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Quarterly Insights Q2’26

ECONOMIC UPDATES
GENERATIONAL AFFINITY
AVOCADOS ON MENUS

HASS AVOCADO BOARD

DATASSENTIAL

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Key Findings: What Moved This Quarter

1. **Operator optimism rebounds sharply.** Operators expecting higher traffic next month rose from roughly two-fifths to over half, while those bracing for lower traffic more than halved. Sales expectations moved in lockstep — the clearest positive swing in the deck.

2. **Consumer sentiment slips back into decline.** Last wave's first uptick in months has reversed; sentiment is falling again month-over-month, signaling renewed pessimism.

3. **Households feel the squeeze tightening.** Fewer consumers are "getting ahead" financially and more are just "getting by." Dining-out frequency and away-from-home share each edged down, even as operators grow confident.

4. **Safety net contracting as SNAP participation falls.** After October 2025 rule changes and a first-ever funding lapse, SNAP participation keeps declining — a headwind for value-driven, lower-income demand.

5. **Gen Z avocado familiarity softens.** The story flipped from improving trial and affinity to Gen Z signaling lessening familiarity — reframing the opportunity toward Gen Z formats like global handhelds and alternative Mexican builds.

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Key Findings

1. Consumer sentiment is weak, savings are shrinking, and food prices—especially at retail and on menus—continue to rise. **Diners are under pressure but not abandoning foodservice**; they are trading toward value, convenience, and “worth it” items. Avocados play well here by adding freshness, quality, and versatility without substantially increasing overall plate cost.

2. Despite soft overall job growth, **foodservice employment is expanding and restaurant units are increasing, led by QSR and Casual/ Upscale Casual**. These segments see enough demand to keep building. For an avocado distributor, this is where to focus—on high-throughput, value-forward concepts where avocado can upgrade core items (sandwiches, burgers, bowls, breakfast, shareables) and fit smoothly into existing operations.

3. Millennials and Gen Z remain the core avocado audience in trendy tacos, Asian fusion (e.g., sushi burritos), handhelds, and build-your-own formats like bowls and fajitas—but **Gen Z signaled softer familiarity with avocados this wave, making targeted innovation, marketing, and education more important, not less**. Lean into avocado-forward fusions, alternative Mexican formats, and customizable add-ons to re-engage younger consumers, while maintaining familiar options (tacos, chips & guac, fajitas) to capture Gen X, Boomer, and mainstream traffic.

4. **Avocado menu growth is broad-based but especially strong in fast casual and all-day menus, with sliced, diced, and spreadable avocado formats driving future gains beyond guacamole**. Avocados continue to grow penetration as nationally ubiquitous ingredient, with notable recovery and growth in regions outside the West after pandemic- and economic-induced penetration dips. Distributors should prioritize labor-saving sliced/diced solutions, fast casual partners, and all-day applications that flex across breakfast, lunch, and dinner – particularly sandwiches, burgers, salads, bowls, and breakfast mashups.

5. **Avocado remains a reliable profit driver and premium signal**! Avocado dishes consistently command about a $2 price premium, with appetizers (breaded/fried apps and salads) delivering the strongest margin lift. Given its ubiquity—menued by over two-thirds of American restaurants—future growth will come from positioning avocado as a premium, margin-bolstering ingredient in innovative applications and equipping operators with recipes, pricing guidance, and ideas that clearly justify that premium to value-conscious diners

6. **Spring & summer are prime seasons to use avocado to make “lighter but still filling” favorites.** Warm-weather launches skew toward salads, sandwiches, appetizers/sides, and burgers—exactly where avocado shines. Operators use avocado to add creaminess, indulgence, and substance without feeling overly heavy: as a hero ingredient in hearty entrée salads, a balance point on cold and hot sandwiches, a versatile shareable app component (e.g., fried wedges, avocado toast), and a “healthier-feeling” topper that lightens spring/summer burger builds.

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Edible Economy

KEY ECONOMIC INDICATORS
CONSUMER & OPERATOR SNAPSHOT
FOODSERVICE GROWTH & SPEND

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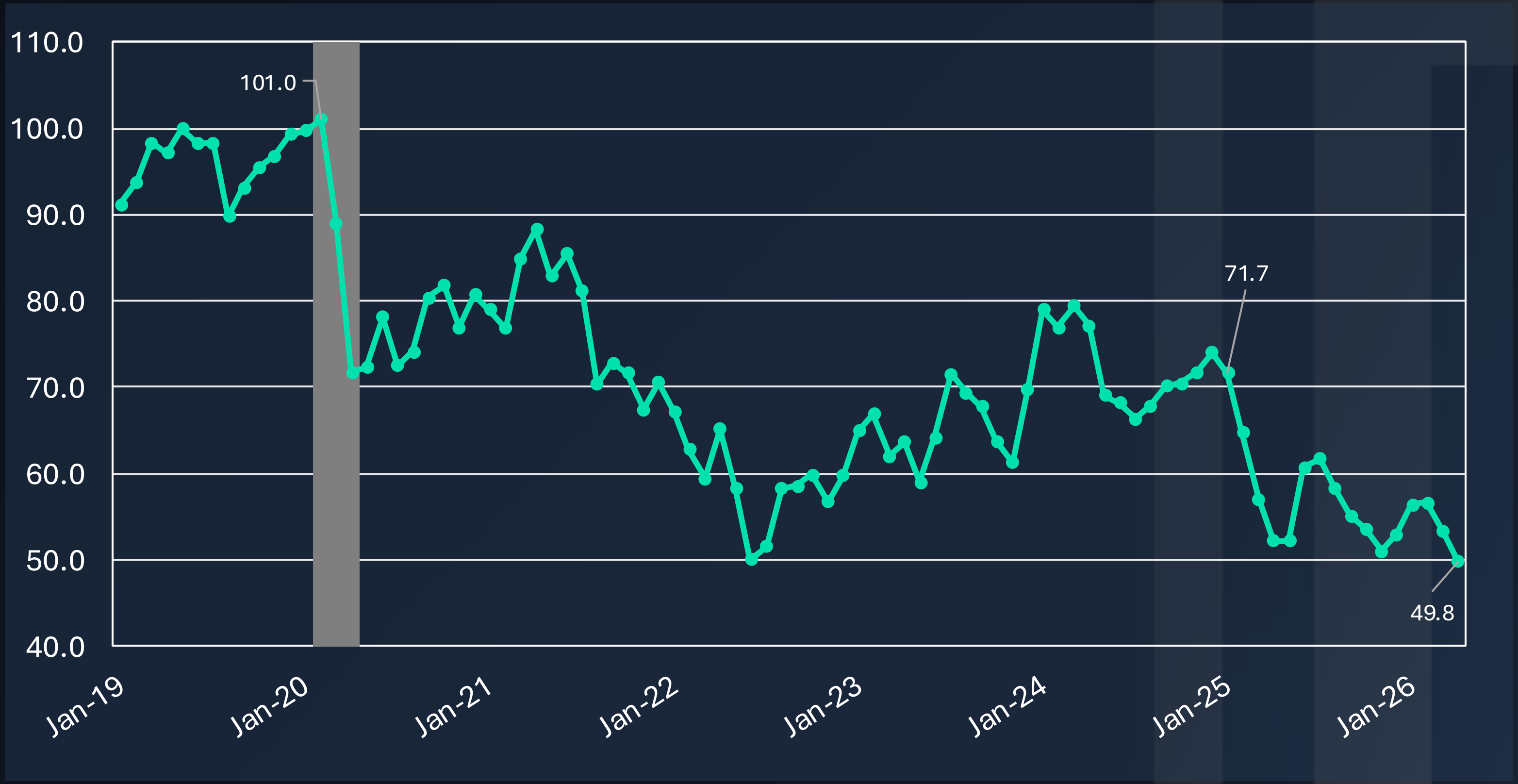
INDEX OF CONSUMER SENTIMENT

The Index of Consumer Sentiment (ICS) is a leading economic indicator that measures changes in the outlook for the economy. It is based on how shoppers feel about their interest and willingness to buy things in the future.

April consumer sentiment fell again to 49.8, down from 53.3 in March and 4.6% lower than a year prior, the weakest reading in over a year and lower than June 2022, when overall inflation was even more of a pressure on consumers. April marked the first full month of the Strait of Hormuz closure, with gasoline prices climbing to an average of $4.24 (up $0.47 from March) and households feeling the strain at the pump and at the grocery shelf. For restaurants and food manufacturers, weaker sentiment historically translates into trade-down behavior, smaller checks, and slower frequency on discretionary occasions.

CONSUMER SENTIMENT INDEX



Note: Grey bars represent recession periods

MONTHLY ICS

Apr-25	52.2
May-25	52.2
Jun-25	60.7
Jul-25	61.7
Aug-25	58.2
Sep-25	55.1
Oct-25	53.6
Nov-25	51.0
Dec-25	52.9
Jan-26	56.4
Feb-26	56.6
Mar-26	53.3
Apr-26	49.8

SOURCE: Thomson Reuters University of Michigan Survey of Consumers

SPENDING INDICATORS

The Bureau of Economic Analysis (BEA) produces economic accounts statistics that enable government and business decision-makers, researchers, and the American public to follow and understand the performance of the nation's economy. One of these statistics is Personal Income and Its Disposition, which is composed of income that people get from wages and salaries, Social Security, and other government benefits, dividends, and interest, business ownership, and other sources. These statistics can offer clues to Americans' financial health and future consumer spending.

Personal savings continued to deteriorate in March, dropping further to $857.3 billion which is about 26% lower than March 2025 and the lowest level in this series since late 2025. This drop-off coincided with another month-over-month and year-over-year increase in Consumer Expenditures, up 1.1% and 5.7%, respectively. This growth outpaced both month-over-month and year-over-year income changes, which, combined with depleting savings, signals that consumers continue to draw down savings to cover costs.

Date	Personal Income (billions)	% Change from Prior Month	Disposable Personal Income (billions)	% Change from Prior Month	Personal Consumption Expenditure (billions)	% Change from Prior Month	Personal Savings (billions)	% Change from Prior Month
Mar 2025	$25,877.30	0.67%	$22,704.40	0.68%	$20,683.00	0.80%	$1,163.20	-1.21%
Apr 2025	$26,061.10	0.71%	$22,873.10	0.74%	$20,746.40	0.31%	$1,268.90	9.09%
May 2025	$25,925.80	-0.52%	$22,722.60	-0.66%	$20,755.00	0.04%	$1,111.20	-12.43%
Jun 2025	$25,975.70	0.19%	$22,764.10	0.18%	$20,868.40	0.55%	$1,040.90	-6.33%
Jul 2025	$26,149.60	0.67%	$22,903.10	0.61%	$21,007.30	0.67%	$1,030.20	-1.03%
Aug 2025	$26,278.10	0.49%	$23,009.00	0.46%	$21,123.80	0.55%	$1,007.10	-2.24%
Sep 2025	$26,381.00	0.39%	$23,091.60	0.36%	$21,202.40	0.37%	$1,002.10	-0.50%
Oct 2025	$26,405.70	0.09%	$23,095.80	0.02%	$21,288.10	0.40%	$925.40	-7.65%
Nov 2025	$26,494.80	0.34%	$23,166.50	0.31%	$21,356.00	0.32%	$931.10	0.62%
Dec 2025	$26,565.70	0.27%	$23,232.90	0.29%	$21,445.90	0.42%	$910.50	-2.21%
Jan 2026	$26,679.10	0.43%	$23,448.10	0.93%	$21,511.80	0.31%	$1,056.40	16.02%
Feb 2026	$26,661.00	-0.07%	$23,429.80	-0.08%	$21,615.10	0.48%	$931.50	-11.82%
Mar 2026	$26,844.50	0.69%	$23,601.90	0.73%	$21,860.50	1.13%	$857.30	-7.96%

Note: All dollars in billions, seasonally adjusted to annual rate. Values covered include personal income (PI), disposable personal income (DSPI), personal consumption expenditure (PCE), and personal savings (PS).

SOURCE: U.S. Bureau of Economic Analysis, retrieved from FRED, Federal Reserve Bank of St. Louis.

INFLATION RATE

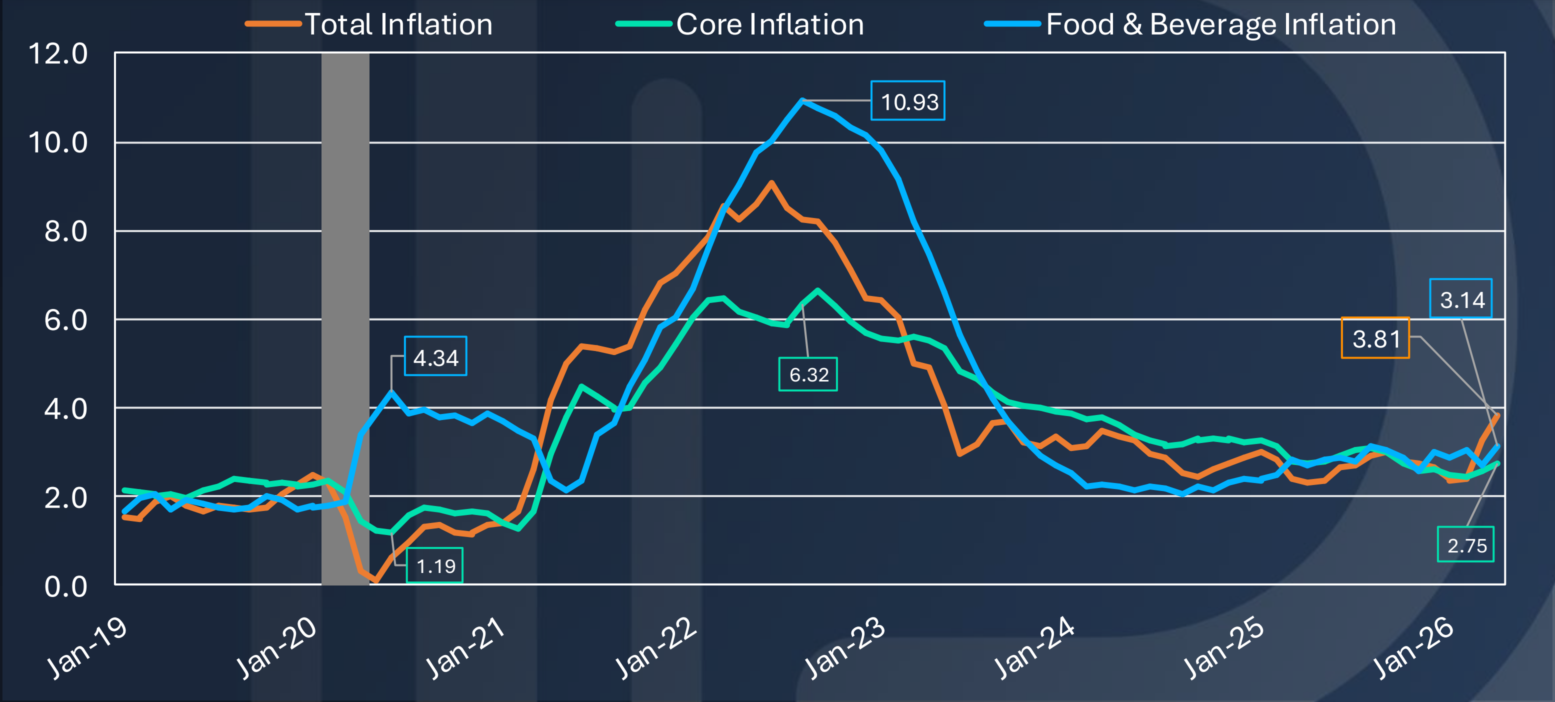
The Consumer Price Index (CPI) is a measure of the average change over time in the prices paid by urban consumers for a market basket of consumer goods and services. The percentage change in a CPI is used as a measure of inflation. CPI helps us determine to what extent prices paid by consumers are changing and how quickly. Inflation for all items less food and energy is known as “Core Inflation” and helps provide a better view of persistent underlying inflation, without some of the more volatile price measures found in food and energy. Food & Beverage inflation refers to inflation among at-home and away-from-home food & beverage items.

Headline inflation jumped to 3.8% year-over-year in April, up from 3.3% in March, driven by an increase in energy costs. Core inflation, which strips out food and energy, ticked up to 2.8% year-over-year. Food & beverage inflation accelerated to 3.1% year-over-year, returning to its highest level since late 2024 as compounding supply chain factors begin to impact food costs. This is before the impact of the closure of the Strait of Hormuz has fully impacted food prices, as many of the goods available in April were produced before the impact of the closure. For operators, the gap between core (which is still relatively contained) and headline (now energy-driven) suggests the inflation challenge is shifting from labor and shelter back toward inputs and logistics, a meaningful change in cost-management priorities versus this time last year.

MONTHLY INFLATION RATE (%)

Month	Inflation	Core Inflation	F & B Inflation
Apr-25	2.31	2.78	2.70
May-25	2.35	2.79	2.81
Jun-25	2.67	2.93	2.90
Jul-25	2.70	3.06	2.81
Aug-25	2.92	3.11	3.12
Sep-25	3.01	3.02	3.05
Oct-25*	2.79	2.75	2.87
Nov-25	2.74	2.63	2.58
Dec-25	2.68	2.64	2.99
Jan-26	2.39	2.50	2.88
Feb-26	2.41	2.46	3.05
Mar-26	3.26	2.60	2.69
Apr-26	3.81	2.75	3.14

MONTHLY INFLATION RATE (%)



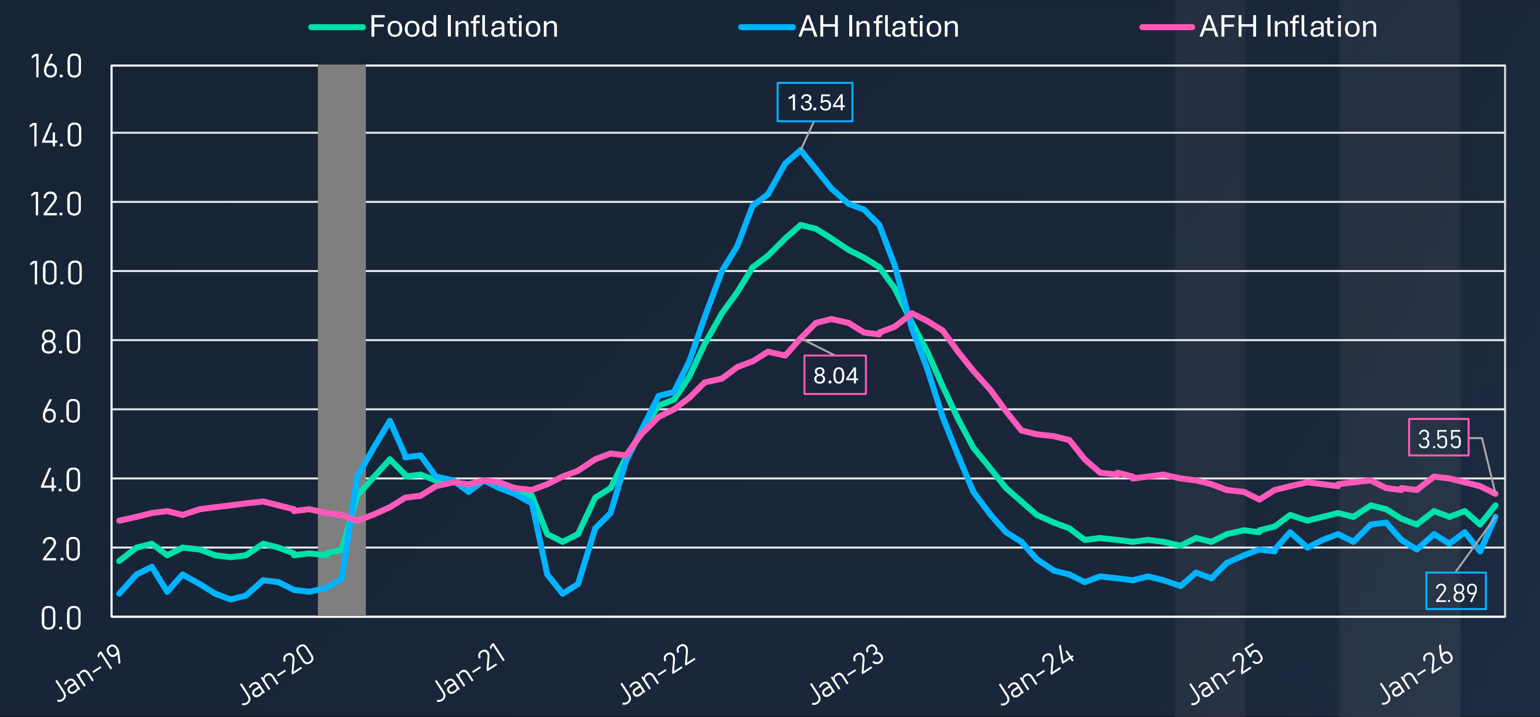
*Note: Inflation rate refers to the percent change of the CPI compared to the same month of the previous year. Presented measures include core inflation among all items excluding food and energy (a.k.a. Core Inflation, CPILFENS) and food and beverage inflation (CPIFABNS). Seasonally unadjusted values are used to assess prices experienced. Grey bars represent recession periods. *October 2025 values estimated using recommended procedure provided by the BLS.*

CONSUMER PRICE INDEX - FOOD

Food inflation accounts for changes in both at-home and away-from-home price changes. At-home inflation typically is referring to prices consumers pay at grocery stores, c-stores, and other food retailers. Whereas away-from-home inflation refers to the changes in menu prices at restaurants and other non-food retailer food establishments.

Overall food prices rose 3.2% from April 2025, the highest year-over-year reading in over a year. On the month, food rose 0.5%, with grocery (food-at-home) up 0.7% and food-away-from-home up just 0.2%. Year-over-year, grocery inflation accelerated to 2.9% while menu inflation moderated to 3.6%, resulting in the narrowest gap in this cycle and a notable reversal of the 2024 dynamic that had favored grocery on relative value. For restaurants, the closing gap creates room for measured menu pricing and value-bundle messaging without losing the perceived gap to home cooking. For food manufacturers, the move signals that previously absorbed input costs are now reaching consumers, with elevated category pressure persisting in beef, coffee, and tomatoes (the latter compounded by Mexican import dynamics). Strait of Hormuz fertilizer disruptions remain a watch item for the back half of the year.

MONTHLY INFLATION RATE (%)



MONTHLY INFLATION RATE (%)

Month	Food Inflation	AH Inflation	AFH Inflation
Apr-25	2.76	2.01	3.89
May-25	2.88	2.23	3.85
Jun-25	2.97	2.38	3.83
Jul-25	2.87	2.16	3.91
Aug-25	3.19	2.68	3.93
Sep-25	3.11	2.69	3.73
Oct-25*	2.82	2.21	3.72
Nov-25	2.65	1.94	3.66
Dec-25	3.07	2.36	4.07
Jan-26	2.88	2.09	3.98
Feb-26	3.06	2.45	3.90
Mar-26	2.68	1.90	3.78
Apr-26	3.18	2.89	3.55

*Note: Inflation rate refers to the percent change of the CPI compared to the same month of the previous year. Presented measures include food inflation (CPIUFDNS), at-home food price inflation (CUUR0000SAF11) and food-away-from-home price inflation (CUUR0000SEFV). Seasonally unadjusted values are used to assess prices experienced. Data series include grey bars represent recession periods. *October 2025 values estimated using the recommended procedure provided by the BLS.*

SOURCE: U.S. Bureau of Labor Statistics, retrieved from FRED, Federal Reserve Bank of St. Louis.

