

Quarterly Insights Q1'26

ECONOMIC UPDATES
GENERATIONAL AFFINITY
AVOCADOS ON MENUS



HASS
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 **DATASSENTIAL**

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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 are leading avocado trial and affinity, especially in trendy tacos, Asian fusion (e.g., sushi burritos), handhelds, and build-your-own formats like bowls and fajitas. **Target innovation, marketing, and social content toward these younger consumers** with avocado-forward fusions, alternative Mexican formats, and customizable add-ons, 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.

Edible Economy

KEY ECONOMIC INDICATORS
CONSUMER & OPERATOR SNAPSHOT
FOODSERVICE GROWTH & SPEND

Overview

Detailed Summary

December saw the first upward movement in consumer sentiment since July, increasing 1.9 points from November. This value remains lower than most indicators since 2022, emphasizing continued pessimism among consumers about the state of the economy. Since January 2025 personal savings have been steadily declining, with November values 25% lower than a year prior. Meanwhile, personal expenditures are only up about 5%, suggesting savings are depleting more than people are spending.

Core prices in December remained relatively unchanged since November, a positive for consumers. However, food budgets continue to face pressure. Overall, food & beverage prices experienced significant increases up 3% year-over-year (YOY). This coincided with a 0.7% increase on a month-to-month (MOM) basis, the largest since 2022. Grocery prices were up 2.36% YOY at the end of 2025, an increase from the previous two months. Menu prices rose the fastest YOY in December than they have since the start of 2025. December saw beverage manufacturing costs outpace food manufacturing costs, at 2.3% and 1.8% higher, YOY, than December 2024.

Bureau of Economic Analysis released updated 2025Q3 estimates of GDP, coming in at 4.4%. Much of the growth was from consumer spending, which was primarily in healthcare services. Recreation and vehicle purchase also contributed. There were also higher exports and lower imports, while investment expenditure declined this quarter. The personal consumption expenditure price index, the Federal Reserve Board measure of inflation, which is broader than CPI, increased 2.8 percent this quarter, slightly higher than the BLS metric.

Total jobs added in 2025 were the lowest outside of a recession since 2003, coming in with 584K jobs. Total unemployment fell slightly in December, to 4.4%, aligning with the Federal Reserve Bank Federal Open Market Committee's aim of addressing the rising unemployment alongside inflation, coinciding with an additional rate decrease in December. Food service employment has remained positive for six-straight months, adding 27K jobs in December. This, along with the Datassential Chain Tracker, which found 1,159 net restaurant units added in October, suggests that the sector is steadily improving. Given that much of the unit growth remains in QSR and Casual & Upscale Casual dining segments, it highlights the strengths of the foodservice sector at a time when budgets are tight.

INDEX OF CONSUMER SENTIMENT

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

Consumer sentiment has generally been on the decline since the start of 2025. November marked the lowest point of consumer sentiment since June 2022, suggesting a difficult outlook as consumers headed into the holiday season. Despite a slight bump in December, values remain far lower than they've been since 2022, signaling a general pessimism among consumers.

CONSUMER SENTIMENT INDEX



MONTHLY ICS

Jan-25	71.7
Feb-25	64.7
Mar-25	57.0
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

Note: Grey bars represent recession periods

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.

Since January 2025 personal savings have been steadily declining, with November values 25% lower than a year prior. Meanwhile, personal expenditures are only up about 5% suggesting savings are depleting more than people are spending.

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
Nov 2024	\$25,322.1	0.38%	\$22,247.7	0.34%	\$20,313.6	0.43%	\$1,088.2	-0.94%
Dec 2024	\$25,418.6	0.38%	\$22,329.3	0.37%	\$20,514.3	0.99%	\$970.5	-10.82%
Jan 2025	\$25,570.5	0.60%	\$22,435.3	0.47%	\$20,462.2	-0.25%	\$1,149.2	18.41%
Feb 2025	\$25,705.4	0.53%	\$22,551.4	0.52%	\$20,519.8	0.28%	\$1,177.4	2.45%
Mar 2025	\$25,877.3	0.67%	\$22,704.4	0.68%	\$20,683.0	0.80%	\$1,163.2	-1.21%
Apr 2025	\$26,061.1	0.71%	\$22,873.1	0.74%	\$20,746.4	0.31%	\$1,268.9	9.09%
May 2025	\$25,925.8	-0.52%	\$22,722.6	-0.66%	\$20,755.0	0.04%	\$1,111.2	-12.43%
Jun 2025	\$25,975.7	0.19%	\$22,764.1	0.18%	\$20,868.4	0.55%	\$1,040.9	-6.33%
Jul 2025	\$26,100.2	0.48%	\$22,863.3	0.44%	\$21,007.3	0.67%	\$990.3	-4.86%
Aug 2025	\$26,200.4	0.38%	\$22,946.1	0.36%	\$21,123.8	0.55%	\$944.3	-4.65%
Sep 2025	\$26,292.4	0.35%	\$23,019.2	0.32%	\$21,202.4	0.37%	\$929.7	-1.55%
Oct 2025	\$26,323.0	0.12%	\$23,031.2	0.05%	\$21,301.0	0.47%	\$843.9	-9.23%
Nov 2025	\$26,402.9	0.30%	\$23,094.9	0.28%	\$21,409.7	0.51%	\$799.7	-5.24%

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

INFLATION RATE

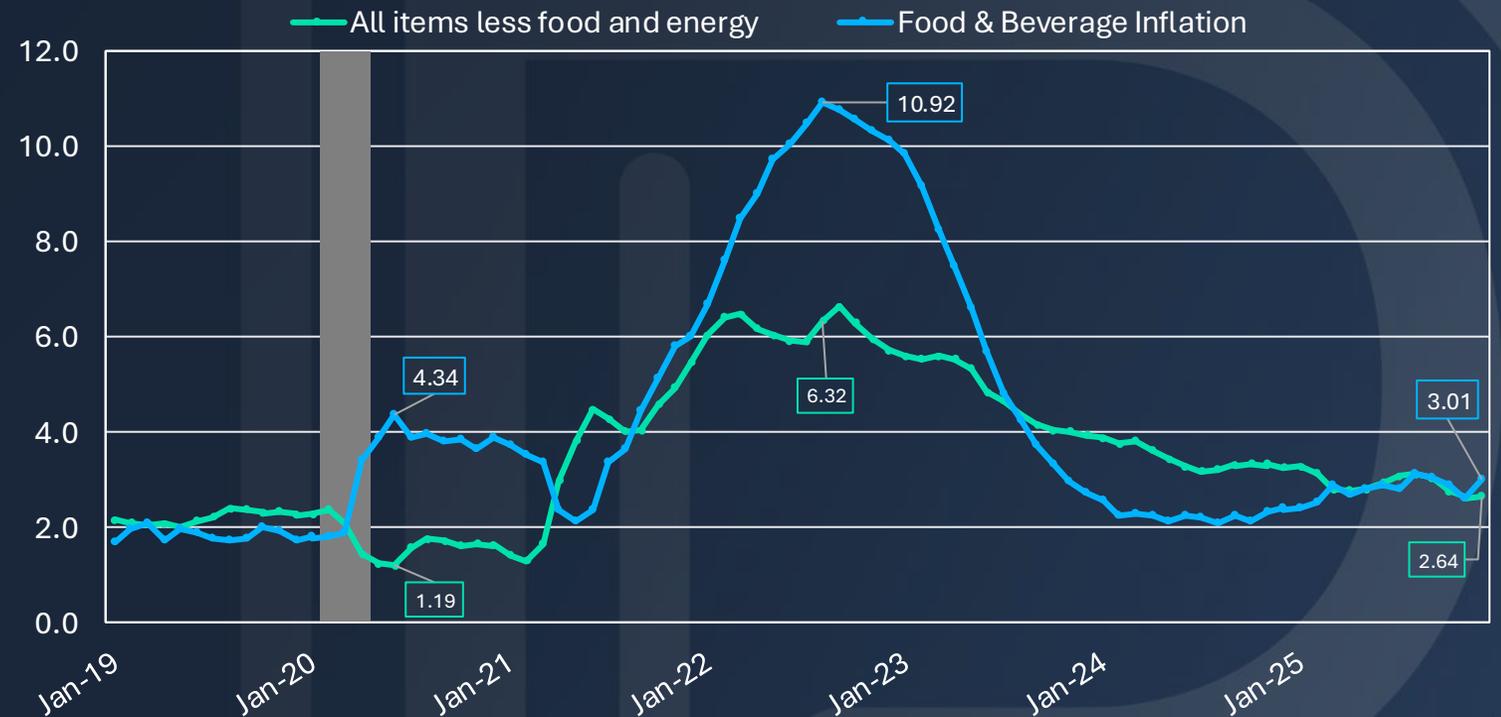
The Consumer Price Index (CPI) is a measure of the average change over time in the prices paid by urban consumers for a market basket of consumer goods and services. The percentage change in a CPI is used as a measure of inflation. CPI helps us determine to what extent prices paid by consumers are changing 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.

Core inflation, removing the volatile food and energy prices, remained essentially unchanged from last month, a positive note for consumers. However, other categories saw stark increases. Food & Beverage Inflation rose 0.7 percent from last month, the highest month-to-month change since 2022.

MONTHLY INFLATION RATE (%)

Month	All items less food and energy inflation	Food & beverage inflation
Dec-24	3.24	2.39
Jan-25	3.26	2.41
Feb-25	3.12	2.52
Mar-25	2.79	2.89
Apr-25	2.78	2.69
May-25	2.79	2.81
Jun-25	2.93	2.89
Jul-25	3.06	2.79
Aug-25	3.11	3.12
Sep-25	3.02	3.05
Oct-25*	2.75	2.86
Nov-25	2.63	2.59
Dec-25	2.64	3.01

MONTHLY INFLATION RATE (%)



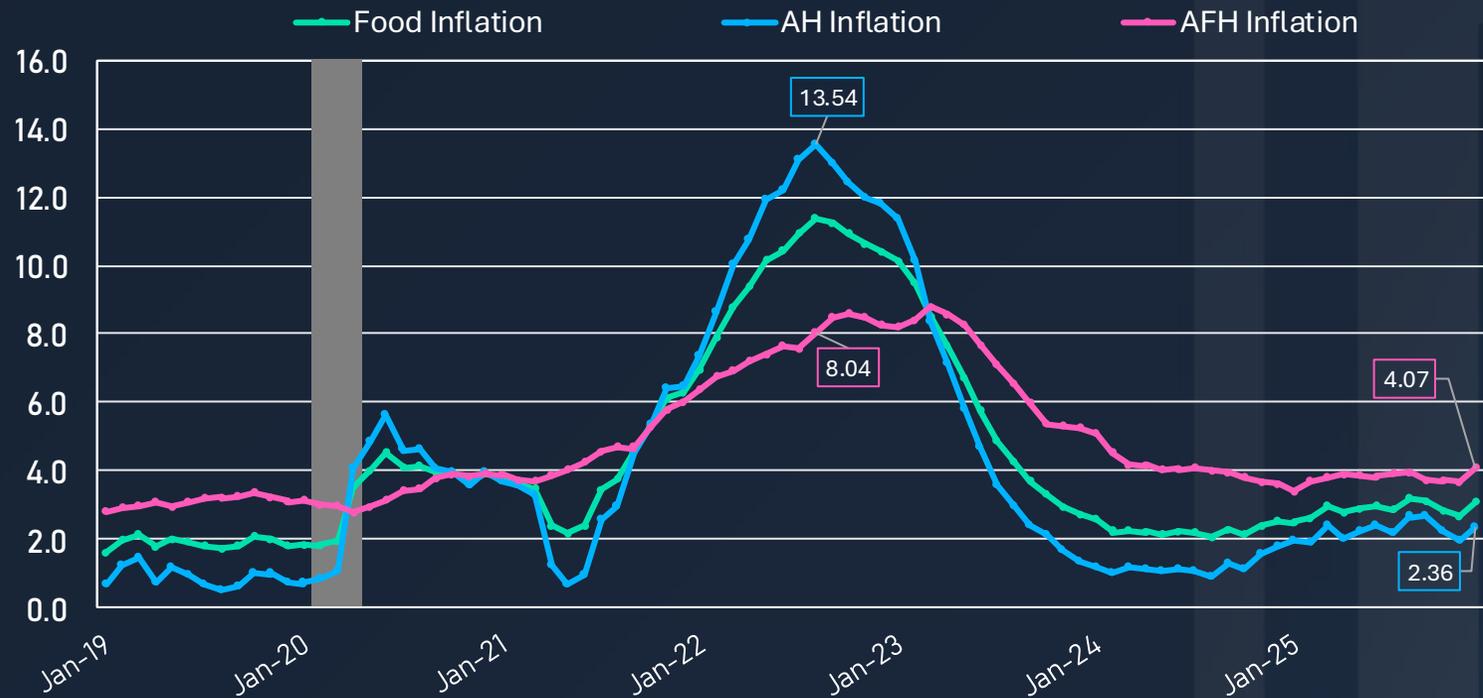
Note: Inflation rate refers to the percent change of the CPI compared to the same month of the previous year. Presented measures include core inflation among all items excluding food and energy (a.k.a. Core Inflation, CPILFENS) and food and beverage inflation (CPIFABNS). Seasonally unadjusted values 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 were up 3.1% from December 2024.
 - Grocery prices experienced the largest month-to-month increase since early 2025, coming in 0.5% higher.
 - Away-from-home inflation saw the largest year-over-year jump out of all of 2025.
- Despite some tariff pressures easing, with many agricultural of the agricultural tariffs easing, there remains some inflationary effects that likely to take time to ease as supply chains are slow to readjust.

MONTHLY INFLATION RATE (%)



MONTHLY INFLATION RATE (%)

Month	Food Inflation	AH Inflation	AFH Inflation
Dec-24	2.51	1.77	3.62
Jan-25	2.50	1.93	3.38
Feb-25	2.61	1.90	3.68
Mar-25	2.96	2.42	3.79
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

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.

PRODUCER PRICE INDEX - MANUFACTURING

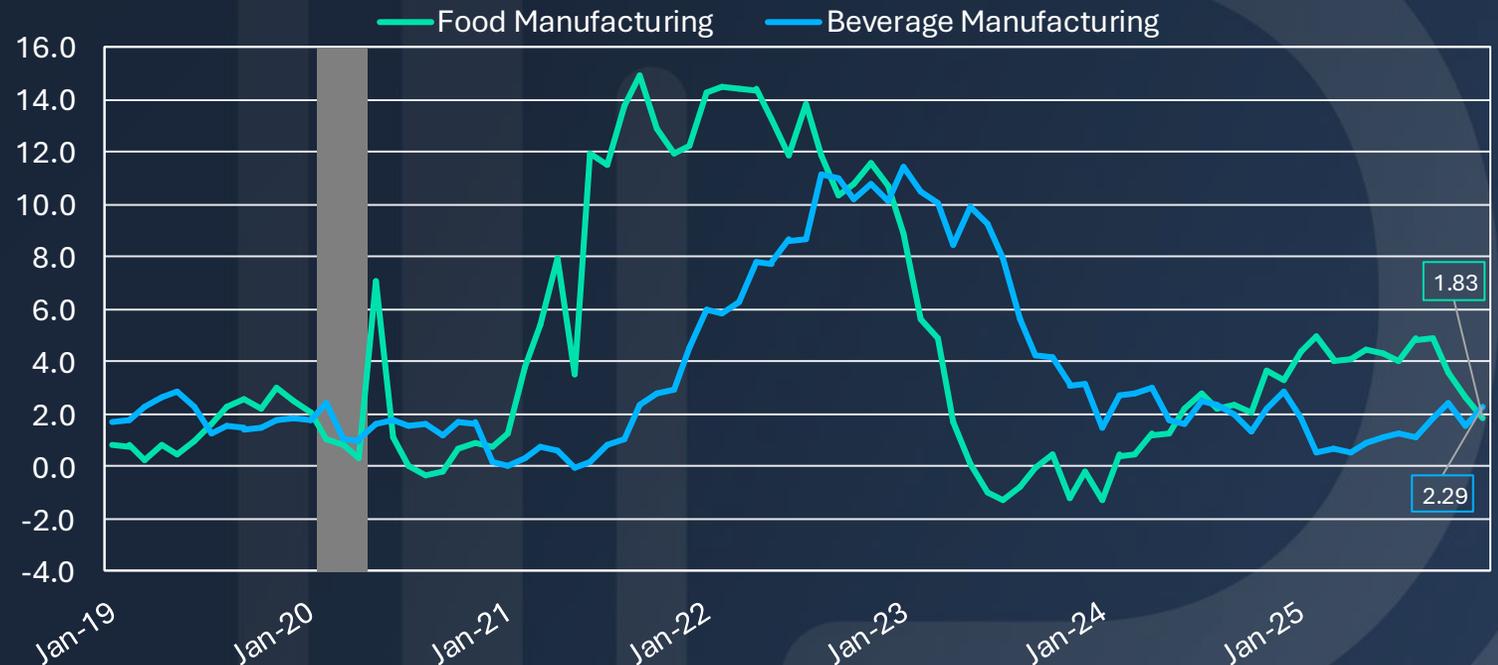
The Producer Price Index (PPI) is a family of indexes that measures the average change over time in selling prices received by domestic producers of goods and services – PPIs measure price change from the perspective of the seller. Sometimes referred to as cost-push inflation, it occurs when the cost 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. Sellers’ and purchasers’ prices may differ due to government subsidies, sales and excise taxes, and distribution costs. 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.

Food and beverage manufacturing has been undergoing increase supply chain pressures, leading to a general increase in overall production throughout the 2025. End of year food production costs (DEC 2025 vs 2024) were lower than all previous months, whereas beverage manufacturing saw it’s second largest YOY increase. While preliminary, this is the first time beverage manufacturing costs have outpaced food manufacturing costs since August 2024.

