkey Wrap, Maki Roll and Crunch Roll.

4

Avocado Salad breaks into the top 15. The new format enters at 9.3% penetration and +6% growth, displacing Ceviche and Avocado Toast from last wave’s most-penetrated dish list.

5

Core formats hold steady, not reversing. Salad and Sandwich penetration barely moved (63.0%, 37.4%); Bowl and Wrap ticked down slightly — signs the category’s biggest use cases have matured rather than declined.

Consumer Affinity

OVERALL FAMILIARITY
GENERATIONAL DIVE

EXPERIENCE How often do you have...

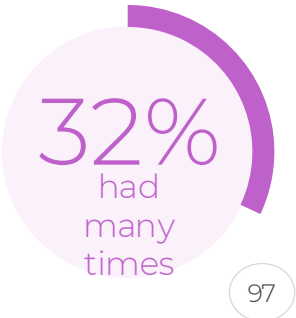
normative indices in
grey circles



- 94% of consumers are aware of AVOCADO
- It's in the 94th percentile among all foods, flavors, and beverages; with greater **awareness** than 94% of all other items
- Change vs. 2 years ago: **-1.2%**



- 77% of consumers have tried AVOCADO
- It's in the 85th percentile among all foods, flavors, and beverages; with greater **trial** than 85% of all other items
- Change vs. 2 years ago: **-0.4%**



- 32% of consumers have had AVOCADO many times
- It's in the 97th percentile among all foods, flavors, and beverages; with greater **regular consumption** than 97% of all other items
- Change vs. 2 years ago: **-1.4%**

HEAT SCORE Growth in consumer familiarity with AVOCADO

declining	flat	gaining slow	gaining fast	on fire!
ripe for reinvention	plateauing but still holding	established trends	trendy, emerging items	the trendiest foods



AFFINITY How do you feel about...

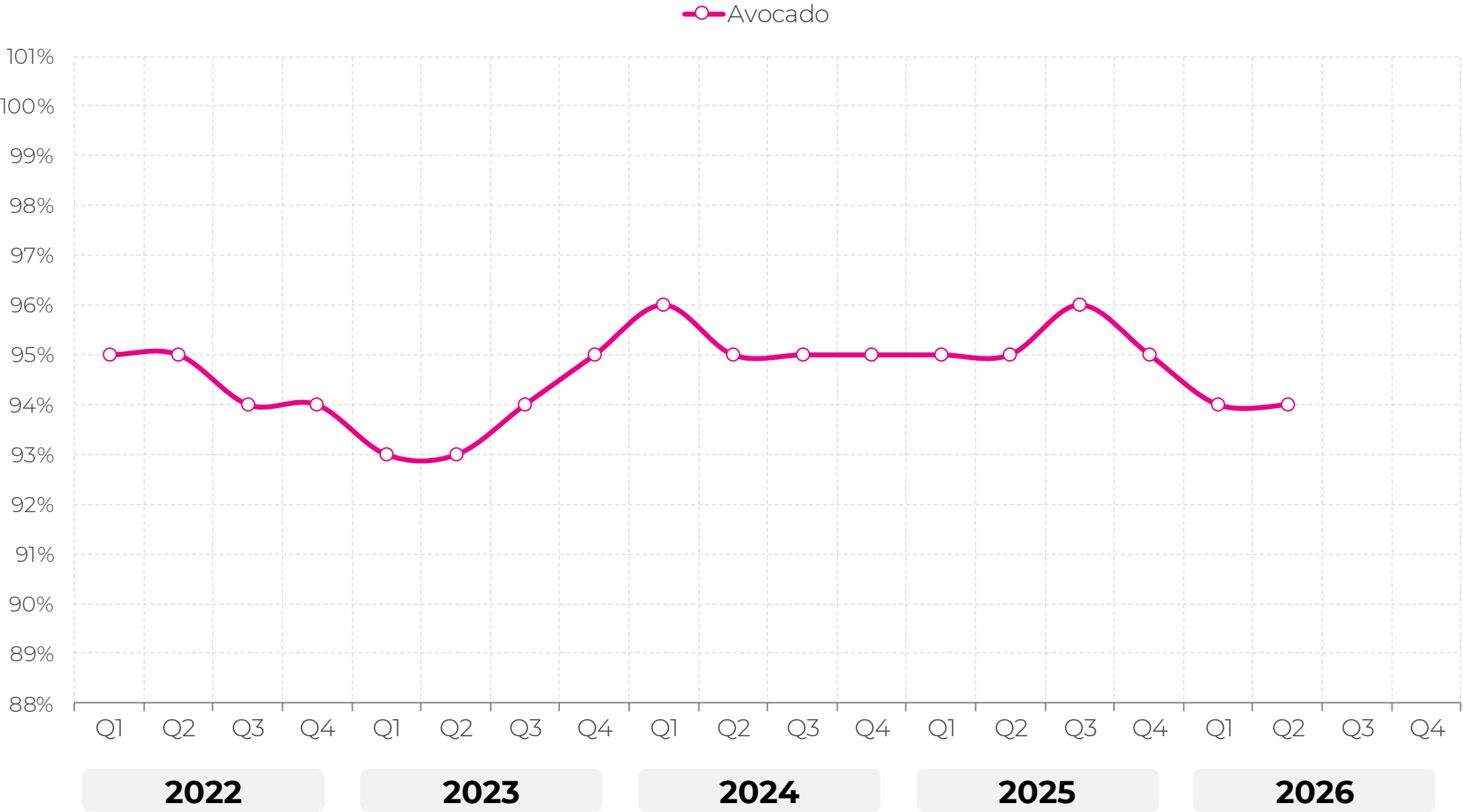
Among Selected Consumers

	All	Consumers Who Know It	Consumers Who Have Tried It
Love It	42%	45%	54%
Like It	22%	24%	28%
Neutral	11%	11%	10%
Dislike	7%	8%	5%
Hate It	6%	7%	2%
No Opinion	11%	5%	1%
Total	100%	100%	100%
Top 2 Box	65%	69%	82%

- Top 2 Box Analysis
- 65% of **consumers** love or like this
 - 69% of **consumers who know it** love or like it
 - 82% of **consumers who have tried it** love or like it
 - Awareness of AVOCADO has a **+4%** impact on Top 2 Box affinity
 - Trial of AVOCADO has a **+17%** impact on Top 2 Box affinity

GROWTH IN 'KNOW IT' FOR: AVOCADO

% of consumers who know it



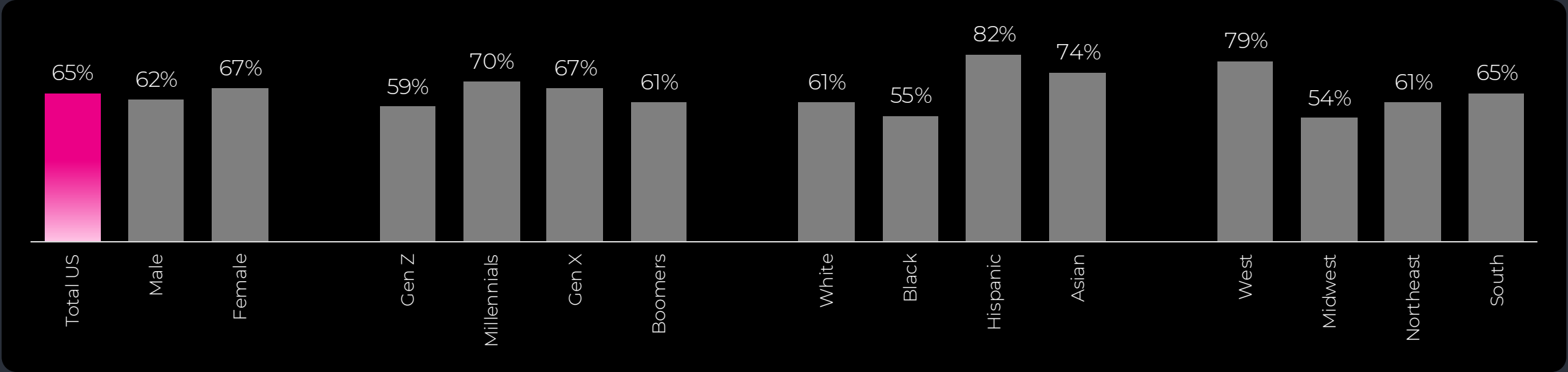
KNOW IT	
YE Q2 2026	94%
YE Q1 2026	94%
YE Q4 2025	95%
YE Q3 2025	96%
YE Q2 2025	95%
YE Q1 2025	95%
YE Q4 2024	95%
YE Q3 2024	95%
Change vs. 2 yrs ago	-1.2%
Heat Score: flat	(plateauing but still holding)

Selected Consumers: **Total US consumers**
Figures shown represent a rolling 1 year (4 quarters) of data

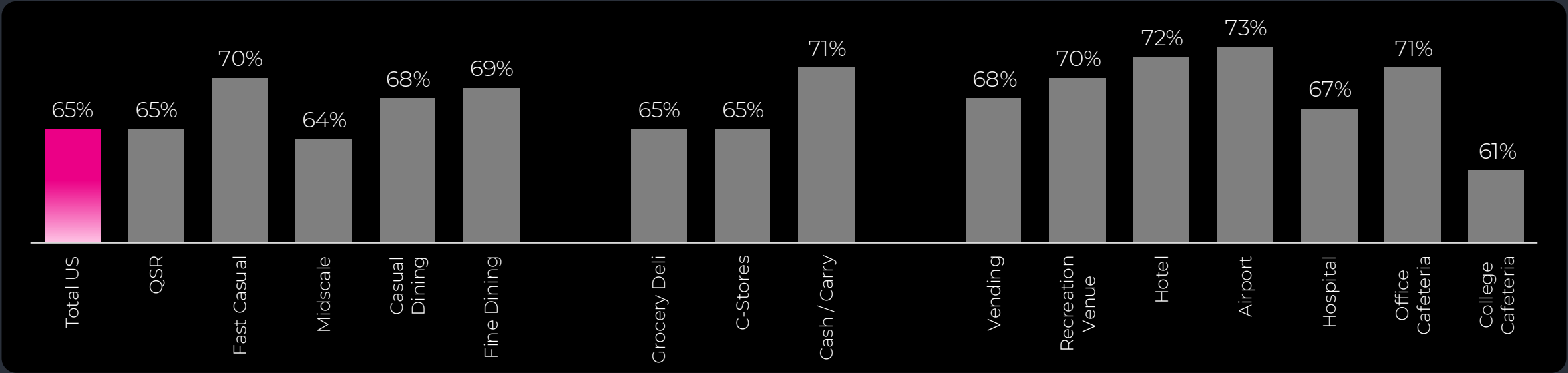
CONSUMER AFFINITY FOR: AVOCADO

% of consumers who love/like it;
among all consumers

BY DEMOGRAPHIC



AMONG VISITORS OF



visitors = past 6 months; data as of YE JUN 2026

Gen Z consumers have less familiarity with avocados. Consider what Gen Z-friendly angles could make for successful pro-avocado social media campaigns.

Guacamole, on the other hand, is seeing Millennials lead in decreasing trial and awareness. For the generation that are the biggest fans of avocados, this highlights a gap that could be addressed to increase guacamole sales.

AVOCADO SENTIMENT

% of gen pop consumers who...