PRODUCER PRICE INDEX - MANUFACTURING

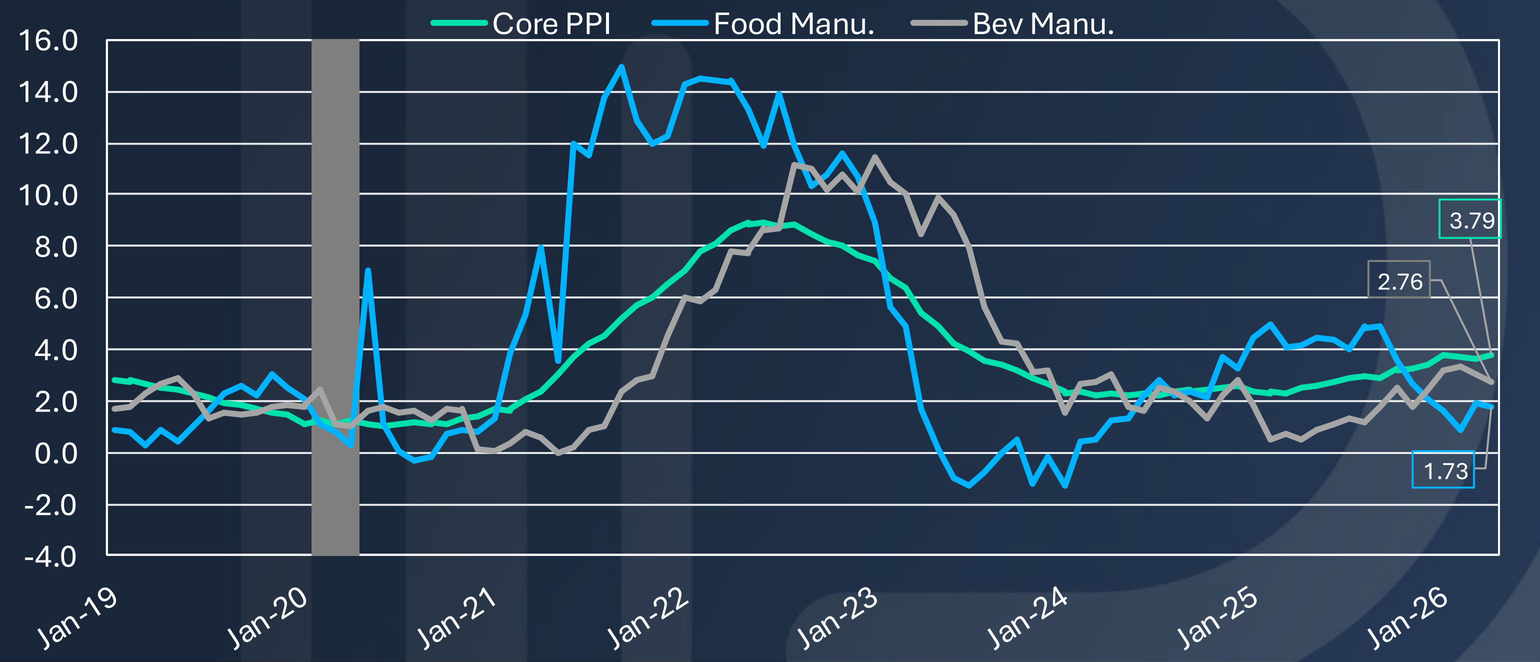
The Producer Price Index (PPI) is a family of indexes that measures the average change over time in selling prices received by domestic producers of goods and services – PPIs measure price change from the perspective of the seller. Sometimes referred to as cost-push inflation, it occurs when the cost of producing products and services rises, forcing business to raise their prices. This contrasts with other measures that capture price change from the purchaser's perspective, like the Consumer Price Index. Core PPI removes food and energy costs, which are two highly volatile categories. Food manufacturing focuses on the cost of producing food goods such as animal food manufacturing, fruit & vegetable preserving and specialty food manufacturing, and dairy product manufacturing, whereas beverage manufacturing includes those that manufacture nonalcoholic beverages, alcoholic beverages through the fermentation processes and those that produce distilled alcoholic beverages.

April food manufacturing PPI moderated to 1.7% year-over-year, easing from March's 1.9%, while beverage manufacturing PPI softened slightly to 2.8% year-over-year, down from 3.1% in March. At the same time, core PPI (excluding food and energy) accelerated to 3.8% year-over-year, the highest reading in over a year, signaling stickier underlying cost pressure from services, packaging, and non-food materials. The bigger story sits at the top of the index: headline final-demand PPI jumped 1.4% on the month, the largest monthly advance since March 2022, pushing the 12-month change to 6.0%. This indicates that input costs will likely continue to rise, impacting both manufacturers and operators.

MONTHLY INFLATION RATE (%)

Month	Core PPI	Food Manu	Beverage Manu
Mar-25	2.32	4.12	0.69
Apr-25	2.50	4.13	0.53
May-25	2.56	4.44	0.89
Jun-25	2.70	4.35	1.11
Jul-25	2.84	4.01	1.28
Aug-25	2.94	4.86	1.13
Sep-25	2.91	4.90	1.79
Oct-25	3.25	3.55	2.49
Nov-25	3.26	2.69	1.74
Dec-25	3.39	2.09	2.42
Jan-26	3.77	1.61	3.21
Feb-26	3.67	0.88	3.35
Mar-26	3.65	1.91	3.05
Apr-26	3.79	1.73	2.76

MONTHLY PRODUCER PRICE INDEX (% change, year-over-year)



Note: Inflation rate refers to the percent change of the PPI compared to the same month of the previous year. Series include core PPI (food manufacturing (PCU311311) and beverage manufacturing (PCU31213121). Seasonally unadjusted values are used to assess prices experienced. Grey bars represent recession periods.

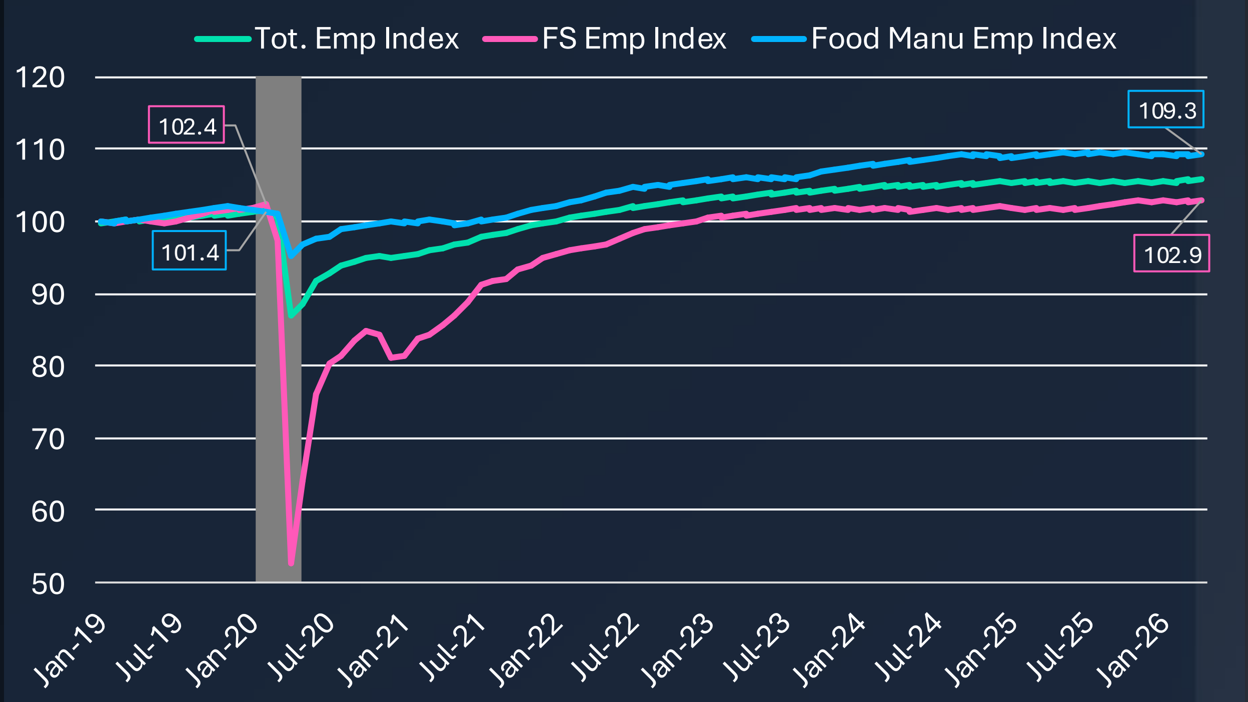
SOURCE: U.S. Bureau of Labor Statistics, retrieved from FRED, Federal Reserve Bank of St. Louis.

EMPLOYMENT LEVELS

The Bureau of Labor Statistics (BLS) runs the establishment-based Current Employment Statistics survey for jobs numbers. This section provides information relating to employment in the total non-farm economy, food manufacturing, food services and drinking places. These food service sectors includes full-service restaurants, limited-service eating places, special food services, and drinking places (including alcohol serving places). Food manufacturing includes animal food manufacturing, grain and oilseed milling, sugar and confectionary product manufacturing, fruit and vegetable preserving and specialty food manufacturing, dairy product manufacturing, animal slaughtering and processing, seafood product preparation and packaging, bakeries and tortilla manufacturing, and other food manufacturing.

April nonfarm payrolls grew by 115K, with gains led by health care (+37K), transportation & warehousing (+30K), retail trade (+22K), and social assistance (+17K). Food service employment added 17.2K jobs, continuing the recovery after February's weather-related dip, and food manufacturing edged up roughly 1.5K. Federal government employment continued to decline (-9K, now down 348K or 11.5% since the October 2024 peak), and information shed another 13K. February's tally was revised down by 23K to -156K while March was revised up by 7K to +185K.

EMPLOYMENT LEVELS (INDEX = JANUARY 2019, per industry)



Employment Levels (Thousands)

Month	Total Employment	Food Service Employment	Food Manufacturing Employment
Apr-25	158,485.0	12,221.9	1,783.7
May-25	158,498.0	12,217.5	1,785.6
Jun-25	158,478.0	12,218.7	1,784.5
Jul-25	158,542.0	12,224.0	1,784.8
Aug-25	158,472.0	12,245.0	1,785.0
Sep-25	158,548.0	12,283.9	1,784.1
Oct-25	158,408.0	12,326.5	1,785.0
Nov-25	158,449.0	12,348.1	1,781.2
Dec-25	158,432.0	12,343.3	1,780.2
Jan-26	158,592.0	12,366.5	1,780.2
Feb-26	158,436.0	12,327.7	1,779.9
Mar-26	158,621.0	12,339.2	1,779.9
Apr-26	158,736.0	12,356.4	1,781.4

Note: Grey bars represent recession periods. Data series include total employment (PAYEMS), food service and drinking places (CES7072200001), and food manufacturing (CES3231100001), seasonally adjusted.

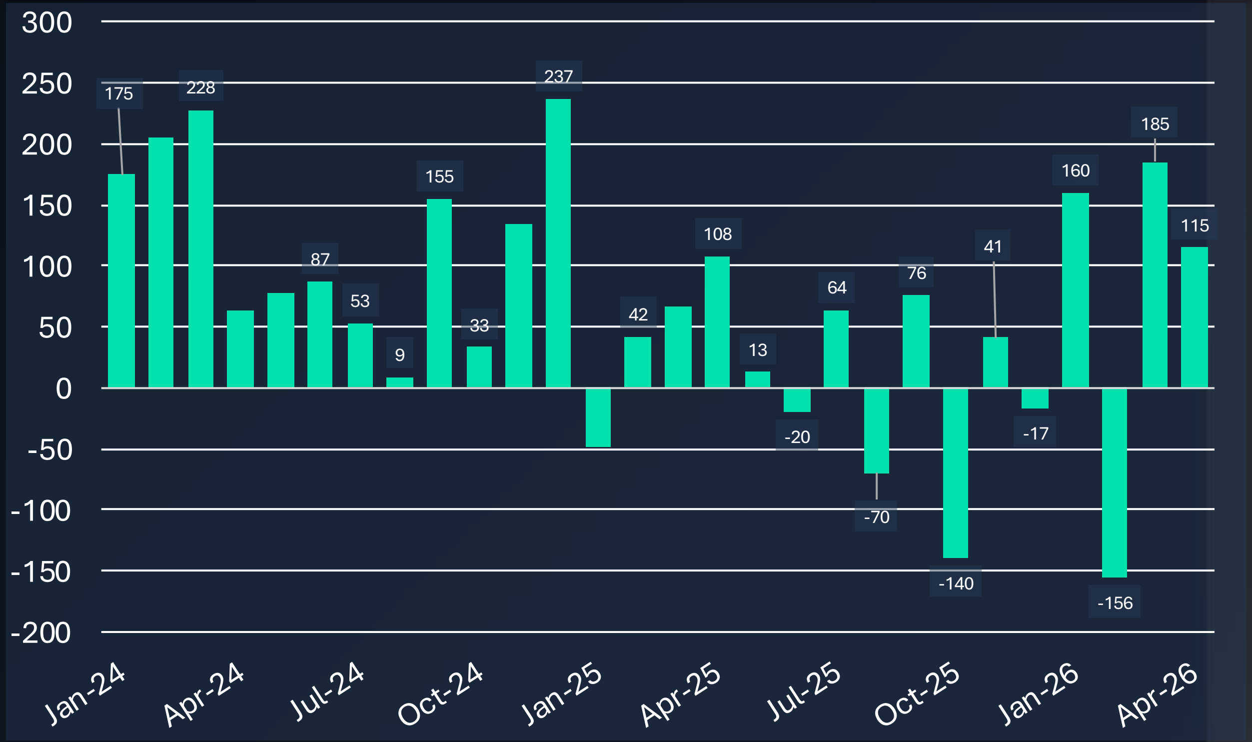
MONTH-TO-MONTH CHANGES

April saw continued job growth of 115K, on top of March's revised 185K, led by health care, transportation & warehousing, and retail trade. Food service added 17.2K jobs after March's 11.5K gain, building positive momentum following February's weather-related decline.

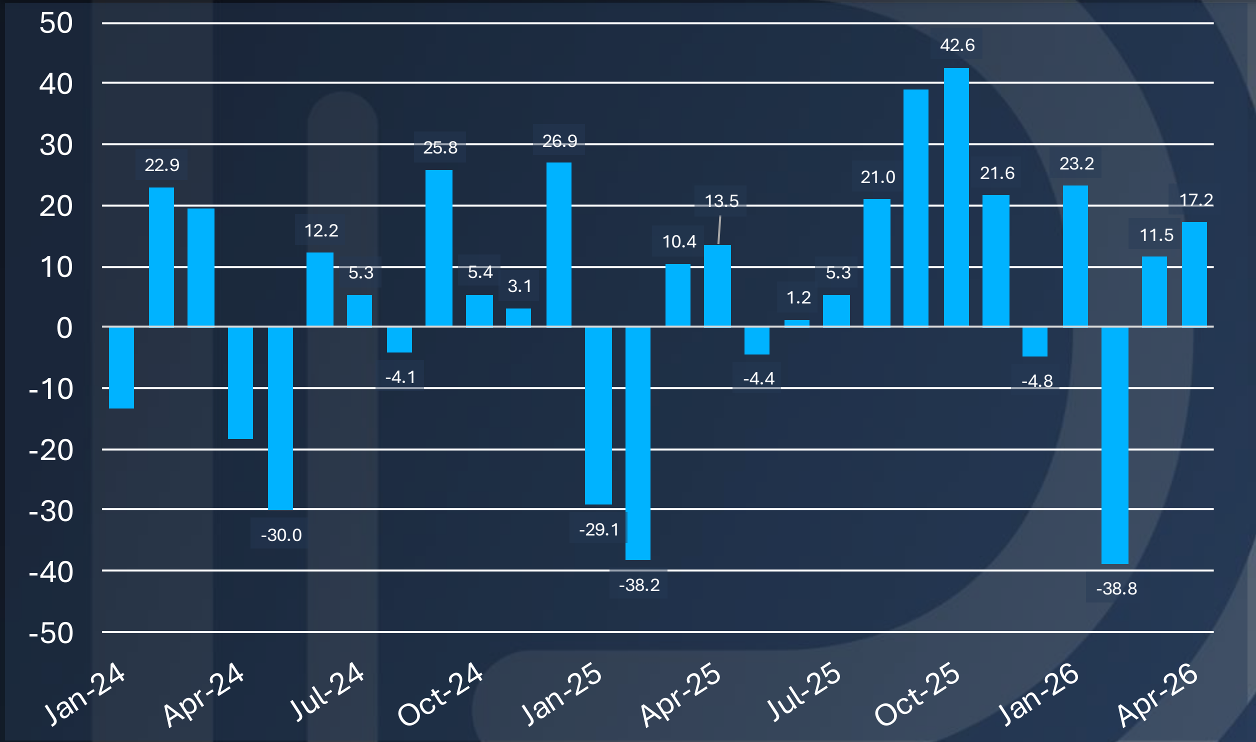
Leisure & hospitality overall showed little change on the month, with food service gains essentially offset by softness in accommodations and arts/entertainment. This is consistent with the weaker April consumer-sentiment reading and travel pullback.

Year-over-year food service employment remains positive, suggesting underlying operator demand for staff is holding even as discretionary spending weakens at the margin.

Total employment month-to-month jobs added (thousands)



Food service month-to-month jobs added (thousands)



Note: Data series include total employment (PAYEMS), food service and drinking places (CES7072200001), seasonally adjusted. Please note the different vertical scales.

UNEMPLOYMENT & LABOR FORCE PARTICIPATION

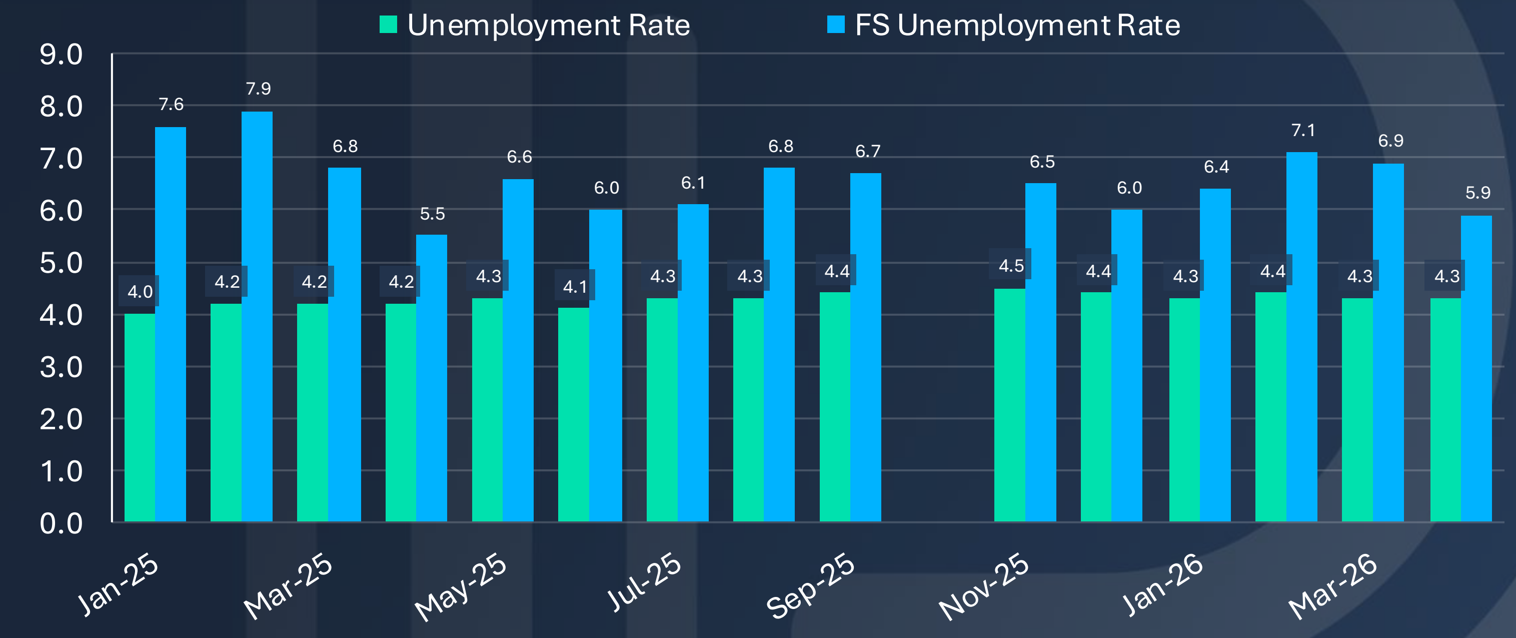
The Bureau of Labor Statistics (BLS) runs the Current Population Survey (CPS) to determine current employment rates. The BLS specifically defines unemployed persons as those who don't have a job but are available for work and have looked for work in the past four weeks. The unemployment rate measures the share of workers in the labor force who do not currently have a job but are actively looking for work. The Labor Force Participation Rate is the percentage of the population that is either working or actively looking for work. Alongside the overall unemployment rate, we present the unemployment rate among foodservice and accommodation (FS) employees.

Overall unemployment held at 4.3% in April, with the number of unemployed essentially unchanged at 7.4 million; both have changed little over the year. Labor force participation slipped to 61.8%, the lowest reading in the past year, suggesting some workers are stepping back from active job search rather than entering unemployment. Food service unemployment fell to 5.9%, helped by the sector adding 17.2K jobs in April. The number of people working part-time for economic reasons rose by 445K to 4.9 million, indicating some softening in hours availability. For operators, the labor backdrop is the most favorable it has been in some time: ample supply of part-time-willing workers, wage growth cooling toward 3.6% year-over-year, and reduced turnover pressure heading into the summer hiring season.

UNEMPLOYMENT & LABOR FORCE PARTICIPATION RATES FOR TOTAL WORKFORCE(%)

Month	Unemployment	Labor Force Participation
Apr-25	4.2	62.6
May-25	4.3	62.4
Jun-25	4.1	62.3
Jul-25	4.3	62.2
Aug-25	4.3	62.3
Sep-25	4.4	62.5
Oct-25*		
Nov-25	4.5	62.5
Dec-25	4.4	62.4
Jan-26	4.3	62.1
Feb-26	4.4	62.0
Mar-26	4.3	61.9
Apr-26	4.3	61.8

UNEMPLOYMENT RATES



*Note: Data series include unemployment rate (UNRATE), labor force participation (CIVPART) and foodservice and accommodation unemployment rate (NAICS Sector 722, BLS code LNU04034262). As a result of the 2025 government shutdown, official data from Oct-2025 data will be unavailable. * indicates the average between preceding and subsequent months.*

SOURCE: U.S. Bureau of Labor Statistics, retrieved from FRED, Federal Reserve Bank of St. Louis.

SNAP PARTICIPATION RATE

The Supplemental Nutrition Assistance Program (SNAP) provides nutritional assistance to eligible, low-income individuals and households via a monthly benefit on an Electronic Benefits Transfer (EBT) card, similar to a debit card, which can be used at authorized retailer stores to purchase food.

SNAP is the largest federal nutritional assistance program. The U.S. Department of Agriculture's (USDA) Food and Nutrition Service (FNS) administers SNAP at the federal level. Every $1 spent on SNAP generates an additional $1.80 in economic activity.

The USDA also authorizes and monitors retailer stores that redeem SNAP benefits. States operate the program at the local level, determining eligibility and issuing benefits to eligible households.

Following changes to SNAP rules in October 2025, participation has continued fall. This is unsurprising when combined with the lapse in funding that limited access to benefits, the first time in the program's history, the month prior.

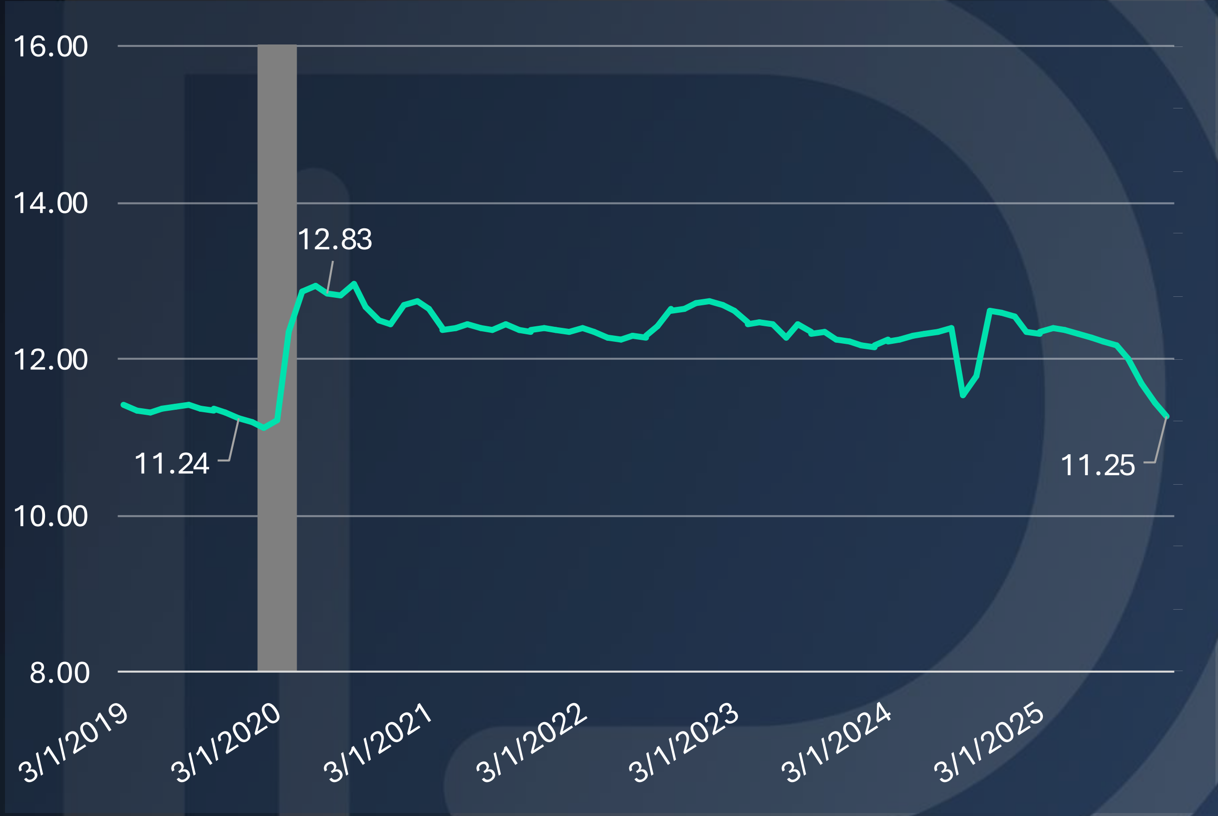
December participation fell below September 2024 levels to 11.45%, and January 2026 dropped further to 11.25% — a new multi-year low. FNS also revised November 2025 down to 11.68% in the latest release.