MONTHLY INFLATION RATE (%)

Month	Food Manufacturing	Beverage Manufacturing
Dec-24	3.29	2.83
Jan-25	4.42	1.82
Feb-25	4.98	0.51
Mar-25	4.12	0.69
Apr-25	4.13	0.53
May-25	4.44	0.89
Jun-25	4.35	1.11
Jul-25	4.01	1.28
Aug-25	4.86	1.13
Sep-25	4.91	1.82
Oct-25	3.57	2.46
Nov-25	2.66	1.55
Dec-25	1.83	2.29

MONTHLY PRODUCER PRICE INDEX (%)



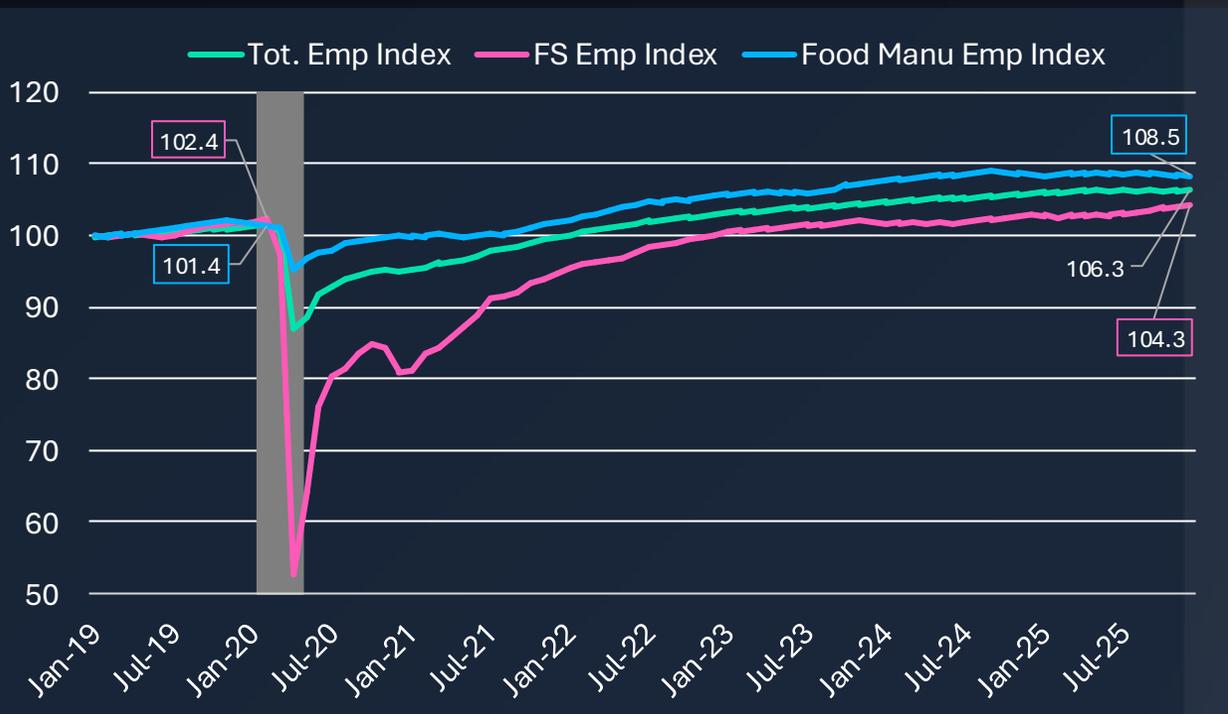
Note: Inflation rate refers to the percent change of the PPI compared to the same month of the previous year. Series include food manufacturing (PCU311311) and beverage manufacturing (PCU31213121). Seasonally unadjusted values are used to assess prices experienced. Grey bars represent recession periods.

EMPLOYMENT LEVELS

The Bureau of Labor Statistics (BLS) runs the establishment-based Current Employment Metrics 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 foodservice 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.

- Total nonfarm payroll reached 159,526K in December.
 - November and October metrics were revised down by 68K and 8K, respectively, as is standard procedure as additional surveys were received by BLS.
- Total food service employment continues its growth, reaching a total 12,514.5K total employees, a continued increase after a slight drop in June 2025.
- Food manufacturing employment has fallen to 1,768.8K the fourth month of negative gains, and slight negative growth year-over-year. Overall, manufacturing has been struggling.

EMPLOYMENT LEVELS (INDEX = JANUARY 2019, per industry)



Employment Levels (Thousands)

Month	Total Employment	Food Service Employment	Food Manufacturing Employment
Dec-24	158,942	12,365.0	1,769.6
Jan-25	159,053	12,338.0	1,768.3
Feb-25	159,155	12,299.1	1,769.8
Mar-25	159,275	12,337.0	1,772.5
Apr-25	159,433	12,351.5	1,772.8
May-25	159,452	12,366.7	1,775.1
Jun-25	159,439	12,360.8	1,774.7
Jul-25	159,511	12,371.1	1,772.5
Aug-25	159,485	12,392.0	1,774.4
Sep-25	159,593	12,429.7	1,771.4
Oct-25	159,420	12,480.5	1,770.9
Nov-25	159,476	12,487.3	1,769.0
Dec-25	159,526	12,514.5	1,768.8

Note: Grey bars represent recession periods. Data series include total employment (PAYEMS), food service and drinking places (CES707220001), and food manufacturing (CES323110001), seasonally adjusted.

MONTH-TO-MONTH CHANGES

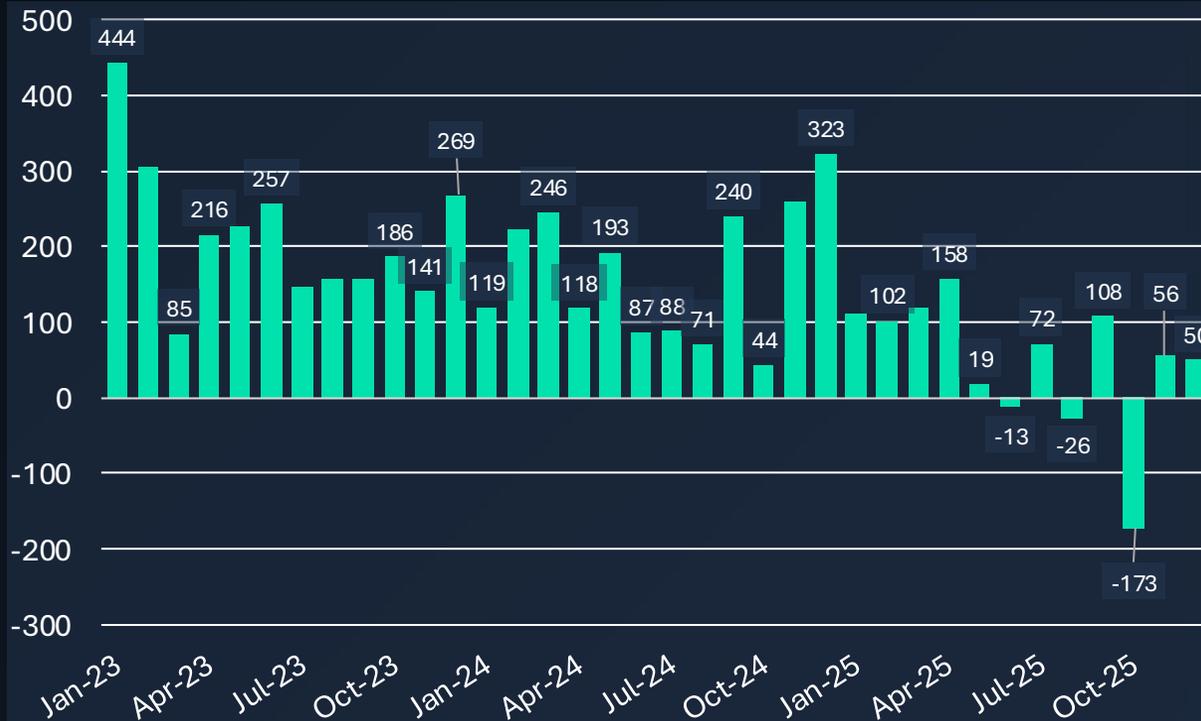
December marks the first consecutive month of total employment gains for the economy since Mar-April and April-May. The economy added a total 50K jobs in December.

- That brings the total jobs added in 2025 to 584K jobs.
 - Much of this was focused in Q1, (when 333K jobs were added), and is prior to the large tariff enactment in April. Q4 saw the economy hemorrhage jobs, losing 67K.
- Additional revisions occurred for both October and November after data collection was completed. The total economy lost 68K more jobs in October, higher than previously estimated, bringing the total loss to 173K jobs. October revisions were focused on retail trade (which appears to have upwardly adjusted in November,) temporary health services, healthcare, and government employment.
- December saw month-to-month losses in employment at warehouse clubs/supercenters/general merchandise retailers, the second month of decline.

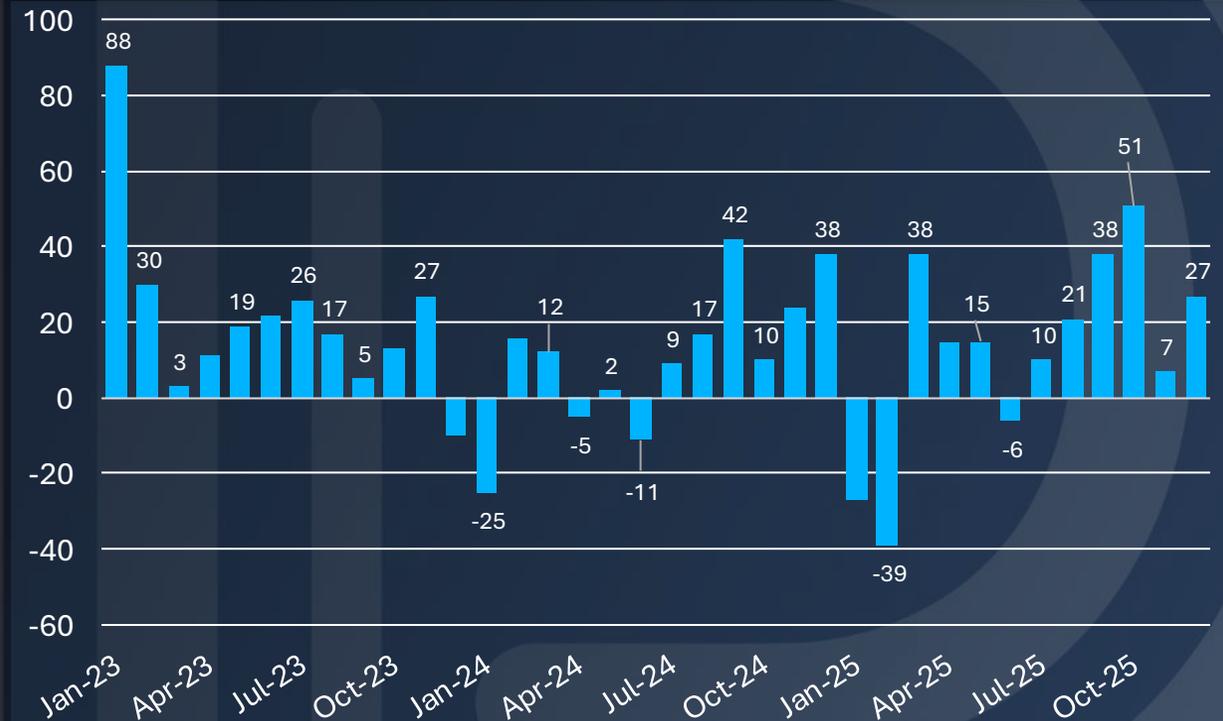
Despite a fall in in employment among the Leisure and Hospitality sector in November, an addition 47K jobs were added in December.

- Much of this gain was focused in the food service sector. Now in its 6th consecutive month of gains, the sector added 27.2K jobs. The sector has added a net of 149.5K jobs in 2025,

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

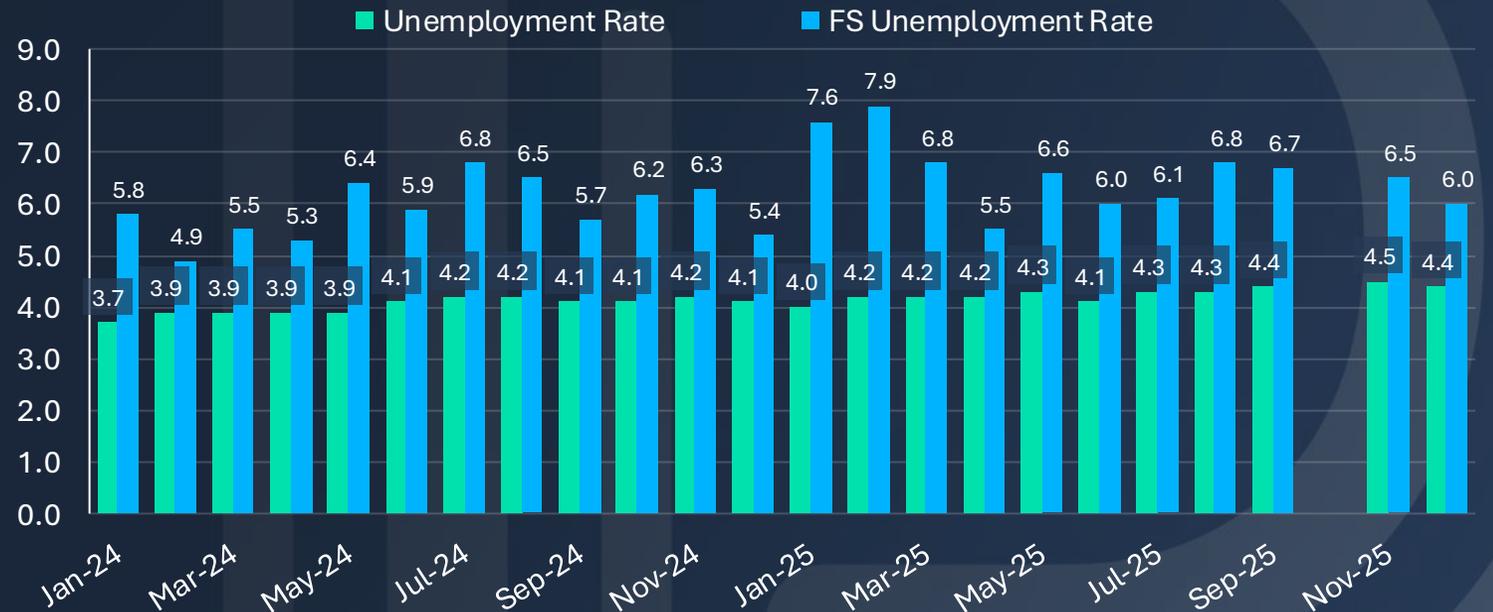
The Bureau of Labor Statistics (BLS) runs the Current Population Survey (CPS) to determine current employment rates. The BLS specifically defines unemployed persons as those who don't have a job but are available for work and have looked for work in the past four weeks. The unemployment rate measures 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.

- Total unemployment fell slightly in December, to 4.4%. This was after last months (revised) high of 4.5%.
 - Percent of people participating in the labor force fell slightly to 62.4%.
- While unemployment for November was revised down to 4.5%, previously reported to be 4.6%, there remains an elevated concern of overall employment across the total economy.
- The food service unemployment rate continues to fall, down 6.5% to 6.0% in December. Combined with the gains in month-to-month employment, suggests some resiliency of the subsector.

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

Month	Unemployment	Labor Force Participation
Dec-24	4.1	62.5
Jan-25	4.0	62.6
Feb-25	4.2	62.5
Mar-25	4.2	62.5
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	4.45*	62.5*
Nov-25	4.5	62.5
Dec-25	4.4	62.4

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.

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. For 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.

SNAP participation has been declining since April 2025.

Data are currently available through September 2025, which does not include the lapse in funding for the program in October 2025, the first time in the program's history.

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



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.

- The increases were primarily driven by energy services (not displayed), which were up about 7.7% YOY.
- Average monthly gas prices continue to fall, down an additional 16¢ from November to December. Energy inflation also cooled somewhat, rising only 2.3% YOY.

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.

Q3 growth was largely driven by sustained consumer spending, higher exports and lower imports. Investment expenditures declined this quarter.

Consumer spending increases were focused in healthcare expenditures, both outpatient services, as well as hospital and nursing home services. Additional expenditures in recreational goods and vehicles also contributed to the increase.

The personal consumption expenditure (PCE) price index, the Federal Reserve Board measure of inflation which is broader than CPI, increased 2.8 percent this quarter, and excluding the more volatile food and energy metrics, rose 2.9 percent.