AVOCADOS	KNOW IT		TRIED IT		LOVE OR LIKE IT	
	Q2'26	2-Yr Change	Q2'26	2-Yr Change	Q2'26	2-Yr Change
Gen Z	89%	-4.7%	73%	-2.9%	59%	+1.6%
Millennials	95%	+1.6%	81%	+4.9%	70%	+7.7%
Gen X	94%	-2.1%	78%	-1.3%	67%	-0.6%
Boomers	96%	-0.9%	74%	-3.1%	61%	-3.9%
U.S. Total	94%	-1.2%	77%	-0.4%	65%	+1.1%

GUACAMOLE	KNOW IT		TRIED IT		LOVE OR LIKE IT	
	Q2'26	2-Yr Change	Q2'26	2-Yr Change	Q2'26	2-Yr Change
Gen Z	89%	-0.8%	72%	-0.3%	55%	-0.2%
Millennials	89%	-3.7%	74%	-2.7%	60%	-4.5%
Gen X	91%	-1.3%	78%	+1.6%	68%	+3.3%
Boomers	89%	-4.6%	71%	-4.4%	60%	-1.2%
U.S. Total	90%	-2.9%	74%	-1.7%	61%	-0.9%

Bold, globally-inspired mashups like birria ramen, sushi burritos, and tacos arabes over-index most sharply with Gen Z. When trying to grow Gen Z avocado attachment, these cross-cultural formats are the perfect category to lean on.

Another way to bring avocados to dishes loved by Gen Z is to consider alternative formats of traditional Mexican dishes, such as walking tacos and elote.

GEN Z: TOP INDEXING DISHES

ranked by love/like it index

AVOCADO-FEATURING DISH	TOTAL US	GEN Z CONSUMERS	INDEX
Birria Ramen	19%	32%	165
Sushi Burrito	13%	21%	157
Birria	24%	38%	156
Tacos Arabes	15%	22%	146
Elote	22%	31%	144
Tacos Campechano	17%	24%	140
Walking Taco	32%	43%	137
Birria Tacos	35%	46%	133
Chicken Tinga	17%	22%	129
Al Pastor	26%	32%	124
Torta	26%	31%	119
Chilaquiles	19%	23%	118
Asian Taco	22%	26%	117
Street Taco	64%	71%	113
California Burger	31%	35%	112
Poke	16%	17%	111
California Roll	44%	47%	106
Avocado Toast	43%	46%	106
Taquito	51%	54%	105
Carne Asada	50%	52%	105

Millennial indexes uncover key dishes that align with Gen Z tastes and already have sizeable total affinity: birria ramen, sushi burritos, tacos arabes, birria tacos, and chicken tinga are all good avenues to target younger consumers.

Millennials also over-index on more familiar handheld and Americanized formats like California rolls, Mexican pizza, and taco pizza.

MILLENNIALS: TOP INDEXING DISHES

ranked by love/like it index

AVOCADO-FEATURING DISH	TOTAL US	MILLENNIAL CONSUMERS	INDEX
Birria Ramen	19%	30%	155
Sushi Burrito	13%	20%	148
Tacos Arabes	15%	23%	147
Birria Tacos	35%	50%	143
Chicken Tinga	17%	24%	143
Elote	22%	31%	141
Birria	24%	34%	140
Chilaquiles	19%	27%	139
Al Pastor	26%	36%	137
Torta	26%	35%	135
Asian Taco	22%	30%	134
Tacos Campechano	17%	22%	134
Gordita	32%	43%	132
Barbacoa	27%	34%	128
Poke	16%	20%	125
California Roll	44%	55%	123
Mexican Pizza	46%	55%	119
Carne Asada	50%	59%	118
Taco Pizza	44%	52%	118
Flauta	23%	28%	118

Where younger consumers over-index with lesser-known dishes and formats, Gen X over-indexes to a lesser degree with more broadly-known dishes.

Familiar formats like gorditas, chalupas, and barbacoa lead the list, although this cresting demographic also over-indexes on Western-style dishes like Mexican pizza, California burritos, and taco salad.

GEN X: TOP INDEXING DISHES

ranked by love/like it index

AVOCADO-FEATURING DISH	TOTAL US	GEN X CONSUMERS	INDEX
Gordita	32%	42%	129
Chalupa	40%	46%	116
Barbacoa	27%	31%	115
Chimichanga	51%	58%	115
Mexican Pizza	46%	53%	115
Taco Salad	70%	79%	113
California Burrito	34%	38%	112
Guacamole	61%	68%	111
Hard Taco	70%	78%	111
Huevos Rancheros	35%	39%	111
Taco Pizza	44%	49%	111
Tostada	52%	58%	110
Chips And Guacamole	65%	70%	108
Flauta	23%	25%	108
Salsa Verde	52%	56%	108
Soft Taco	80%	87%	108
Torta	26%	28%	108
Enchilada	68%	73%	107
Fajita	71%	76%	107
Carnitas	45%	47%	106

Compared to the general population, Boomers do not over-index in affinity for any avocado-featuring dishes.

While a strong majority of Boomers love or like the most typical avocado-featuring dishes like fajitas, tacos, and burritos, they are less enthused with these dishes (and global foods/ingredients) in general when compared to any younger generations.

BOOMERS: TOP INDEXING DISHES

ranked by love/like it index

AVOCADO-FEATURING DISH	TOTAL US	BOOMER CONSUMERS	INDEX
Chips And Salsa	82%	81%	100
Enchilada	68%	67%	98
Guacamole	61%	60%	98
Burrito	78%	76%	97
Fajita	71%	69%	97
Taco	84%	82%	97
Taco Salad	70%	67%	96
Fish Taco	44%	42%	95
Mexican Omelette	40%	38%	94
Soft Taco	80%	76%	94
Mexican Food	82%	77%	93
Taco Meat	78%	73%	93
Tostada	52%	48%	92
Chips And Guacamole	65%	60%	91
Quesadilla	77%	69%	90
Breakfast Burrito	70%	63%	89
Hard Taco	70%	62%	89
Chimichanga	51%	45%	88
Huevos Rancheros	35%	31%	87
Salsa Verde	52%	44%	86

WINNING LAUNCHES FROM Q2 2026: GEN Z

new launches from past 3 months

Apr 2026

\$12.99

Smashburger

DOUBLE GREEN GODDESS BACON STACK



Certified Angus Beef, American cheese, layers of stacked applewood smoked bacon, organic arugula, tomato, fresh-sliced avocado, and green goddess dressing on a butter-toasted bun.

Limited Time Offer

Unbranded PI: 71%

Branded PI: 70%

Uniqueness: 67%

Frequency: 38%

Draw: 65%

Value: 67%

SCORE

99

superstar

Apr 2026

\$8.99

Smashburger

AVOCADO GREEN GODDESS SALAD



Baby arugula and leaf lettuce topped with fresh-sliced avocado, egg, chopped bacon, shredded cheddar cheese, diced tomatoes, and red onion. Served with green goddess dressing.

Limited Time Offer

Unbranded PI: 65%

Branded PI: 83%

Uniqueness: 65%

Frequency: 22%

Draw: 61%

Value: 70%

SCORE

99

superstar

Apr 2026

\$11.29

Smashburger

GREEN GODDESS BACON STACK CHICKEN SMASH



Savory ground chicken burger, American cheese, layers of stacked applewood smoked bacon, organic arugula, tomato, fresh-sliced avocado, and green goddess dressing on a butter-toasted bun.

Limited Time Offer

Unbranded PI: 66%

Branded PI: 75%

Uniqueness: 68%

Frequency: 41%

Draw: 65%

Value: 68%

SCORE

99

superstar

Apr 2026

\$10.99

Torchy's Tacos

NACHOS



Nachos with fresh tortilla chips, Green Chile Queso, pico de gallo, guacamole, sour cream, and choice of protein (Chicken Fajita, Steak Fajita, Green Chile Pork, or Brisket).

Limited Time Offer

Unbranded PI: 75%

Branded PI: 69%

Uniqueness: 61%

Frequency: 27%

Draw: 71%

Value: 66%

SCORE

96

superstar

WINNING LAUNCHES FROM Q2 2026: MILLENNIALS

new launches from past 3 months

Apr 2026

Rubio's

MACROS BOWL



The perfect balance of carbohydrates, protein and fat. Half brown rice, half lettuce blend, a double portion of chicken, black beans, salsa fresca, guacamole, chipotle lime crema and avocado tomatillo vinaigrette.

Limited Time Offer

Unbranded PI: 76%★★★★★

Branded PI: 80%★★★★★

Uniqueness: 60%★★★★

Frequency: 41%★★★★★

Draw: 66%★★★★

Value: -

SCORE

99

superstar

Apr 2026

\$10.99

Torchy's Tacos

NACHOS



Nachos with fresh tortilla chips, Green Chile Queso, pico de gallo, guacamole, sour cream, and choice of protein (Chicken Fajita, Steak Fajita, Green Chile Pork, or Brisket).

Limited Time Offer

Unbranded PI: 83%★★★★★

Branded PI: 82%★★★★★

Uniqueness: 59%★★★★

Frequency: 29%★★★

Draw: 65%★★★★

Value: 67%★★★★

SCORE

99

superstar

Apr 2026

\$20.49

Bahama Breeze

ISLAND GRILLE STEAK SALAD



Hands down the best chimichurri topped skirt steak with avocado, egg, smoked bacon, black beans, roasted corn and an avocado-ranch dressing.

Returning Item

Unbranded PI: 69%★★★★★

Branded PI: 72%★★★★

Uniqueness: 64%★★★★★

Frequency: 31%★★★★

Draw: 75%★★★★★

Value: 45%★★★

SCORE

99

superstar

Apr 2026

\$13.79

Smashburger

DOUBLE AVOCADO BACON RANCH STACK CHICKEN SMASH



Savory ground chicken burger, American cheese, layers of stacked applewood smoked bacon, lettuce, tomato, fresh-sliced avocado, and ranch dressing on a butter-toasted bun.

Limited Time Offer

Unbranded PI: 78%★★★★★

Branded PI: 72%★★★★

Uniqueness: 74%★★★★★

Frequency: 37%★★★★★

Draw: 65%★★★

Value: 65%★★★★

SCORE

99

superstar

WINNING LAUNCHES FROM Q2 2026: GEN X

new launches from past 3 months

Apr 2026

\$20.49

Bahama Breeze

ISLAND GRILLE STEAK SALAD



Hands down the best chimichurri topped skirt steak with avocado, egg, smoked bacon, black beans, roasted corn and an avocado-ranch dressing.

Returning Item

Unbranded PI: 61%★★★★

Branded PI: 67%★★★★★

Uniqueness: 56%★★★★★

Frequency: 26%★★★★

Draw: 64%★★★★★

Value: 38%★★★★

SCORE

97

superstar

Apr 2026

Rubio's

MACROS BOWL



The perfect balance of carbohydrates, protein and fat. Half brown rice, half lettuce blend, a double portion of chicken, black beans, salsa fresca, guacamole, chipotle lime crema and avocado tomatillo vinaigrette.

Limited Time Offer

Unbranded PI: 65%★★★★★

Branded PI: 63%★★★

Uniqueness: 45%★★★

Frequency: 27%★★★★★

Draw: 57%★★★★

Value: -

SCORE

88

volume driver

May 2026

\$8.99

Jollibee

ORIGINAL AVOCADO BACON CHICKEN SANDWICH



Starts with a crispy, juicy, hand-breaded chicken breast fillet, topped with hickory-smoked bacon, creamy Hass avocado, crisp lettuce, and rich umami mayo, served on a toasted brioche bun.