There has been increased focus on the reduction in access to sugar-sweetened beverages (SSBs) and other sweetened foods, which have recently gone into effect in 2026.

- USDA has approved waivers prohibiting the purchase of these foods for 18 states, with the first 5 states enacting the restrictions at the start of 2026.
- Trade associations have indicated that the restriction will cost retailers an initial $1.6 billion.

AVERAGE SNAP PARTICIPATION RATE

Month	Participation Rate
Jan-25	12.55
Feb-25	12.36
Mar-25	12.36
Apr-25	12.40
May-25	12.36
Jun-25	12.31
Jul-25	12.28
Aug-25	12.23
Sep-25	12.16
Oct-25	12.00
Nov-25	11.68
Dec-25	11.45
Jan-26	11.25



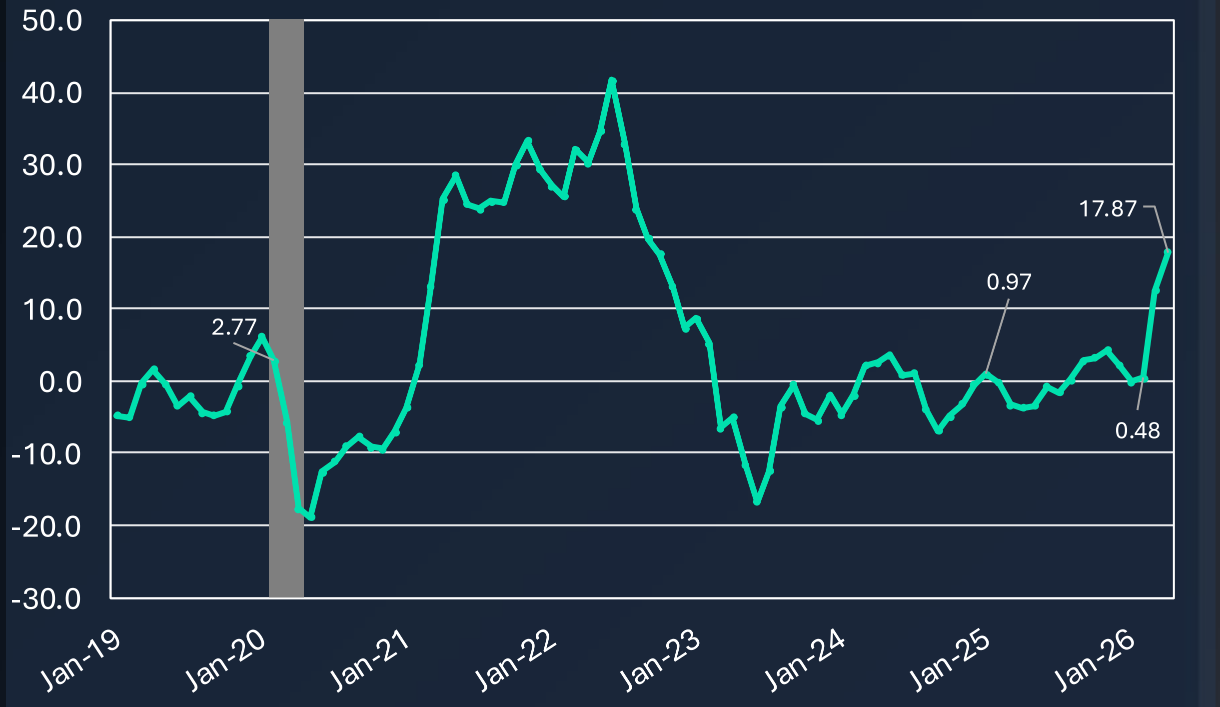
Note: Grey bars represent recession periods. Participation rate is calculated using the number of persons actively enrolled in SNAP each month divided by the (seasonally unadjusted) monthly population (POPTHM) from the Bureau of Economic Analysis.

GAS PRICES & ENERGY INFLATION

The U.S. Energy Information Administration (EIA) collects data from residential and commercial consumers through a survey of companies that deliver gas to consumers. When gas prices rise it can ripple through everything from consumer spending to the price of airline tickets to hiring practices. If discretionary spending is hampered by higher gasoline costs, it can have knock-on effects throughout the broader economy. The energy index includes energy commodities, such as gasoline (all types) and fuel oil, as well as energy services, such as electricity, and utility (piped) gas services.

- Energy inflation surged to 17.9% higher than a year prior in April, accelerating from March's 12.5%, driven by the sustained closure of the Strait of Hormuz restricting oil supply. The April year-over-year energy reading is the highest since mid-2022.
- Average monthly gas prices continued climbing in April to $4.24, up $0.47 from March and 28.4% higher than a year prior. Sustained tightness from the Strait of Hormuz situation has now pushed average gas prices to their highest level since mid-2022.

MONTHLY INFLATION RATE (%)



MONTHLY GAS PRICES ($)

Note: National average of all grades of gasoline (does not include diesel; GASALLM , not seasonally adjusted), average based on prices at the end of the month. Inflation rate refers to the percent change of the CPI compared to the same month of the previous year. Presented measures include energy inflation (CPIENGNS, seasonally unadjusted values). Data series include grey bars represent recession periods. The October 2025 inflation value was estimated using recommended procedure provided by the BLS.

GROSS DOMESTIC PRODUCT (%)

The Gross Domestic Product (GDP) is the most used measure for the size of the economy, looking at the total monetary or market value of all the finished goods and services produced within a country's borders in a specific time period – used as a broad measure of overall domestic production and a way of gauging a country's economic health.

Q1 2026 advance estimate showed renewed momentum at 2.0%, a sharp rebound from Q4 2025's revised 0.5%. Consumer spending and investment rebounded after a weak Q4 weighed down by the government shutdown drag.

Real food & beverage consumption for off-premises consumption showed signs of stabilization after Q4's decline. Real food services and accommodation showed modest recovery from the prior quarter. The Q1 rebound reflects renewed consumer activity following the late-2025 disruptions.

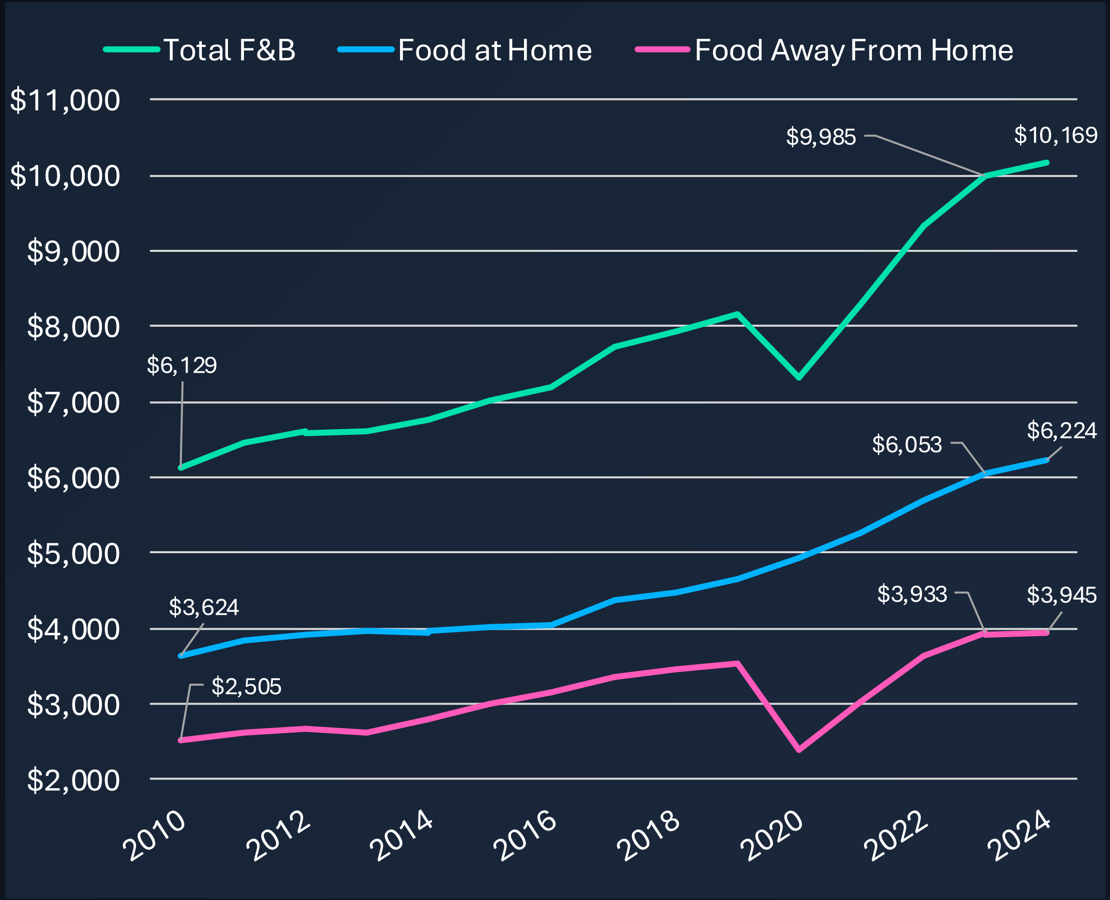
The personal consumption expenditure (PCE) price index, the Federal Reserve Board measure of inflation, which is broader than CPI, increased 2.9% this quarter, and excluding the more volatile food and energy metrics, rose 2.7%. This remains higher than the target metric of 2.0%.

CONSUMER FOOD EXPENDITURES

The Consumer Expenditure Survey (CE) provides data on expenditures, income, and demographic characteristics of consumers in the United States. This is a national survey conducted by the Census Bureau on behalf of the Bureau of Labor Statistics, and the collected data is used for calculating the Consumer Price Index (CPI) to help measure inflation.

2023 to 2024 saw the smallest, non-negative, increase in FAFH spending since 2019. At-home spending was the primary driver in increased food expenditures.

AVERAGE ANNUAL FOOD SPENDING



AVERAGE ANNUAL FOOD SPENDING

Year	Total F&B	Change From Prior Year	Food at Home	Change From Prior Year	Food Away From Home	Change From Prior Year
2013	$6,602	-0.7%	$3,977	1.4%	$2,625	-2.0%
2014	$6,759	2.4%	$3,971	-0.2%	$2,787	6.2%
2015	$7,023	3.9%	$4,015	1.1%	$3,008	7.9%
2016	$7,203	2.6%	$4,049	0.8%	$3,154	4.9%
2017	$7,729	7.3%	$4,363	7.8%	$3,365	6.7%
2018	$7,923	2.5%	$4,464	2.3%	$3,459	2.8%
2019	$8,169	3.1%	$4,643	4.0%	$3,526	1.9%
2020	$7,316	-10.4%	$4,942	6.4%	$2,375	-32.6%
2021	$8,289	13.3%	$5,259	6.4%	$3,030	27.6%
2022	$9,343	12.7%	$5,703	8.4%	$3,639	20.1%
2023	$9,985	6.9%	$6,053	6.1%	$3,933	8.1%
2024	$10,169	1.8%	$6,224	2.8%	$3,945	0.3%

SOURCE: Bureau of Labor Statistics. 2024 metrics released December 19, 2025. Next release anticipated September 2026.

ANNUAL AVERAGE GAS PRICES

The U.S. Energy Information Administration (EIA) collects data from residential and commercial consumers through a survey of companies that deliver gas to consumers. When gas prices rise, it can be a drag on the economy – impacting everything from consumer spending to the price of airline tickets to hiring practices. Gas is an important input for transportation, which directly impacts households as they drive, but also businesses that rely on logistics and transportation. If discretionary spending is hampered by higher gasoline costs, it can have knock-on effects throughout the broader economy.

The 2025 annual gas price showed the continued general decline in average price observed since 2022.

ANNUAL GAS PRICES ($)

AVERAGE ANNUAL GAS PRICES

Year	Average annual gas price	Change From Prior Year
2014	$3.44	-3.0%
2015	$2.51	-3.7%
2016	$2.25	-27.0%
2017	$2.53	-10.3%
2018	$2.82	12.3%
2019	$2.69	11.3%
2020	$2.26	-4.7%
2021	$3.09	-15.9%
2022	$4.06	36.9%
2023	$3.63	31.4%
2024	$3.43	-10.6%
2025	$3.23	-5.7%

Note: National average of all grades of gasoline (does not include diesel), not seasonally adjusted, (GASALLM), annual averages.

SOURCE: U.S. Energy Information Administration, retrieved from FRED, Federal Reserve Bank of St. Louis.

U.S. TOTAL POPULATION ESTIMATES & PROJECTIONS (in thousands)

The Census Bureau's Population Estimates Program (PEP) produces estimates of the population, including demographic components of population change (births, deaths, and migration), and are produced at the national, state, and county levels of geography.

Year	Total Population	Male	Female	White	Black	American Indian	Asian	Mixed Race	Hispanic or Latino
2022	333,288	165,283	168,004	251,602	45,400	4,382	20,954	10,071	63,664
2025	338,016	167,544	170,473	253,416	46,248	4,464	22,115	10,858	66,657
2030	345,074	170,857	174,216	255,570	47,622	4,593	24,051	12,264	71,677
2035	350,861	173,533	177,328	256,548	48,881	4,713	25,914	13,778	76,719
2040	355,309	175,598	179,711	256,274	50,032	4,820	27,729	15,374	81,650
2045	358,438	177,091	181,347	254,811	51,087	4,911	29,485	17,014	86,283
2050	360,639	178,197	182,442	252,546	52,068	4,979	31,183	18,683	90,524
2055	362,450	179,144	183,306	249,976	53,024	5,023	32,810	20,392	94,404
2060	364,287	180,097	184,190	247,459	53,997	5,046	34,357	22,165	97,994

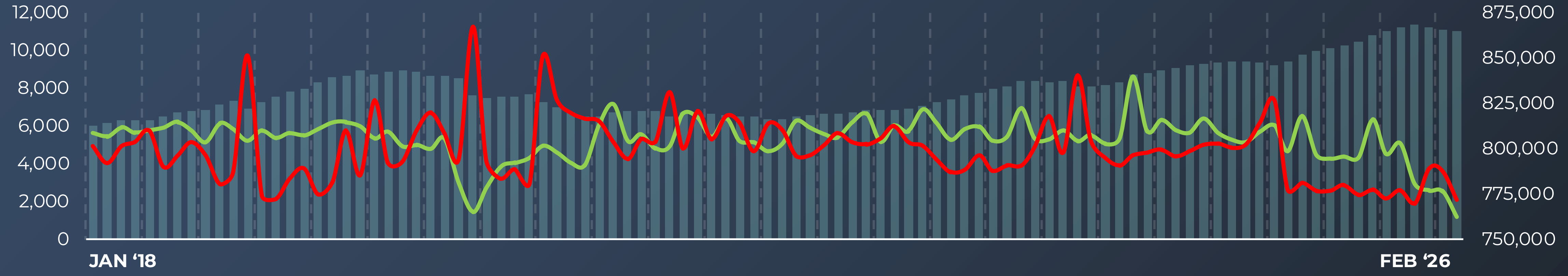
Note: 2022 is base population from when census obtained actual numbers for projections.

SOURCE: U.S. Census

Foodservice Openings & Closings

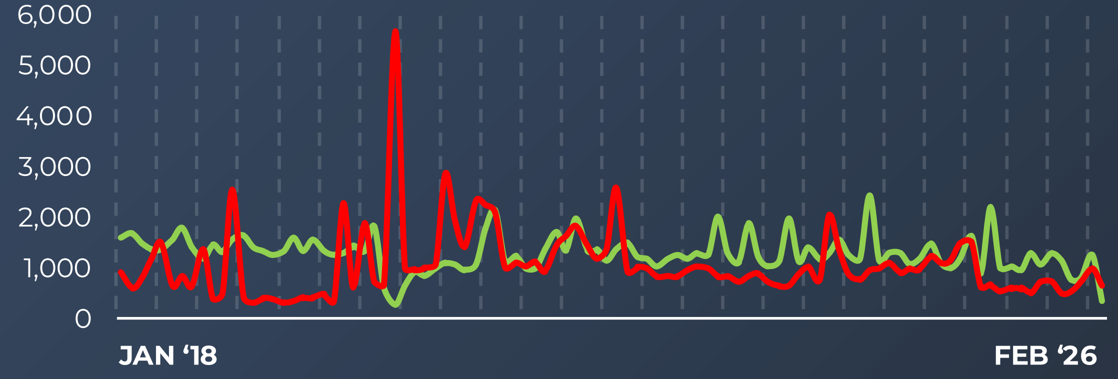
ALL OPERATORS

Permanent Closures FEB ‘26: 2,076 units
New Openings FEB ‘26: 1,179 units
Total Active Restaurants FEB ‘26: 865,030 units



CHAIN

Permanent Closures FEB ‘26: 638 units
New Openings FEB ‘26: 366 units

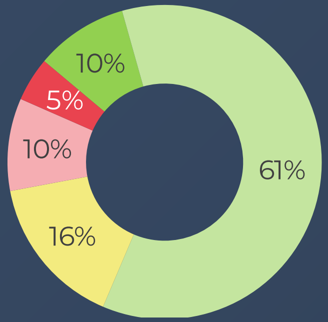


INDEPENDENT

Permanent Closures FEB ‘26: 1,483 units
New Openings FEB ‘26: 813 units

Operator: Previous Month Performance

How Would Operators Describe Their Business In The Past Month?



10%
VERY PROFITABLE
It was an excellent month

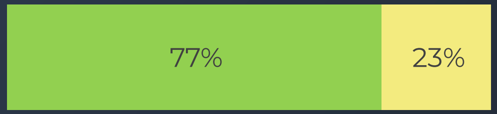
61%
PROFITABLE
We had an average month

16%
NOT VERY PROFITABLE
We had a below average month

10%
BROKE EVEN
Our revenue just covered our costs

5%
MADE A LOSS
Our costs exceeded our revenue

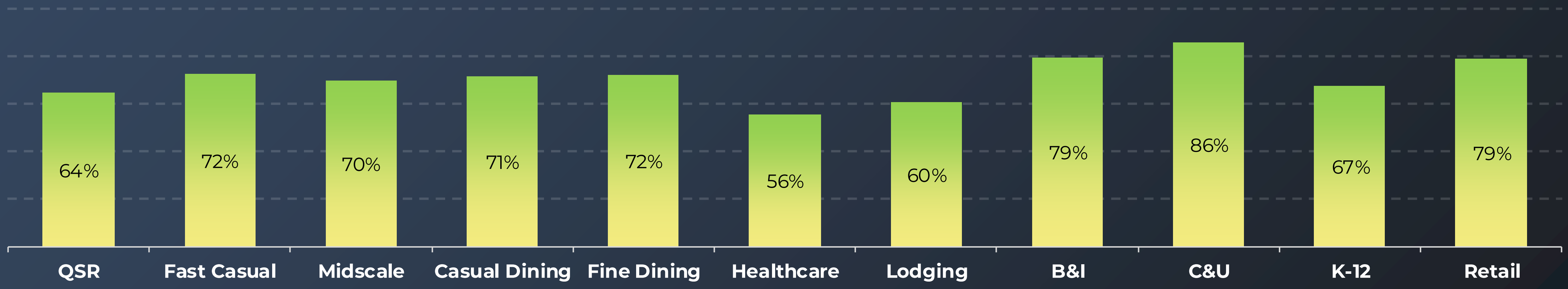
77%
ON-PREMISE REVENUE



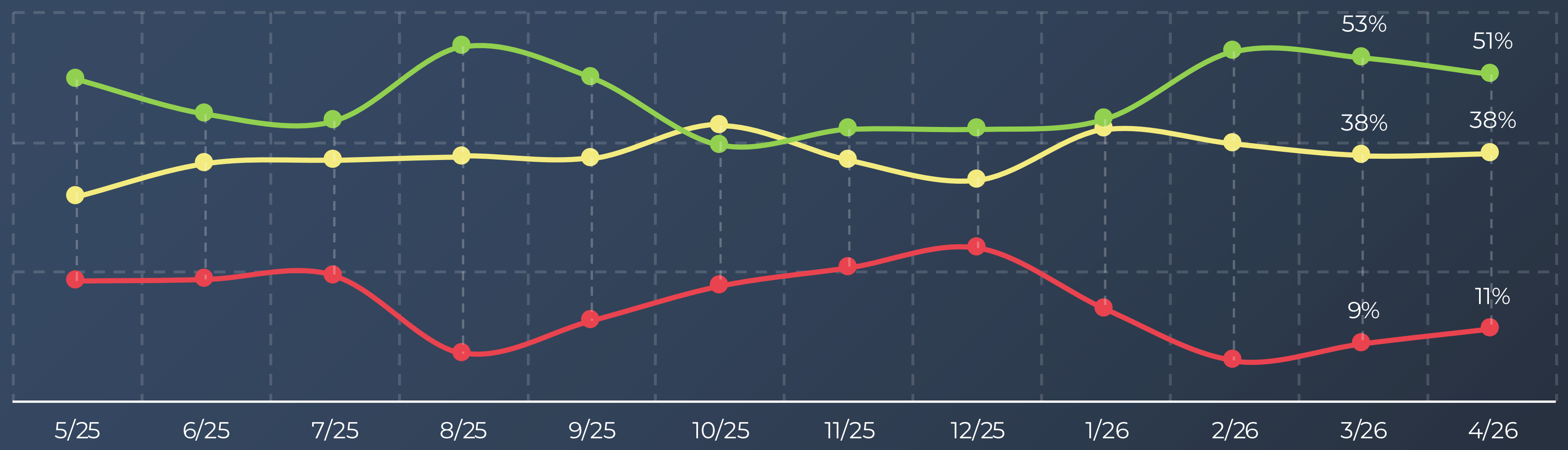
23%
OFF-PREMISE REVENUE

BY SEGMENT

TOP 2; 5 PT. SCALE – “Very Profitable” + “Profitable”