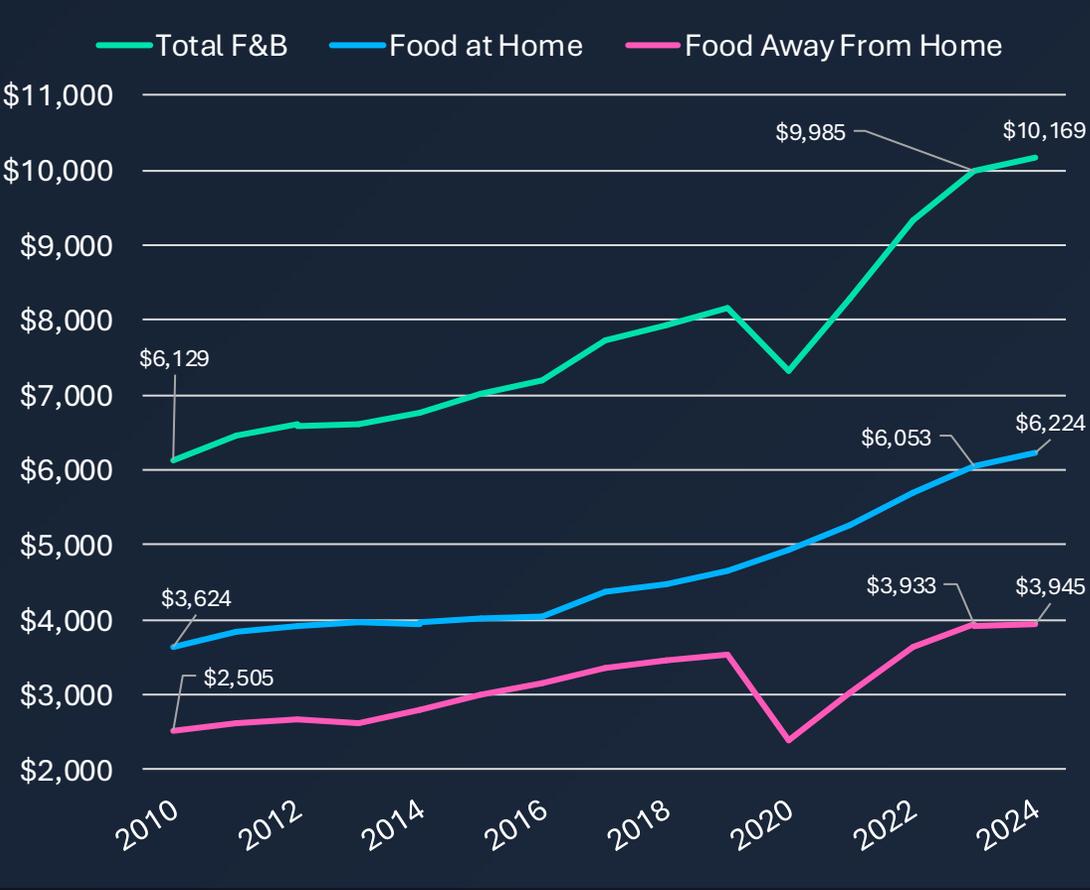


CONSUMER FOOD EXPENDITURES

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, nonnegative, 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.

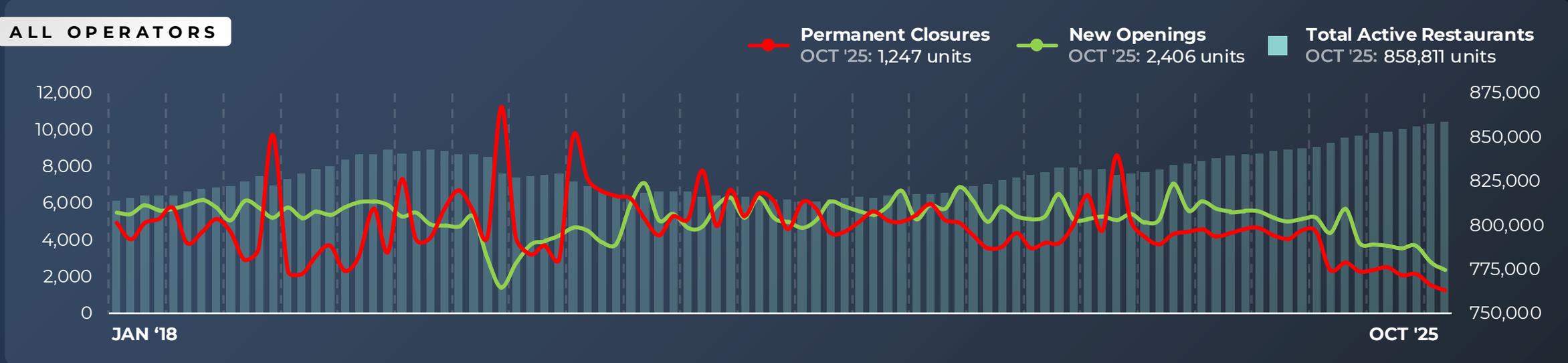
U.S. TOTAL POPULATION ESTIMATES & PROJECTIONS (in thousands)

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

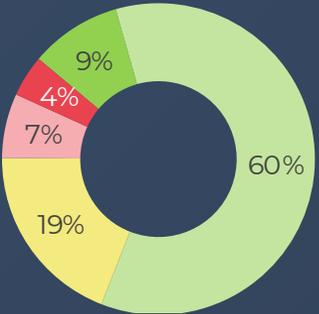
Note: 2022 is base population from when census obtained actual numbers for projections.

Foodservice Openings & Closings



Operator: Previous Month Performance

How Would Operators Describe Their Business In The Past Month?



9%

VERY PROFITABLE
It was an excellent month

60%

PROFITABLE
We had an average month

19%

NOT VERY PROFITABLE
We had a below average month

7%

BROKE EVEN
Our revenue just covered our costs

4%

MADE A LOSS
Our costs exceeded our revenue

76%

ON-PREMISE REVENUE

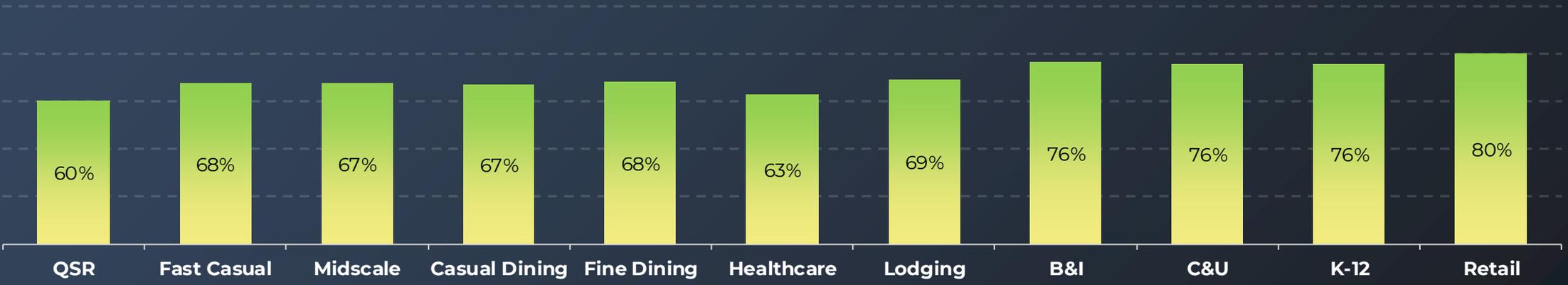


24%

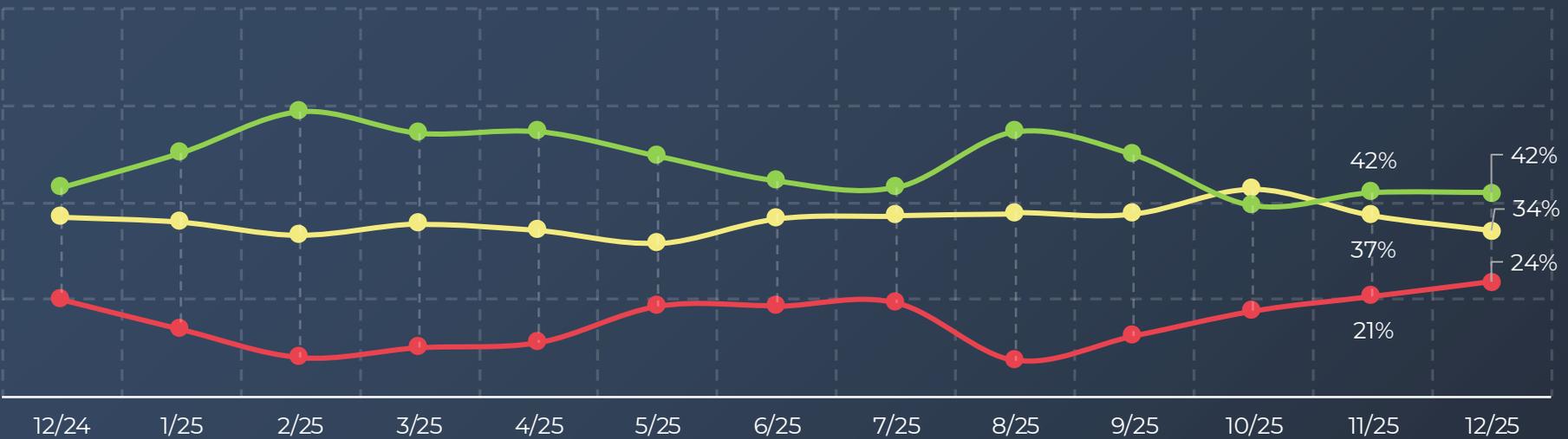
OFF-PREMISE REVENUE

BY SEGMENT

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



Operator: Traffic Expectation For The Upcoming Month



WILL BE HIGHER

42%

WILL BE THE SAME

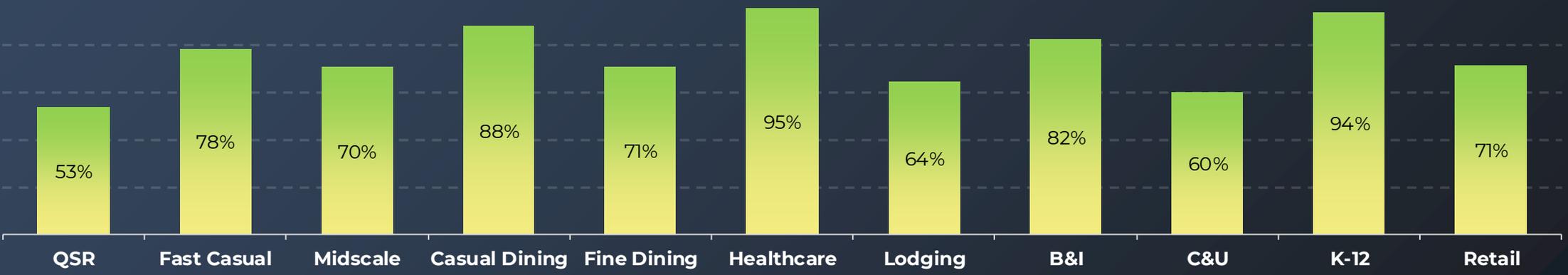
34%

WILL BE LOWER

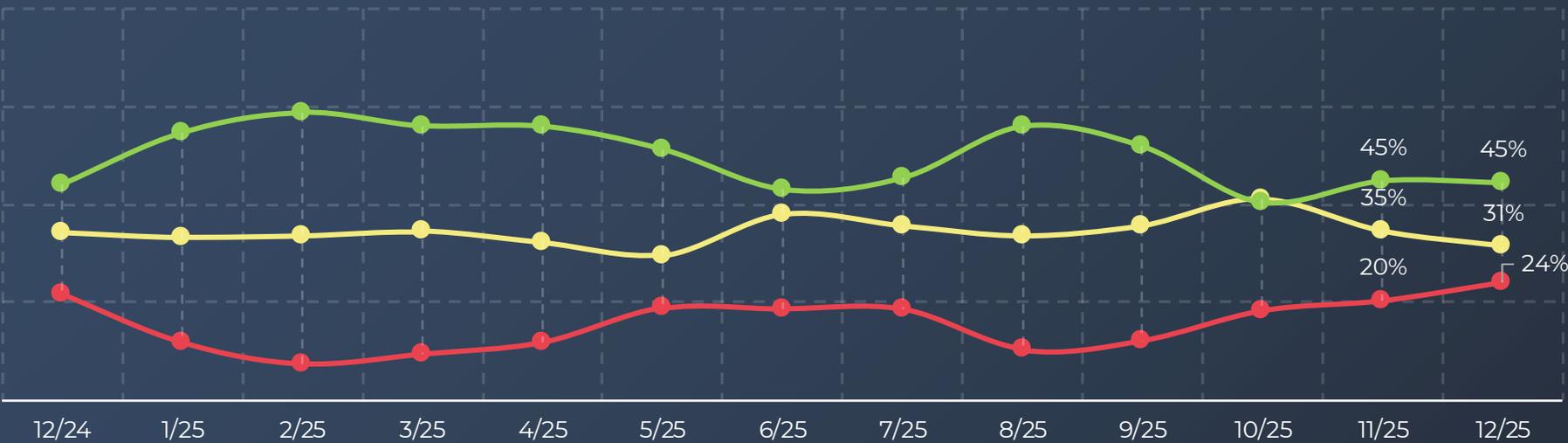
24%

BY SEGMENT

TOP 2 - "Will Be Higher" + "Will Be The Same"



Operator: Sales Expectation For The Upcoming Month



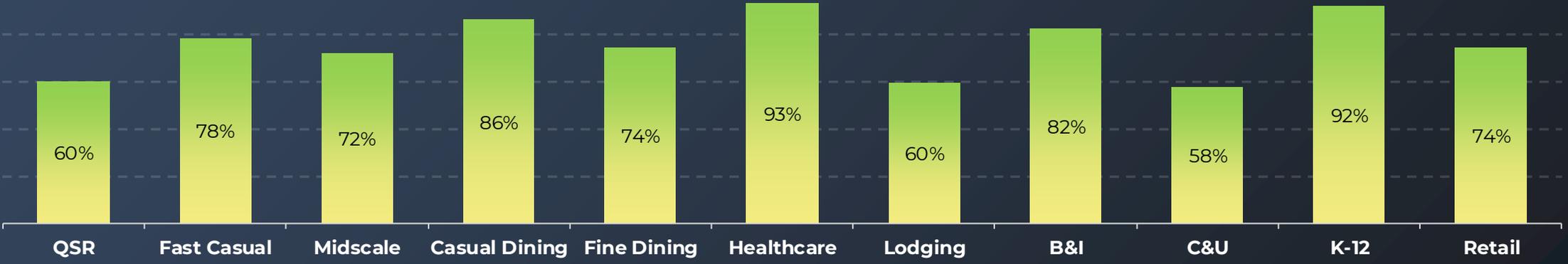
WILL BE HIGHER
45%

WILL BE THE SAME
31%

WILL BE LOWER
24%

BY SEGMENT

TOP 2 - "Will Be Higher" + "Will Be The Same"



Operator: Current Challenges & Future Goals

What Are Operators' Top Operational Challenges?

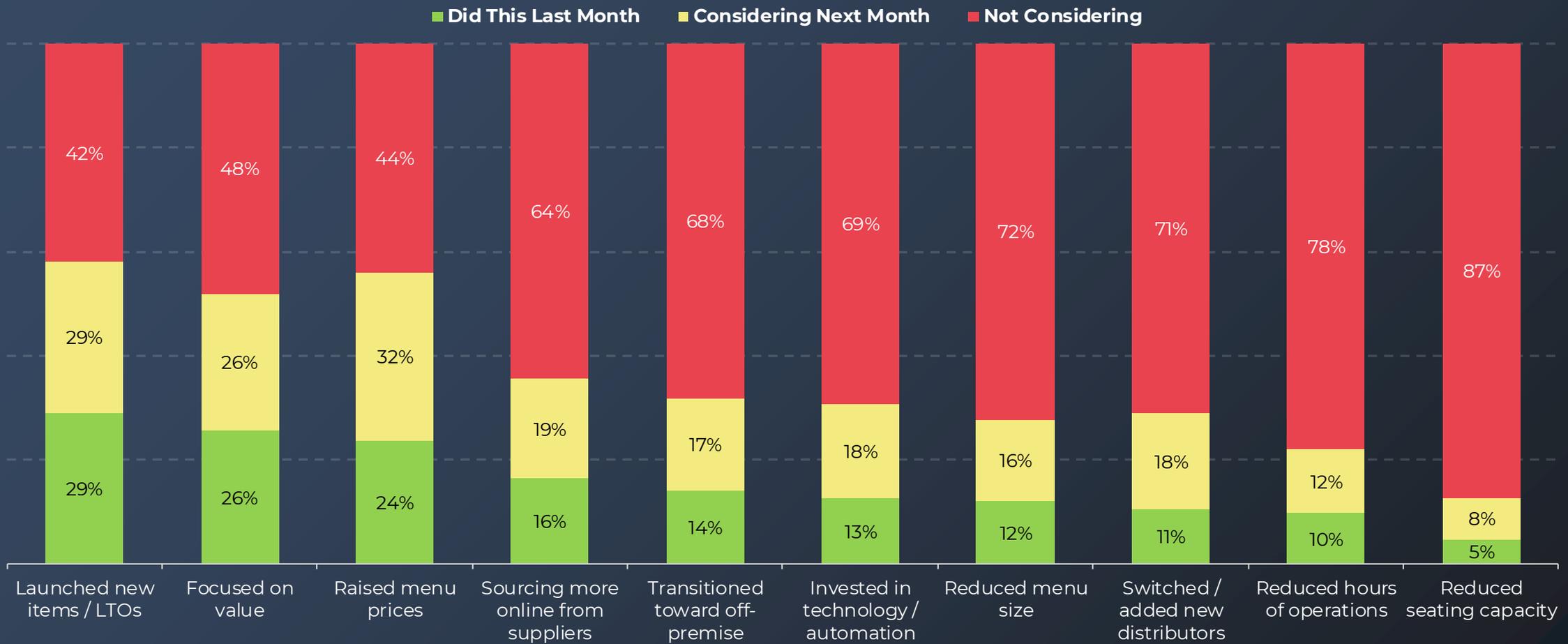
	11/25	12/25	1-mo. change
Food costs	75%	71%	-4%
Labor costs	53%	54%	1%
Labor recruitment / hiring	33%	29%	-5%
Retaining current staff	27%	27%	0%
Customers reducing how much they spend	25%	26%	1%
Customers reducing how often they visit	23%	23%	1%
New laws or regulations	10%	11%	1%
New sources of competition in my area	9%	8%	-1%
Sourcing challenges / ingredient shortages	9%	8%	-1%
Marketing / promoting our business	5%	8%	2%
Innovating / updating our menu	6%	5%	0%
Other	1%	2%	1%

What Business Goals Are Operators Prioritizing This Month?