Limited Time Offer

Unbranded PI: 58%★★★

Branded PI: 67%★★★

Uniqueness: 51%★★★★

Frequency: 26%★★★★

Draw: 66%★★★★★

Value: 37%★★★

SCORE

80

consider

May 2026

\$7.99

Taco John's

AVOCADO RANCH CHICKEN TACO SALAD



Summer cravings, satisfied. A crunchy tortilla bowl filled with shredded lettuce, grilled all-white-meat chicken, four-cheese blend, house-made Pico de Gallo, sour cream, and crispy bacon pieces, then drizzled with our new Avocado Ranch Dressing.

Limited Time Offer

Unbranded PI: 61%★★★★

Branded PI: 70%★★★★★

Uniqueness: 45%★★★

Frequency: 24%★★★★

Draw: 52%★★★

Value: 59%★★★★

SCORE

78

consider

WINNING LAUNCHES FROM Q2 2026: BOOMERS

new launches from past 3 months

Apr 2026

Rubio's

HIGH PROTEIN, LOW CALORIE SALAD



Under 500 calories and 33g protein. Lettuce blend, cabbage blend, three cheese, salsa fresca, tortilla chips and a double portion of shrimp topped with Avocado Tomatillo Vinaigrette.

Limited Time Offer

Unbranded PI: 43%★★★★

Branded PI: 62%★★★★

Uniqueness: 44%★★★★

Frequency: 14%★★★★

Draw: 40%★★★

Value: -

SCORE

86

superstar

Jun 2026

La Madeleine French Bakery

FRENCH COBB SALADE



A hearty and satisfying twist on a classic Cobb, piled high on a crisp romaine base with smoky bacon, sweet grape tomatoes, fresh green onions, a boiled egg, shredded cheddar cheese, and sliced avocado.

Limited Time Offer

Unbranded PI: 49%★★★★

Branded PI: 54%★★★★

Uniqueness: 27%★★★

Frequency: 20%★★★★★

Draw: 49%★★★★★

Value: 18%★★★

SCORE

78

volume driver

May 2026

Torchy's Tacos

MR. BLONDE



Blackened salmon, with cooked cabbage slaw, pickled onions and jalapenos, avocado slice, cotija, poblano ranch and cilantro on a corn tortilla with a lime wedge.

Limited Time Offer

Unbranded PI: 30%★★

Branded PI: 68%★★★★★

Uniqueness: 53%★★★★★

Frequency: 7%★★

Draw: 40%★★★

Value: 54%★★★★

SCORE

78

volume driver

Jun 2026

La Madeleine French Bakery

PROTEIN BOWL



This power-packed bowl brings together tender grilled chicken, a boiled egg, grape tomatoes, and sliced avocado for a satisfying, nutrient-rich meal that doesn't compromise on flavor.

Limited Time Offer

Unbranded PI: 36%★★★

Branded PI: 48%★★★★

Uniqueness: 44%★★★★

Frequency: 13%★★★★

Draw: 40%★★★

Value: 37%★★★★

SCORE

73

consider

Avocados On Menus

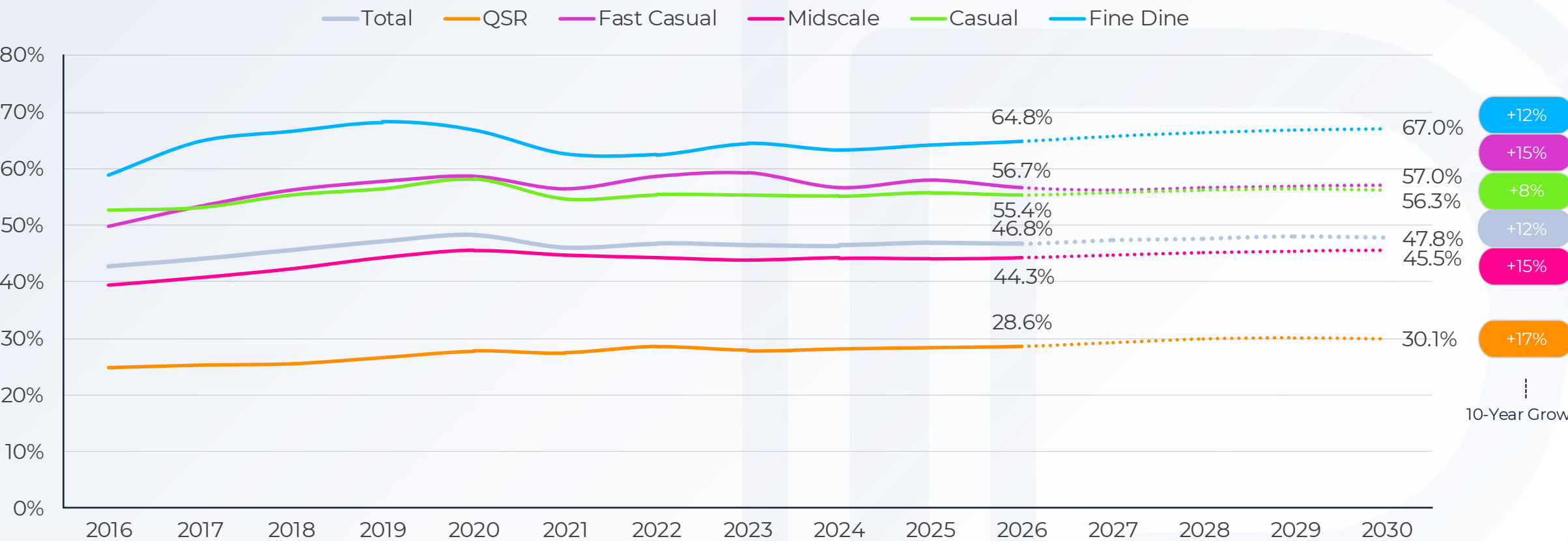
MENU PENETRATION
TRENDING DISHES
PRICING

Avocado menu growth has been widespread across segments and is projected to continue steady growth over the next several years.

In the first two quarters of 2026, the fast casual segment has lost ground gained last year. Lean on avocado's premium halo to play into fast casual operators' goal of providing affordable quality.

Casual dining restaurants have seen the least growth over the past decade, highlighting a growth gap that stands to be capitalized on; focus on opportunities to grow Casual Dining avocado menuing.

AVOCADOS BY SEGMENT penetration trend by segment

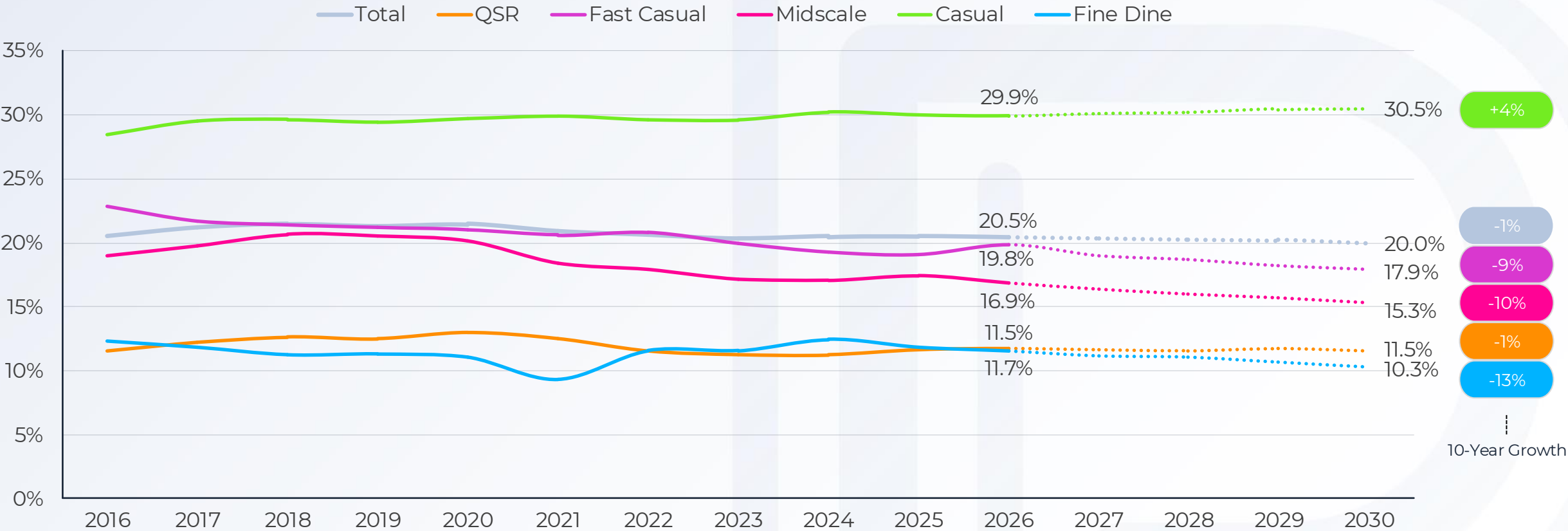


Avocado menu growth is projected to come from dishes that use sliced or diced avocado rather than guacamole.

Casual dining stands out as the only segment projected to increase guacamole presence over the next several years, indicating that guacamole is still a safe and widely-loved item – but that avocado innovation is spreading beyond guacamole.

GUACAMOLE BY SEGMENT

penetration trend by segment

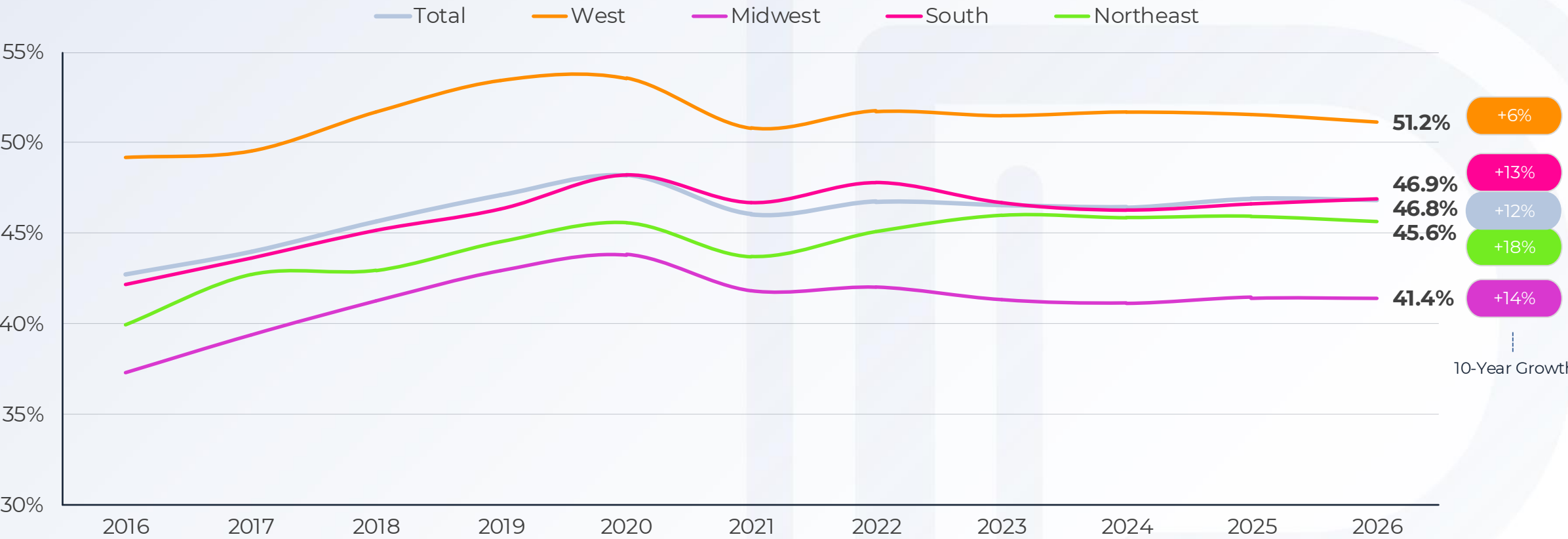


The West consistently menus avocado more than other regions, though the gap between them has shrunk as other regions' growth outpaces the West's.