Operator: Traffic Expectation For The Upcoming Month

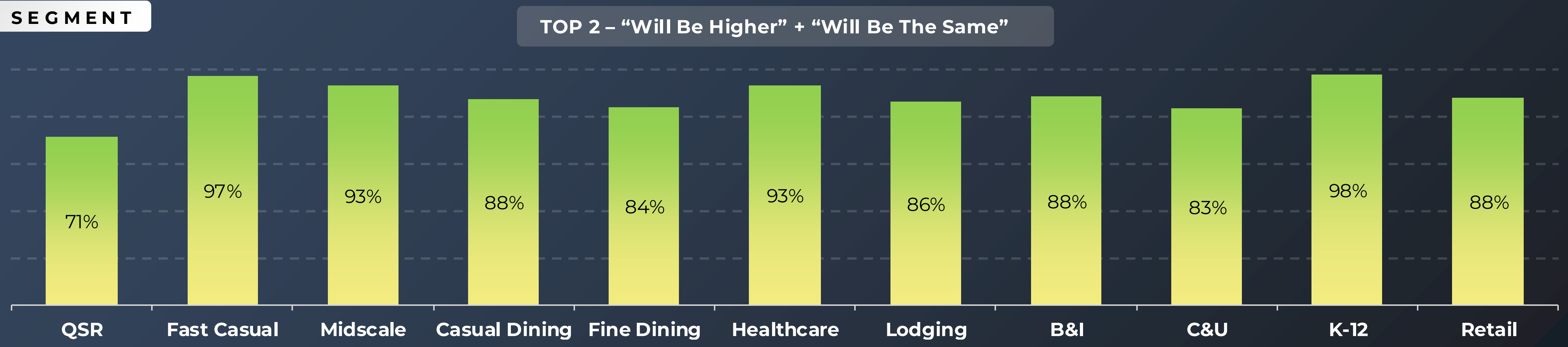


WILL BE HIGHER
51%

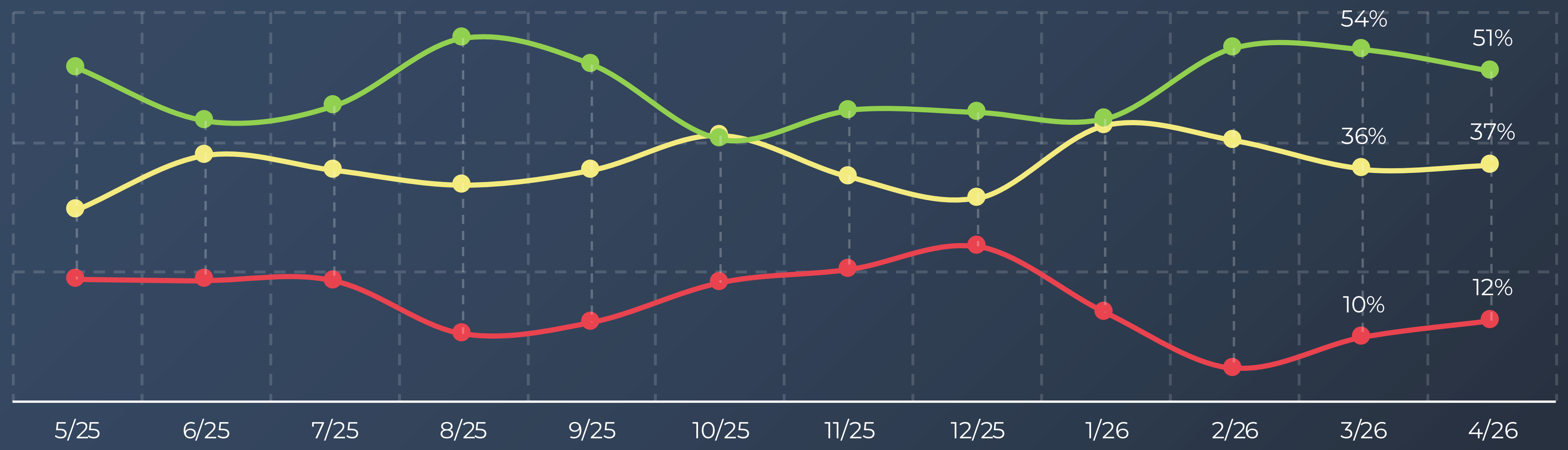
WILL BE THE SAME
38%

WILL BE LOWER
11%

BY SEGMENT

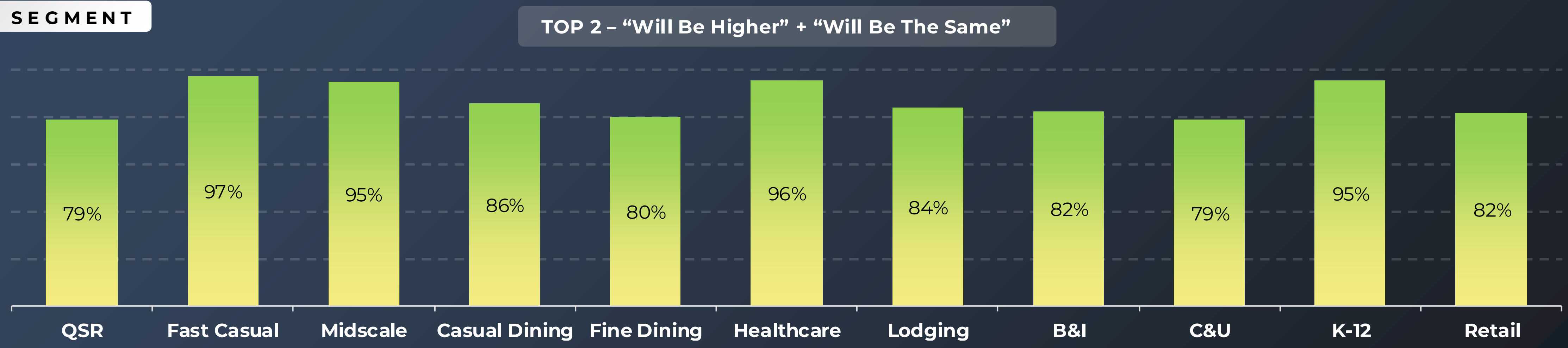


Operator: Sales Expectation For The Upcoming Month



WILL BE HIGHER
51%
WILL BE THE SAME
37%
WILL BE LOWER
12%

BY SEGMENT



Operator: Current Challenges & Future Goals

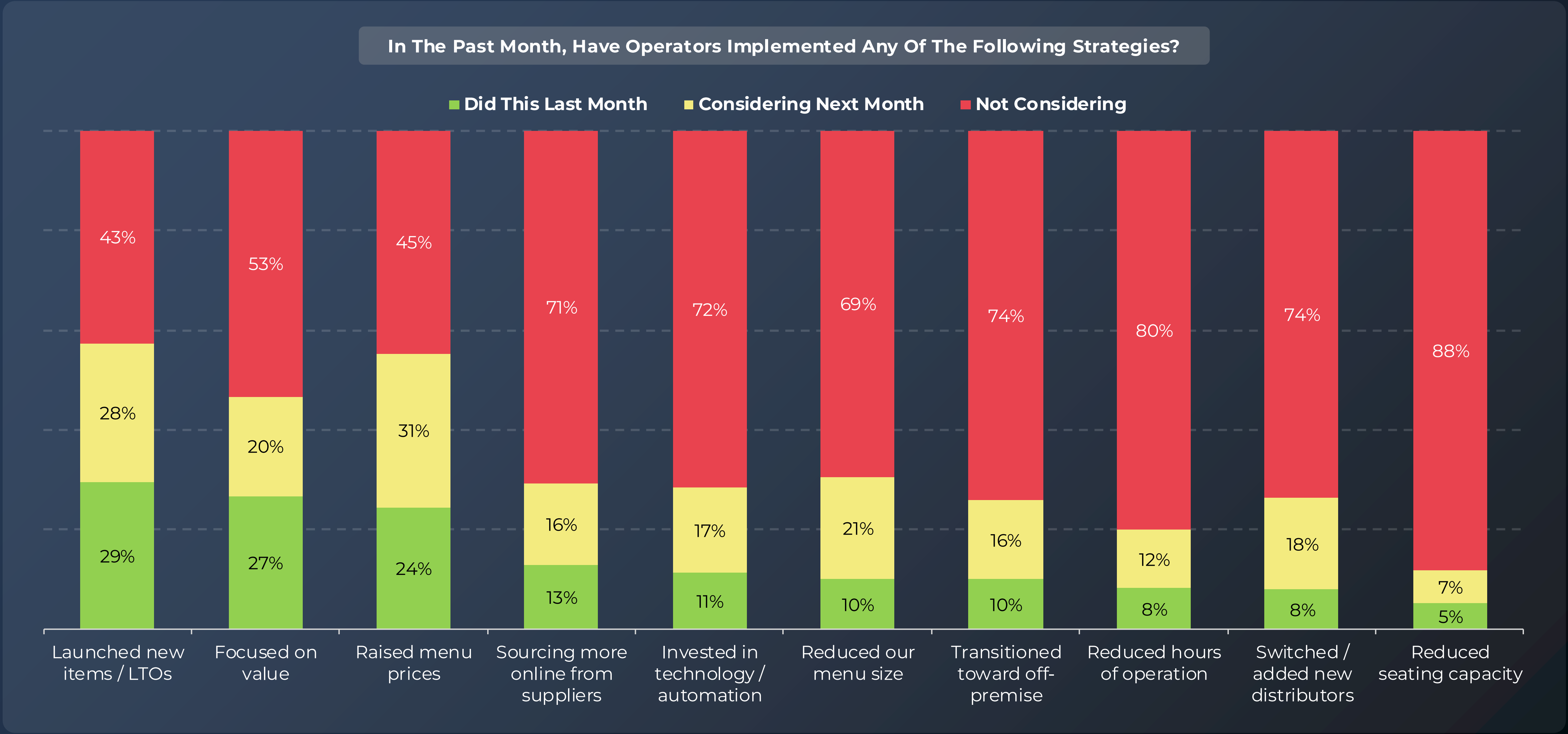
What Are Operators' Top Operational Challenges?

	03/26	04/26	1-mo. change
Food costs	74%	74%	**0%**
Labor costs	56%	57%	**1%**
Labor recruitment / hiring	28%	32%	**4%**
Retaining current staff	25%	24%	**-1%**
Customers reducing how much they spend	24%	22%	**-2%**
Customers reducing how often they visit	23%	18%	**-4%**
New laws or regulations	9%	9%	**0%**
New sources of competition in my area	8%	8%	**0%**
Marketing / promoting our business	6%	7%	**1%**
Sourcing challenges / ingredient shortages	7%	5%	**-2%**
Innovating / updating our menu	6%	4%	**-2%**
Other	2%	1%	**-1%**

What Business Goals Are Operators Prioritizing This Month?

	03/26	04/26	1-mo. change
Reducing monthly food cost	44%	47%	**3%**
Increasing our earnings / bottom line	26%	32%	**6%**
Increasing our average check	26%	29%	**3%**
Improving our labor / staffing situation	29%	28%	**-1%**
Reducing monthly business expenses	26%	25%	**-1%**
Improving customer satisfaction / feedback	29%	22%	**-7%**
Increasing our revenue / top line	20%	22%	**2%**
Developing / launching new menu items	16%	15%	**-1%**
Improving employee capabilities	16%	13%	**-3%**
Improving speed of service	10%	10%	**0%**
Expanding marketing / promotional efforts	10%	9%	**-1%**
Expanding loyalty and rewards programs	6%	6%	**0%**
Adjusting our physical layout / ambiance	5%	5%	**0%**
Forging new supplier / distributor relationships	4%	4%	**0%**
None of the above	3%	3%	**0%**

Operator: Top Profitability Strategies

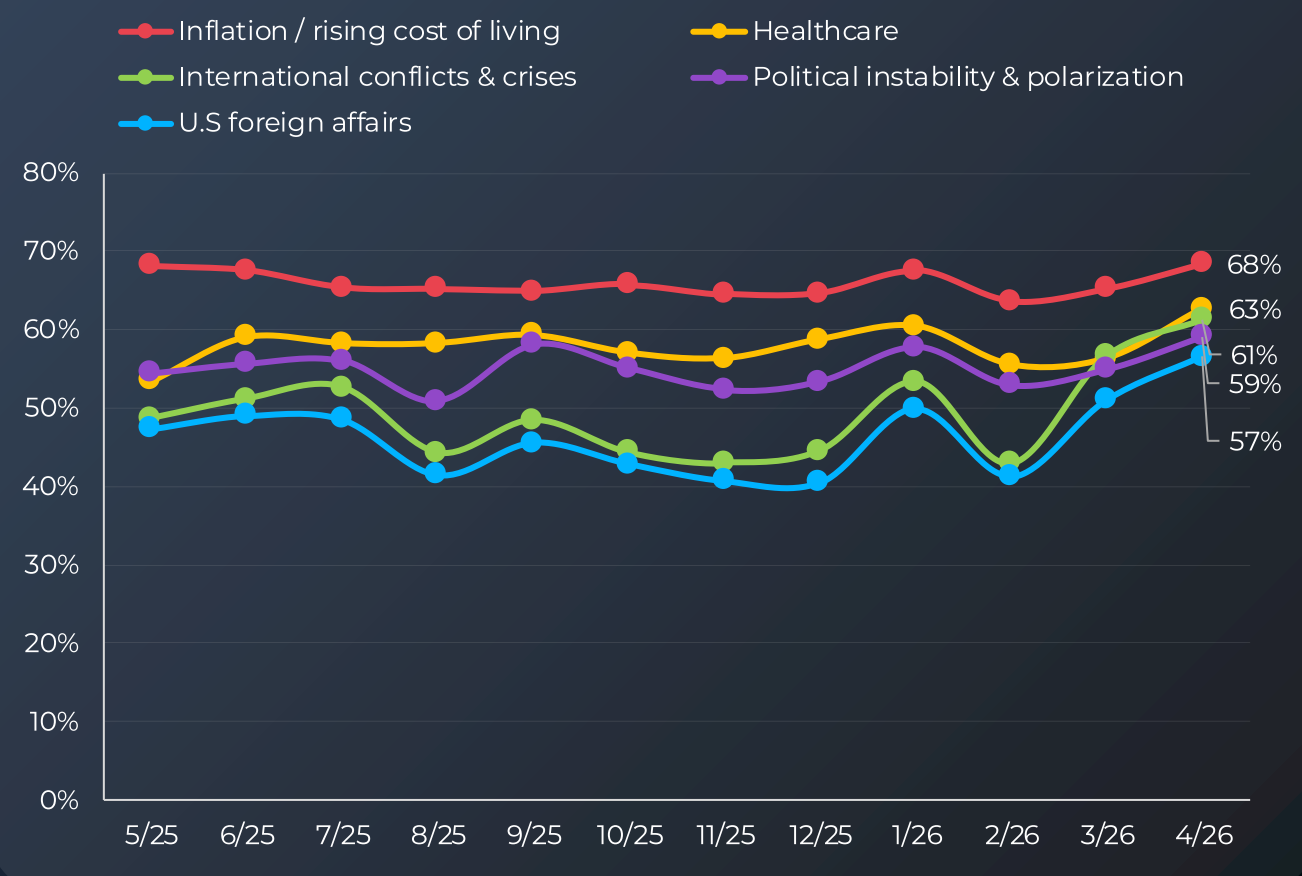


Consumer: Most Pressing Life Concerns

What Issues Are Consumers Currently Concerned About? (top 2, 5pt. scale)

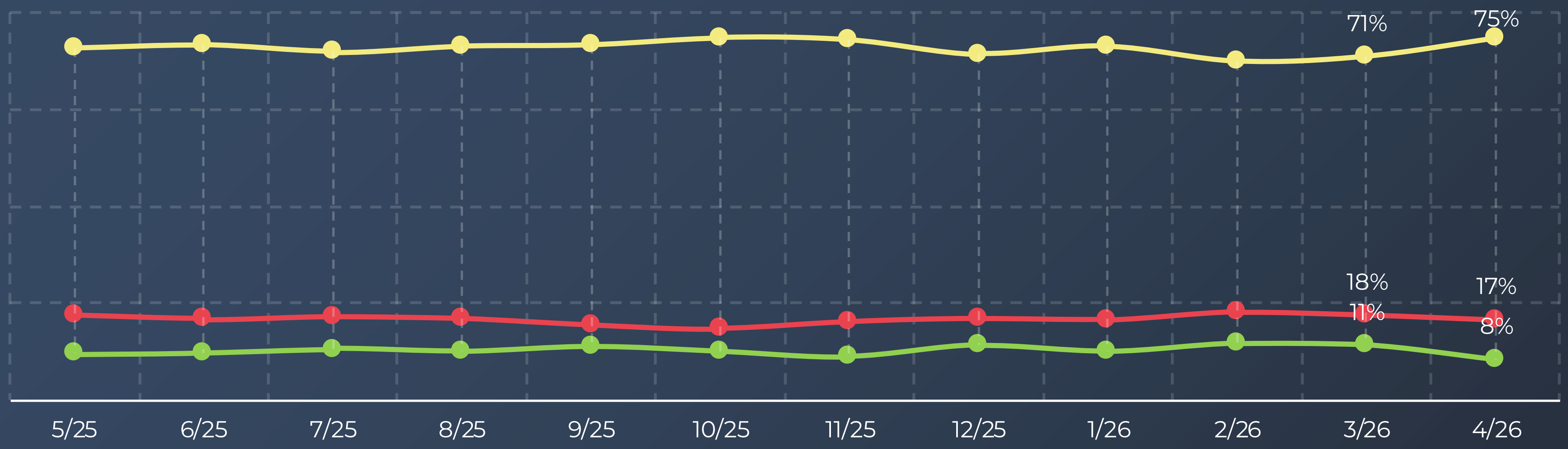
	03/26	04/26	1-mo. change
Inflation / rising cost of living	65%	68%	**3%**
Healthcare	56%	63%	**6%**
International conflicts & crises	57%	61%	**5%**
Political instability & polarization	55%	59%	**4%**
U.S foreign affairs	51%	57%	**6%**
A recession	49%	51%	**3%**
Climate change	47%	50%	**4%**
Gun policy	45%	46%	**2%**
Making ends meet every day	44%	46%	**2%**
Racial justice / inequality	44%	46%	**1%**
Immigration	40%	44%	**4%**
Jobs becoming automated	43%	43%	**0%**
Paying off debt (any kind)	39%	41%	**2%**
Job security	37%	39%	**1%**
Gender equality	36%	38%	**2%**
Jobs moving overseas	33%	32%	**0%**

TOP 5 CONCERNS: 12-MONTH VIEW



DATASSENTIAL

Consumer: Current Financial Situation



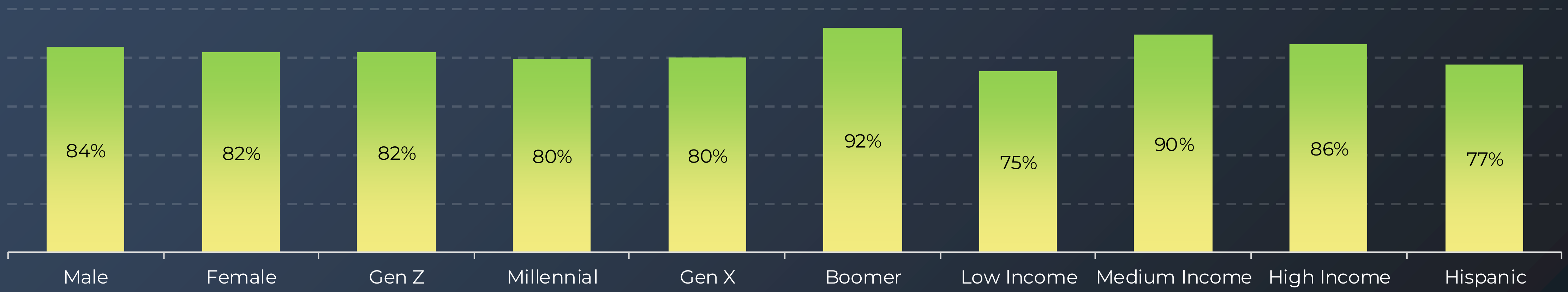
GETTING BY
75%

FALLING BEHIND
17%

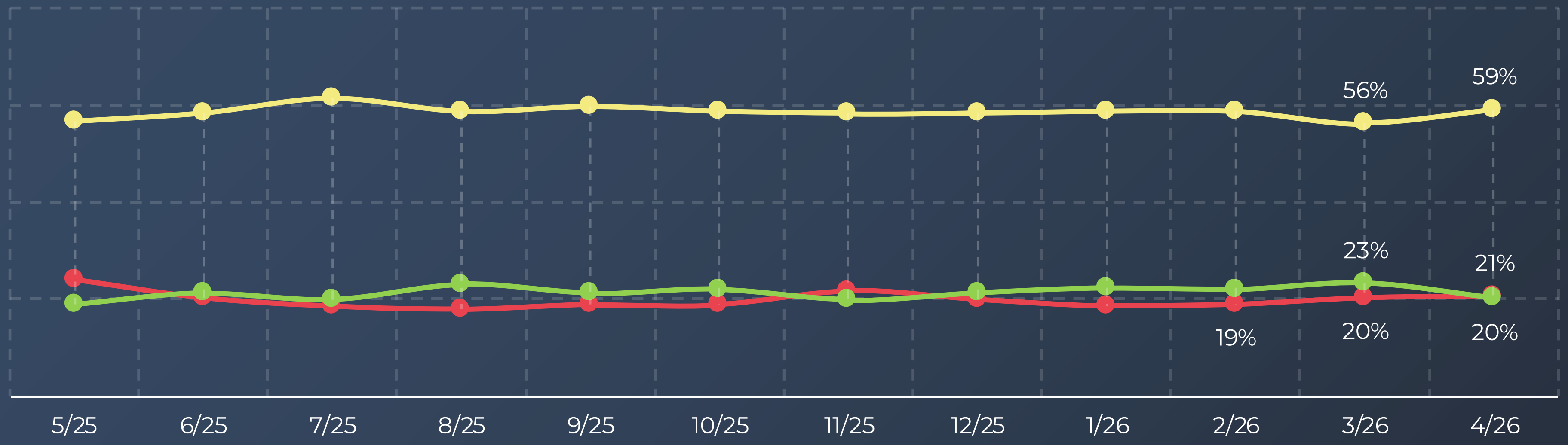
GETTING AHEAD
8%

BY DEMOGRAPHIC

TOP 2 – "Getting Ahead" + "Getting By"



Consumer: Future Budget Expectations



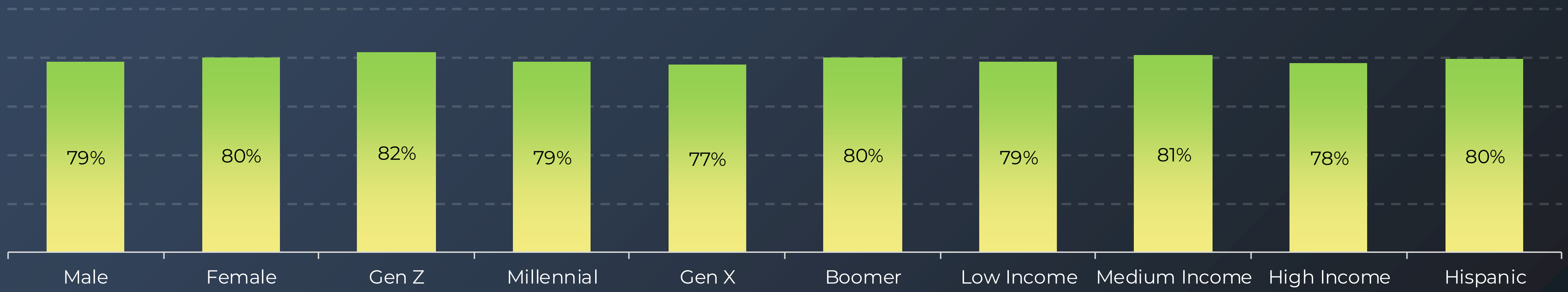
WILL STAY THE SAME
59%

WILL IMPROVE
20%

WILL GET WORSE
21%

BY DEMOGRAPHIC

TOP 2 – "Will Improve" + "Will Stay The Same"