	11/25	12/25	1-mo. change
Reducing monthly food cost	49%	45%	-3%
Improving our labor / staffing situation	33%	33%	0%
Increasing our earnings / bottom line	23%	31%	8%
Increasing our average check	28%	28%	0%
Reducing monthly business expenses	30%	26%	-4%
Increasing our revenue / top line	18%	20%	2%
Improving customer satisfaction / feedback	23%	19%	-3%
Improving employee capabilities	16%	18%	2%
Developing / launching new menu items	15%	13%	-2%
Expanding marketing / promotional efforts	9%	11%	3%
Improving speed of service	10%	9%	0%
Expanding loyalty and rewards programs	5%	6%	1%
Adjusting our physical layout / ambiance	5%	4%	-1%
Forging new supplier / distributor relationships	3%	3%	0%
None of the above	3%	3%	0%

Operator: Top Profitability Strategies

In The Past Month, Have Operators Implemented Any Of The Following Strategies?

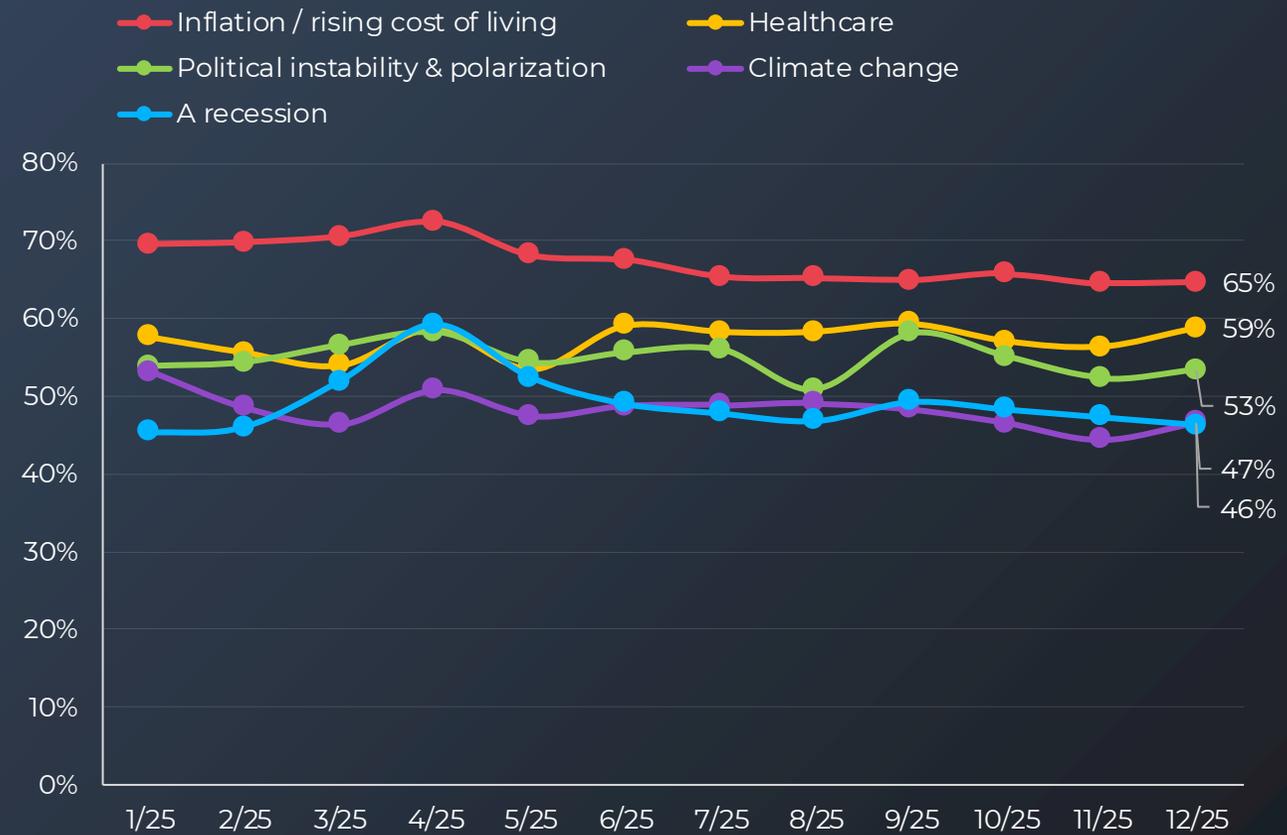


Consumer: Most Pressing Life Concerns

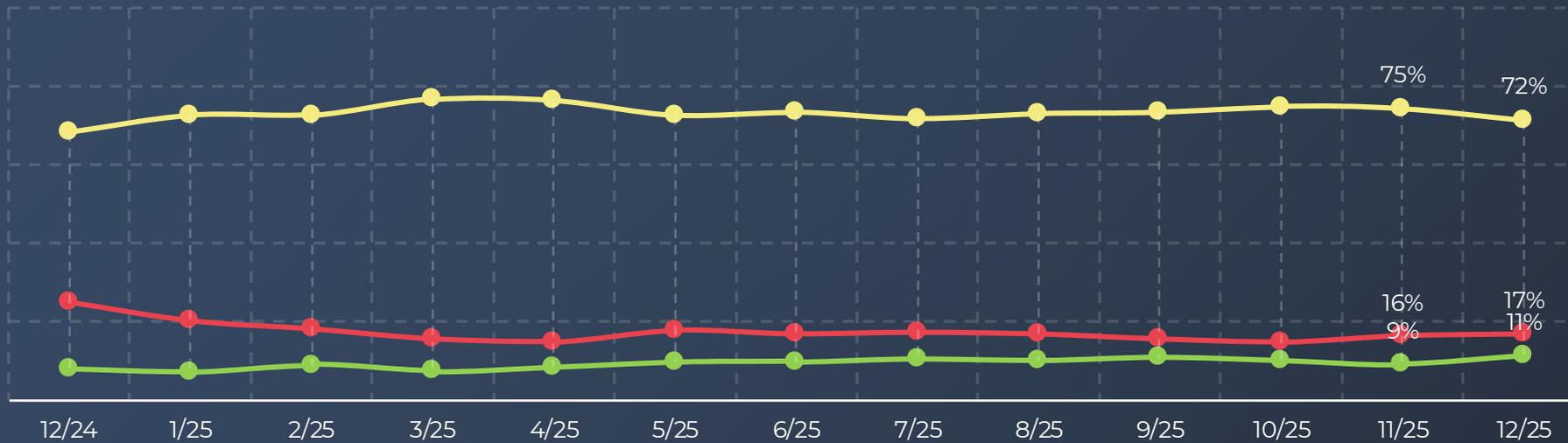
What Issues Are Consumers Currently Concerned About? (top 2, 5pt. scale)

	11/25	12/25	1-mo. change
Inflation / rising cost of living	65%	65%	0%
Healthcare	56%	59%	2%
Political instability & polarization	52%	53%	1%
Climate change	44%	47%	2%
A recession	47%	46%	-1%
Gun policy	43%	45%	2%
International conflicts & crises	43%	45%	2%
Racial justice / inequality	41%	44%	2%
Making ends meet every day	41%	43%	2%
Immigration	39%	43%	4%
U.S foreign affairs	41%	41%	0%
Jobs becoming automated	38%	38%	0%
Paying off debt (any kind)	36%	37%	1%
Job security	35%	36%	1%
Gender equality	32%	33%	1%
Jobs moving overseas	28%	29%	0%

TOP 5 CONCERNS: 12-MONTH VIEW



Consumer: Current Financial Situation



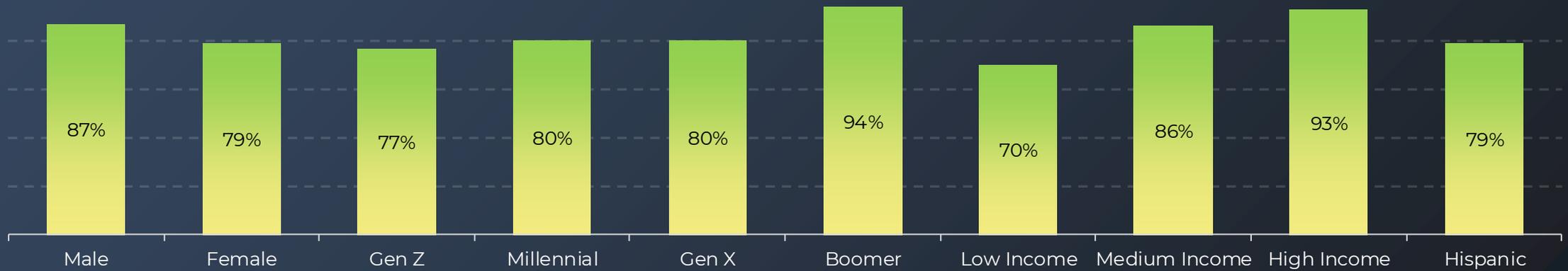
GETTING BY
72%

FALLING BEHIND
17%

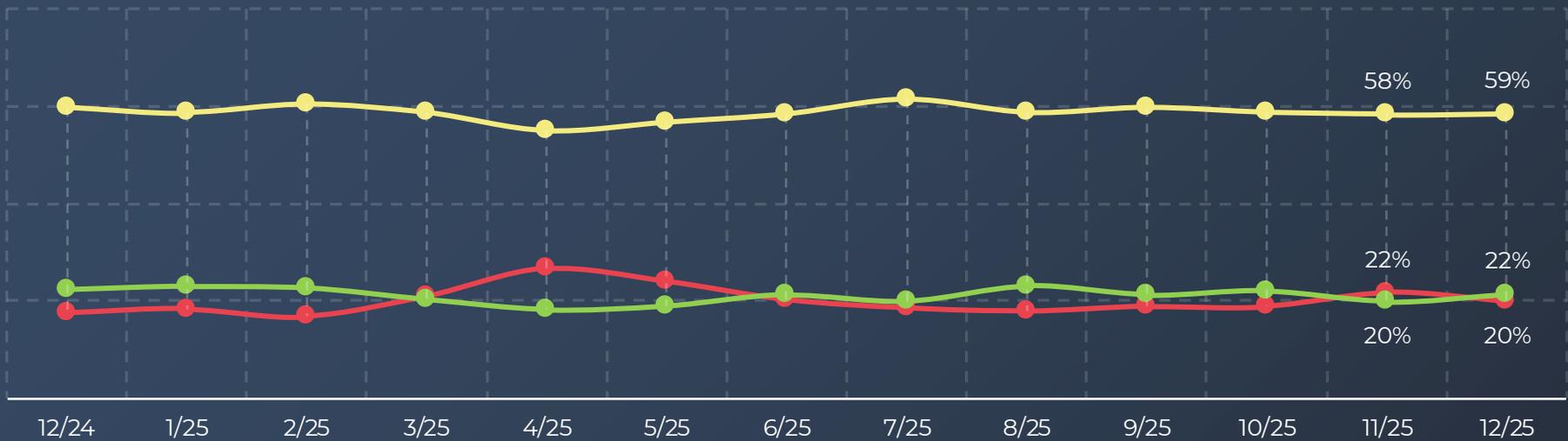
GETTING AHEAD
11%

BY DEMOGRAPHIC

TOP 2 - "Getting Ahead" + "Getting By"



Consumer: Future Budget Expectations



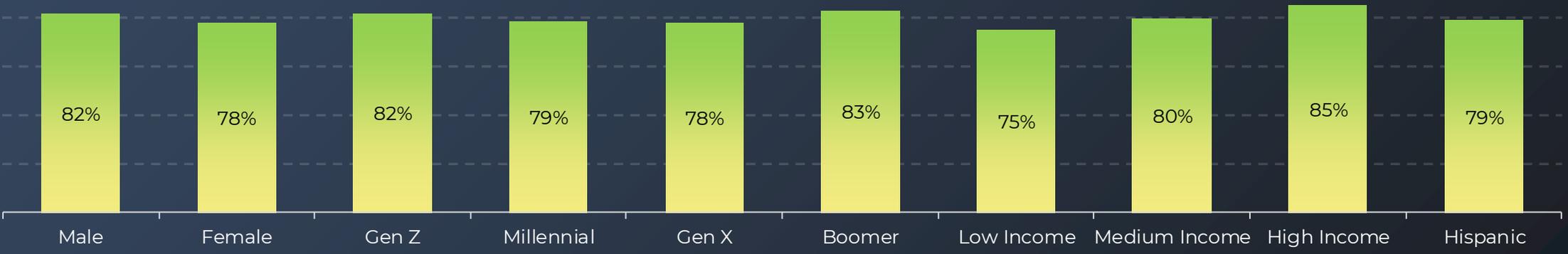
WILL STAY THE SAME
59%

WILL IMPROVE
22%

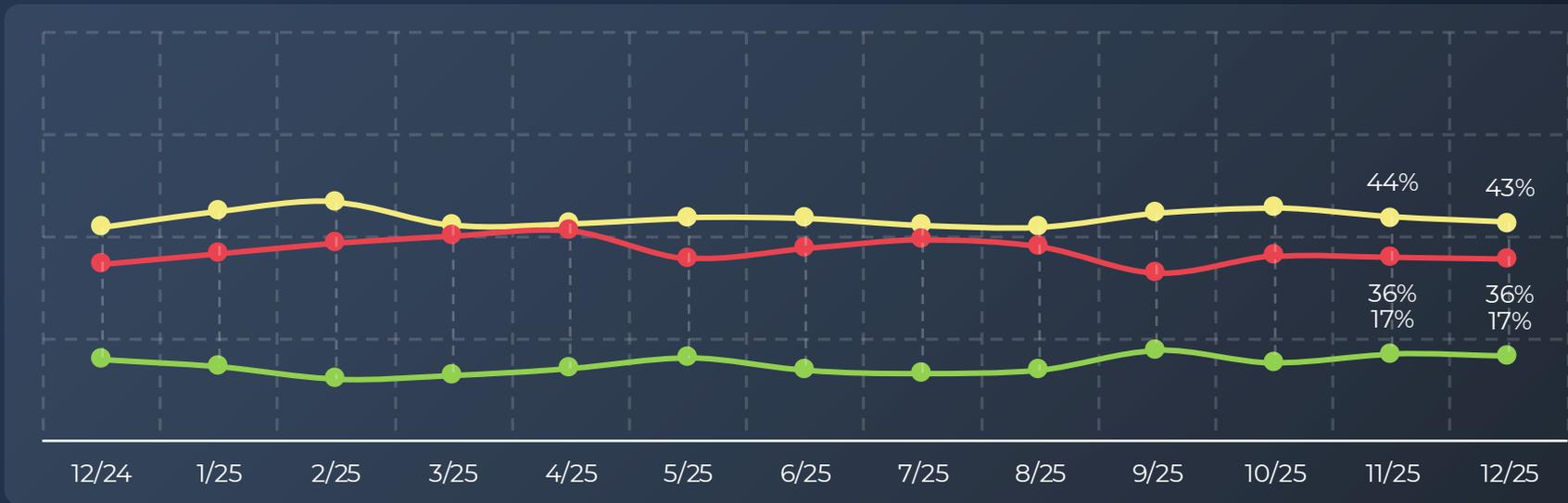
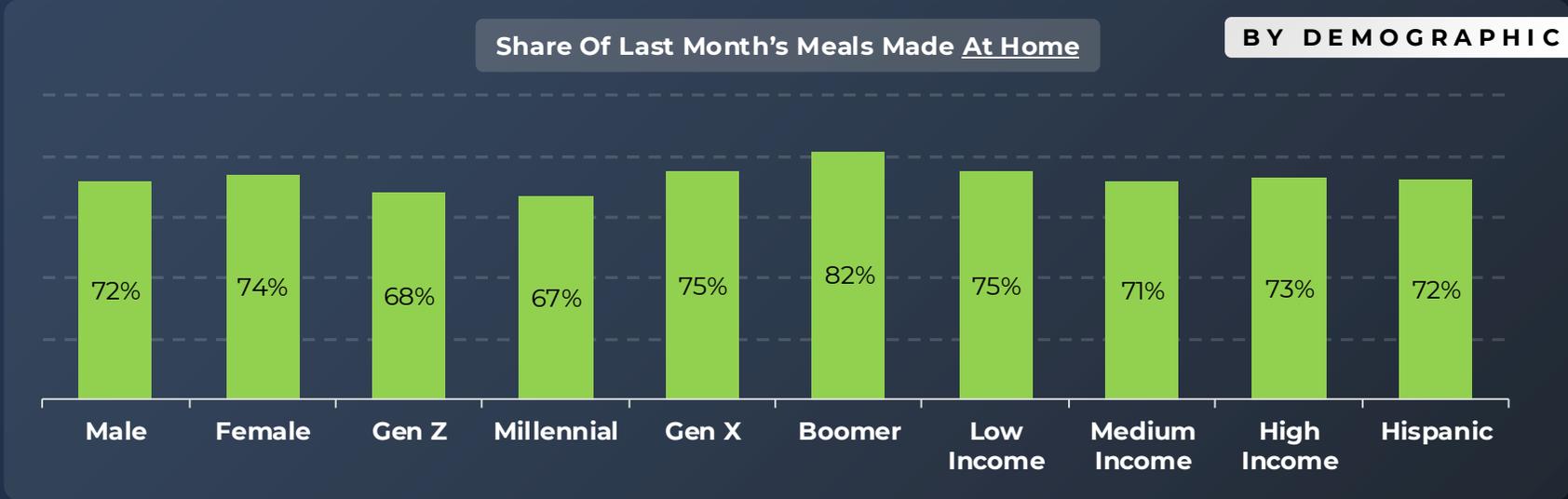
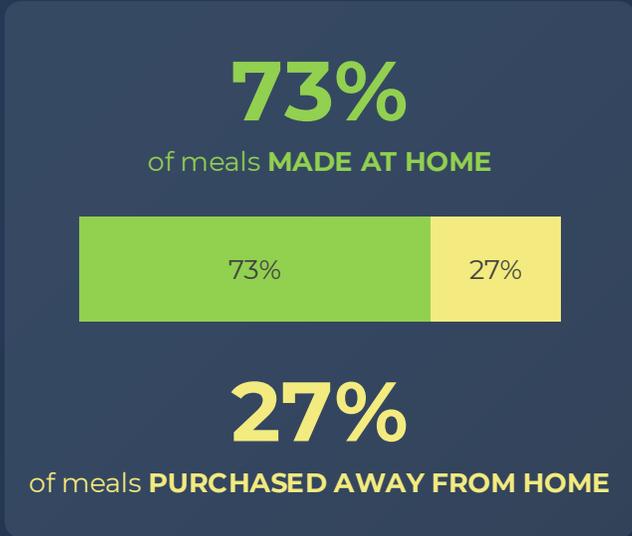
WILL GET WORSE
20%