The West was hit the hardest by the combination of widespread drought and the COVID pandemic in 2021, though its penetration has recovered well. The Northeast has seen the strongest recovery as the past few years saw stark regional avocado menu growth.

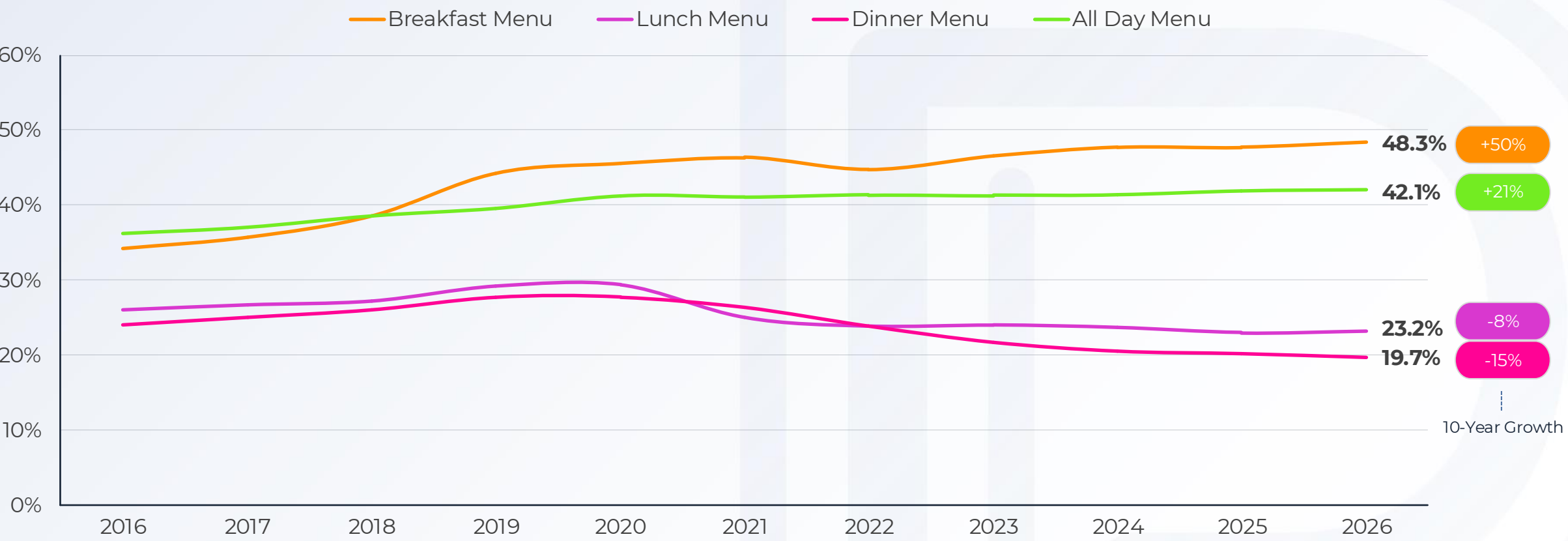
AVOCADOS BY REGION

penetration trend by segment



The past decade brought two major changes for avocados on daypart-specific menus: first, avocados have consistently grown on breakfast menus as new breakfast opportunities continue to emerge. Second, avocados moved off lunch- and dinner-specific menus, instead finding their steady home on all-day menus as an ingredient operators can lean on from dusk until dawn.

AVOCADOS BY DAYPART

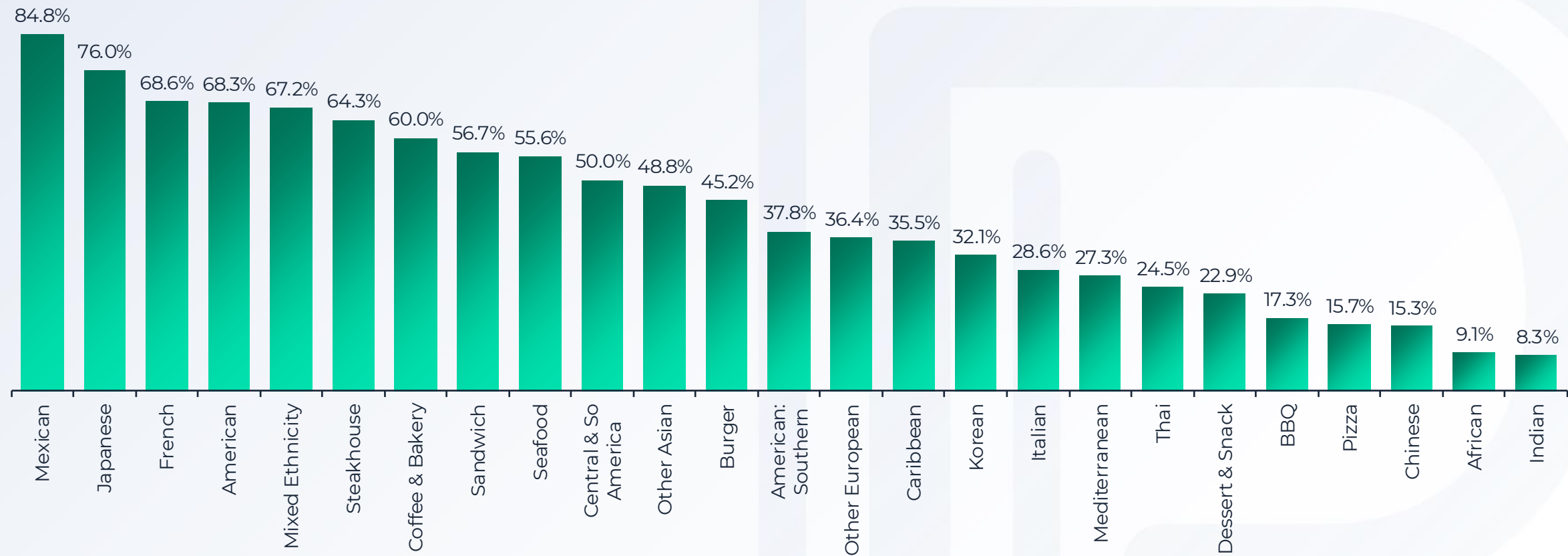


With the strong presence of avocado in Americanized sushi rolls, Japanese cuisine is the second-most common avocado adopter after Mexican cuisine.

More than two-thirds of American restaurants menu avocado in some shape or form. With this level of mainstream ubiquity, continued avocado growth will depend on finding new, innovative avocado uses – potentially through continuing to incorporate it in cuisine fusion dishes.

AVOCADOS BY CUISINE TYPE

ranked by penetration

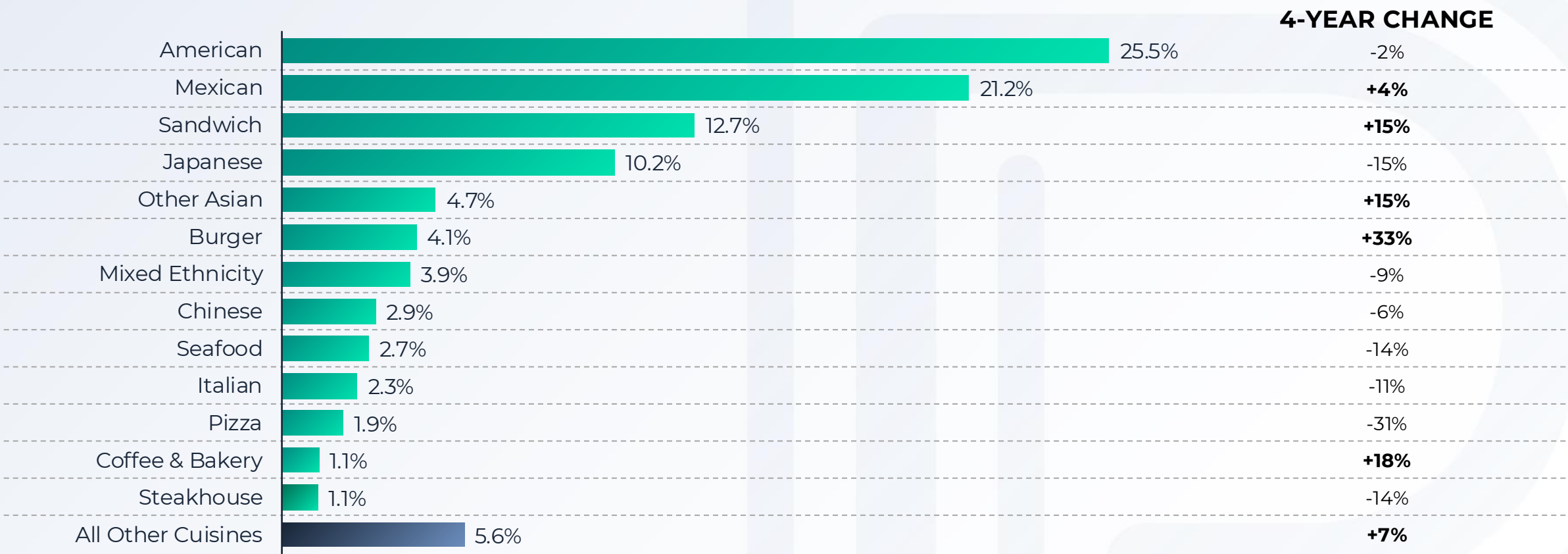


Mexican avocado incidence ticked upwards since Q1, indicating that this essential cuisine is not looking to shed its avocado associations any time soon.

Despite slightly lower penetration, American restaurants are the largest buyers of avocado due to the sheer number of American restaurant units. Avocado is a beloved sandwich and burger topping, with handheld-focused operations seeing the strongest growth in avocado share. Keep it going with fresh sandwich and burger ideas for operators.

AVOCADO INCIDENCE DISTRIBUTION

cuisine incidence distribution



Continue exploring innovative breakfast twists on classic Mexican dish formats, as trending avocado dishes on breakfast menus largely follow this formula.

Avocados have also found a place on breakfast menus as a topper for Western breakfast favorites. Avocado is often sliced or spread on top of toast, bowls, omelettes, eggs benedict, bagels, and more – or at least offered as a side/topping option.

AVOCADO A.M. DISHES

menu penetration

TOP ranked by penetration	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH	TRENDING ranked by 4-year growth	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Avocado Toast	44.9%	-3%	+14%	Bagel	6.7%	+6%	+72%
Breakfast Bowl	25.1%	-2%	+10%	Chilaquiles	7.6%	-7%	+53%
Sandwich	20.3%	+1%	-2%	Torta	2.1%	+23%	+47%
Breakfast Sandwich	19.6%	-3%	+10%	Breakfast Taco	3.4%	-11%	+38%
Omelette	19.4%	-8%	-24%	Taco	6.9%	+1%	+25%
Wrap	15.8%	+5%	+14%	Arugula Salad	1.5%	+21%	+20%
Breakfast Burrito	14.5%	+10%	+16%	Burrito	14.5%	+12%	+18%
Salad	13.1%	-10%	-25%	Breakfast Burrito	14.5%	+10%	+16%
Eggs Benedict	11.3%	-3%	-5%	Wrap	15.8%	+5%	+14%
Chilaquiles	7.6%	-7%	+53%	Avocado Toast	44.9%	-3%	+14%
Huevos Rancheros	7.6%	+3%	-7%	California Omelette	3.0%	+29%	+12%
Taco	6.9%	+1%	+25%	Breakfast Bowl	25.1%	-2%	+10%
Bagel	6.7%	+6%	+72%	Tostada	3.1%	+7%	+10%
Vegetable Sandwich	6.0%	-21%	-27%	Breakfast Sandwich	19.6%	-3%	+10%
Scramble	4.8%	-16%	-21%				

More and more, consumers want to be in charge of their dishes' builds and ingredients, and this is reflected in trending dishes as buildable items like fajitas and bowls.