Consumer: Away-From-Home Share & Future Outlook

74%

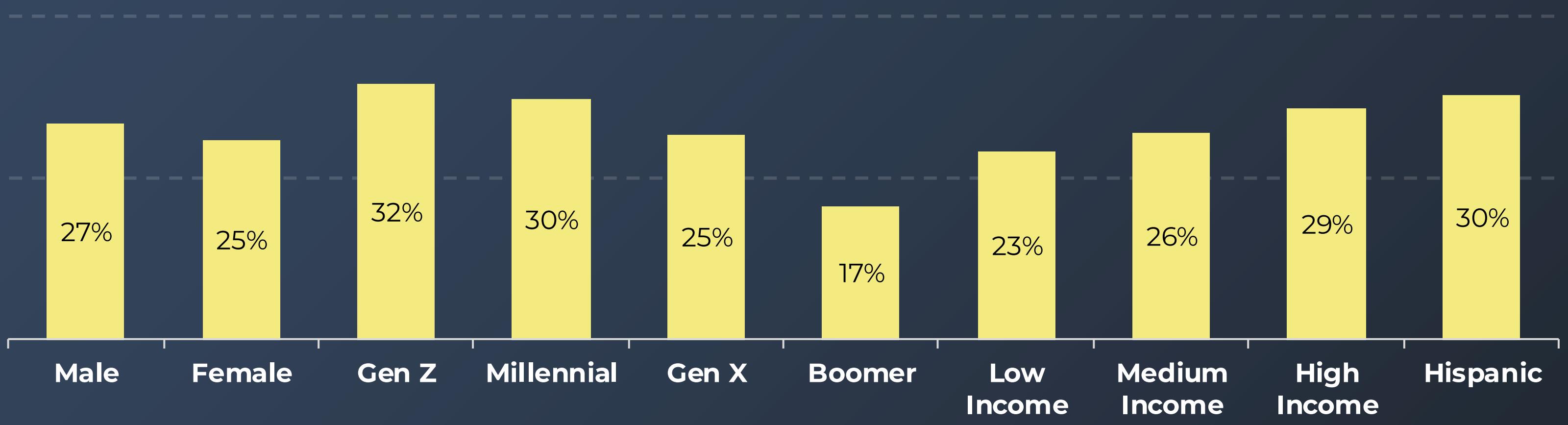
of meals **MADE AT HOME**

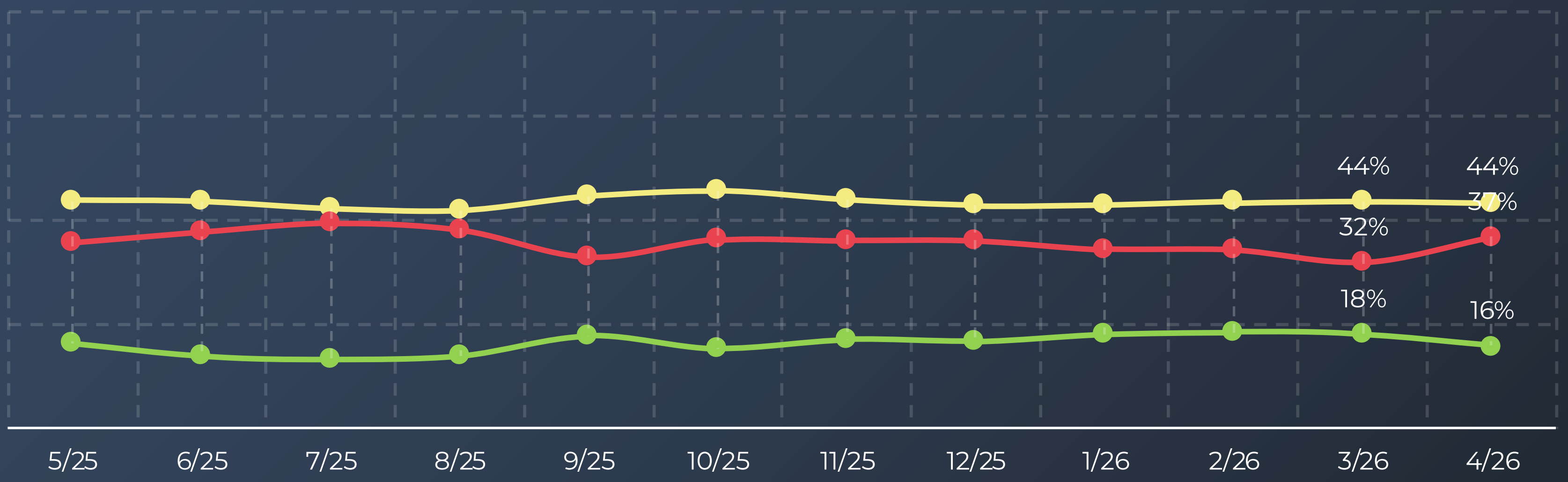
26%

of meals **PURCHASED AWAY FROM HOME**

Share Of Last Month's Meals Purchased Away From Home

BY DEMOGRAPHIC





In The Coming Month, Consumers Expect To Dine Out…

MORE OFTEN

16%

JUST AS OFTEN

44%

LESS OFTEN OR STOP COMPLETELY

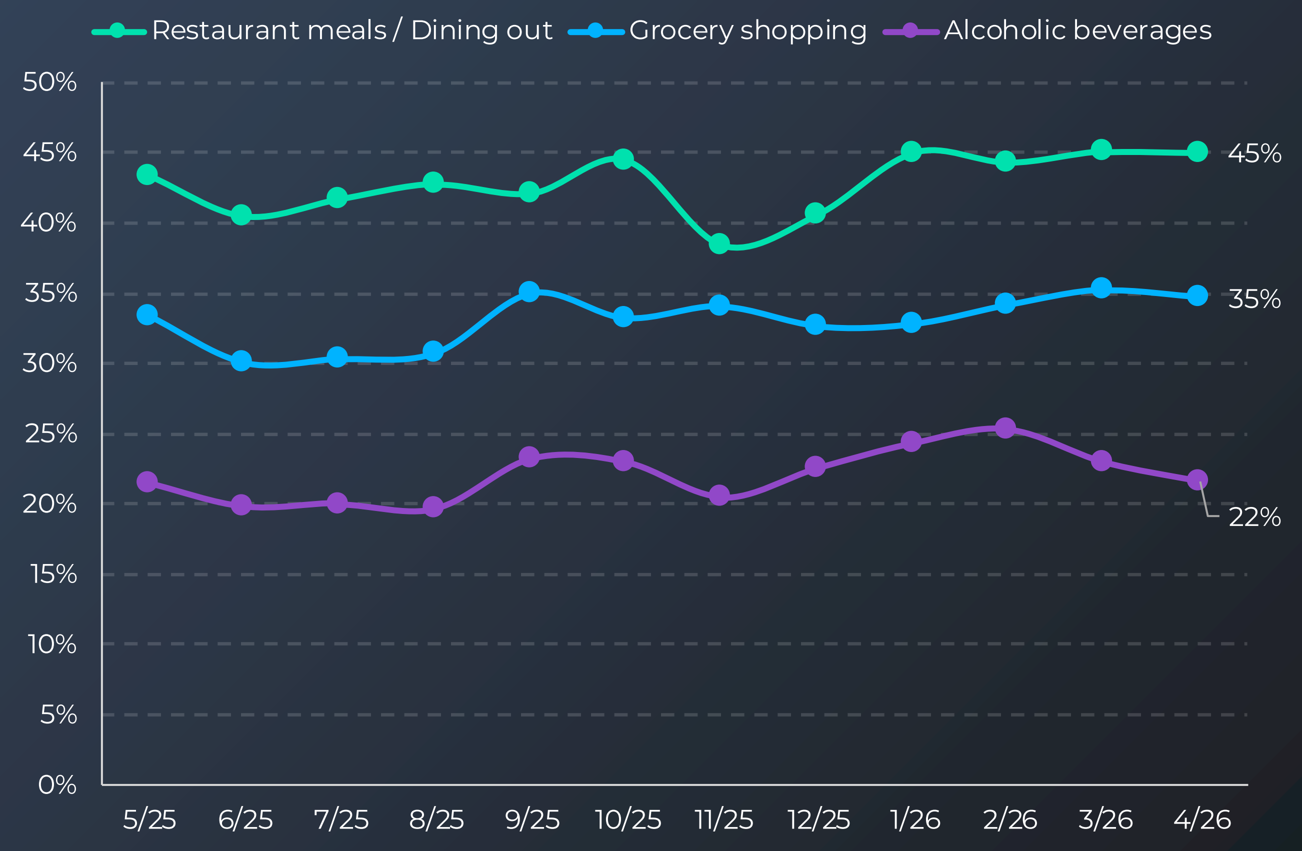
37%

Consumer: Spending Cuts

Which Areas Of Spending Have Consumers Cut Back On Last Month?

	03/26	04/26	1-mo. change
Restaurant meals / Dining out	45%	45%	**0%**
Clothing, shoes, apparel	41%	41%	**0%**
Grocery shopping	35%	35%	**-1%**
Travel	30%	31%	**1%**
Live entertainment	26%	27%	**1%**
Hair / Nails / Grooming	23%	23%	**0%**
Gasoline	20%	23%	**3%**
E-commerce	22%	23%	**0%**
Alcoholic beverages	23%	22%	**-1%**
Housing	8%	7%	**-1%**
None of the above	23%	23%	**0%**

F & B - RELATED CUTS: 12 - MONTH VIEW



DATASSENTIAL

Consumer: Most Popular Saving Strategies

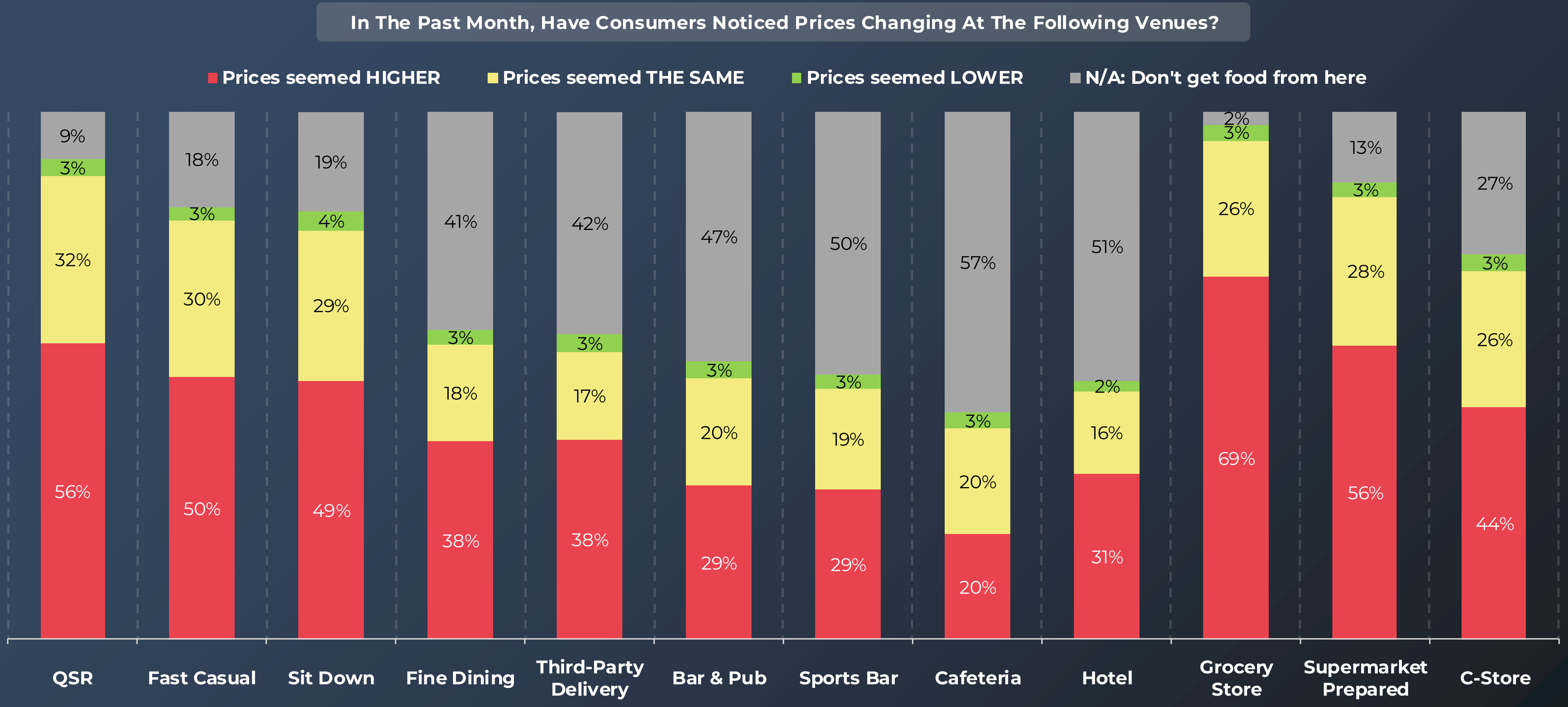
In The Past Month, How Did Consumers Try To Save Money While Grocery Shopping?

	11/25	12/25	1-mo. change
Buying store brands or private-label brands	41%	42%	**2%**
Using coupons more often	38%	38%	**-1%**
Visiting lower-cost grocery stores	32%	32%	**0%**
Shopping at multiple stores to find lowest prices	30%	29%	**-1%**
Making at home what I would buy prepared or packaged	33%	29%	**-4%**
Buying ingredients in bulk to prep and freeze for later	24%	24%	**0%**
Buying frozen produce instead of fresh produce	22%	18%	**-4%**
Substituting lower-price proteins	19%	17%	**-2%**
Switching from organic brands to regular brands	12%	12%	**0%**
None of the above	16%	**17%**	**2%**

In The Past Month, How Did Consumers Try To Save Money While Eating Out At Restaurants?

	11/25	12/25	1-mo. change
Order fewer or no beverages with my meal	25%	25%	**0%**
Order cheaper menu items than usual	24%	25%	**1%**
Choose more affordable venues than usual	25%	22%	**-3%**
Order fewer or no add-ons (appetizers, sides, etc.)	23%	22%	**-2%**
Look for restaurant coupons that come in the mail	21%	21%	**0%**
Look for deals on restaurant apps or delivery apps	21%	19%	**-1%**
Stretch a combo or meal deal by saving an item for later	19%	18%	**-1%**
Join restaurant loyalty clubs	17%	16%	**-1%**
Look for restaurant “menu hacks” on social media	14%	13%	**-1%**
Feed a group by splitting add-ons & buying separate entrees	13%	11%	**-2%**
Make a meal only of add-ons but skip the entrée	11%	9%	**-1%**
None of the above	28%	29%	**1%**

Consumer: Perception of Foodservice Prices



Consumer: Most Popular Saving Strategies

In The Past Month, How Did Consumers Try To Save Money While Grocery Shopping?

	03/26	04/26	1-mo. change
Buying store brands or private-label brands	42%	46%	**4%**
Using coupons more often	41%	41%	**0%**
Making at home what I would buy prepared or packaged	32%	35%	**3%**
Shopping at multiple stores to find lowest prices	31%	35%	**4%**
Visiting lower-cost grocery stores	31%	35%	**3%**
Buying ingredients in bulk to prep and freeze for later	27%	28%	**1%**
Buying frozen produce instead of fresh produce	22%	23%	**1%**
Substituting lower-price proteins	21%	21%	**0%**
Switching from organic brands to regular brands	13%	14%	**0%**
None of the above	16%	15%	**-1%**

In The Past Month, How Did Consumers Try To Save Money While Eating Out At Restaurants?

	03/26	04/26	1-mo. change
Order cheaper menu items than usual	26%	28%	**2%**
Order fewer or no beverages with my meal	25%	27%	**2%**
Choose more affordable venues than usual	26%	27%	**1%**
Order fewer or no add-ons (appetizers, sides, etc.)	21%	24%	**3%**
Look for deals on restaurant apps or delivery apps	25%	23%	**-2%**
Look for restaurant coupons that come in the mail	21%	23%	**1%**
Join restaurant loyalty clubs	18%	20%	**2%**
Stretch a combo or meal deal by saving an item for later	19%	19%	**0%**
Look for restaurant “menu hacks” on social media	13%	14%	**1%**
Feed a group by splitting add-ons & buying separate entrees	13%	12%	**-1%**
Make a meal only of add-ons but skip the entrée	13%	12%	**-1%**
None of the above	27%	27%	**-1%**

FOODSERVICE TOTAL

2026 Operator Spend ($B)	2026 Consumer Spend ($B)
$343.6	$978.8

2024 Actual Real Growth	2025 Projected Real Growth	2026 Projected Real Growth	2027 Projected Real Growth
0.9%	0.9%	1.1%	1.3%

QSR

2026 Operator Spend ($B)		2026 Consumer Spend ($B)	
$89.6		$344.5	
2024 Actual Real Growth	2025 Projected Real Growth	2026 Projected Real Growth	2027 Projected Real Growth
0.7%	1.0%	1.2%	1.4%

QSR is expected to have a good 2026 relative to full-restaurant segments (though lower than pre-COVID average growth). QSR of course relies heavily on its value proposition with consumers and despite headlines about how many consumers now consider fast food a “luxury”, the reality is that the segment has the lowest price point among restaurants. Major chains have also focused on value with special meal deals and bundles that are helping to drive traffic. Consumers are always looking for fast and easy ways to eat out and as the cost-conscious consumer turns away from delivery fees, they are most likely to return to the drive-thru where QSR has a stronghold. What’s more, the QSR segment is made up of primarily chain locations and those locations have been able to invest in technology (both FOH and BOH) and to massively expand their loyalty programs/apps. Not all brands will succeed in the coming year, but those who are able to offer good value are likely to keep traffic coming in the door.

FAST CASUAL

2026 Operator Spend ($B)	2026 Consumer Spend ($B)
$24.5	$87.4

2024 Actual Real Growth	2025 Projected Real Growth	2026 Projected Real Growth	2027 Projected Real Growth
1.3%	1.6%	2.0%	2.0%

The fast casual segment is expected to have the highest growth among all restaurant segments in 2026. Fast casual operators have done a masterful job of pivoting to suburban locations and dinner occasions, which has helped them bounce back from their pre-COVID reliance on urban locations and daytime work population lunch occasions. They have also successfully leveraged their heavy reliance on technology to improve digital ordering, which has in turn improved their loyalty programs and repeat business. The segment benefits from a more well-perceived workplace environment and culture than QSRs, which has helped it compete in a very tight labor market. Fast casual (although looking more like QSR today than ever before) offers items at higher prices than their fast-food peers and will see some customers trade down. However, we are also likely to see some casual dining consumers turn to fast casual. Although the in-person dining experience is obviously not the same as in a full-service restaurant, consumers do, to a lesser degree, turn to fast casuals for socializing and in many ways they can fill the void of a lower-cost, quality-food experience that today's consumer is seeking. Notably, there are some risks for the segment as casual dining restaurants create meal bundles and do aggressive discounted pricing, which can create the potential for a lower-priced experience at casual dining than at fast casual.

MIDSCALE

2026 Operator Spend ($B)		2026 Consumer Spend ($B)	
$21.6		$60.1	
2024 Actual Real Growth	2025 Projected Real Growth	2026 Projected Real Growth	2027 Projected Real Growth
-0.7%	-0.9%	-0.7%	-0.5%

Midscale continues to struggle and is forecasted to have the lowest projected real growth of all foodservice segments in 2026. Before COVID, 83% of midscale segment's business was dine-in and although some locations were able to quickly pivot to off-premise, the segment suffered from on-premise dining restrictions. As we came out of the pandemic, a limited labor pool hit midscale operators hard and led to a drop in the quality of on-premise dining experiences. Consumers also learned to cook more at home during COVID and so midscale offerings, which tend toward comfort foods and familiar items, had lower appeal when consumers returned to restaurants. The lower price point for a dine-in experience will be a positive for the segment as consumers face continued food-away-from-home inflation that is higher than at-home inflation. Notably, in our State of Value report, Midscale combo/value meal prices have fallen which has in turn increased the value perceptions of these offerings with consumers. However, many casual dining chains are also trying to seek out the value-focused consumer and are dropping their prices to levels that directly compete with midscale (and even fast casual). Lower income consumers have been cutting cut back the most on their foodservice spend and that is directly impacting midscale restaurants as their patron base skews toward lower- and middle-income households. The midscale operators who succeed will likely find ways to do "one thing well". As consumers cut back on dining out, they will prioritize types of experiences and midscale can find a niche as a more affordable but still full-service offering where consumers can order menu items they can't easily make at home.

CASUAL DINING

2026 Operator Spend ($B)	2026 Consumer Spend ($B)
$61.3	$161.3

2024 Actual Real Growth	2025 Projected Real Growth	2026 Projected Real Growth	2027 Projected Real Growth
0.0%	-0.2%	0.2%	0.5%

Casual dining is projected to have negative real growth in 2025, though will turn slightly positive again in 2026. Consumers love dining out at casual dining locations and these types of restaurants play a major role in life events, celebrations, and socializing (which we are more eager to do now than ever after having endured a pandemic). The segment continues to get additional revenue from off-premise offerings with increased curbside, delivery, family meals, and off-premise alcohol though the share of revenue from off-premise has peaked and is likely to continue to fall in the coming years as consumers are more price-sensitive and so want to avoid delivery fees. The segment has also taken note of the needs of the value-focused consumer and is offering meal deals and drink specials at prices that resemble their limited-service peers. Casual dining is a service-forward and experience-focused segment and although labor shortages hit the segment hard, they have also been able to pivot and innovate with investments in technology and loyalty programs to keep patrons coming back. The segment is deeply tied to consumer optimism which has been falling throughout the year which is why real growth will be negative in 2025 due to declining traffic.

FINE DINING

2026 Operator Spend ($B)		2026 Consumer Spend ($B)	
$3.6		$9.0	
2024 Actual Real Growth	2025 Projected Real Growth	2026 Projected Real Growth	2027 Projected Real Growth
0.2%	0.5%	0.5%	0.8%

The fine dining segment continues to see slight positive real growth. Fine dining operators are benefiting from the fact that consumers are eager to get back to experiences and many have pent up demand and the disposable income to pay for them. The segment caters most heavily to higher-income consumers who are also feeling the impact of historically high inflation rates but tend to own their own homes and simply have enough income to manage those price increases. Lower-income consumers are cutting back the most with their dining at restaurants and are a small share of fine dining patrons. Labor shortages have impacted fine dining, though not as badly as other full-service segments since workers and waitstaff generally have more experience and are paid higher wages. Fine dining was also slower to return to the same sales volume it had pre-COVID and so its moderate growth is on top of dollars that are more muted than for other key restaurant segments (except for midscale which still remains below pre-COVID dollars).