BY DEMOGRAPHIC

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



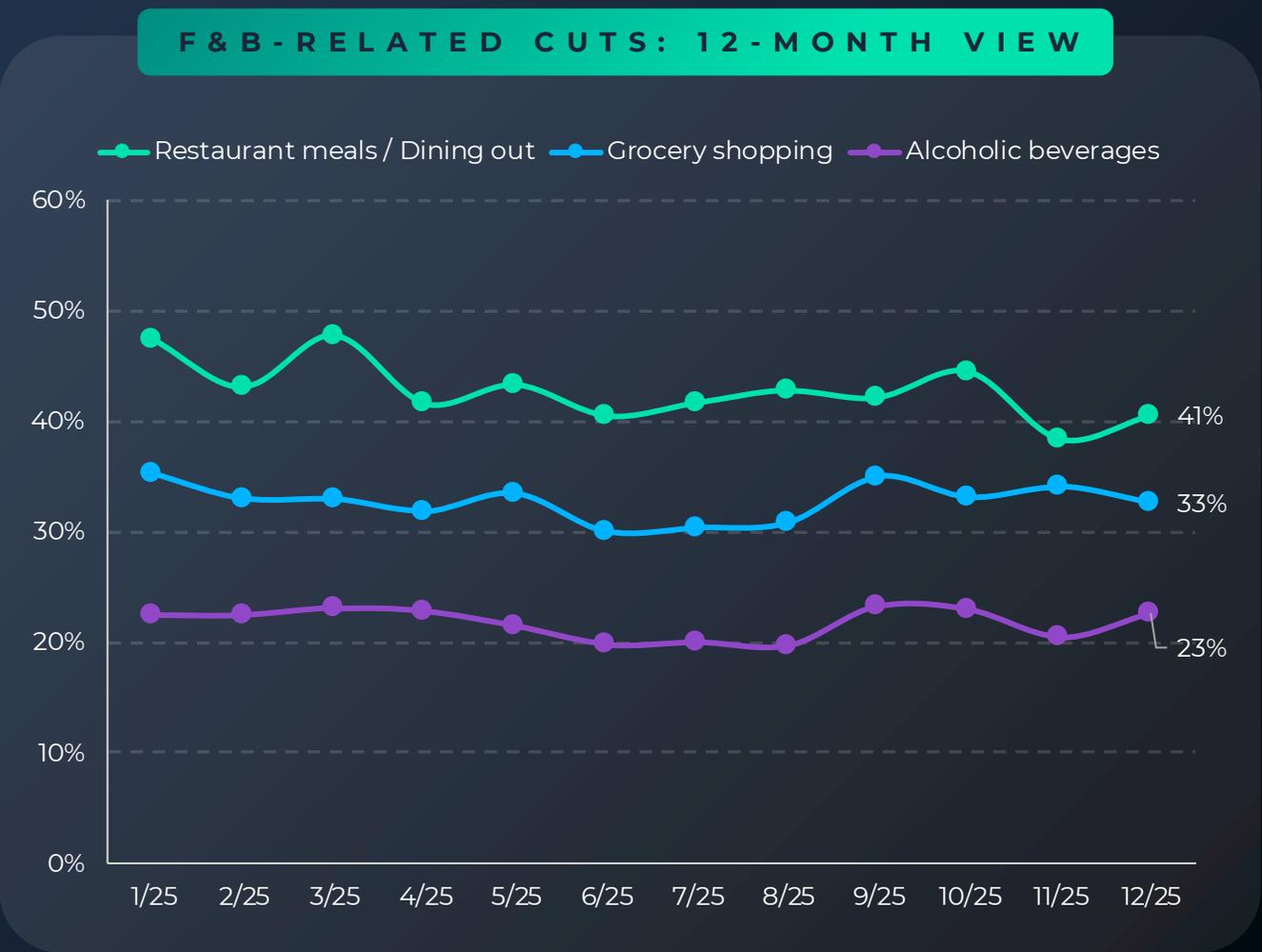
Consumer: Away-From-Home Share & Future Outlook



Consumer: Spending Cuts

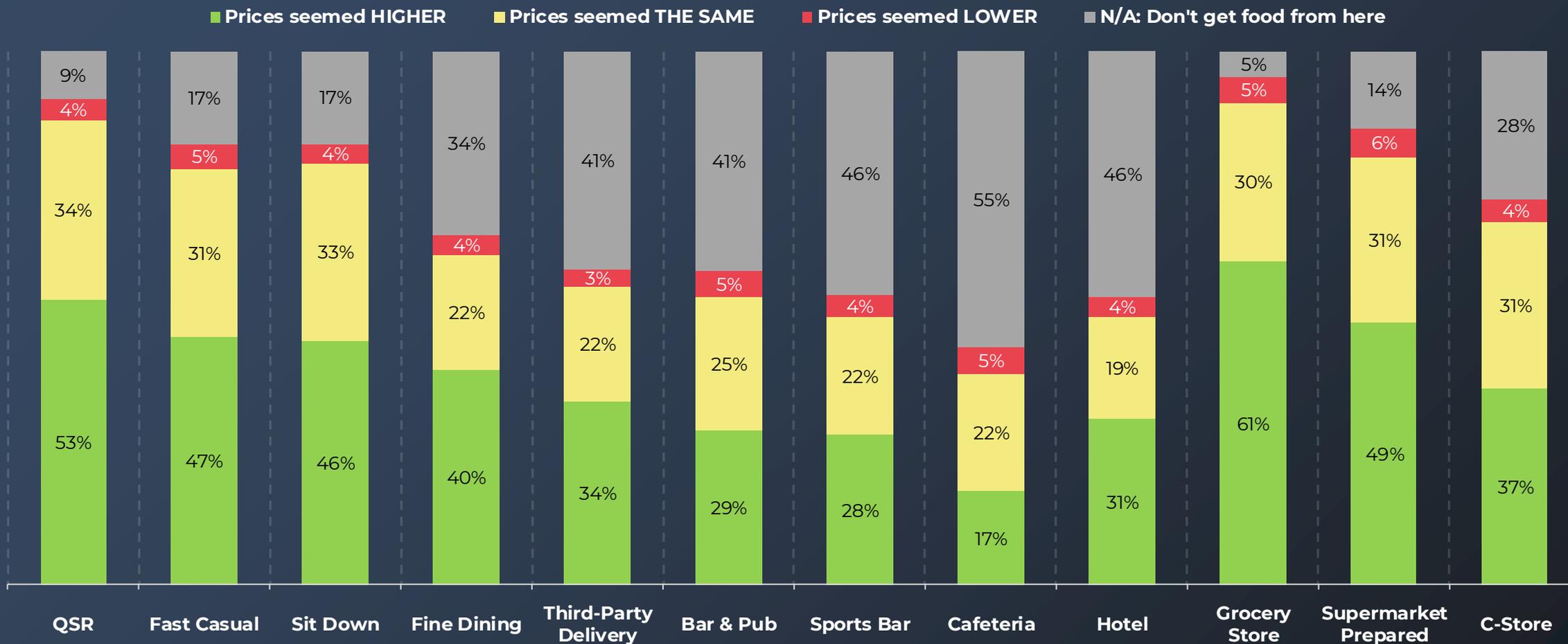
Which Areas Of Spending Have Consumers Cut Back On Last Month?

	11/25	12/25	1-mo. change
Clothing, shoes, apparel	40%	41%	1%
Restaurant meals / Dining out	38%	41%	2%
Grocery shopping	34%	33%	-1%
Travel	28%	27%	-1%
Live entertainment	26%	26%	0%
Alcoholic beverages	20%	23%	2%
Hair / Nails / Grooming	24%	22%	-1%
Gasoline	16%	18%	2%
E-commerce	21%	18%	-3%
Housing	8%	8%	0%
None of the above	26%	26%	0%



Consumer: Perception of Foodservice Prices

In The Past Month, Have Consumers Noticed Prices Changing At The Following Venues?



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%

FOODSERVICE TOTAL

2026 Operator Spend (\$B)

\$343.6

2026 Consumer Spend (\$B)

\$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)

\$89.6

2026 Consumer Spend (\$B)

\$344.5

2024 Actual
Real Growth

0.7%

2025 Projected
Real Growth

1.0%

2026 Projected
Real Growth

1.2%

2027 Projected
Real Growth

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)

\$24.5

2026 Consumer Spend (\$B)

\$87.4

2024 Actual
Real Growth

1.3%

2025 Projected
Real Growth

1.6%

2026 Projected
Real Growth

2.0%

2027 Projected
Real Growth

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)

\$21.6

2026 Consumer Spend (\$B)

\$60.1

2024 Actual
Real Growth

-0.7%

2025 Projected
Real Growth

-0.9%

2026 Projected
Real Growth

-0.7%

2027 Projected
Real Growth

-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)

\$61.3

2026 Consumer Spend (\$B)

\$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)

\$3.6

2026 Consumer Spend (\$B)

\$9.0

2024 Actual
Real Growth

0.2%

2025 Projected
Real Growth

0.5%

2026 Projected
Real Growth

0.5%

2027 Projected
Real Growth

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

EXPERIENCE How often do you have...

normative indices in grey circles



- 95% of consumers are aware of AVOCADO
- It's in the 94th percentile among all foods, flavors, and beverages; with greater awareness than 94% of all other items
- Change vs. 2 years ago: -0.1%



- 77% of consumers have tried AVOCADO
- It's in the 85th percentile among all foods, flavors, and beverages; with greater trial than 85% of all other items
- Change vs. 2 years ago: +0.9%



- 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%

HEAT SCORE Growth in consumer familiarity with AVOCADO

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



AFFINITY How do you feel about...

Among Selected Consumers

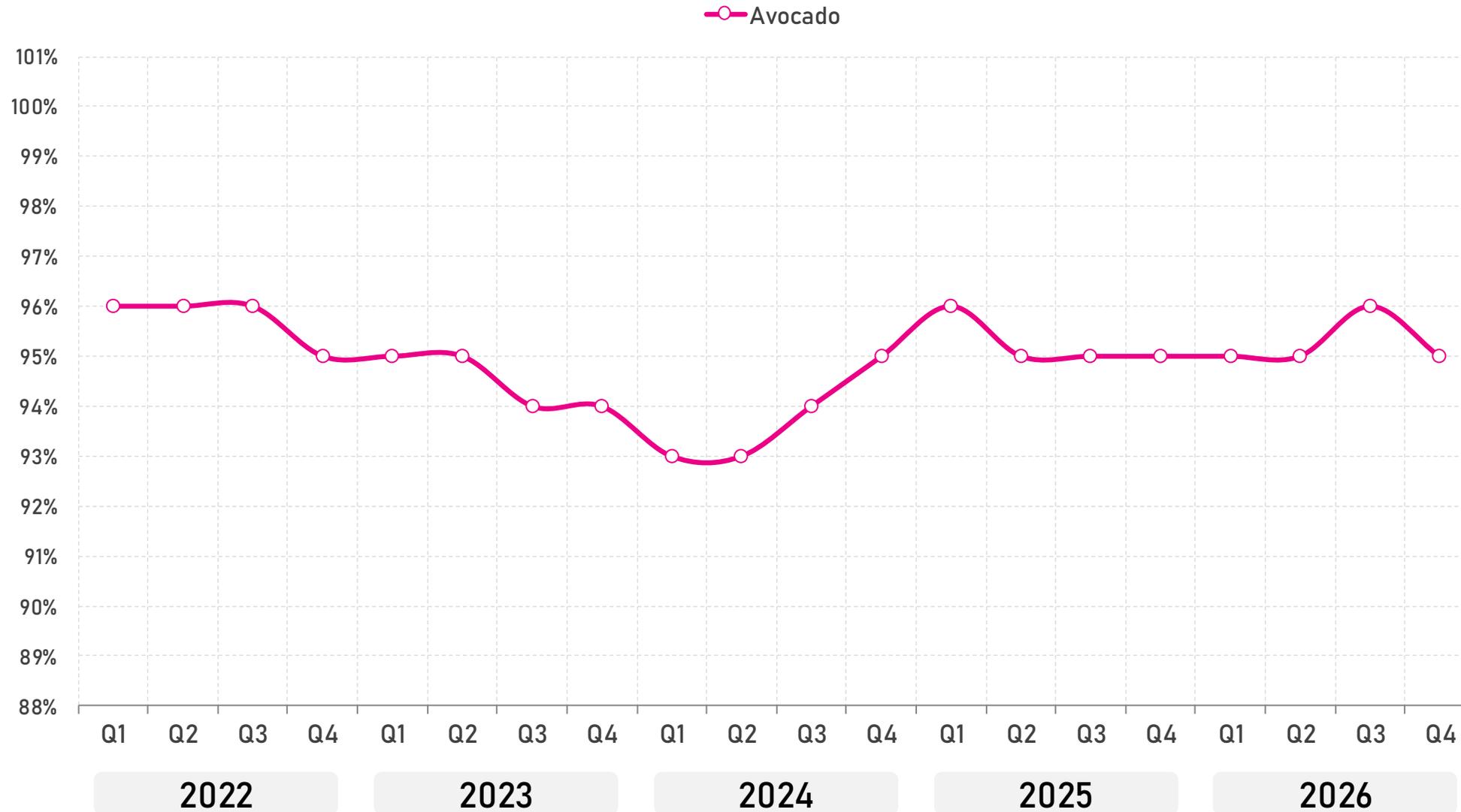
	All	Consumers Who Know It	Consumers Who Have Tried It
Love It	42%	45%	54%
Like It	23%	24%	28%
Neutral	10%	11%	9%
Dislike	8%	8%	5%
Hate It	7%	7%	2%
No Opinion	10%	5%	1%
Total	100%	100%	100%
Top 2 Box	65%	69%	83%

Top 2 Box Analysis

- 65% of consumers love or like this
- 69% 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 **+18%** impact on Top 2 Box affinity

GROWTH IN 'KNOW IT' FOR: AVOCADO

% of consumers who know it



KNOW IT

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%
YE Q1 2024	96%

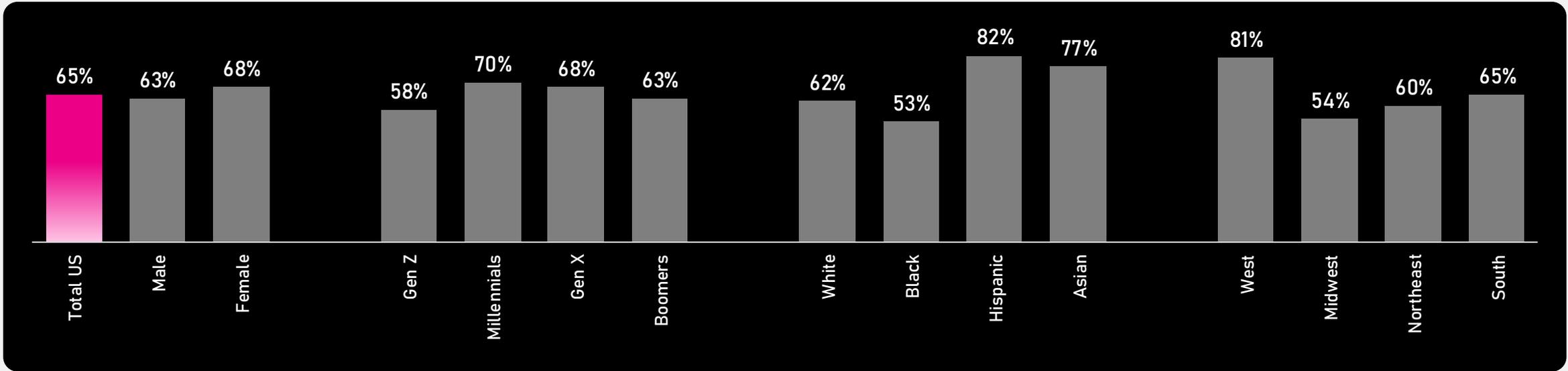
Change vs. 2 yrs ago -0.1%

Heat Score: flat
(plateauing but still holding)

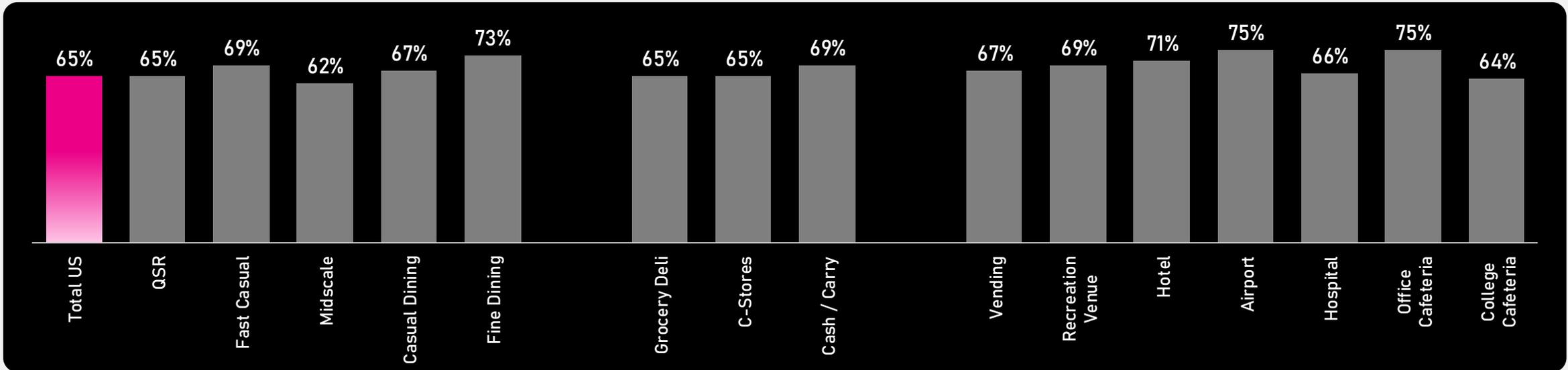
CONSUMER AFFINITY FOR: AVOCADO

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

BY DEMOGRAPHIC



AMONG VISITORS OF



Driven largely by Millennials, avocado trial and affinity has improved over the past two years while awareness remains unchanged.