Salads are the top avocado application, and innovation continues in this category as avocado grows in premium salad offerings like seaweed salad and steak salad.

Lettuce wraps are a booming avocado vehicle as health-conscious consumers seek to load veggie-forward dishes with highly nutrient-dense components – an angle absolutely worth leaning into for marketing efforts.

AVOCADO P.M. DISHES

menu penetration

TOP ranked by penetration	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH	TRENDING ranked by 4-year growth	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Salad	63.0%	-1%	+0%	Lettuce Wrap	2.4%	+22%	+117%
Sandwich	37.4%	+4%	+2%	Hand Roll	1.6%	+30%	+97%
Taco	18.4%	+1%	+5%	Chips And Guacamole	1.3%	+7%	+68%
Bowl	18.3%	+3%	+27%	Steak Fajita	1.6%	+9%	+64%
Wrap	18.3%	+5%	+18%	Nigiri	1.3%	-4%	+62%
Chicken Sandwich	16.8%	-1%	-2%	Chicken Bowl	1.7%	+23%	+54%
Burger	15.8%	-4%	-10%	Chicken Wrap	2.2%	-5%	+49%
Sushi	11.5%	+3%	+4%	Seaweed Salad	3.0%	+6%	+49%
Avocado Salad	9.3%	+6%	+7%	Dinner Bowl	14.7%	+7%	+44%
Poke	7.0%	+7%	+30%	Crunch Roll	1.9%	+2%	+39%
Fries	7.0%	-0%	-11%	Turkey Wrap	1.1%	+40%	+39%
Soup	6.9%	-3%	-3%	Bagel	2.2%	+37%	+36%
BLT	6.6%	+11%	+25%	Chicken Fajita	2.8%	+8%	+35%
Burrito	6.4%	+0%	-0%	Maki Roll	1.1%	+19%	+31%
Tostada	6.3%	+9%	+14%	Poke	7.0%	+7%	+30%

WINNING LAUNCHES FROM Q1 2026: TOTAL U.S.

new launches from past 3 months

Winning Q2 launches found avocado success in two lanes: complex builds that feature avocado as a health signal, and Tex Mex creations that lean on avocado to bring more Mexican authenticity to less authentic formats like taco salads and nachos. This speaks to how consumers like avocados not just for their healthfulness – but also as an important part of Tex Mex comfort food.

Apr 2026

Rubio's

MACROS BOWL



The perfect balance of carbohydrates, protein and fat. Half brown rice, half lettuce blend, a double portion of chicken, black beans, salsa fresca, guacamole, chipotle lime crema and avocado tomatillo vinaigrette.

Limited Time Offer

Unbranded PI: 58%★★★★

Branded PI: 67%★★★★

Uniqueness: 47%★★★

Frequency: 29%★★★★★

Draw: 57%★★★★

Value: -

SCORE

99

superstar

Apr 2026

\$20.49

Bahama Breeze

ISLAND GRILLE STEAK SALAD



Hands down the best chimichurri topped skirt steak with avocado, egg, smoked bacon, black beans, roasted corn and an avocado-ranch dressing.

Returning Item

Unbranded PI: 58%★★★★

Branded PI: 62%★★★★★

Uniqueness: 54%★★★★★

Frequency: 25%★★★★

Draw: 63%★★★★★

Value: 34%★★★

SCORE

99

superstar

May 2026

\$7.99

Taco John's

AVOCADO RANCH CHICKEN TACO SALAD



Summer cravings, satisfied. A crunchy tortilla bowl filled with shredded lettuce, grilled all-white-meat chicken, four-cheese blend, house-made Pico de Gallo, sour cream, and crispy bacon pieces, then drizzled with our new Avocado Ranch Dressing.

Limited Time Offer

Unbranded PI: 59%★★★★

Branded PI: 66%★★★★★

Uniqueness: 46%★★★

Frequency: 25%★★★★★

Draw: 60%★★★★★

Value: 55%★★★

SCORE

90

superstar

Apr 2026

\$10.99

Torchy's Tacos

NACHOS



Nachos with fresh tortilla chips, Green Chile Queso, pico de gallo, guacamole, sour cream, and choice of protein [Chicken Fajita, Steak Fajita, Green Chile Pork, or Brisket].

Limited Time Offer

Unbranded PI: 67%★★★★★

Branded PI: 73%★★★★★

Uniqueness: 42%★★★

Frequency: 22%★★★★

Draw: 54%★★★★★

Value: 49%★★★

SCORE

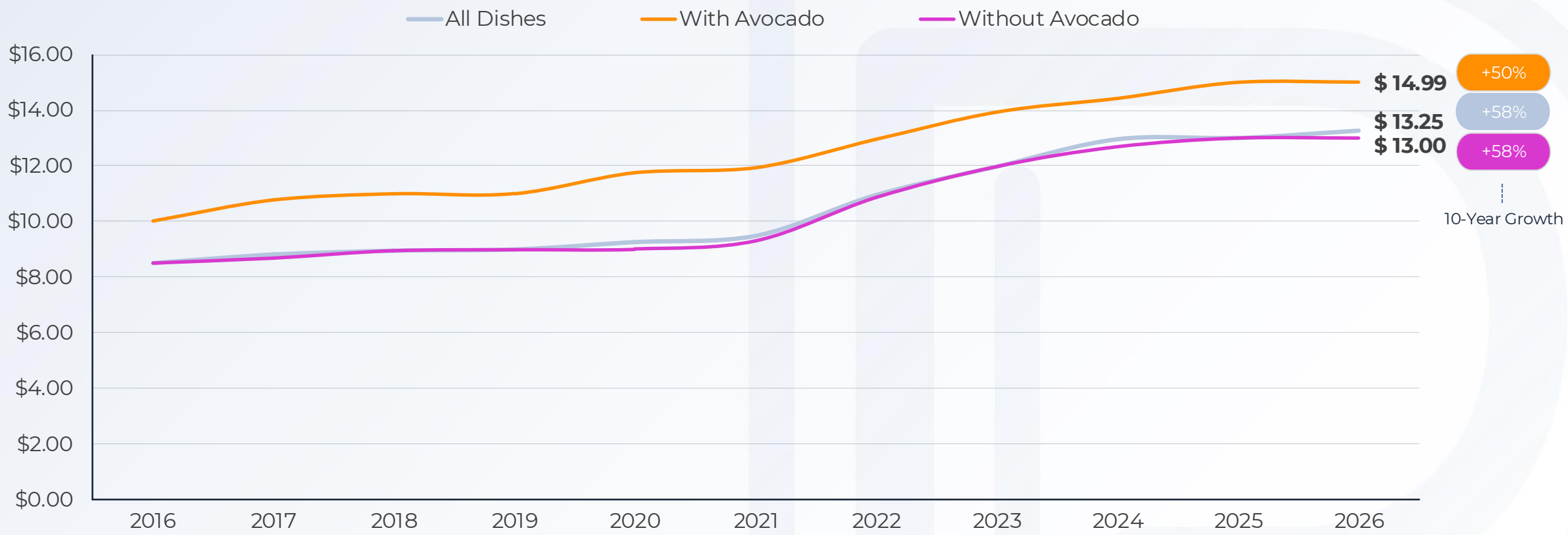
90

superstar

Dishes with avocado command a very consistent premium of about \$2.00 over dishes without – a gap that has held true through economic uncertainty and other global shifts.

DATA SOURCE: ALL 12 million menu items from 2016 to 2026. MEDIAN PRICE: The median price of all appetizer, entrée, and/or side dishes.

DISH PRICE



Appetizers drive the price premium delivered by avocados, as they are often used as a premium ingredient or topping on salads.

Entrees often feature a host of premium ingredients, making the addition of avocado less impactful to the overall price point.

Avocado sides are less pricey than other sides primarily because avocados are offered as a side on their own – whereas non-avocado sides often include larger items like cups of soup, side salads, or even small portions of entrée dishes, and these larger items inflate the median price.

PRICE PREMIUM BY MEAL PART

median price

MEAL PART	DISH TYPE	MEDIAN PRICE	PREMIUM
Appetizer	With Avocado	\$ 14.00	\$3.01
	Without Avocado	\$ 10.99	
Entrée	With Avocado	\$ 15.18	\$0.23
	Without Avocado	\$ 14.95	
Side	With Avocado	\$ 2.99	- \$1.01
	Without Avocado	\$ 4.00	
Total	With Avocado	\$ 14.99	\$1.99
	Without Avocado	\$ 13.00	

Several types of appetizer float to the top as seeing avocado command the strongest price premium, especially bread apps, fried apps, and appetizer salads.

Sales agents should couple recipe suggestions with price premium data to position avocados as a premium ingredient that drives stronger margins.

PRICE PREMIUM BY ITEM TYPE

median price

ITEM TYPE	WITH AVOCADO	WITHOUT AVOCADO	PREMIUM
Deli Salad Side	\$ 10.50	\$ 4.00	\$ 6.50
Bread Side	\$ 9.00	\$ 3.85	\$ 5.15
Fried Protein App	\$ 18.00	\$ 13.00	\$ 5.00
Bread Appetizer	\$ 13.95	\$ 9.00	\$ 4.95
Fried Other App	\$ 13.00	\$ 8.99	\$ 4.01
Sampler	\$ 21.95	\$ 17.99	\$ 3.96
Side Soup/Chili	\$ 8.95	\$ 4.99	\$ 3.96
Appetizer Fries/Wedges	\$ 12.00	\$ 8.19	\$ 3.81
Combos/Multi Protein	\$ 17.00	\$ 13.24	\$ 3.76
Appetizer Salad	\$ 14.00	\$ 10.50	\$ 3.50
Non-Fried Protein App	\$ 18.00	\$ 15.00	\$ 3.00
Non-Fried Veggie App	\$ 13.00	\$ 10.00	\$ 3.00
Pasta/Noodles	\$ 19.50	\$ 16.50	\$ 3.00
Wings	\$ 14.99	\$ 11.99	\$ 3.00
Side Salad	\$ 7.99	\$ 5.00	\$ 2.99
Other App	\$ 12.99	\$ 10.00	\$ 2.99
Breakfast Starch	\$ 14.95	\$ 12.00	\$ 2.95
Hot Sandwich	\$ 14.99	\$ 12.50	\$ 2.49
Cold Sandwich	\$ 13.95	\$ 11.50	\$ 2.45
Entrée Salad	\$ 16.40	\$ 14.00	\$ 2.40
Deli Salad Appetizer	\$ 14.00	\$ 11.99	\$ 2.01

Entrees starring proteins as the center of the plate realize smaller price premiums from avocado due to the already-pricy nature of meat.

Fish and shellfish main entrees have a reduced median price when avocado is included, potentially because standalone seafood dishes often feature more generous protein portions than the types of seafood dishes that might include avocado like tacos, bowls, etc.

Veggie-centric dishes are also less costly to consumers without avocado, as are soup entrees.