Consumer Affinity

OVERALL FAMILIARITY
GENERATIONAL DIVE

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AVOCADO

consumer awareness, experience, affinity

EXPERIENCE How often do you have...

normative indices in grey circles

94%
know it
93

- 94% of consumers are aware of AVOCADO
- It's in the 93th percentile among all foods, flavors, and beverages; with greater **awareness** than 93% of all other items
- Change vs. 2 years ago: **-1.8%**

76%
have tried it
84

- 76% of consumers have tried AVOCADO
- It's in the 84th percentile among all foods, flavors, and beverages; with greater **trial** than 84% of all other items
- Change vs. 2 years ago: **-1.3%**

32%
had many times
97

- 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: **-0.8%**

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	**41%**	**44%**	**54%**
Like It	**23%**	**25%**	**29%**
Neutral	11%	11%	10%
Dislike	7%	8%	4%
Hate It	7%	7%	2%
No Opinion	11%	5%	1%
Total	100%	100%	100%
Top 2 Box	**64%**	**68%**	**83%**

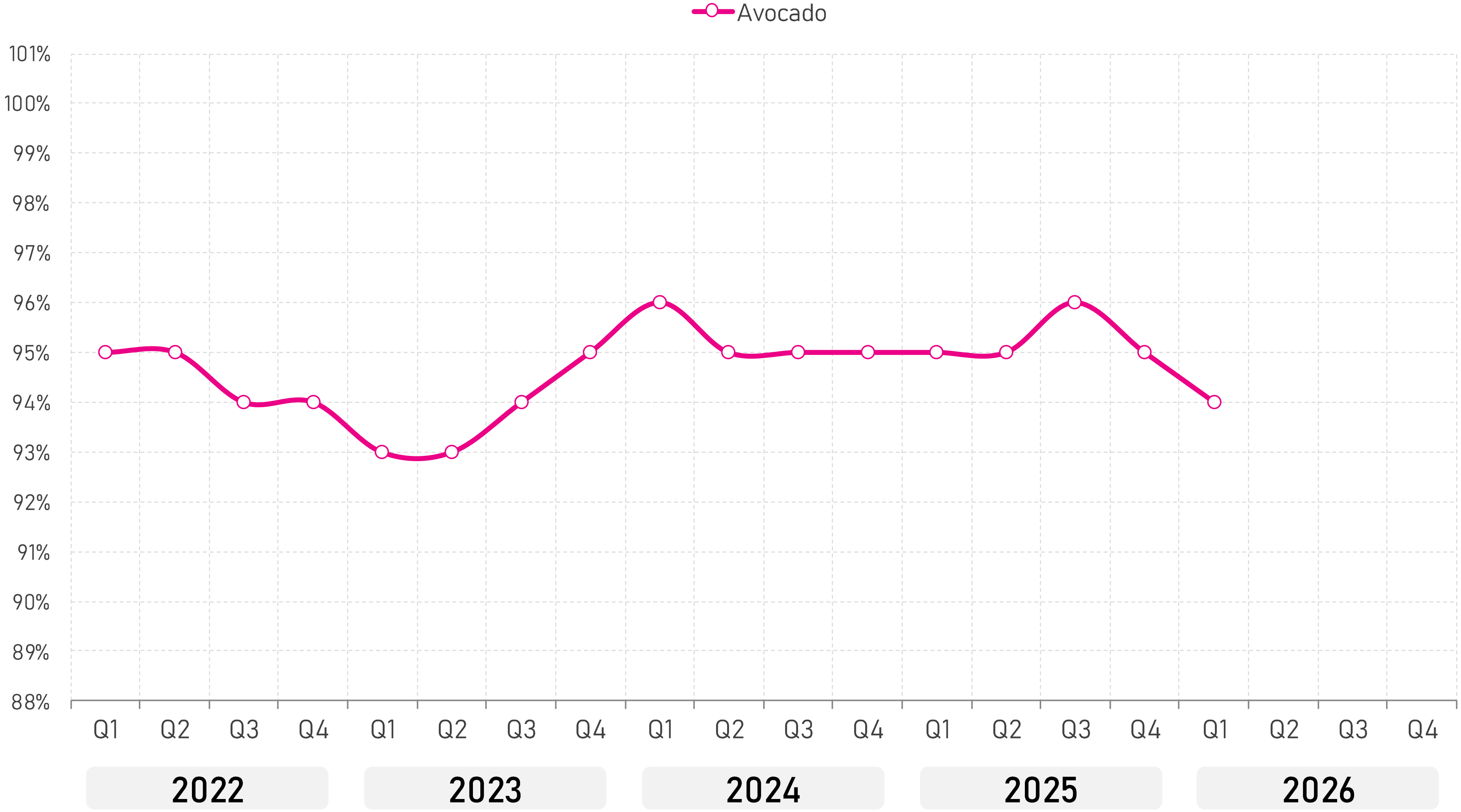
Top 2 Box Analysis

- 64% of **consumers** love or like this
- 68% of **consumers who know it** love or like it
- 83% 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 **+19%** impact on Top 2 Box affinity

Selected Consumers: **Total US consumers**
Data as of YE MAR 2026 | n = 2,095.00

GROWTH IN 'KNOW IT' FOR: AVOCADO

% of consumers who know it



KNOW IT

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%
YE Q2 2024	95%
Change vs. 2 yrs ago	-1.8%

Heat Score: declining
(ripe for reinvention)

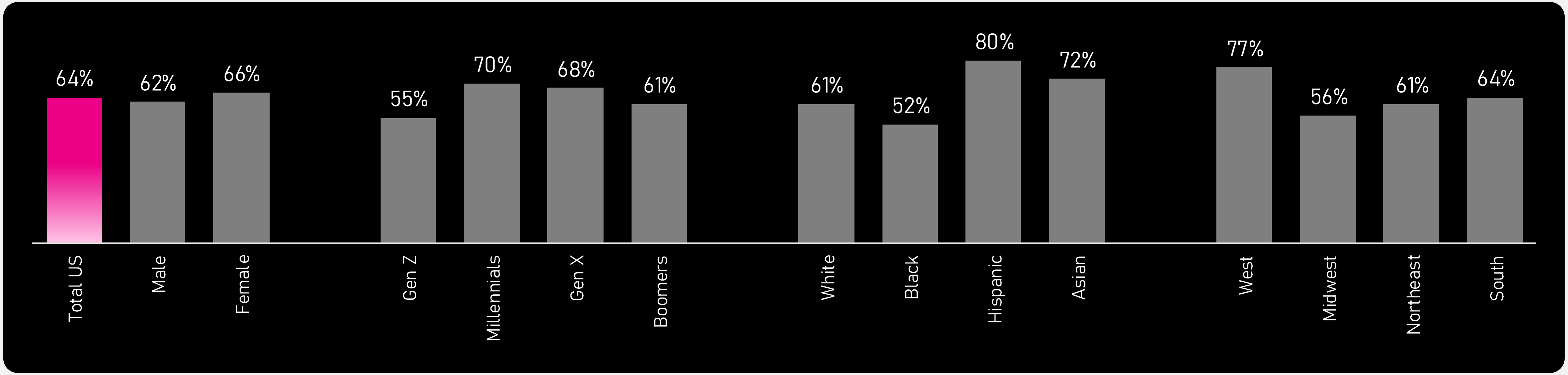
Selected Consumers: **Total US consumers**
Figures shown represent a rolling 1 year (4 quarters) of data

DATASSENTIAL

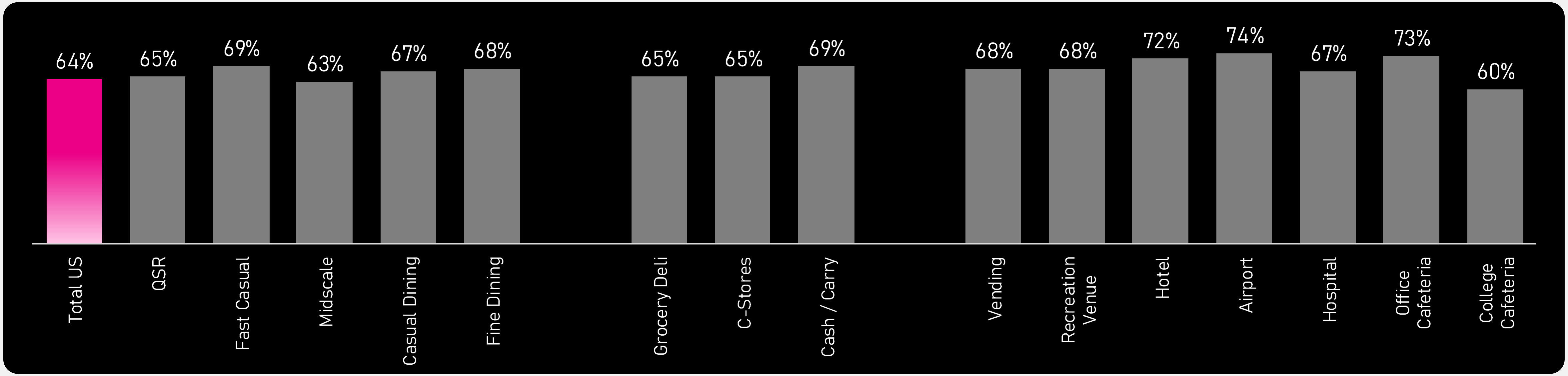
CONSUMER AFFINITY FOR: AVOCADO

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

BY DEMOGRAPHIC



AMONG VISITORS OF



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

DATASSENTIAL

Gen Z consumers are communicating 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	
	Q1'26	2-Yr Change	Q1'26	2-Yr Change	Q1'26	2-Yr Change
Gen Z	89%	-5.9%	70%	-6.0%	55%	-2%
Millennials	95%	+0.3%	80%	+4.1%	70%	+6.8%
Gen X	94%	-1.9%	78%	-1.6%	68%	+1.7%
Boomers	96%	-1.1%	73%	-3.2%	61%	-1.8%
U.S. Total	94%	-1.8%	76%	-1.3%	64%	+1.2%

GUACAMOLE	KNOW IT		TRIED IT		LOVE OR LIKE IT	
	Q1'26	2-Yr Change	Q1'26	2-Yr Change	Q1'26	2-Yr Change
Gen Z	89%	-0.1%	73%	+3.6%	55%	+1.5%
Millennials	90%	-3.7%	76%	-1.7%	61%	-2.8%
Gen X	92%	-0.2%	78%	+1.4%	70%	+8.2%
Boomers	90%	-2.9%	71%	-4.4%	59%	-2.4%
U.S. Total	90%	-2.1%	75%	-0.8%	62%	+0.7%

DATASSENTIAL Consumer Preferences YE MAR'25, % demos that love/like....

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Global handhelds like sushi burritos and specialty tacos are what appeal most specifically to Gen Z. When trying to grow Gen Z avocado attachment, this is the perfect category to lean on.

Another way to bring avocados to dishes loved by Gen Z is to consider how to play with alternative formats of traditional Mexican dishes, such as with walking tacos or burrito bowls.

GEN Z: TOP INDEXING DISHES

ranked by love/like it index

AVOCADO-FEATURING DISH	TOTAL US	GEN Z CONSUMERS	INDEX
Sushi Burrito	44%	53%	150
Tacos Arabes	36%	48%	147
Tacos Campechano	37%	52%	146
Jackfruit Taco	29%	38%	137
Birria Tacos	54%	73%	134
Walking Taco	48%	64%	133
Avocado Leaves	41%	49%	129
Asian Taco	47%	55%	121
Torta	48%	55%	115
California Burger	58%	65%	113
Street Taco	85%	92%	111
Avocado Toast	82%	86%	109
California Roll	74%	80%	105
Avocado Oil	83%	83%	104
Chilaquiles	40%	43%	102
Breakfast Quesadilla	84%	83%	100
Burrito Bowl	87%	88%	100
Breakfast Burrito	93%	92%	99
California Burrito	58%	60%	99
Flauta	43%	42%	99

DATASSENTIAL Consumer Preferences YE MAR'25, % of consumers who love/like… | INDEX represents a comparison between total-population and generational affinity, where a score of 100 means the generation is aligned with the general population while an index of 120 means that generation is 20% more likely to love/like the dish.

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

Millennials also love Americanized handheld formats like the BLTA sandwich, avocado ranch, and Mexican or taco pizza.

MILLENNIALS: TOP INDEXING DISHES

ranked by love/like it index

AVOCADO-FEATURING DISH	TOTAL US	MILLENNIAL CONSUMERS	INDEX
Sushi Burrito	44%	52%	150
BLTA	23%	30%	145
Tacos Arabes	36%	48%	143
Chilaquiles	40%	51%	143
Birria Tacos	54%	69%	140
Avocado Leaves	41%	47%	137
Jackfruit Taco	29%	33%	134
Torta	48%	58%	130
Asian Taco	47%	54%	129
California Roll	74%	83%	127
Avocado Ranch	76%	82%	125
Poke	46%	51%	124
Tacos Campechano	37%	41%	121
Flauta	43%	49%	121
Taco Pizza	79%	81%	118
Street Taco	85%	92%	117
Mexican Pizza	77%	84%	117
Avocado Toast	82%	85%	116
Breakfast Taco	86%	87%	116
Burrito Bowl	87%	90%	115

DATASSENTIAL Consumer Preferences YE MAR'25, % of consumers who love/like... | INDEX represents a comparison between total-population and generational affinity, where a score of 100 means the generation is aligned with the general population while an index of 120 means that generation is 20% more likely to love/like the dish.

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

Traditional formats like tacos, tortas, tostadas, and chips & guacamole are popular with this cresting demographic – although they also largely enjoy Western dishes that first arrived on the scene like Mexican pizza, California burritos, and breakfast quesadillas.

GEN X: TOP INDEXING DISHES

ranked by love/like it index

AVOCADO-FEATURING DISH	TOTAL US	GEN X CONSUMERS	INDEX
Mexican Pizza	77%	80%	115
Hard Taco	90%	92%	113
Guacamole	90%	92%	113
Chilaquiles	40%	44%	110
Tostada	74%	78%	110
Huevos Rancheros	65%	67%	110
Taco Salad	91%	95%	110
California Burrito	58%	59%	109
Chips And Guacamole	93%	95%	109
Torta	48%	50%	108
Taco Pizza	79%	82%	108
Soft Taco	94%	96%	108
Poke	46%	46%	107
Breakfast Quesadilla	84%	87%	107
Fajita	89%	92%	107
Avocado	94%	94%	106
Enchilada	91%	92%	106
California Roll	74%	75%	105
Mexican Omelette	69%	70%	105
Fish Taco	84%	85%	104

DATASSENTIAL Consumer Preferences YE MAR'25, % of consumers who love/like... | INDEX represents a comparison between total-population and generational affinity, where a score of 100 means the generation is aligned with the general population while an index of 120 means that generation is 20% more likely to love/like the dish.

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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
Enchilada	91%	91%	98
Burrito	95%	96%	98
Taco	96%	98%	98
Fajita	89%	89%	97
Mexican Omelette	69%	70%	97
Guacamole	90%	90%	96
Taco Salad	91%	91%	96
Tostada	74%	73%	95
Huevos Rancheros	65%	65%	95
Avocado	94%	96%	95
Soft Taco	94%	93%	94
Fish Taco	84%	84%	94
Quesadilla	92%	91%	92
Chips And Guacamole	93%	92%	91
Breakfast Burrito	93%	94%	91
Hard Taco	90%	85%	86
Avocado Oil	83%	78%	86
Avocado Ranch	76%	70%	86
Avocado Toast	82%	78%	83
Breakfast Quesadilla	84%	80%	82

DATASSENTIAL Consumer Preferences YE MAR'25, % of consumers who love/like… | INDEX represents a comparison between total-population and generational affinity, where a score of 100 means the generation is aligned with the general population while an index of 120 means that generation is 20% more likely to love/like the dish.

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WINNING LAUNCHES FROM Q1 2026: GEN Z

new launches from past 3 months

Mar 2026 $6.99

Taco Bell

CANTINA CHICKEN ROLLED QUESADILLA

A warm flour tortilla filled with savory slow-roasted chicken, a melty blend of mozzarella, pepper jack, and cheddar cheeses, and creamy chipotle sauce, grilled to perfection, rolled, cut, and wrapped for easy enjoying on the go. Served with reduced-fat sour cream and an Avocado Verde Salsa packet.

New Item

Unbranded PI:	81%	★★★★★
Branded PI:	75%	★★★★★
Uniqueness:	60%	★★★★
Frequency:	33%	★★★★
Draw:	67%	★★★★
Value:	60%	★★★★

SCORE 99 superstar

Feb 2026

Mendocino Farms

THE FARMHOUSE RANCH SALAD

vine-ripened cherry tomatoes, cucumber, avocado, parmesan, tuscan krispies, chives, romaine, kale mixed greens, herb buttermilk ranch

Limited Time Offer

Unbranded PI:	72%	★★★★★
Branded PI:	69%	
Uniqueness:	59%	★★★★★
Frequency:	33%	★★★★
Draw:	79%	★★★★★
Value:	-	

SCORE 99 superstar

Jan 2026 $12.69

El Pollo Loco

MEXICAN CAESAR SALAD

Super greens blend with spinach and crisp lettuce topped with a double portion of our citrus-marinated, fire-grilled chopped chicken breast, hand-sliced avocados, crumbled cotija cheese, crunchy tortilla strips, chili lime seasoning, and freshly-prepared salsa fresca. Served with a new Mexican Caesar dressing.

Limited Time Offer

Unbranded PI:	68%	★★★★★
Branded PI:	71%	★★★★
Uniqueness:	55%	★★★★
Frequency:	35%	★★★★★
Draw:	70%	★★★★★
Value:	52%	★★★★

SCORE 99 superstar

Jan 2026 $12.69

El Pollo Loco

BACON RANCH SALAD

Super greens blend with spinach and crisp lettuce topped with a double portion of our citrus-marinated, fire-grilled chopped chicken breast, hand-sliced avocados, crumbled cotija cheese, bacon, chili lime seasoning, and freshly-prepared salsa fresca. Served with a new House Ranch dressing.

Limited Time Offer

Unbranded PI:	78%	★★★★★
Branded PI:	81%	★★★★★
Uniqueness:	51%	★★★★
Frequency:	38%	★★★★★
Draw:	68%	★★★★★
Value:	61%	★★★★★

SCORE 99 superstar

DATASSENTIAL Launches & Ratings MAY'26, Composite score based on performance across all 6 key metrics vs the same category

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WINNING LAUNCHES FROM Q1 2026: MILLENNIALS

new launches from past 3 months

Feb 2026 $4.99

Rubio's

BAJA FISH SLIDER

Beer-battered wild-caught Alaska pollock, charred jalapeño tartar sauce and avocado tomatillo slaw. All on a toasted King's Hawaiian© bun.

Limited Time Offer

Unbranded PI:	69%	★★★★
Branded PI:	79%	★★★★★
Uniqueness:	61%	★★★★★
Frequency:	28%	★★★
Draw:	71%	★★★★★
Value:	70%	★★★★★

SCORE 99 superstar

Feb 2026 $11.49

Pollo Tropical

COCONUT SHRIMP SALAD W/ RICE

Juicy shrimp covered in coconut flakes and cooked until perfectly golden on top of a bed of rice. Topped with diced tomatoes, our fiesta bean mix, shredded cheddar cheese and our delicious guacamole.

Returning Item

Unbranded PI:	63%	★★★
Branded PI:	71%	★★★★
Uniqueness:	58%	★★★★
Frequency:	37%	★★★★★
Draw:	71%	★★★★★
Value:	62%	★★★★★

SCORE 99 superstar

Jan 2026

Lazy Dog Restaurant and Bar

PROTEIN CRUNCH BOWL

Crunchy, oven-roasted garbanzo beans, jammy egg, avocado, almonds, tomatoes + feta cheese on a bed of supergreens with honey apple cider vinegar dressing on the side. Sub rice for supergreens. Add your favorite protein: Chicken (51g protein), Steak (40g protein), Salmon (40g protein)

Limited Time Offer

Unbranded PI:	72%	★★★★★
Branded PI:	83%	
Uniqueness:	67%	★★★★★
Frequency:	38%	★★★★★
Draw:	70%	★★★★★
Value:	-	

SCORE 99 superstar

Jan 2026

Lazy Dog Restaurant and Bar

SEARED AHI TUNA SALAD

Line caught, seared-rare furikake-crusted yellowfin tuna, field greens, carrots, radish, avocado, pickled cucumbers, peanut ponzu vinaigrette + soy dipping sauce on the side.

Limited Time Offer

Unbranded PI:	64%	★★★★
Branded PI:	75%	
Uniqueness:	67%	★★★★★
Frequency:	26%	★★★
Draw:	69%	★★★★★
Value:	-	

SCORE 99 superstar

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WINNING LAUNCHES FROM Q1 2026: GEN X

new launches from past 3 months

Jan 2026 $12.69

El Pollo Loco

STREET CORN SALAD

Super greens blend with spinach and crisp lettuce topped with a double portion of our citrus-marinated, fire-grilled chopped chicken breast, hand-sliced avocados, crumbled cotija cheese, corn and red peppers, chili lime seasoning, and freshly-prepared salsa fresca. Served with creamy cilantro dressing.

Limited Time Offer

Unbranded PI:	58%	★★★★
Branded PI:	63%	★★★★
Uniqueness:	66%	★★★★★
Frequency:	31%	★★★★★
Draw:	53%	★★★★
Value:	38%	★★★★

SCORE 99 superstar

Jan 2026

Lazy Dog Restaurant and Bar

PROTEIN CRUNCH BOWL

Crunchy, oven-roasted garbanzo beans, jammy egg, avocado, almonds, tomatoes + feta cheese on a bed of supergreens with honey apple cider vinegar dressing on the side. Sub rice for supergreens. Add your favorite protein: Chicken (51g protein), Steak (40g protein), Salmon (40g protein)

Limited Time Offer

Unbranded PI:	52%	★★★
Branded PI:	83%	
Uniqueness:	50%	★★★★
Frequency:	33%	★★★★★
Draw:	63%	★★★★★
Value:	-	

SCORE 99 superstar

Feb 2026 $7.65

Chick-fil-A

AVOCADO SRIRACHA BLT SANDWICH W/ CHICK-FIL-A FILET

Limited Time Offer

Unbranded PI:	59%	★★★
Branded PI:	57%	★★★★
Uniqueness:	61%	★★★★★
Frequency:	23%	★★★★
Draw:	66%	★★★★★
Value:	53%	★★★★

SCORE 88 specialty appeal

Jan 2026 $12.69

El Pollo Loco

MEXICAN CAESAR SALAD

Super greens blend with spinach and crisp lettuce topped with a double portion of our citrus-marinated, fire-grilled chopped chicken breast, hand-sliced avocados, crumbled cotija cheese, crunchy tortilla strips, chili lime seasoning, and freshly-prepared salsa fresca. Served with a new Mexican Caesar dressing.

Limited Time Offer

Unbranded PI:	63%	★★★★★
Branded PI:	64%	★★★★
Uniqueness:	49%	★★★★
Frequency:	20%	★★★
Draw:	59%	★★★★★
Value:	38%	★★★★

SCORE 83 superstar

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WINNING LAUNCHES FROM Q1 2026: BOOMERS

new launches from past 3 months

Mar 2026 $0.79

Huey Magoo's Chicken Tenders

AVOCADO RANCH DIP

Smooth, zesty ranch blended with the rich, buttery flavor of avocado.

Limited Time Offer

Unbranded PI:	35%	★★★★★
Branded PI:	52%	★★★
Uniqueness:	31%	★★★
Frequency:	11%	★★★★
Draw:	27%	★★★★
Value:	65%	★★★★

SCORE **99** superstar

Feb 2026 $4.99

Rubio's

BAJA FISH SLIDER

Beer-battered wild-caught Alaska pollock, charred jalapeño tartar sauce and avocado tomatillo slaw. All on a toasted King's Hawaiian© bun.

Limited Time Offer

Unbranded PI:	34%	★★
Branded PI:	57%	★★★★
Uniqueness:	50%	★★★★★
Frequency:	14%	★★★★
Draw:	54%	★★★★★
Value:	55%	★★★★

SCORE **92** volume driver

Feb 2026 $5.95

Condado

YUZU BUTTER SHRIMP TACO

Flour + hard corn shell with guac, citrusy Yuzu Butter Shrimp, jicama + cabbage slaw, pico de gallo, and avocado ranch sauce.

Limited Time Offer

Unbranded PI:	35%	★★★
Branded PI:	54%	★★★
Uniqueness:	49%	★★★★★
Frequency:	13%	★★★★
Draw:	44%	★★★★
Value:	46%	★★★

SCORE **80** specialty appeal

Mar 2026 $12.79

La Madeleine French Bakery

CAFÉ CLUB SANDWICH

A taste of the French Riviera. Toasted bread is stacked with hand-carved turkey, crispy bacon, fresh lettuce, ripe tomato, mayo, and avocado - perfectly suited for a leisurely café lunch.

Limited Time Offer

Unbranded PI:	55%	★★★★★
Branded PI:	58%	★★★★
Uniqueness:	21%	★★
Frequency:	16%	★★★★★
Draw:	43%	★★★★
Value:	27%	★★★

SCORE **74** volume driver

DATASSENTIAL Launches & Ratings MAY'26, Composite score based on performance across all 6 key metrics vs the same category

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Avocados On Menus

MENU PENETRATION
TRENDING DISHES
PRICING

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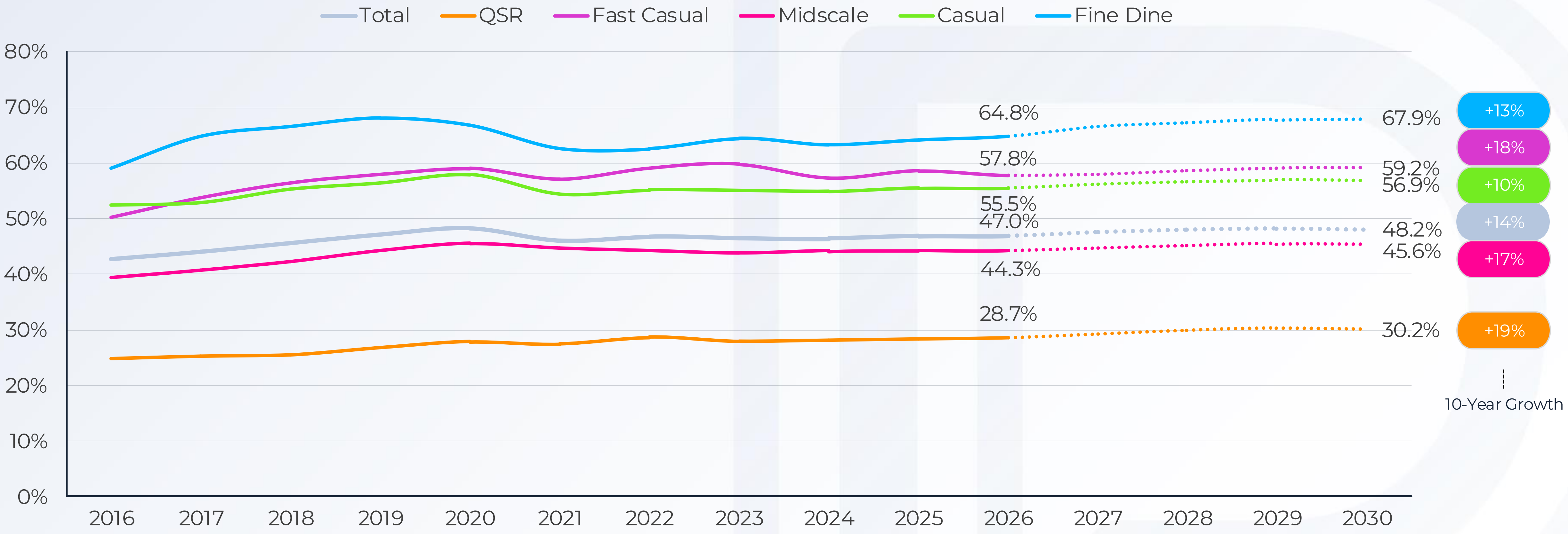
Avocado menu growth has been widespread across segments and is projected to continue steady growth over the next several years.