The small decrease in avocado awareness among Gen Z communicates a need to boost avocado advertisements aimed at younger consumers – especially on social media.

AVOCADO SENTIMENT

% of gen pop consumers who...

AVOCADOS	KNOW IT		TRIED IT		LOVE OR LIKE IT	
	Q4'25	2-Yr Change	Q4'25	2-Yr Change	Q4'25	2-Yr Change
Gen Z	92%	-2.5%	74%	-0.1%	58%	+0.3%
Millennials	96%	+2.4%	81%	+5.9%	70%	+8.2%
Gen X	95%	-0.8%	79%	-0.1%	68%	+4.0%
Boomers	96%	-0.3%	74%	-2.4%	63%	+0.9%
U.S. Total	95%	-0.1%	77%	+0.9%	65%	+3.5%

GUACAMOLE	KNOW IT		TRIED IT		LOVE OR LIKE IT	
	Q4'25	2-Yr Change	Q4'25	2-Yr Change	Q4'25	2-Yr Change
Gen Z	87%	-1.6%	70%	+2.4%	54%	-0.3%
Millennials	90%	-2.4%	77%	+1.0%	60%	-2.2%
Gen X	93%	+0.7%	79%	+2.6%	70%	+9.2%
Boomers	92%	-1.6%	73%	-2.1%	62%	-0.5%
U.S. Total	91%	-1.3%	76%	+0.8%	62%	+1.5%

Trendy, specialty tacos are proving to be a generational favorite among Gen Z along with Asian fusion dishes like a sushi burrito or Asian taco.

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
Tacos Arabes	16%	23%	147
Birria Tacos	33%	48%	144
Tacos Campechano	16%	23%	142
Sushi Burrito	12%	17%	138
Walking Taco	30%	41%	135
Jackfruit Taco	7%	9%	133
Avocado Leaves	10%	12%	126
Asian Taco	21%	24%	118
Poke	17%	19%	115
Torta	29%	32%	113
Avocado Toast	44%	49%	112
California Burger	31%	35%	112
Street Taco	64%	69%	109
BLTA	9%	10%	106
Burrito Bowl	61%	64%	105
California Roll	46%	48%	105
Breakfast Burrito	70%	72%	102
Avocado Oil	45%	45%	101
Chilaquiles	19%	20%	101
Quesadilla	79%	80%	101

Millennial indexes uncover key dishes that align with Gen Z tastes and already have sizeable total affinity: 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	GEN Z CONSUMERS	INDEX
Jackfruit Taco	7%	11%	152
Sushi Burrito	12%	19%	151
BLTA	9%	13%	148
Birria Tacos	33%	47%	143
Tacos Arabes	16%	22%	139
Chilaquiles	19%	27%	139
Avocado Leaves	10%	13%	135
Torta	29%	36%	128
Asian Taco	21%	26%	127
California Roll	46%	57%	125
Avocado Ranch	41%	52%	125
Tacos Campechano	16%	20%	123
Poke	17%	20%	123
Flauta	26%	31%	123
Breakfast Taco	56%	66%	118
California Burrito	33%	40%	118
Mexican Pizza	48%	56%	118
Taco Pizza	43%	51%	118
Street Taco	64%	75%	117
Walking Taco	30%	35%	115

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 Z CONSUMERS	INDEX
Huevos Rancheros	37%	43%	118
Mexican Pizza	48%	55%	115
Hard Taco	70%	79%	113
California Burrito	33%	38%	112
Guacamole	62%	70%	112
Torta	29%	32%	111
Taco Pizza	43%	48%	111
Tostada	53%	58%	111
Chips And Guacamole	66%	72%	110
Chilaquiles	19%	21%	109
Breakfast Quesadilla	58%	63%	109
Taco Salad	70%	77%	109
Fajita	73%	78%	108
Poke	17%	18%	107
Soft Taco	80%	85%	107
Avocado Oil	45%	48%	106
Enchilada	69%	74%	106
California Roll	46%	48%	105
Mexican Omelette	42%	44%	105
Fish Taco	45%	48%	105

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

While the 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-FEATUREING DISH	TOTAL US	GEN Z CONSUMERS	INDEX
Guacamole	62%	62%	99
Fajita	73%	71%	97
Taco	86%	83%	97
Tostada	53%	51%	97
Avocado	65%	63%	96
Burrito	80%	76%	96
Mexican Omelette	42%	40%	96
Fish Taco	45%	43%	95
Huevos Rancheros	37%	35%	95
Taco Salad	70%	67%	95
Enchilada	69%	65%	94
Quesadilla	79%	74%	94
Soft Taco	80%	75%	94
Chips And Guacamole	66%	59%	89
Breakfast Burrito	70%	61%	87
Hard Taco	70%	61%	87
Avocado Ranch	41%	35%	84
Avocado Oil	45%	37%	83
Breakfast Quesadilla	58%	48%	83
Breakfast Taco	56%	46%	82

WINNING LAUNCHES FROM Q4 2025: GEN Z

new launches from past 3 months

Oct 2025 \$10.99

Farmer Boys Restaurant

PARM-CRUSTED 1/2LB BURGER



Locally baked sourdough in a tasty parmesan crust loaded with a half-pound of two fresh, never frozen beef patties, grilled onions, hickory smoked bacon, hand smashed avocado, American Swiss cheese, green leaf lettuce, tomato, and house made Thousand Island dressing.

Limited Time Offer

Unbranded PI: 70% ★★★★★
 Branded PI: 81% ★★★★★
 Uniqueness: 70% ★★★★★
 Frequency: 33% ★★★★★
 Draw: 72% ★★★★★
 Value: 59% ★★★★★

SCORE
99
 superstar

Oct 2025 \$2.99

Taco Bell

AVOCADO RANCH CRISPY CHICKEN SOFT TACO



A warm flour tortilla filled with premium all-white-meat, marinated chicken seasoned with bold Mexican spices and tossed in a crunchy tortilla chip coating. Topped with real shredded cheddar cheese, freshly prepared pico de gallo, crisp lettuce, shredded purple cabbage, and Frank's RedHot® Diablo Sauce.

Limited Time Offer

Unbranded PI: 66% ★★★★★
 Branded PI: 60% ★★★☆☆
 Uniqueness: 55% ★★★★★
 Frequency: 40% ★★★★★
 Draw: 57% ★★★☆☆
 Value: 82% ★★★★★

SCORE
94
 superstar

Nov 2025 \$6.20

Taco Bell

BURRITO BLISS



Cheesy Bean and Rice Burrito topped with pico de gallo, crunchy tortilla strips, and Avocado Ranch sauce, then grilled, created by Kajol in Louisville, Ky.

Limited Time Offer

Unbranded PI: 80% ★★★★★
 Branded PI: 76% ★★★★★
 Uniqueness: 52% ★★★★★
 Frequency: 23% ★★★☆☆
 Draw: 60% ★★★★★
 Value: 61% ★★★★★

SCORE
91
 superstar

Oct 2025 \$13.49

Baja Fresh

SHRIMP STACKED ENCHILADA



Fire-grilled shrimp, shredded jack cheese, salsa suiza, sour cream, pico, cotija cheese & cilantro on top of two soft corn tortillas filled with shredded jack cheese, salsa suiza, roasted veggies & avocado slices, served with smashed pinto beans, Baja rice & a lime wedge.

Limited Time Offer

Unbranded PI: 67% ★★★★★
 Branded PI: 69% ★★★★★
 Uniqueness: 67% ★★★★★
 Frequency: 16% ★★☆☆☆
 Draw: 75% ★★★★★
 Value: 56% ★★★☆☆

SCORE
88
 superstar

WINNING LAUNCHES FROM Q4 2025: MILLENNIALS

new launches from past 3 months

Oct 2025 \$10.99

Farmer Boys Restaurant

PARM-CRUSTED 1/2LB BURGER



Locally baked sourdough in a tasty parmesan crust loaded with a half-pound of two fresh, never frozen beef patties, grilled onions, hickory smoked bacon, hand smashed avocado, American Swiss cheese, green leaf lettuce, tomato, and house made Thousand Island dressing.

Limited Time Offer

Unbranded PI: 71%	☆☆☆	SCORE 99 superstar
Branded PI: 83%	★★★★★	
Uniqueness: 72%	★★★★★	
Frequency: 35%	★★★★★	
Draw: 76%	★★★★★	
Value: 69%	★★★★★	

Oct 2025 \$2.99

Taco Bell

AVOCADO RANCH CRISPY CHICKEN SOFT TACO



A warm flour tortilla filled with premium all-white-meat, marinated chicken seasoned with bold Mexican spices and tossed in a crunchy tortilla chip coating. Topped with real shredded cheddar cheese, freshly prepared pico de gallo, crisp lettuce, shredded purple cabbage, and Frank's RedHot® Diablo Sauce.

Limited Time Offer

Unbranded PI: 77%	★★★★★	SCORE 99 superstar
Branded PI: 75%	★★★★★	
Uniqueness: 58%	★★★★	
Frequency: 30%	☆☆☆	
Draw: 63%	★★★★	
Value: 83%	★★★★★	

Oct 2025 \$3.99

Baja Fresh

TORTILLA SOUP



Roasted tomato and tortilla soup topped with fresh sliced avocado, cheese, onion & cilantro mix and tortilla strips.

Limited Time Offer

Unbranded PI: 52%	☆☆☆	SCORE 76 consider
Branded PI: 61%	☆☆☆	
Uniqueness: 48%	★★★★	
Frequency: 21%	☆☆☆	
Draw: 56%	★★★★	
Value: 64%	★★★★★	

Oct 2025 \$6.65

Torchy's Tacos

THE RONIN



Flame-grilled teriyaki steak, chipotle slaw, grilled onions, cotija cheese, chopped peanuts, sriracha sauce, avocado sauce, and fresh mint served on a flour tortilla.

Limited Time Offer

Unbranded PI: 65%	☆☆☆	SCORE 76 specialty appeal
Branded PI: 68%	☆☆☆	
Uniqueness: 66%	★★★★★	
Frequency: 25%	☆☆☆	
Draw: 65%	★★★★	
Value: 62%	★★★★	

WINNING LAUNCHES FROM Q4 2025: GEN X

new launches from past 3 months

Oct 2025 \$10.99

Farmer Boys Restaurant

PARM-CRUSTED 1/2LB BURGER



Locally baked sourdough in a tasty parmesan crust loaded with a half-pound of two fresh, never frozen beef patties, grilled onions, hickory smoked bacon, hand smashed avocado, American Swiss cheese, green leaf lettuce, tomato, and house made Thousand Island dressing.

Limited Time Offer

Unbranded PI: 61%	☆☆☆	SCORE 99 superstar
Branded PI: 77%	★★★★★	
Uniqueness: 70%	★★★★★	
Frequency: 32%	★★★★★	
Draw: 68%	★★★★★	
Value: 51%	★★★★	

Oct 2025 \$3.99

Baja Fresh

TORTILLA SOUP



Roasted tomato and tortilla soup topped with fresh sliced avocado, cheese, onion & cilantro mix and tortilla strips.

Limited Time Offer

Unbranded PI: 54%	★★★★	SCORE 91 superstar
Branded PI: 59%	★★★★	
Uniqueness: 46%	★★★★	
Frequency: 14%	★★	
Draw: 43%	☆☆☆	
Value: 68%	★★★★★	

Oct 2025 \$6.65

Torchy's Tacos

THE RONIN



Flame-grilled teriyaki steak, chipotle slaw, grilled onions, cotija cheese, chopped peanuts, sriracha sauce, avocado sauce, and fresh mint served on a flour tortilla.

Limited Time Offer

Unbranded PI: 49%	★★	SCORE 80 specialty appeal
Branded PI: 70%	★★★★	
Uniqueness: 62%	★★★★★	
Frequency: 19%	☆☆☆	
Draw: 60%	★★★★	
Value: 57%	★★★★	

Oct 2025 \$13.25

Condado

SWOLE BOWL



The Swole Bowl is PACKED with 61g of protein! Roasted chicken, rice, black beans, queso blanco, red cabbage, pico de gallo, pickled jalapeños, monterey jack cheese, and a drizzle of avocado ranch sauce.

Limited Time Offer

Unbranded PI: 53%	☆☆☆	SCORE 70 consider
Branded PI: 65%	★★★★	
Uniqueness: 50%	★★★★	
Frequency: 20%	☆☆☆	
Draw: 50%	☆☆☆	
Value: 44%	★★★★	

WINNING LAUNCHES FROM Q4 2025: BOOMERS

new launches from past 3 months

Oct 2025 \$2.99

Taco Bell

AVOCADO RANCH CRISPY CHICKEN SOFT TACO



A warm flour tortilla filled with premium all-white-meat, marinated chicken seasoned with bold Mexican spices and tossed in a crunchy tortilla chip coating. Topped with real shredded cheddar cheese, freshly prepared pico de gallo, crisp lettuce, shredded purple cabbage, and Frank's RedHot® Diablo Sauce.

Limited Time Offer

Unbranded PI: 39%	☆☆☆	SCORE 86 volume driver
Branded PI: 40%	★★★★☆	
Uniqueness: 33%	☆☆☆☆	
Frequency: 22%	★★★★★	
Draw: 43%	★★★★☆	
Value: 74%	★★★★★	

Oct 2025 \$9.49

Farmer Boys Restaurant

PARM-CRUSTED 1/4LB BURGER



Locally baked sourdough in a tasty parmesan crust loaded with a quarter-pound of two fresh, never frozen beef patties, grilled onions, hickory smoked bacon, hand smashed avocado, American Swiss cheese, green leaf lettuce, tomato, and house made Thousand Island dressing.

Limited Time Offer

Unbranded PI: 45%	☆☆☆	SCORE 71 specialty appeal
Branded PI: 42%	☆☆	
Uniqueness: 53%	★★★★★	
Frequency: 16%	★★★★★	
Draw: 42%	☆☆☆☆	
Value: 31%	☆☆☆	

Oct 2025 \$12.99

Baja Fresh

CHICKEN STACKED ENCHILADA



Fire-grilled chicken, shredded jack cheese, salsa suiza, sour cream, pico, cotija cheese & cilantro on top of two soft corn tortillas filled with shredded jack cheese, salsa suiza, roasted veggies & avocado slices, served with smashed pinto beans, Baja rice & a lime wedge.

Limited Time Offer

Unbranded PI: 45%	★★★★☆	SCORE 64 consider
Branded PI: 60%	★★★★★	
Uniqueness: 36%	☆☆☆☆	
Frequency: 8%	☆☆☆☆	
Draw: 39%	☆☆☆☆	
Value: 22%	☆☆☆	

Oct 2025 \$6.65

Torchy's Tacos

THE RONIN



Flame-grilled teriyaki steak, chipotle slaw, grilled onions, cotija cheese, chopped peanuts, sriracha sauce, avocado sauce, and fresh mint served on a flour tortilla.