PRICE PREMIUM BY ITEM TYPE CONT.

median price

ITEM TYPE	WITH AVOCADO	WITHOUT AVOCADO	PREMIUM
Appetizer Soup/Chili	\$ 9.00	\$ 6.99	\$ 2.01
Hot Dog/Sausage	\$ 10.99	\$ 8.99	\$ 2.00
Appetizer Quesadilla	\$ 15.00	\$ 13.00	\$ 2.00
Mexican Entree	\$ 14.99	\$ 13.00	\$ 1.99
Appetizer Nachos	\$ 15.95	\$ 13.99	\$ 1.96
Fried Veggie Side	\$ 6.99	\$ 5.05	\$ 1.94
Egg Dish	\$ 16.50	\$ 14.99	\$ 1.51
Appetizer Dip	\$ 12.00	\$ 10.50	\$ 1.50
Burger	\$ 15.75	\$ 14.29	\$ 1.46
Rice Entree	\$ 16.40	\$ 15.00	\$ 1.40
Fried Veggie App	\$ 10.95	\$ 9.75	\$ 1.20
Rice/Grains Side	\$ 5.00	\$ 3.95	\$ 1.05
Chicken Main Entree	\$ 16.95	\$ 15.95	\$ 1.00
Pork Main Entree	\$ 17.95	\$ 16.95	\$ 1.00
Other Entree	\$ 15.95	\$ 15.00	\$ 0.95
Pizza	\$ 17.75	\$ 16.95	\$ 0.80
Beef Main Entree	\$ 20.00	\$ 19.25	\$ 0.75
Condiment/Topping	\$ 2.50	\$ 1.95	\$ 0.55
Other Potato Side	\$ 3.75	\$ 3.29	\$ 0.46
Other Side	\$ 5.00	\$ 4.60	\$ 0.40
Fruit Side	\$ 2.50	\$ 2.75	-\$ 0.25
Protein Side	\$ 4.00	\$ 5.00	-\$ 1.00

Health & Wellness on the Menu

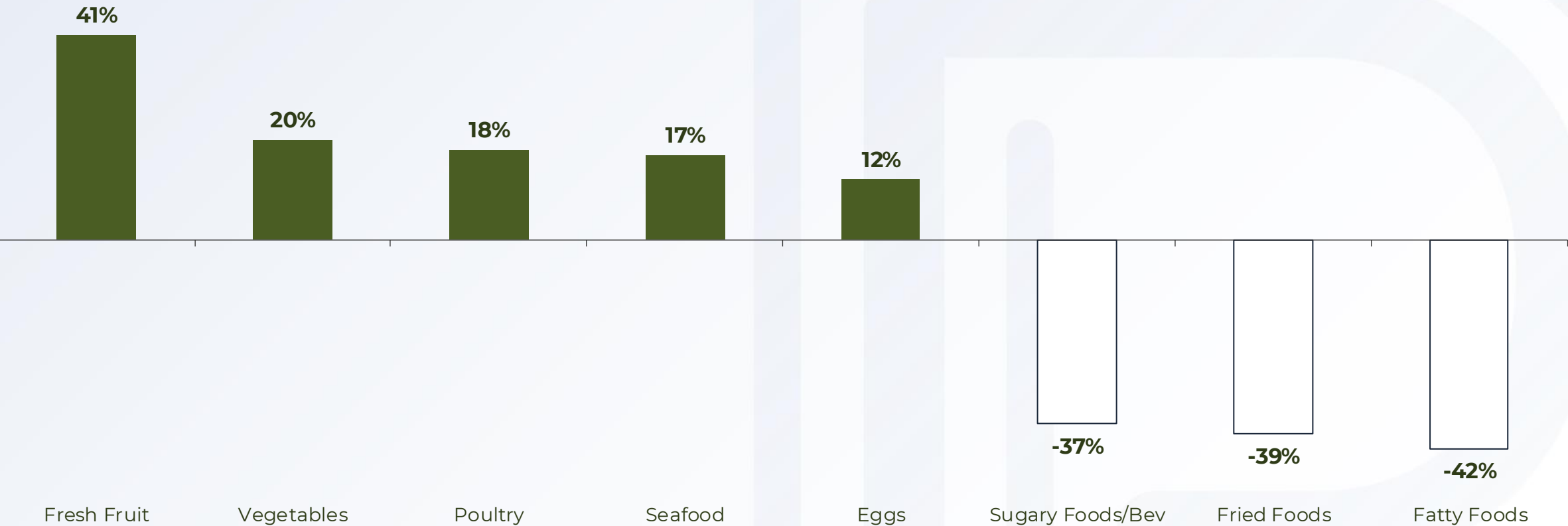
NEW CONSUMER TRENDS
WHAT THEY MEAN FOR AVOCADOS

GLP-1 adoption is reshaping “healthy eating” — pushing consumers toward fresh, whole foods and away from processed, indulgent ones.

GLP-1 households have cut grocery spend 5.5% and limited-service restaurant spend 8% over six months — avocado’s whole-food, healthy-fat profile fits exactly where consumption is shifting up.

GLP-1 & THE NEW CONSUMER DIET

% change in consumption among GLP-1 users

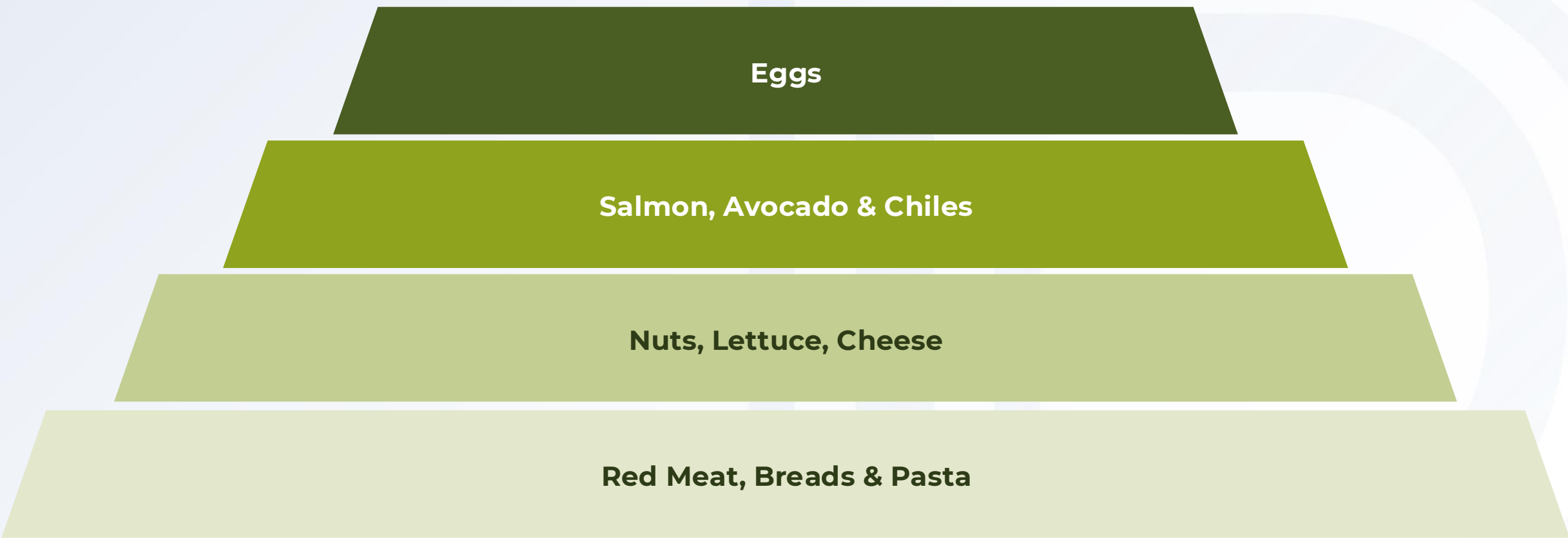


The 2025–2030 Dietary Guidelines swap MyPlate for a “Real Food Pyramid” built on whole foods and healthy fats — and avocado has a literal seat at the table.

Consumers are more eager than operators to act on the new guidance: 58% of consumers plan dietary changes vs. 48% of operators planning menu changes.

THE NEW DIETARY GUIDELINES

the USDA's new food guidance graphic

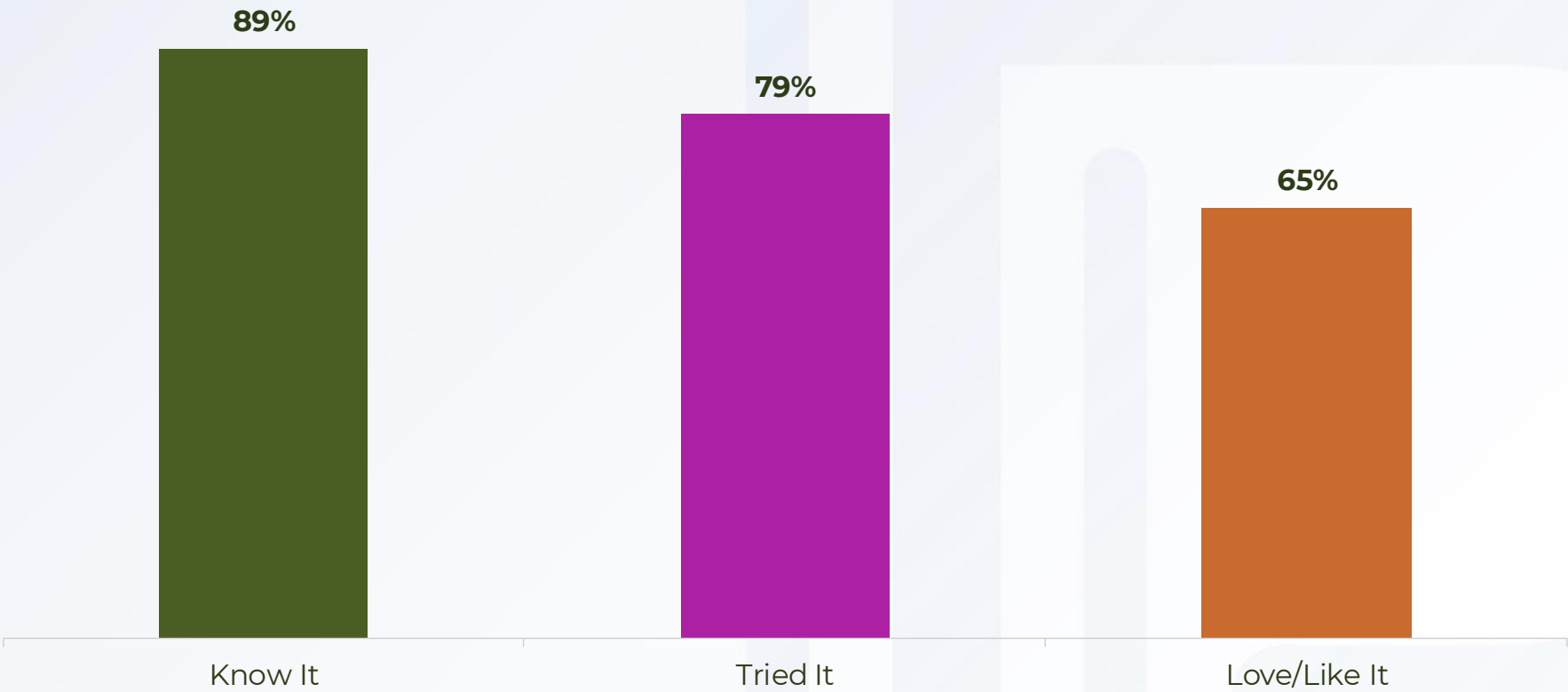


Protein isn't a trend anymore — it's table stakes. 89% of consumers already know the term, and menu callouts have surged.