Growth has softened slightly in the fast casual segment since Q4'25 – but overall FC growth still remains strong.

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



DATASSENTIAL Menu Trends and Menucast for Menu Trends YE MAR'25, PENETRATION: % of restaurants serving avocados.

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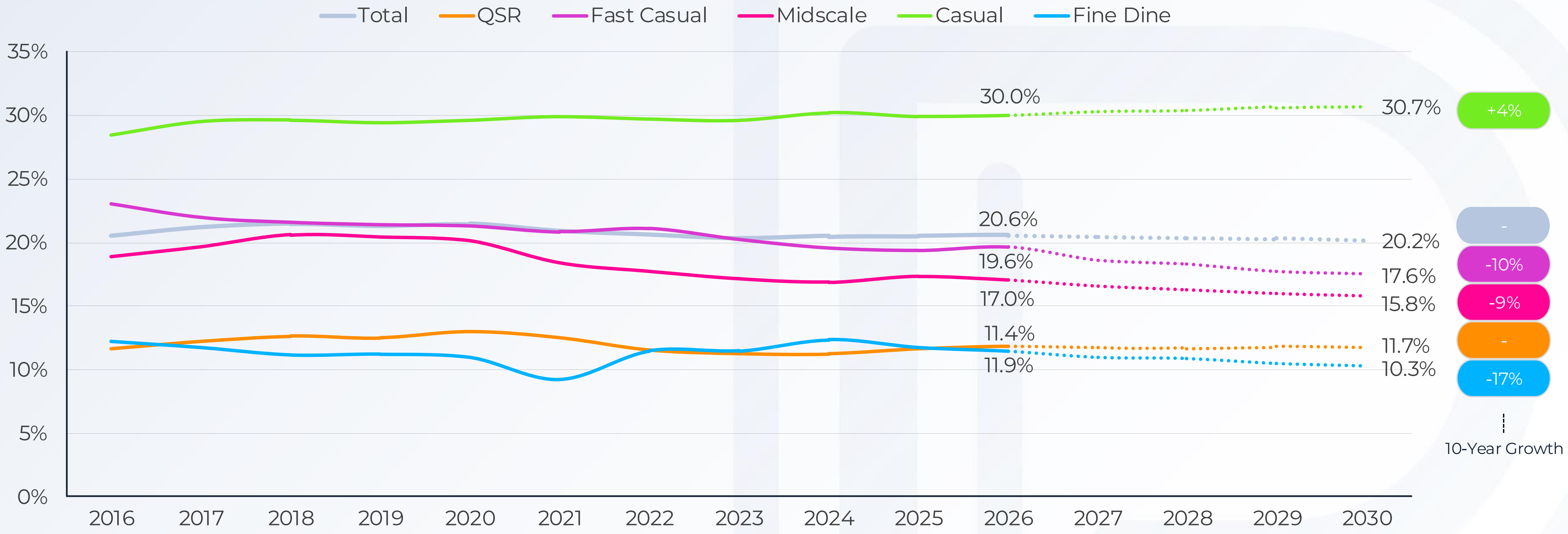
Avocado menu growth is projected to come from dishes that use sliced or diced avocado rather than guacamole.

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



DATASSENTIAL Menu Trends and Menucast for Menu Trends YE MAR'25, PENETRATION: % of restaurants serving guacamole.

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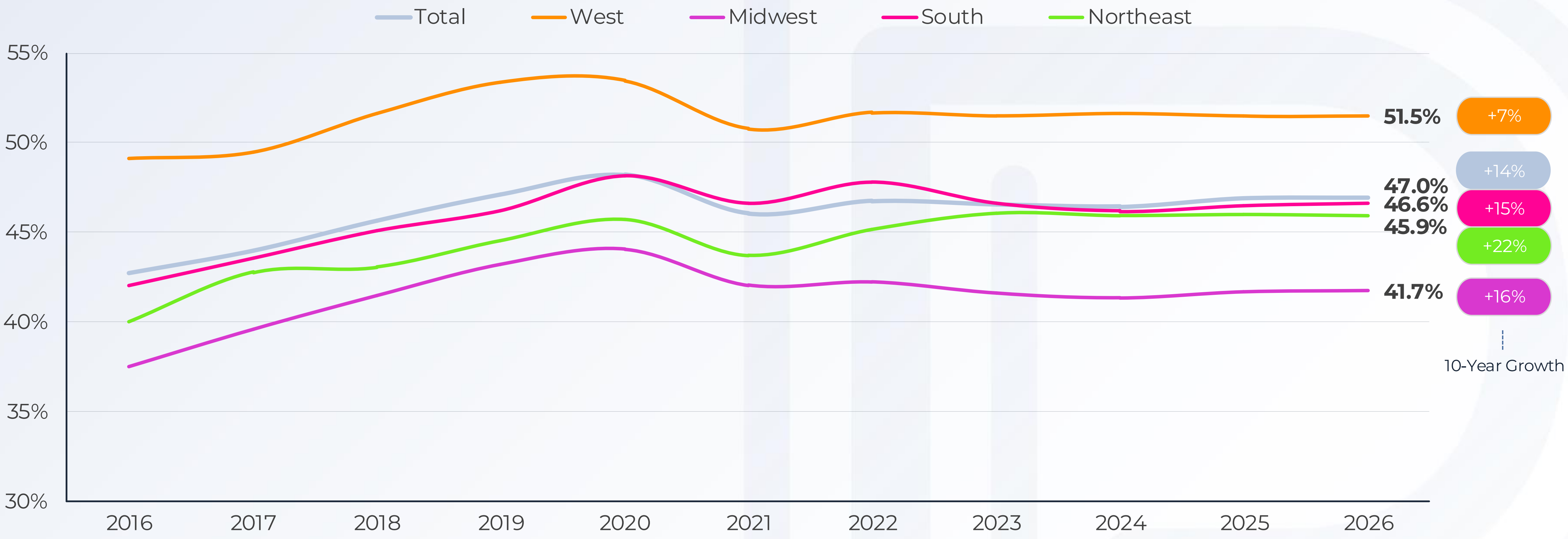
The West consistently menus avocado more than other regions, though the gap between them has shrunk as other regions' growth outpaces the West's.

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



DATASSENTIAL Menu Trends YE MAR'25, PENETRATION: % of restaurants serving avocados.

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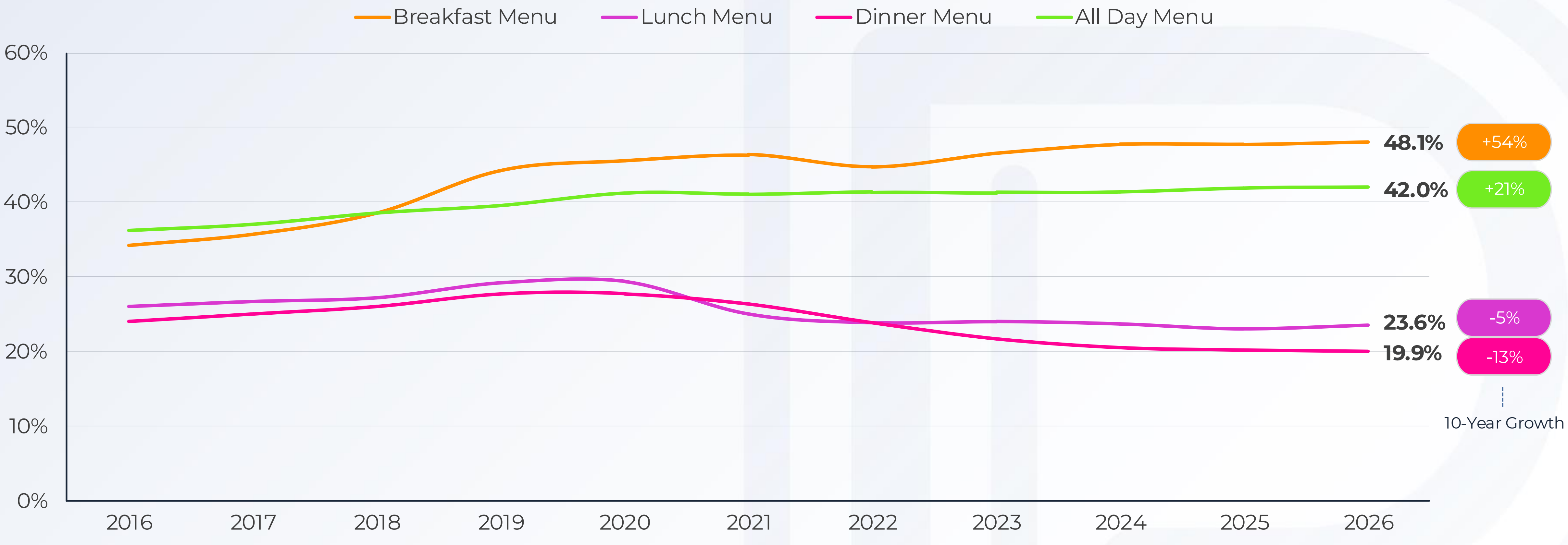
The past decade brought two major changes for avocados on daypart-specific menus: first, avocados have consistently grown on breakfast menus as new breakfast opportunities continue to emerge. Second, avocados moved off lunch- and dinner-specific menus, instead finding their steady home on all-day menus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

AVOCADOS BY DAYPART

penetration trend by segment



DATASSENTIAL Menu Trends YE MAR'25, PENETRATION: % of restaurants serving avocados.

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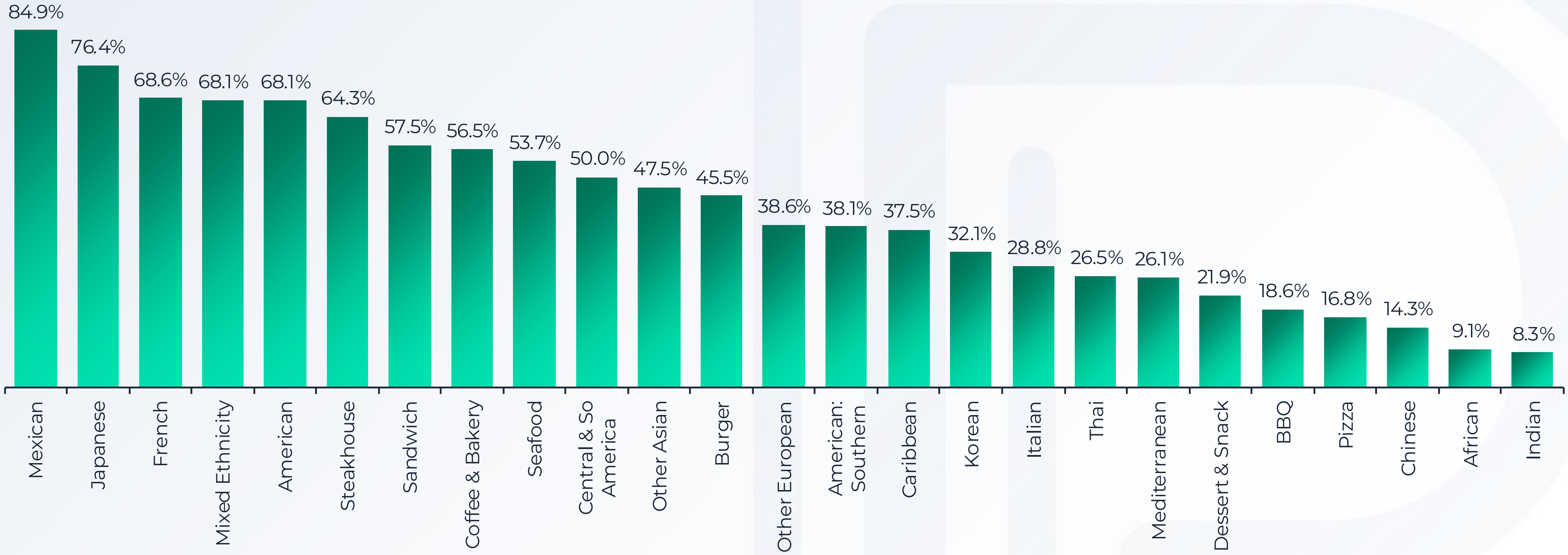
With the strong presence of avocado in Americanized sushi rolls, Japanese cuisine is the second-most common avocado adopter after Mexican cuisine.

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



DATASSENTIAL Menu Trends YE MAR'25, PENETRATION: % of restaurants that offer avocado.

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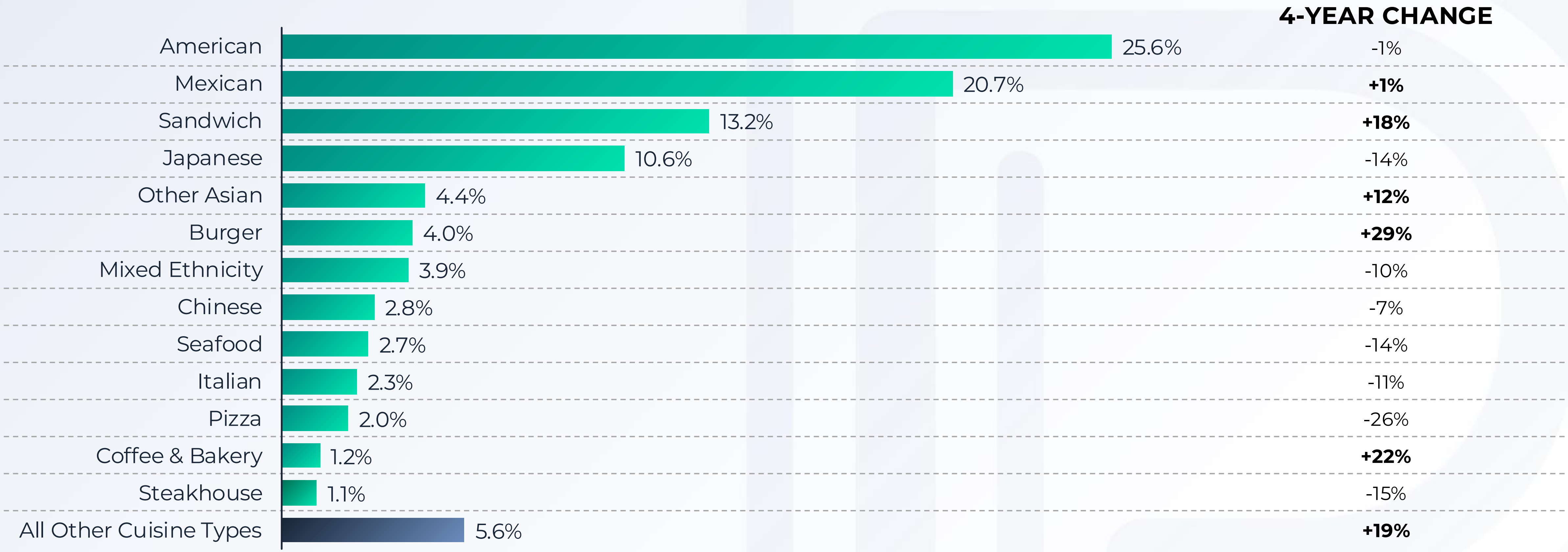
Since Q4’25, the All Other Cuisine Types bucket has seen an increase in 4-year change, indicating that avocados are being adopted more readily by more niche cuisines.

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



DATASSENTIAL Menu Trends YE MAR’25, INCIDENCE DISTRIBUTION: of all avocado dishes on menus, % that are found on menus focusing each type of cuisine.

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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
Avocado Toast	44.8%	-1%	+17%
Breakfast Bowl	24.4%	-4%	+6%
Omelette	20.4%	+1%	-22%
Sandwich	19.6%	+3%	-7%
Breakfast Sandwich	19.0%	-1%	+9%
Wrap	15.4%	**+5%**	**+18%**
Breakfast Burrito	14.5%	**+11%**	**+25%**
Salad	13.5%	-8%	-28%
Eggs Benedict	11.7%	-3%	-8%
Chilaquiles	7.6%	-6%	+42%
Taco	7.2%	**+20%**	**+38%**
Huevos Rancheros	6.6%	-11%	-20%
Bagel	5.7%	-5%	+59%
Scramble	4.9%	-11%	-21%
Breakfast Taco	3.9%	**+27%**	**+81%**

TRENDING ranked by 4-year growth	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Breakfast Taco	3.9%	**+27%**	**+81%**
Bagel	5.7%	-5%	+59%
Torta	2.1%	**+14%**	**+46%**
Chilaquiles	7.6%	-6%	+42%
Taco	7.2%	**+20%**	**+38%**
Burrito	14.5%	**+11%**	**+33%**
Breakfast Burrito	14.5%	**+11%**	**+25%**
Wrap	15.4%	**+5%**	**+18%**
Avocado Toast	44.8%	-1%	+17%
Bowl	11.1%	**+11%**	**+14%**
Tostada	3.0%	-11%	+11%
Breakfast Sandwich	19.0%	-1%	+9%
California Omelette	2.7%	**+10%**	**+7%**
Breakfast Bowl	24.4%	-4%	+6%
Arugula Salad	1.5%	**+39%**	**+4%**

DATASSENTIAL Menu Trends YE MAR'25, PENETRATION: of restaurants serving breakfast apps, entrees, and/or sides with avocado, % that offer...

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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
Salad	62.8%	-1%	-
Sandwich	37.4%	+4%	-
Taco	18.8%	**+6%**	**+6%**
Wrap	18.6%	**+6%**	**+22%**
Bowl	18.5%	**+11%**	**+31%**
Burger	16.0%	-3%	-10%
Sushi	11.2%	-	+3%
Fries	7.0%	+4%	-8%
Poke	6.8%	**+5%**	**+37%**
Soup	6.8%	-5%	-2%
Burrito	6.4%	**+4%**	**+3%**
Tostada	6.4%	**+10%**	**+15%**
Ceviche	6.3%	**+3%**	**+20%**
BBQ	5.8%	-4%	+1%
Avocado Toast	5.6%	+3%	-4%

TRENDING ranked by 4-year growth	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Lettuce Wrap	2.7%	**+55%**	**+159%**
Steak Fajita	1.6%	**+15%**	**+102%**
Chicken Bowl	1.6%	**+12%**	**+85%**
Hand Roll	1.6%	**+60%**	**+85%**
Chips And Guacamole	1.4%	**+14%**	**+69%**
Seaweed Salad	3.0%	**+2%**	**+54%**
Chicken Wrap	2.2%	**+3%**	**+47%**
Dinner Bowl	14.5%	**+16%**	**+47%**
Bagel	2.1%	**+23%**	**+46%**
Nigiri	1.3%	**+6%**	**+42%**
Street Taco	1.1%	-5%	+41%
Steak Salad	1.5%	**+31%**	**+41%**
Chicken Fajita	2.7%	**+6%**	**+37%**
Poke	6.8%	**+5%**	**+37%**
BLTA	1.4%	**+14%**	**+34%**

DATASSENTIAL Menu Trends YE MAR'25, PENETRATION: of restaurants serving lunch, dinner, and/or all-day apps, entrees, and/or sides with avocado, % that offer...

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WINNING LAUNCHES FROM Q1 2026: TOTAL U.S.

new launches from past 3 months

Winning Q1 launches found avocado success in complex builds that feature avocado as a health signal. Whether used directly as a salad ingredient or incorporated into a sandwich-topping slaw, avocado delivers freshness, nutrients, and great flavor that consumers know, trust, and crave.

Jan 2026

Lazy Dog Restaurant and Bar

PROTEIN CRUNCH BOWL

Crunchy, oven-roasted garbanzo beans, jammy egg, avocado, almonds, tomatoes + feta cheese on a bed of supergreens with honey apple cider vinegar dressing on the side. Sub rice for supergreens. Add your favorite protein: Chicken (51g protein), Steak (40g protein), Salmon (40g protein)

Limited Time Offer

Unbranded PI: 52%
Branded PI: 76%
Uniqueness: 52%
Frequency: 29%
Draw: 58%
Value: -

SCORE **99** superstar

Feb 2026 $4.99

Rubio's

BAJA FISH SLIDER

Beer-battered wild-caught Alaska pollock, charred jalapeño tartar sauce and avocado tomatillo slaw. All on a toasted King's Hawaiian© bun.

Limited Time Offer

Unbranded PI: 50%
Branded PI: 68%
Uniqueness: 53%
Frequency: 20%
Draw: 61%
Value: 65%

SCORE **89** volume driver

Feb 2026 $7.65

Chick-fil-A

AVOCADO SRIRACHA BLT SANDWICH W/ CHICK-FIL-A FILET

Limited Time Offer

Unbranded PI: 56%
Branded PI: 52%
Uniqueness: 58%
Frequency: 25%
Draw: 60%
Value: 50%

SCORE **85** specialty appeal

Jan 2026 $12.69

El Pollo Loco

MEXICAN CAESAR SALAD

Super greens blend with spinach and crisp lettuce topped with a double portion of our citrus-marinated, fire-grilled chopped chicken breast, hand-sliced avocados, crumbled cotija cheese, crunchy tortilla strips, chili lime seasoning, and freshly-prepared salsa fresca. Served with a new Mexican Caesar dressing.

Limited Time Offer

Unbranded PI: 60%
Branded PI: 62%
Uniqueness: 45%
Frequency: 22%
Draw: 55%
Value: 36%

SCORE **84** superstar

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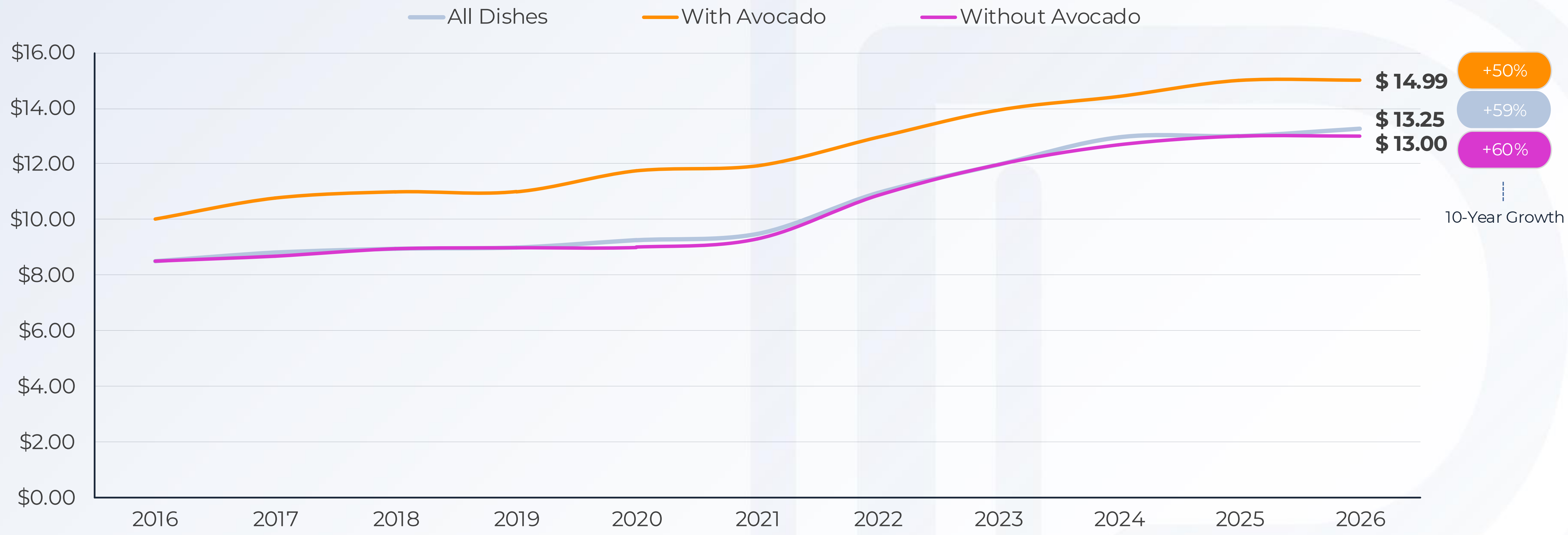
Dishes with avocado command a very consistent premium of about $2.00 over dishes without – a gap that has held true through economic uncertainty and other global shifts.