Limited Time Offer

Unbranded PI: 27%	☆☆	SCORE 52 specialty appeal
Branded PI: 48%	☆☆☆☆	
Uniqueness: 48%	★★★★★	
Frequency: 4%	☆☆	
Draw: 41%	★★★★☆	
Value: 40%	☆☆☆☆	

Avocados On Menu

MENU PENETRATION
TRENDING DISHES
PRICING

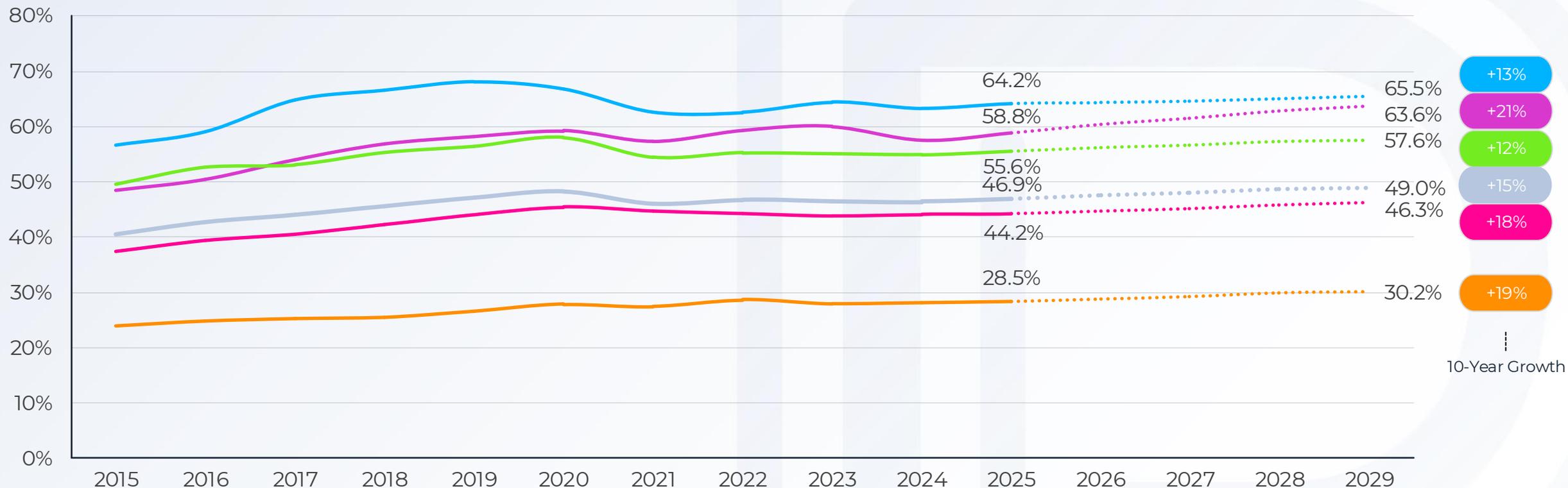
Avocado menu growth has been widespread across segments and is projected to continue steady growth over the next several years.

With a large uptick in fast casual penetration last year, the fast casual segment is poised to see the strongest additional growth in upcoming years. Zero in on this thriving segment to make sure Hass avocados fill the slimming white space opportunities.

AVOCADOS BY SEGMENT

penetration trend by segment

— Total — QSR — Fast Casual — Midscale — Casual — Fine Dine

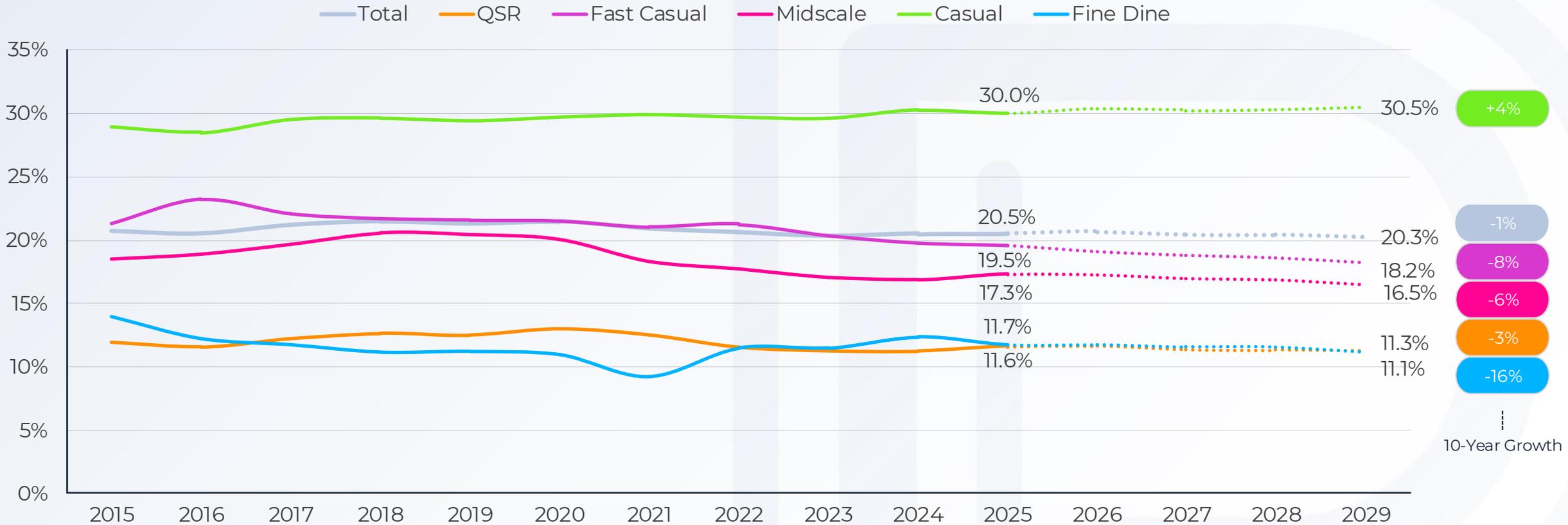


Avocado menu growth is projected to come from dishes that use sliced or diced avocado rather than guacamole.

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

GUACAMOLE BY SEGMENT

penetration trend by segment

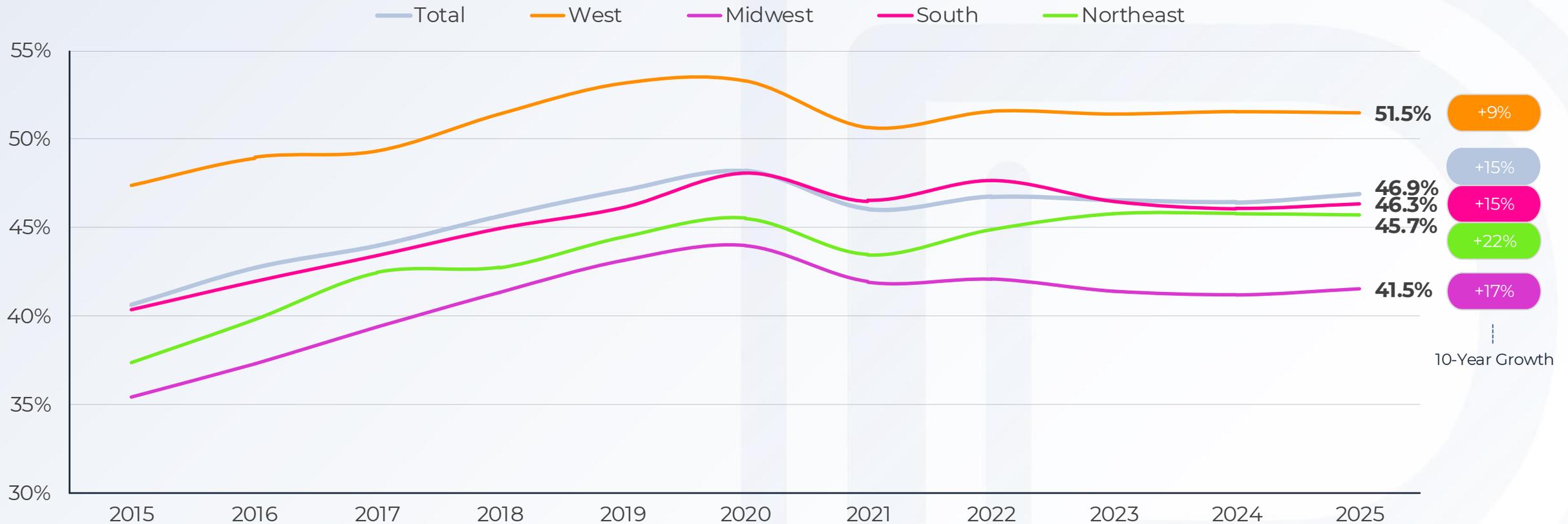


The West consistently menus avocado more than other regions, though the gap between them has shrunk as other regions' growth outpaces the West's.

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

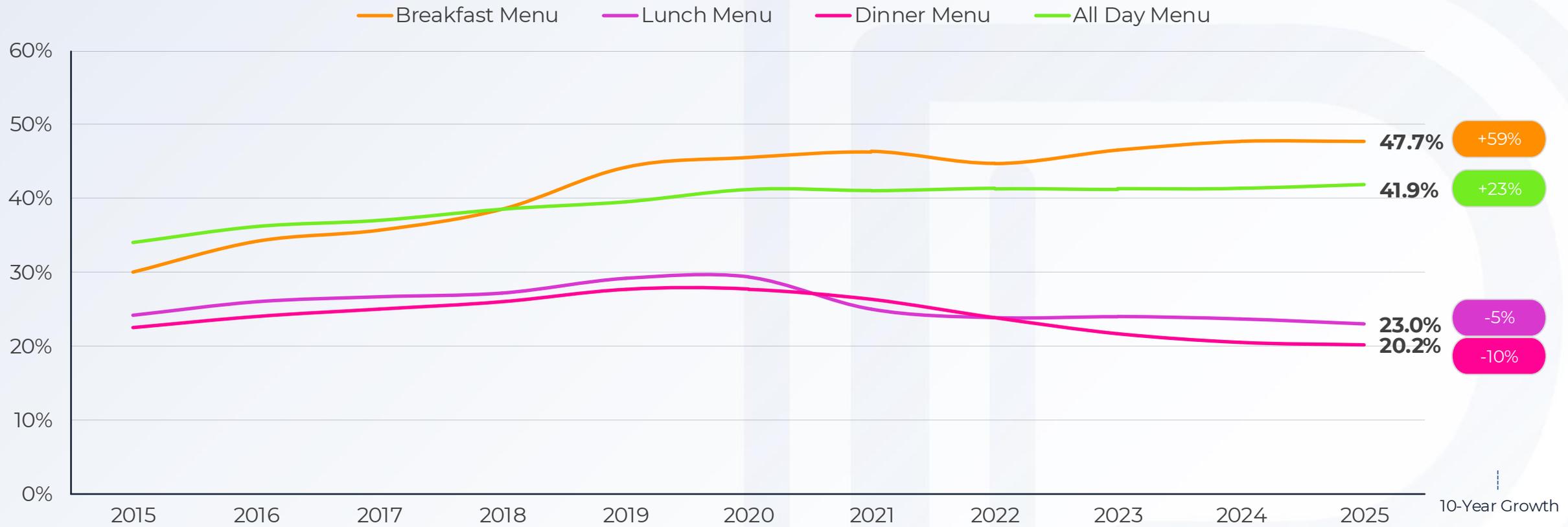
AVOCADOS BY REGION

penetration trend by segment



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

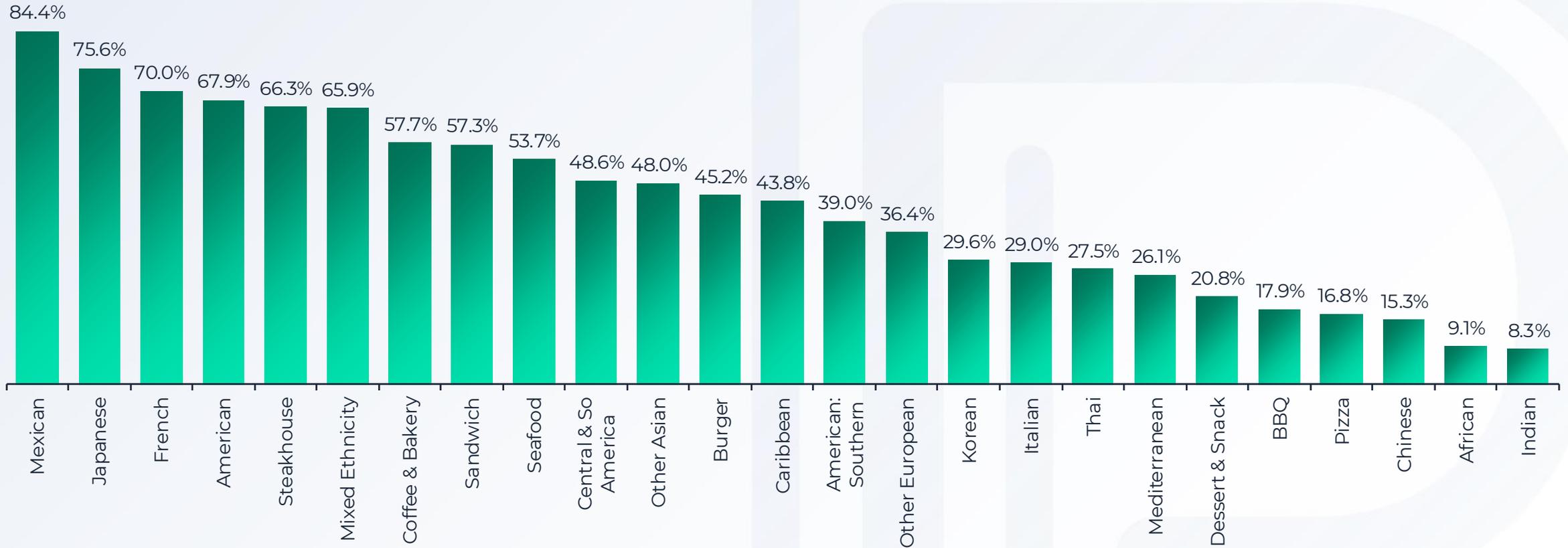
AVOCADOS BY DAYPART penetration trend by segment



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

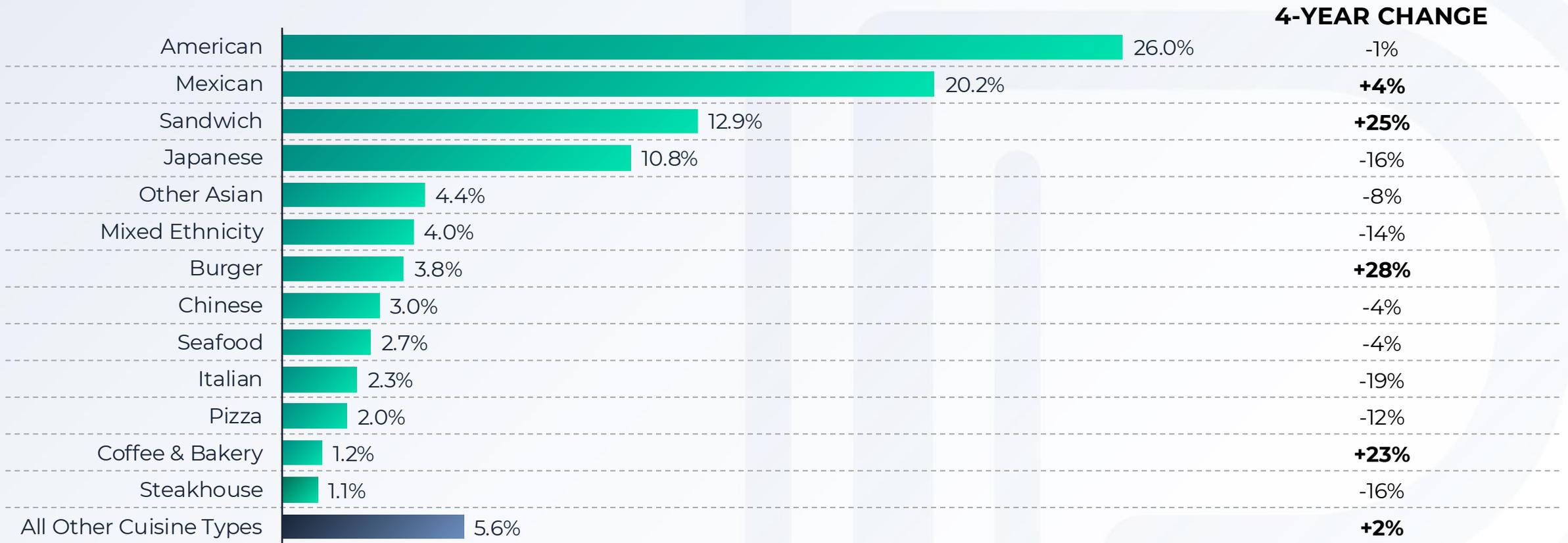


Despite slightly lower penetration, American restaurants are the largest buyers of avocado due to the sheer number of American restaurant units.

With handheld-focusing operations seeing the largest growth in avocado share, avocado has proven itself as a beloved sandwich and burger topping. Keep this trend going by providing operators with innovative new avocado sandwich and burger ideas and products.

AVOCADO INCIDENCE DISTRIBUTION

cuisine incidence distribution



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

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

AVOCADO A.M. DISHES

menu penetration

TOP ranked by penetration	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH	TRENDING ranked by 4-year growth	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Avocado Toast	44.6%	-1%	+13%	Tartine	1.5%	+64%	+176%
Breakfast Bowl	24.8%	-3%	+4%	Torta	2.1%	+25%	+65%
Sandwich	20.6%	+16%	-9%	Breakfast Taco	4.1%	+47%	+59%
Omelette	19.9%	-3%	-27%	Chilaquiles	7.7%	+4%	+36%
Breakfast Sandwich	19.1%	+1%	+2%	Bagel	4.8%	-25%	+20%
Wrap	15.4%	+3%	+11%	Avocado Toast	44.6%	-1%	+13%
Breakfast Burrito	13.6%	-	+5%	Wrap	15.4%	+3%	+11%
Salad	13.4%	-5%	-29%	Breakfast Burrito	13.6%	-	+5%
Eggs Benedict	11.6%	-3%	-13%	Breakfast Bowl	24.8%	-3%	+4%
Chilaquiles	7.7%	+4%	+36%	Taco	7.1%	+15%	+2%
Taco	7.1%	+15%	+2%	Breakfast Sandwich	19.1%	+1%	+2%
Huevos Rancheros	6.5%	-14%	-17%				
Scramble	5.3%	-7%	-10%				
Bagel	4.8%	-25%	+20%				
Breakfast Taco	4.1%	+47%	+59%				

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.

Capitalize on this by helping operators understand all the different places they could offer avocados as sides, toppings, or add-ins on their menus.