Avocado isn't a protein source itself, but it's the go-to pairing ingredient in protein-forward bowls, salads, and sandwiches — riding the halo with zero reformulation.

HIGH-PROTEIN & NUTRIENT-DENSE DEMAND

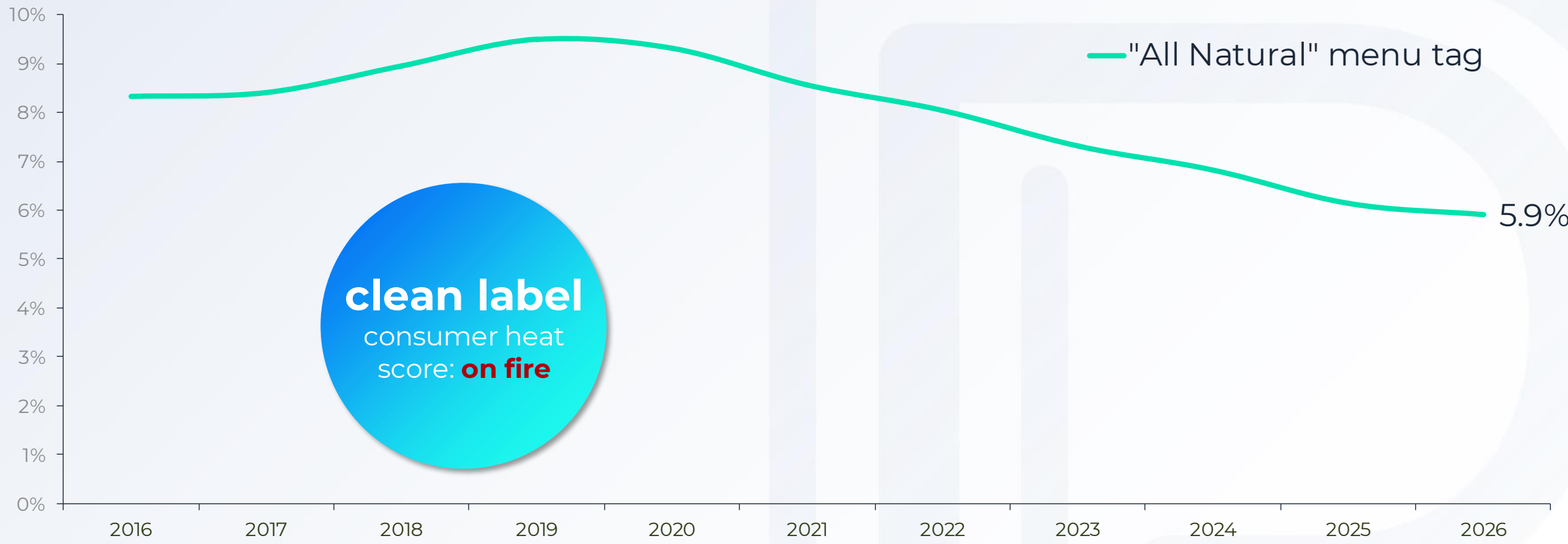
consumer funnel for "High Protein"



Clean Label is the fastest-rising healthy term among consumers that we track but menus haven't caught up to consumer language yet.

Source: Edelman Intelligence, "Consumer Preferences: Clean Labels" (2025) & Edelman Intelligence, "Menu Trends YE JUN'26" ("All Natural" tag)

CLEAN LABEL & MINIMALLY PROCESSED



menu penetration of the "All Natural" claim, 2016-2026

Wellness is going holistic — physical health, mental health, and functional benefits are converging in what consumers eat.

Avocado already carries a “feel-good” wellness halo without functional additives — well-positioned as consumers want benefits that feel natural, not medicinal.

CHANGING WELLNESS PRIORITIES

consumers prioritizing wellness, past 12 months

60%

prioritized physical health more this past year

57%

prioritized mental health more this past year

Flat

Superfood, Immunity Boosting & Sustainable — mature, steady demand

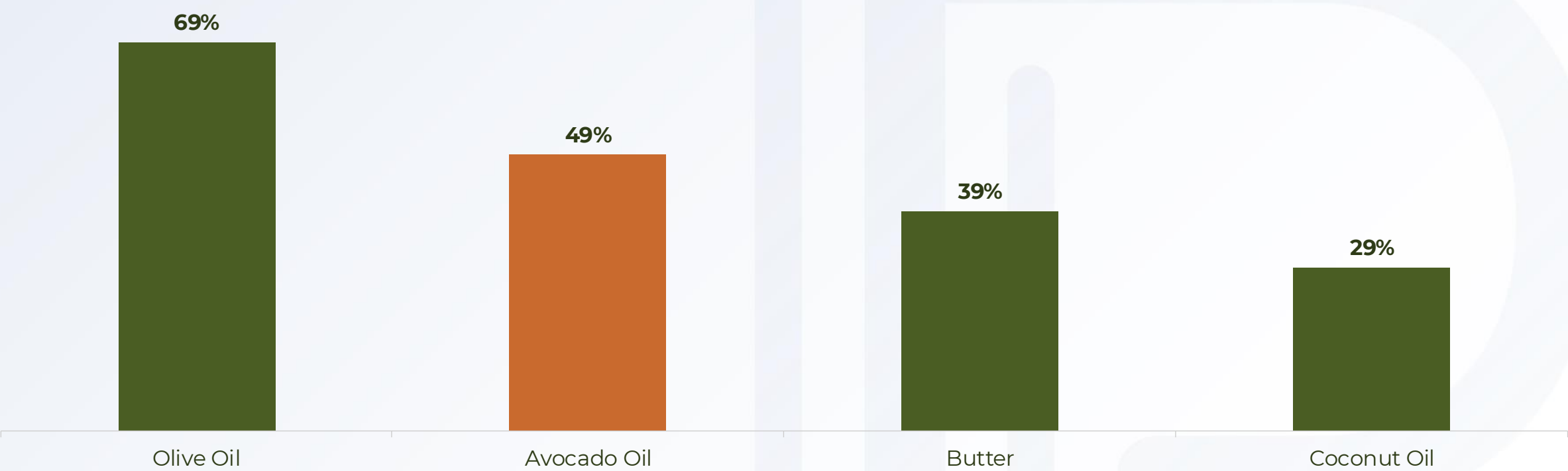
Avocado oil is the biggest beneficiary of the seed-oil-free movement — showing up everywhere from pantries to menus.

Avocado Oil is rated “gaining fast” in consumer affinity (Know It +3.7pts, Love/Like +5.6pts over 2 years) — a direct category win, not just a tie-in.

THE SEED-OIL-FREE SHIFT

oil used as a seed-oil substitute, 2026

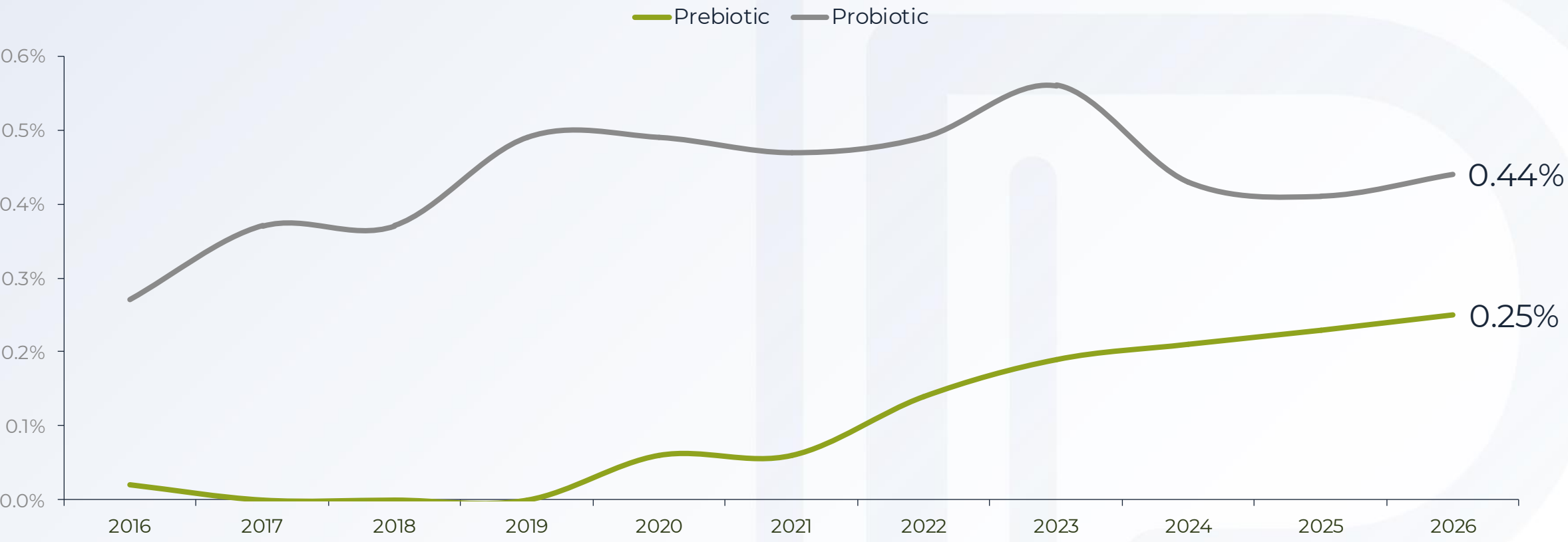
% used as seed-oil substitute



Fiber is having a moment — prebiotic menu mentions are closing the gap on probiotic, and menus haven't caught up to consumer appetite.

THE FIBER & GUT HEALTH TRENDS OF 2024
(Fiber is the New Protein) & Consumer Preferences

FIBER & GUT HEALTH



Across every trend, one pattern holds: avocado already fits the health story consumers are writing — the opportunity is telling it more clearly.

DATA SSENTIAL Why the avocado is in, trends & Consumer Preferences findings, this section

KEY TAKEAWAYS FOR HASS AVOCADO BOARD

01

Lead with avocado oil

The seed-oil-free shift is a direct, quantifiable category win — not just a tie-in.

02

Point to the pyramid

Avocado’s literal presence in the new federal dietary guidance is a credibility asset marketing hasn’t used yet.

03

Pair, don’t compete, on protein

Position avocado alongside protein-forward bowls and salads, not as a protein source itself.

04

Let it be “clean” without a label

Avocado’s single-ingredient simplicity meets the fastest-rising consumer term with zero reformulation.

05

Close the fiber gap

Operators are under-promoting fiber — avocado is an easy, credible way to fill that whitespace.

06

Keep the halo natural, not medicinal

Wellness messaging should lean on “feel-good” and whole-food, not functional additives.

Metrics

Restaurant Segments



Menu Trends Metrics

Menu Trends is the industry's most accurate system for tracking trends at commercial and non-commercial restaurants. The primary U.S. Chains & Independents database is comprised of 4,800 restaurants which are balanced to the U.S. restaurant landscape.

PENETRATION

% of RESTAURANTS that serve that food, flavor, or ingredient.

This is a measure of adoption. Increases in penetration indicate that more restaurants are adding the item to their menu. Penetration is the most important statistic and the best indicator of trend movement.

INCIDENCE

% of MENU ITEMS that feature that food, flavor, or ingredient.

This is a measure of versatility. A restaurant adding yet another chicken dish to its menu will result in an increase in incidence. Incidence is a supporting statistic, to be used as a complement to penetration.

PRICE

MEDIAN PRICE of items that feature that food, flavor, or ingredient.