DISH PRICE

median price



DATASSENTIAL Menu Trends YE MAR'25, MEDIAN PRICE: The median price of all appetizer, entrée, and side dishes.

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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	$ 15.25	**$0.30**
	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	

DATASSENTIAL Menu Trends YE MAR'25, MEDIAN PRICE: The median price of all appetizer, entrée, and/or side dishes.

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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
Bread Side	$ 9.50	$ 3.75	$ 5.75
Fried Protein App	$ 18.00	$ 13.00	$ 5.00
Deli Salad Side	$ 8.95	$ 4.00	$ 4.95
Combos/Multi Protein	$ 17.08	$ 13.00	$ 4.08
Bread Appetizer	$ 13.00	$ 9.00	$ 4.00
Fried Other App	$ 12.99	$ 8.99	$ 4.00
Appetizer Salad	$ 14.00	$ 10.50	$ 3.50
Sampler	$ 21.50	$ 18.00	$ 3.50
Non-Fried Protein App	$ 18.00	$ 15.00	$ 3.00
Appetizer Quesadilla	$ 16.00	$ 13.00	$ 3.00
Pasta/Noodles	$ 19.50	$ 16.50	$ 3.00
Other App	$ 12.99	$ 10.00	$ 2.99
Side Salad	$ 7.95	$ 5.00	$ 2.95
Appetizer Fries/Wedges	$ 11.00	$ 8.18	$ 2.82
Non-Fried Veggie App	$ 12.50	$ 10.00	$ 2.50
Hot Sandwich	$ 14.99	$ 12.50	$ 2.49
Breakfast Starch	$ 14.49	$ 12.00	$ 2.49
Entrée Salad	$ 16.40	$ 14.00	$ 2.40
Cold Sandwich	$ 13.75	$ 11.50	$ 2.25
Appetizer Soup/Chili	$ 9.00	$ 6.99	$ 2.01
Deli Salad Appetizer	$ 14.00	$ 11.99	$ 2.01

DATASSENTIAL Menu Trends YE MAR'25, MEDIAN PRICE: The median price of all dishes of each item type.

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Entrees starring proteins as the center of the plate realize smaller price premiums from avocado due to the already-pricey 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
Other Side	$ 6.49	$ 4.50	$ 1.99
Appetizer Nachos	$ 15.95	$ 14.00	$ 1.95
Mexican Entree	$ 14.99	$ 13.20	$ 1.79
Egg Dish	$ 16.69	$ 14.99	$ 1.70
Burger	$ 15.95	$ 14.48	$ 1.47
Appetizer Dip	$ 12.00	$ 10.75	$ 1.25
Fried Veggie App	$ 10.99	$ 9.79	$ 1.20
Pork Main Entree	$ 17.55	$ 16.50	$ 1.05
Rice Entree	$ 16.00	$ 14.99	$ 1.01
Pizza	$ 18.00	$ 16.99	$ 1.01
Chicken Main Entree	$ 16.99	$ 15.98	$ 1.01
Other Entree	$ 15.95	$ 15.00	$ 0.95
Beef Main Entree	$ 20.00	$ 19.50	$ 0.50
Condiment/Topping	$ 2.29	$ 1.95	$ 0.34
Fruit Side	$ 2.59	$ 2.75	-$ 0.16
Protein Side	$ 4.00	$ 5.00	-$ 1.00
Other Protein Main Entree	$ 19.95	$ 20.95	-$ 1.00
Non-Fried Veggie Side	$ 2.00	$ 3.95	-$ 1.95
Fish Main Entree	$ 15.00	$ 18.00	-$ 3.00
Shellfish Main Entree	$ 14.95	$ 17.99	-$ 3.04
Entrée Soup/Stew/Chili	$ 11.00	$ 14.95	-$ 3.95
Veggie Main Entree	$ 8.95	$ 15.00	-$ 6.05

DATASSENTIAL Menu Trends YE MAR'25, MEDIAN PRICE: The median price of all dishes of each item type.

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Spring/Summer Trends

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Spring/summer trends come from the types of dishes chains launch within those timeframes, and these seasons see comparatively more salad, sandwich, appetizer & side, and burger launches.

Focus on these types of dishes when identifying spring and summer trends.

LAUNCHES IN SPRING/SUMMER

index compared to launches in fall/winter (past 5 years)

DATASSENTIAL Launches & Ratings MAY'26. LAUNCHES INDEX: the relative number of launches released in the spring/summer compared to the fall/winter, where an index of 120 means the category sees 20% more launches in spring/summer than in fall/winter.

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SPRING/SUMMER AVOCADO LAUNCHES: SALADS

new launches from past 3 years

Salads win in the spring and summer because produce is fresh and the cool salad crunch is a welcome contrast to hot weather and long days. However, the modern consumer wants bang for their buck from restaurants, and simple, light salads don't cut it. These winning avocado salad launches capitalize on the trend toward providing greater value through quantity and complexity; avocado is just one of many hearty, filling ingredients. Think of avocado as a surefire way to deliver the filling, substantial punch consumers want from entrée salads. From globally-inspired salads to upleveled classics, on-trend salads marry trending sauces and flavors with tried-and-true proteins and veggies.

Jul 2025 $12.95

Modern Market

GARDEN STEAK SALAD

Mixed greens, garlic herb steak, roasted cremini mushroom, cherry tomato, avocado, pickled onion, ciabatta croutons, citrus vinaigrette.

Limited Time Offer

Unbranded PI:	57%
Branded PI:	72%
Uniqueness:	46%
Frequency:	21%
Draw:	57%
Value:	43%

SCORE 99 superstar

Jun 2025 $11.49

Rubio's

MERCADO SALAD

Choice of grilled chicken, steak or seafood atop lettuce blend, black beans, guacamole, roasted corn blend, tortilla chips, cotija, salsa fresca, avocado tomatillo vinaigrette.

New Item

Unbranded PI:	62%
Branded PI:	68%
Uniqueness:	43%
Frequency:	26%
Draw:	55%
Value:	45%

SCORE 99 superstar

May 2025 $11.59

El Pollo Loco

MEXICAN COBB FRESCA SALAD

Super greens blend with spinach and crisp lettuce topped with a double portion of our citrus-marinated, fire-grilled chopped chicken breast, hand-sliced avocados, bacon, roasted corn and red peppers, and crumbled cotija cheese. Served with creamy cilantro dressing.

Limited Time Offer

Unbranded PI:	59%
Branded PI:	62%
Uniqueness:	46%
Frequency:	25%
Draw:	56%
Value:	43%

SCORE 99 superstar

May 2025 $16.99

TGI Fridays

CHICKEN BACON RANCH SALAD

A new, All-American classic. Crispy or grilled chicken, hickory-smoked bacon, mixed greens, tomatoes, mixed cheese, avocado, red onions, cucumber, Ranch.

New Item

Unbranded PI:	63%
Branded PI:	57%
Uniqueness:	41%
Frequency:	29%
Draw:	57%
Value:	35%

SCORE 96 superstar

DATASSENTIAL Launches & Ratings MAY'26, Composite score based on performance across all 6 key metrics vs the same category

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SPRING/SUMMER AVOCADO LAUNCHES: SANDWICHES

new launches from past 3 years

Spring/summer launches more often feature avocado on cold sandwiches than on warm sandwiches. On cold sandwiches, avocado is often paired with leafy greens, tomato, and onion atop cold cuts; they contribute a bit of indulgence to lighter sandwich builds. On hot sandwiches, indulgence is typically already high from fried proteins, bacon add-ons, etc., and avocado brings even more indulgence to consumers who are seeking a heavier meal. Whether balancing out lighter cold sandwiches or playing its part in complex, hot sandwich builds, operators lean on avocado to ensure their spring and summer sandwiches are filling and texturally nuanced.

Aug 2025

Pret A Manger

AVOCADO VEGGIE SANDWICH

Avocado, pickled cabbage & carrot slaw, tomatoes, crispy onions, Wisconsin cheddar and mesclun with whole grain mustard mayo on a seeded multi-grain roll.

Limited Time Offer

Unbranded PI:	42%	★
Branded PI:	60%	★★★
Uniqueness:	54%	★★★★★
Frequency:	26%	★★★★★
Draw:	58%	★★★★★
Value:	-	

SCORE **74** specialty appeal

Jun 2024 $9.29

Jason's Deli

HEARTY HAM SANDWICH

Ham, American cheese, sliced avocado, red onions, tomato, lettuce, and honey mustard on marbled rye bread, served with potato chips and a pickle.

Limited Time Offer

Unbranded PI:	62%	★★★★
Branded PI:	63%	★★★★
Uniqueness:	32%	★★
Frequency:	25%	★★★★★
Draw:	50%	★★★
Value:	43%	★★★

SCORE **72** volume driver

Apr 2024 $10.99

Shake Shack

AVOCADO CHICKEN BLT

Breaded and fried chicken breast topped with sliced avocado, bacon, tomato, shredded lettuce and choice of ranch or spicy Buffalo ranch sauce on a potato bun.

New Item

Unbranded PI:	58%	★★★★
Branded PI:	54%	★★★
Uniqueness:	40%	★★★
Frequency:	24%	★★★★★
Draw:	56%	★★★★★
Value:	38%	★★★

SCORE **67** consider

May 2024 $9.79

Schlotzsky's

GREEN GODDESS

Turkey, bacon, mozzarella, avocado, lettuce, pesto sauce, and light mayonnaise on a sourdough bun.

Limited Time Offer

Unbranded PI:	56%	★★★
Branded PI:	56%	★★★
Uniqueness:	45%	★★★★
Frequency:	21%	★★★★
Draw:	55%	★★★★
Value:	37%	★★★

SCORE **65** consider

DATASSENTIAL Launches & Ratings MAY'26, Composite score based on performance across all 6 key metrics vs the same category

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SPRING/SUMMER AVOCADO LAUNCHES: APPETIZERS & SIDES

new launches from past 5 years

As consumers take to the outdoors to eat with friends and family, spring and summer appetizers most typically are shareable finger foods. Avocados make a great addition to spring and summer app & side lineups because they can serve as the main focus of an appetizer, as a topping that is easy and beautiful to add on top, or as the glue to hold bite-sized morsels together. One recent spring/summer trend has been fried avocado wedges, sometimes on their own or sometimes fried with ingredients (like fish or cheese) nestled within. Another trend to consider for spring and summer is avocado toast, a still-trending Millennial darling that hosts exactly the types of health-forward ingredients consumers seek from small-portioned and veggie-forward starters.

Jun 2022 $8.49

Pollo Tropical

TOPPED TOSTONES WITH SPICY SHREDDED CHICKEN

Experience our Cuban "ropa vieja style" shredded chicken featuring our special savory house-made spicy tomato-sriracha sauce with sautéed onions and peppers layered over our crispy, crunchy tostones. It comes topped with deliciously fresh sliced avocado – just because we can.

Limited Time Offer

Unbranded PI:	56%	★★★★
Branded PI:	67%	★★★★
Uniqueness:	61%	★★★★★
Frequency:	23%	★★★★
Draw:	51%	★★★★
Value:	42%	★★★

SCORE **90** superstar

Mar 2025 $4.99

Habit Burger & Grill

TEMPURA AVOCADO WEDGES

Fried avocado in tempura batter flavored with serrano peppers and cilantro, served with ranch dressing.

Limited Time Offer

Unbranded PI:	46%	★★
Branded PI:	60%	★★★
Uniqueness:	65%	★★★★★
Frequency:	23%	★★★★
Draw:	51%	★★★★
Value:	53%	★★★★

SCORE **84** specialty appeal

Apr 2021 $13.99

Yard House

CALI ROLL STACK

Crab, crispy rice, baby tomatoes, avocado, cucumber, serranos, masago, nori, sweet soy ginger, cilantro, pickled ginger aïoli.

New Item

Unbranded PI:	42%	★★★
Branded PI:	64%	★★★★
Uniqueness:	57%	★★★★★
Frequency:	21%	★★★
Draw:	47%	★★★★
Value:	31%	★★★

SCORE **66** specialty appeal

Aug 2025 $8.95

Cheesecake Factory

AVOCADO TOAST

Toast with tomato, arugula, and red onion drizzled with extra virgin olive oil and lemon.

Limited Time Offer

Unbranded PI:	46%	★★
Branded PI:	43%	★★
Uniqueness:	42%	★★★
Frequency:	30%	★★★★★
Draw:	52%	★★★★
Value:	35%	★★★

SCORE **54** consider

DATASSENTIAL Launches & Ratings MAY'26, Composite score based on performance across all 6 key metrics vs the same category

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SPRING/SUMMER AVOCADO LAUNCHES: BURGERS

new launches from past 5 years

While fall and winter burger launches often double down on heavy, indulgent flavors and ingredients, successful spring and summer burgers feature simpler flavor profiles; burgers are not built to focus on health-forward qualities in any season. To this end, avocados as a topping are a burger trend of their own in the spring and summer. They enjoy a healthy halo effect that can help burger offerings feel lighter – even though at their core, they are still burgers. Talk up avocados as the perfect ingredient to pack extra creaminess and indulgence into spring and summer burger launches without seeming so heavy that they're *too much*. The poorly-performing burger from Perkins pictured below is a perfect example of how overly-decadent burger builds tend not to perform well in the spring and summer months.

Jul 2021 $6.99

Back Yard Burgers

BACON AVOCADO BURGER

Limited Time Offer

Unbranded PI:	54%	★★★
Branded PI:	75%	★★★★★
Uniqueness:	43%	★★★
Frequency:	24%	★★★★
Draw:	56%	★★★★★
Value:	55%	★★★★

SCORE **86** consider

Jun 2022 $5.99

Burger King

SOUTHWEST BACON WHOPPER

Features a quarter-pound beef patty with avocado spread, crispy bacon, seasoned tortilla strips, American cheese, lettuce, sliced white onions, tomatoes and the creamy spicy sauce on a toasted sesame seed bun.

Limited Time Offer

Unbranded PI:	61%	★★★★★
Branded PI:	58%	★★★★★
Uniqueness:	44%	★★★
Frequency:	23%	★★★★
Draw:	58%	★★★★★
Value:	60%	★★★★

SCORE **84** superstar

Apr 2023 $5.99

Farmer Boys Restaurant

PARMESAN-CRUSTED SOURDOUGH CHEESEBURGER

Parmesan-crusted sourdough loaded with quarter pound 100 percent USDA pure beef, hickory-smoked bacon, cheese, smashed avocado, green leaf lettuce, grilled onions, and house-made thousand island dressing. It's the upper crust of cheeseburgers!

Returning Item

Unbranded PI:	58%	★★★★
Branded PI:	59%	★
Uniqueness:	46%	★★★
Frequency:	18%	★★
Draw:	56%	★★★★★
Value:	70%	★★★★★

SCORE **78** volume driver

Jul 2024 $17.99

Perkins American Food Co.

DOUBLE BACON AVOCADO CRUNCH BURGER

Applewood smoked bacon, crispy tots and Pepper Jack cheese, drizzled with herb dressing, topped with pickled balsamic red onions and fresh avocado slices.

Limited Time Offer

Unbranded PI:	47%	★★
Branded PI:	59%	★★★★
Uniqueness:	56%	★★★★★
Frequency:	22%	★★★★
Draw:	60%	★★★★★
Value:	28%	★★

SCORE **59** specialty appeal

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Metrics

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Restaurant Segments

limited service **(LSR)**

QSR
COUNTER SERVICE
FOCUS: speed and value
check avg: $

Fast Casual
COUNTER SERVICE
FOCUS: customization and quality ingredients
check avg: $$

full service **(FSR)**

Midscale
WAITER SERVICE
FOCUS: value and breakfast
generally no alcohol
check avg: $$

Casual
WAITER SERVICE
FOCUS: shared plates and bar menus serves alcohol
check avg: $$$

Fine Dine
HIGH-END WAIT SERVICE
FOCUS: chef-driven menu
serves alcohol
check avg: $$$$

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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.

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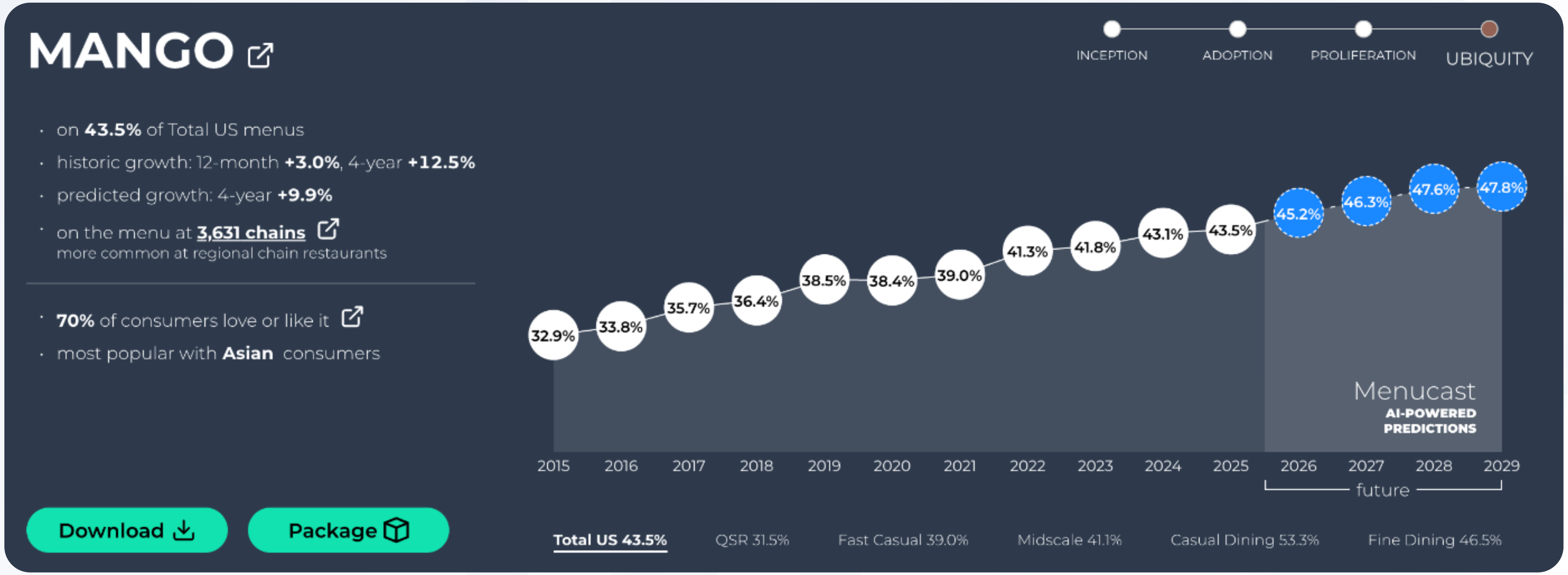
Menu Trends Metrics

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%.



Menu Trends

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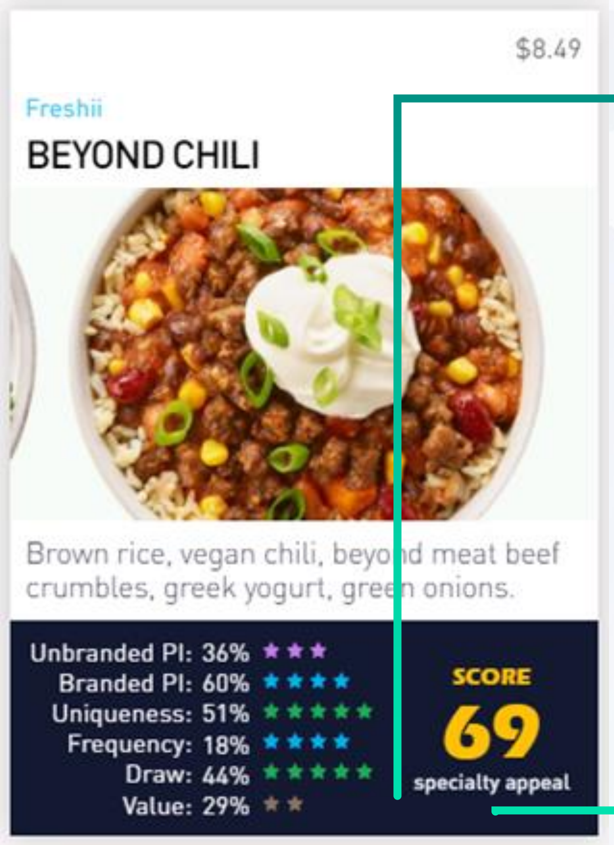
Launches & Ratings Metrics

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

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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?

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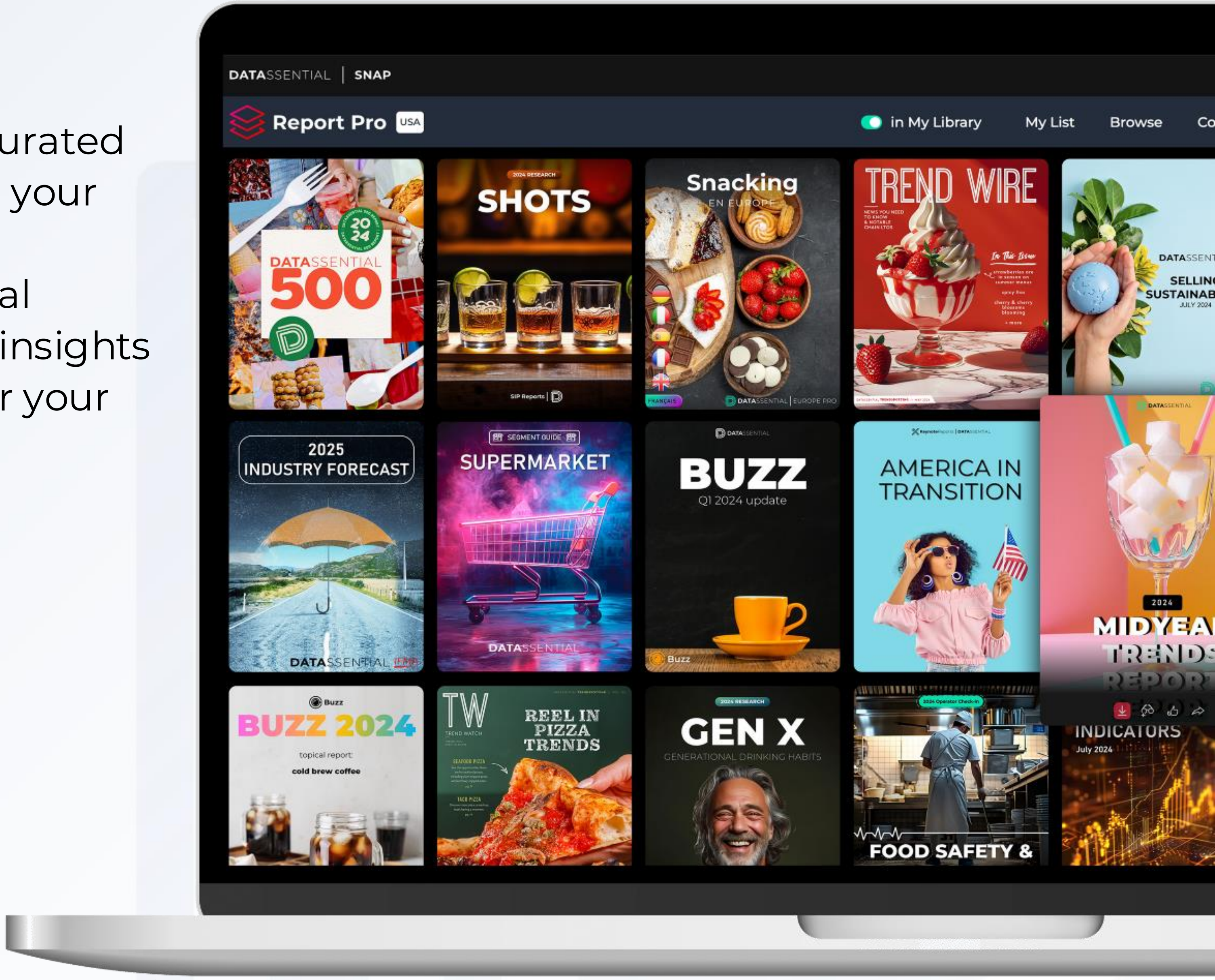

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Datassential is your best source for food industry insights, from the latest menu trends to the products shoppers want at the grocery store.