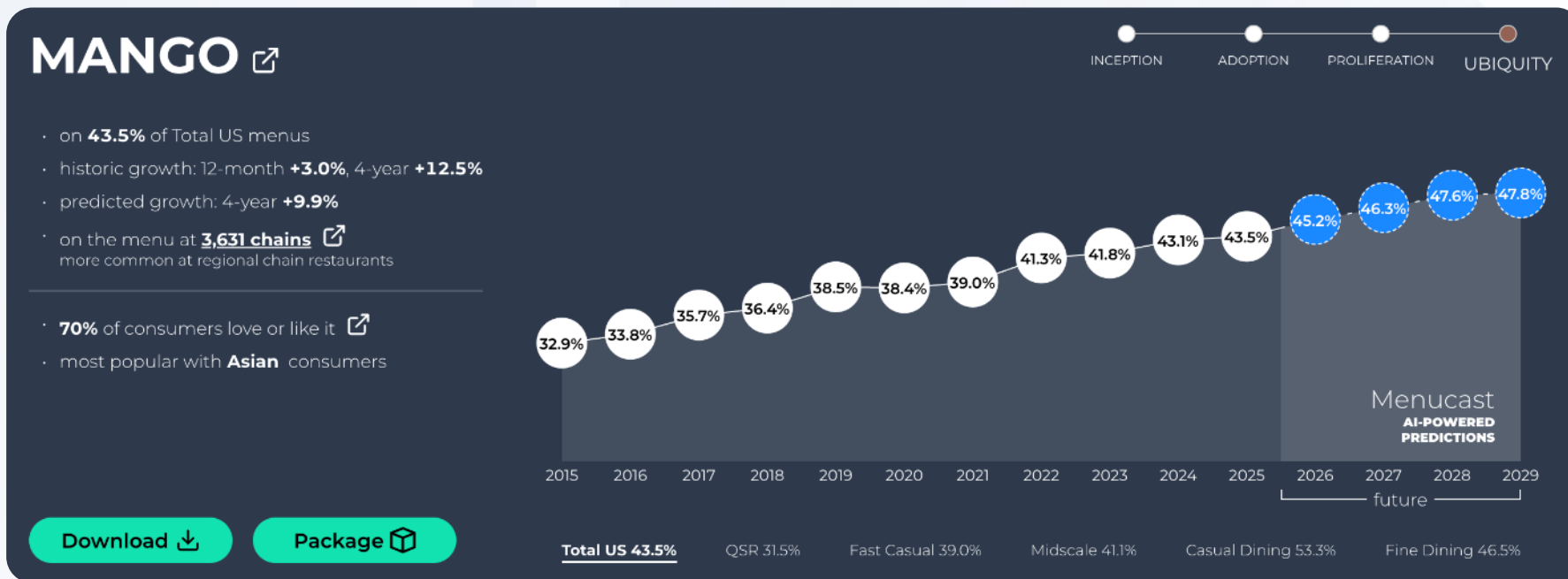
This is the median price of the menu item featuring that ingredient at the time of data collection. Regional pricing is not reflected.

Menu Trends Metrics

Menu Trends is the industry's most accurate system for tracking trends at commercial and non-commercial restaurants. The primary U.S. Chains & Independents database is comprised of 4,800 restaurants which are balanced to the U.S. restaurant landscape. Data is reported using two key metrics:

Have you ever wondered what the future holds for a food, flavor, or ingredient?

Menucast analyzes Menu Trends' historic library of millions of menu items to identify patterns. Those patterns are used to forecast future trends for any term in the database. Menucast can predict an item's menu penetration up to 4-years in the future with a directional accuracy of 97%.

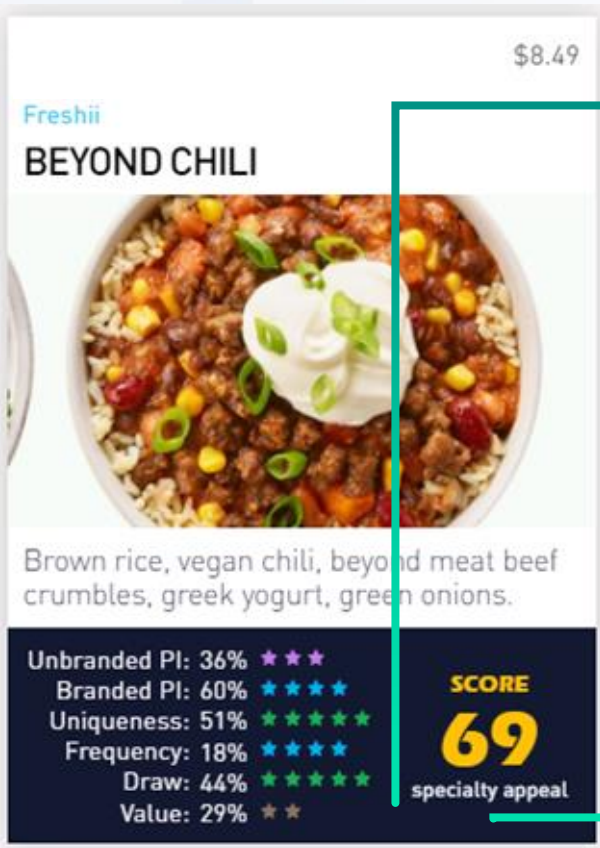


Launches & Ratings Metrics

Each month, Launches & Ratings tests every new menu item and LTO from major chains with consumers. Hundreds of items from all sections of the menu are tested for **six key metrics**:

STAR RATINGS provide an at-a-glance summary of an item’s performance in each key area; while we recommend benchmarking against items within the same category, stars can also be set to show alternative comparisons (same segment, same chain, etc.)

★★★★★	Top Performer	>90 TH percentile
★★★★	Above Average	70 to 90 TH percentile
★★★	Average	30 to 70 TH percentile
★★	Below Average	10 to 30 TH percentile
★	Weak Performer	<10 TH percentile



COMPOSITE SCORE
A single number to assess overall performance across all key metrics; higher scores are better.

VIABILITY RATING
gives context to the numbers an assessment taking both overall performance and individual components into account

SUPERSTAR
exceptional performance with broad appeal and strong uniqueness

VOLUME DRIVER
strong interest driven by product appeal and/or price, but not necessarily unique

SPECIALTY APPEAL
strong uniqueness but lacks broad appeal; may help target specific audiences

CONSIDER
moderate appeal; may benefit from further refinement

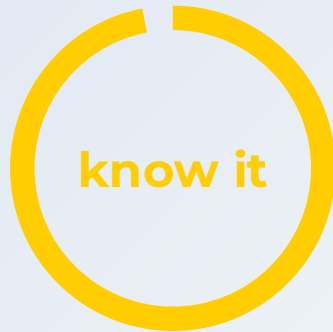
LOW POTENTIAL
underperformer overall



Consumer Preferences Metrics

Every quarter, Consumer Preferences tests thousands of foods, flavors, ingredients, and beverages with consumers. Consumers are asked to rate these foods and flavors across **four key metrics**:

Experience



know it

AWARENESS

How well known is this item?



tried it

TRIAL

Have consumers tried it?



had
many
times

CONSUMPTION

Has this item been consumed many times in the past month?

Affinity



love it

love it
like it
neutral
dislike it
hate it

AFFINITY

How do consumers feel about this item?

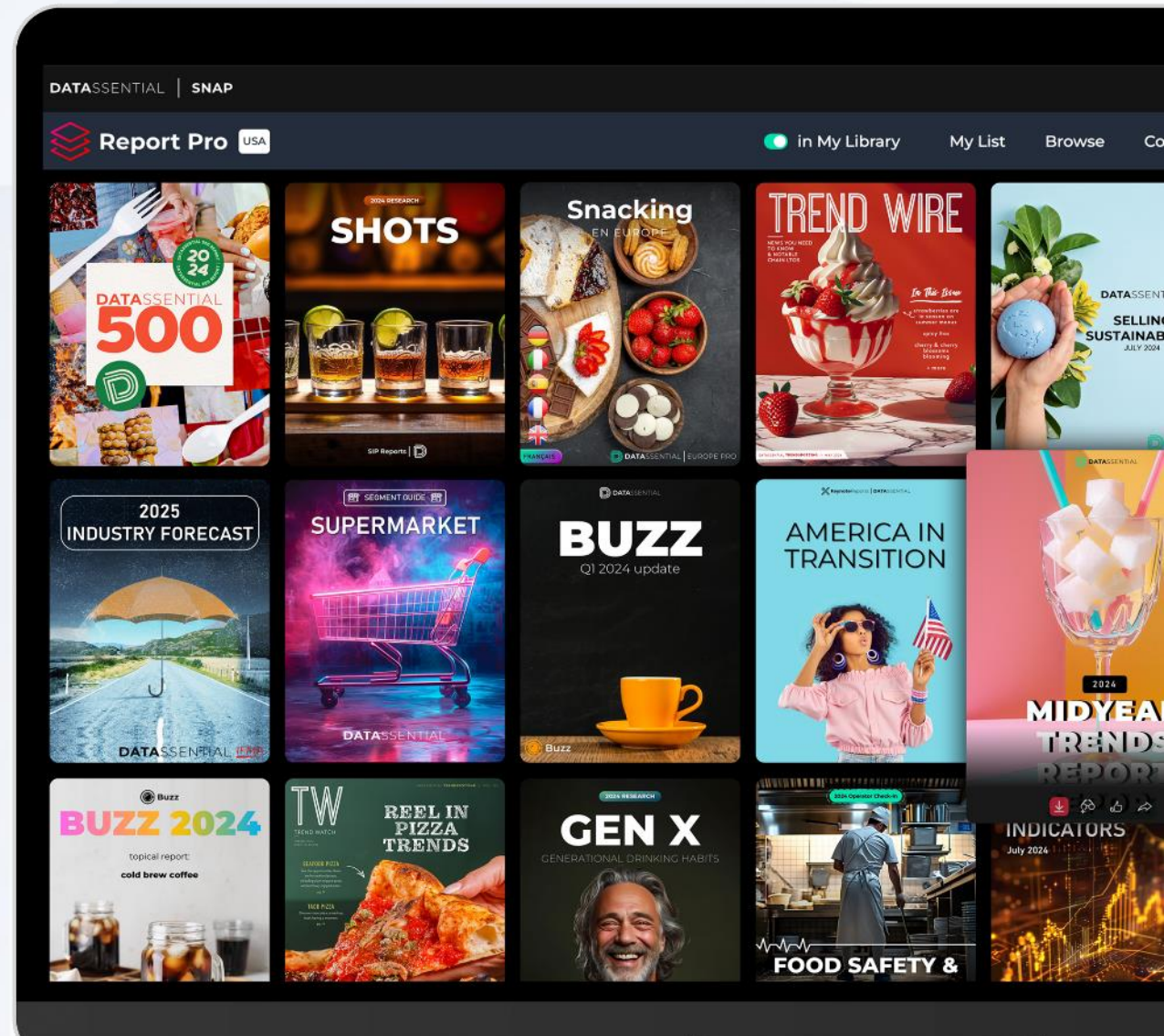
Report Pro

Access on-demand and carefully curated reports that detail what matters to your business. Tap into a vast library of presentation-ready reports with real consumer and operator data, plus insights from Datassential's tools, to answer your questions and guide your strategy.

GET TIME BACK with access to the data and insight you need, when you need it.

CREATE YOUR OWN WATCH LIST and keep up-to-date on new content as it's published.

DAZZLE YOUR CUSTOMERS AND COLLEAGUES with presentation-ready slides and reports, with new content released every week.





Datassential is your best source for food industry insights, from the latest menu trends to the products shoppers want at the grocery store.