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

AVOCADO P.M. DISHES

menu penetration

TOP ranked by penetration	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH	TRENDING ranked by 4-year growth	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Salad	62.6%	-1%	-1%	Steak Fajita	0.2%	+24%	+144%
Sandwich	36.6%	+1%	-8%	Lettuce Wrap	1.3%	+32%	+131%
Taco	18.2%	+1%	+4%	Hand Roll	0.9%	+35%	+63%
Wrap	18.2%	+3%	+22%	Seaweed Salad	0.8%	+12%	+51%
Bowl	18.2%	+7%	+30%	Steak Salad	0.2%	+3%	+47%
Burger	16.4%	-3%	-4%	Chicken Bowl	0.2%	-16%	+47%
Sushi	11.2%	+3%	+2%	Bagel	0.6%	+17%	+42%
Poke	6.9%	+11%	+40%	Chicken Fajita	0.5%	-1%	+40%
Soup	6.9%	+1%	-4%	Poke	1.9%	+11%	+40%
Fries	6.9%	+1%	-7%	Chips And Guacamole	0.2%	+19%	+40%
Burrito	6.2%	+2%	+3%	Breakfast Sandwich	0.4%	+34%	+32%
Ceviche	6.2%	+1%	+17%	BLTA	0.2%	+23%	+32%
Tostada	6.0%	+1%	+7%	Bowl	6.2%	+7%	+30%
BBQ	5.7%	-7%	-2%	Salmon Salad	0.3%	+2%	+27%
Avocado Toast	5.6%	+2%	-	Chicken Cobb	0.5%	+20%	+27%

WINNING LAUNCHES FROM Q4 2025: TOTAL U.S.

new launches from past 3 months

Winning Q4 launches perfectly demonstrate how avocado is a strong ingredient for innovation as it is used to bridge item types and cuisines. It can be used to great success on all manner of handhelds, as a soup topper, or as a creamy sauce to bridge savory American steak with tangy Asian teriyaki zing.

Oct 2025 \$10.99

Farmer Boys Restaurant

PARM-CRUSTED 1/2LB BURGER



Locally baked sourdough in a tasty parmesan crust loaded with a half-pound of two fresh, never frozen beef patties, grilled onions, hickory smoked bacon, hand smashed avocado, American Swiss cheese, green leaf lettuce, tomato, and house made Thousand Island dressing.

Limited Time Offer

Unbranded PI: 60%	☆☆☆	SCORE 99 superstar
Branded PI: 77%	★★★★★	
Uniqueness: 65%	★★★★★	
Frequency: 28%	★★★★★	
Draw: 65%	★★★★★	
Value: 52%	★★★★	

Oct 2025 \$2.99

Taco Bell

AVOCADO RANCH CRISPY CHICKEN SOFT TACO



A warm flour tortilla filled with premium all-white-meat, marinated chicken seasoned with bold Mexican spices and tossed in a crunchy tortilla chip coating. Topped with real shredded cheddar cheese, freshly prepared pico de gallo, crisp lettuce, shredded purple cabbage, and Frank's RedHot® Diablo Sauce.

Limited Time Offer

Unbranded PI: 59%	★★★★	SCORE 88 superstar
Branded PI: 56%	★★★★	
Uniqueness: 45%	☆☆☆	
Frequency: 26%	★★★★★	
Draw: 54%	★★★★	
Value: 78%	★★★★	

Oct 2025 \$5.99

Baja Fresh

CHICKEN TORTILLA SOUP



Roasted tomato and tortilla soup with fire-grilled all white meat chicken, topped with fresh sliced avocado, Jack cheese, fresh onions, cilantro & tortilla strips.

Returning Item

Unbranded PI: 49%	★★★★	SCORE 77 specialty appeal
Branded PI: 54%	☆☆☆	
Uniqueness: 45%	★★★★	
Frequency: 15%	☆☆☆	
Draw: 45%	★★★★	
Value: 48%	★★★★	

Oct 2025 \$6.65

Torchy's Tacos

THE RONIN



Flame-grilled teriyaki steak, chipotle slaw, grilled onions, cotija cheese, chopped peanuts, sriracha sauce, avocado sauce, and fresh mint served on a flour tortilla.

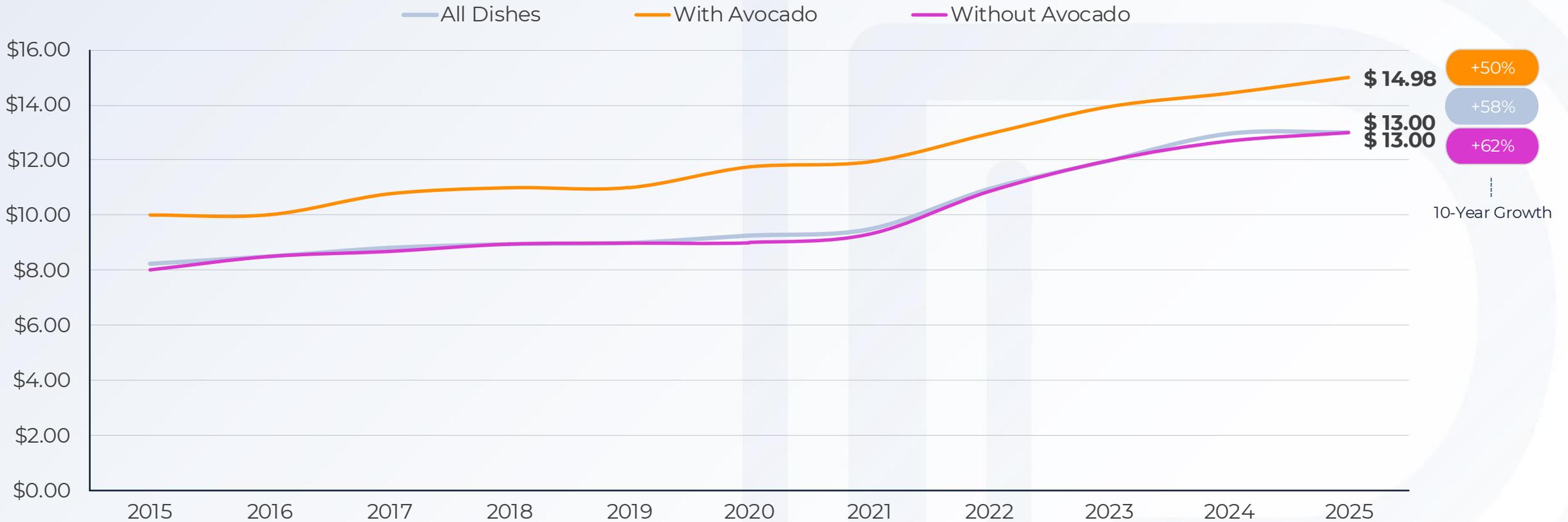
Limited Time Offer

Unbranded PI: 46%	★★	SCORE 70 specialty appeal
Branded PI: 63%	☆☆☆	
Uniqueness: 59%	★★★★★	
Frequency: 17%	★★	
Draw: 56%	★★★★★	
Value: 53%	☆☆☆	

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



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	\$15.00	\$0.05
	Without Avocado	\$14.95	
Side	With Avocado	\$2.99	- \$1.00
	Without Avocado	\$3.99	
Total	With Avocado	\$14.98	\$1.98
	Without Avocado	\$13.00	

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

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

PRICE PREMIUM BY ITEM TYPE

median price

ITEM TYPE	WITH AVOCADO	WITHOUT AVOCADO	PREMIUM
Bread Side	\$9.50	\$3.75	\$5.75
Fried Protein App	\$18.00	\$12.99	\$5.01
Bread Appetizer	\$13.00	\$8.99	\$4.01
Fried Other App	\$12.99	\$8.99	\$4.00
Appetizer Salad	\$14.00	\$10.29	\$3.71
Combos/Multi Protein	\$16.50	\$12.95	\$3.55
Non-Fried Protein App	\$18.00	\$14.99	\$3.01
Other App	\$13.00	\$10.00	\$3.00
Appetizer Quesadilla	\$15.99	\$12.99	\$3.00
Sampler	\$21.00	\$18.00	\$3.00
Side Salad	\$7.95	\$5.00	\$2.95
Pasta/Noodles	\$18.95	\$16.25	\$2.70
Hot Sandwich	\$14.99	\$12.35	\$2.64
Protein Side	\$7.50	\$5.00	\$2.50
Non-Fried Veggie App	\$12.50	\$10.00	\$2.50
Breakfast Starch	\$14.49	\$12.00	\$2.49
Entrée Salad	\$16.29	\$14.00	\$2.29
Appetizer Fries/Wedges	\$10.29	\$8.00	\$2.29
Cold Sandwich	\$13.50	\$11.29	\$2.21
Appetizer Soup/Chili	\$9.00	\$6.99	\$2.01
Mexican Entree	\$14.99	\$13.00	\$1.99

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

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

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

PRICE PREMIUM BY ITEM TYPE CONT.

median price

ITEM TYPE	WITH AVOCADO	WITHOUT AVOCADO	PREMIUM
Appetizer Nachos	\$15.95	\$13.99	\$1.96
Deli Salad Appetizer	\$13.75	\$11.95	\$1.80
Appetizer Dip	\$11.99	\$10.49	\$1.50
Pork Main Entree	\$17.29	\$16.00	\$1.29
Fried Veggie App	\$10.75	\$9.50	\$1.25
Burger	\$15.25	\$14.00	\$1.25
Egg Dish	\$16.15	\$14.95	\$1.20
Rice Entree	\$16.00	\$14.95	\$1.05
Chicken Main Entree	\$16.99	\$15.95	\$1.04
Beef Main Entree	\$20.00	\$19.00	\$1.00
Other Entree	\$15.95	\$15.00	\$0.95
Pizza	\$17.75	\$16.99	\$0.76
Condiment/Topping	\$2.50	\$1.95	\$0.55
Other Side	\$4.99	\$4.49	\$0.50
Fruit Side	\$2.50	\$2.79	-\$0.29
Other Protein Main Entree	\$19.00	\$20.95	-\$1.95
Non-Fried Veggie Side	\$2.00	\$3.95	-\$1.95
Fish Main Entree	\$15.00	\$17.99	-\$2.99
Shellfish Main Entree	\$14.45	\$17.95	-\$3.50
Entrée Soup/Stew/Chili	\$11.00	\$14.50	-\$3.50
Veggie Main Entree	\$8.95	\$15.00	-\$6.05

Spring/Summer Trends

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



DATASSENTIAL Launches & Ratings JAN'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.

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



LIMITED TIME

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



NEW

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

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%	★	SCORE 74 specialty appeal
Branded PI: 60%	★ ★ ★ ★	
Uniqueness: 54%	★ ★ ★ ★ ★	
Frequency: 26%	★ ★ ★ ★ ★	
Draw: 58%	★ ★ ★ ★ ★	
Value: -		

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%	★ ★ ★ ★	SCORE 72 volume driver
Branded PI: 63%	★ ★ ★ ★	
Uniqueness: 32%	★ ★	
Frequency: 25%	★ ★ ★ ★ ★	
Draw: 50%	★ ★ ★	
Value: 43%	★ ★ ★	

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%	★ ★ ★ ★	SCORE 67 consider
Branded PI: 54%	★ ★ ★	
Uniqueness: 40%	★ ★ ★	
Frequency: 24%	★ ★ ★ ★ ★	
Draw: 56%	★ ★ ★ ★ ★	
Value: 38%	★ ★ ★	

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%	★ ★ ★	SCORE 65 consider
Branded PI: 56%	★ ★ ★	
Uniqueness: 45%	★ ★ ★ ★	
Frequency: 21%	★ ★ ★ ★	
Draw: 55%	★ ★ ★ ★	
Value: 37%	★ ★ ★	

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%	★★★★	SCORE 90 superstar
Branded PI: 67%	★★★★★	
Uniqueness: 61%	★★★★★	
Frequency: 23%	★★★★★	
Draw: 51%	★★★★★	
Value: 42%	★★★	

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%	★★	SCORE 84 specialty appeal
Branded PI: 60%	★★★	
Uniqueness: 65%	★★★★★	
Frequency: 23%	★★★★★	
Draw: 51%	★★★★★	
Value: 53%	★★★★	

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 aioli.

New Item

Unbranded PI: 42%	★★★	SCORE 66 specialty appeal
Branded PI: 64%	★★★★★	
Uniqueness: 57%	★★★★★	
Frequency: 21%	★★★	
Draw: 47%	★★★★★	
Value: 31%	★★★	

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%	★★	SCORE 54 consider
Branded PI: 43%	★★	
Uniqueness: 42%	★★★	
Frequency: 30%	★★★★★	
Draw: 52%	★★★★★	
Value: 35%	★★★	

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%	☆☆☆	SCORE 86 consider
Branded PI: 75%	☆☆☆☆☆	
Uniqueness: 43%	☆☆☆	
Frequency: 24%	☆☆☆☆	
Draw: 56%	☆☆☆☆☆	
Value: 55%	☆☆☆☆	

Jun 2022 \$5.99

Burger King

SOUTHWEST BACON WHOPPER



Features a quarter-pound beef patty with avocado spread, crispybacon, 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%	☆☆☆☆☆	SCORE 84 superstar
Branded PI: 58%	☆☆☆☆☆	
Uniqueness: 44%	☆☆☆	
Frequency: 23%	☆☆☆☆	
Draw: 58%	☆☆☆☆☆	
Value: 60%	☆☆☆☆	

Apr 2023 \$5.99

Farmer Boys Restaurant

PARMESAN-CRUSTED SOURDOUGH CHEESEBURGER



Parmesan-crustured 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%	☆☆☆☆	SCORE 78 volume driver
Branded PI: 59%	☆☆	
Uniqueness: 46%	☆☆☆	
Frequency: 18%	☆☆	
Draw: 56%	☆☆☆☆☆	
Value: 70%	☆☆☆☆☆	

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%	☆☆	SCORE 59 specialty appeal
Branded PI: 59%	☆☆☆☆	
Uniqueness: 56%	☆☆☆☆☆	
Frequency: 22%	☆☆☆☆	
Draw: 60%	☆☆☆☆☆	
Value: 28%	☆☆	

Metrics

Restaurant Segments



Menu Trends Metrics

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

PENETRATION

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

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

INCIDENCE

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

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

PRICE

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

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

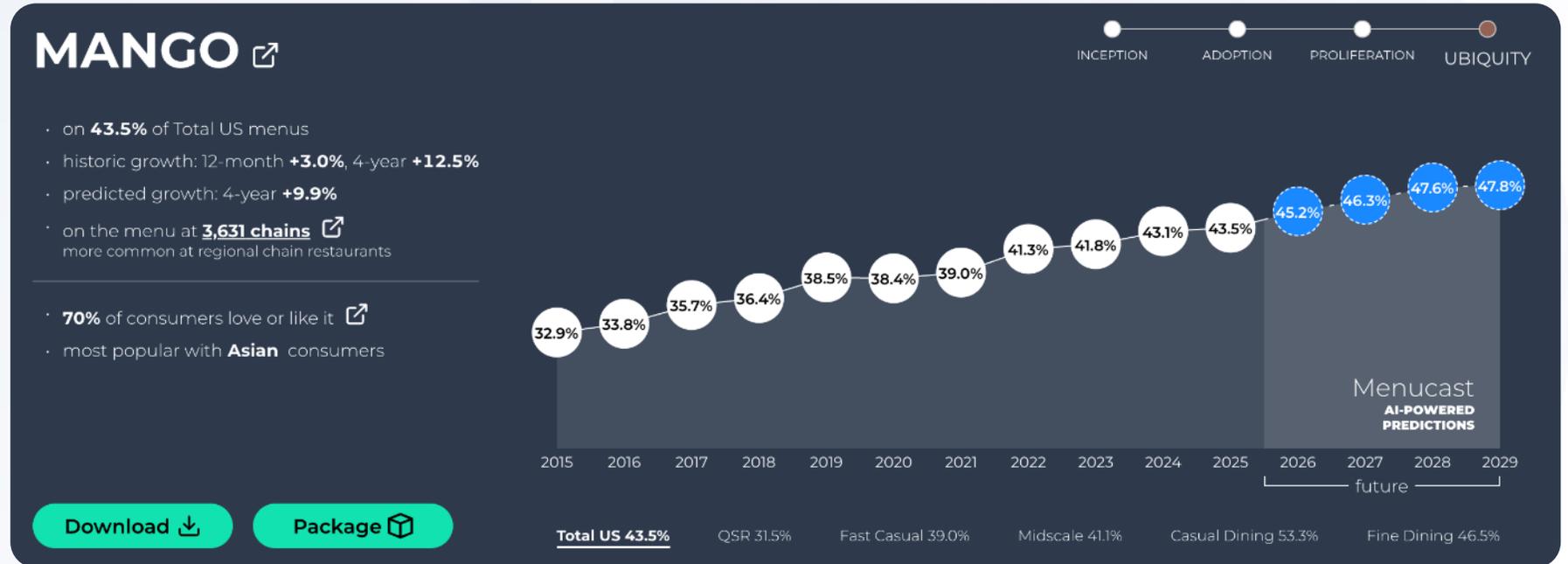


Menu Trends Metrics

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

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

Menu Trends 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. Menu Trends can predict an item's menu penetration up to 4-years in the future with a directional accuracy of 97%.



Launches & Ratings Metrics

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

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

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

\$8.49

Freshii
BEYOND CHILI



Brown rice, vegan chili, beyond meat beef crumbles, greek yogurt, green onions.

Unbranded PI: 36%	★★★
Branded PI: 60%	★★★★
Uniqueness: 51%	★★★★★
Frequency: 18%	★★★★
Draw: 44%	★★★★★
Value: 29%	★★

SCORE
69
specialty appeal

COMPOSITE SCORE

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

VIABILITY RATING

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

SUPERSTAR

exceptional performance with broad appeal and strong uniqueness

VOLUME DRIVER

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

SPECIALTY APPEAL

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

CONSIDER

moderate appeal; may benefit from further refinement

LOW POTENTIAL

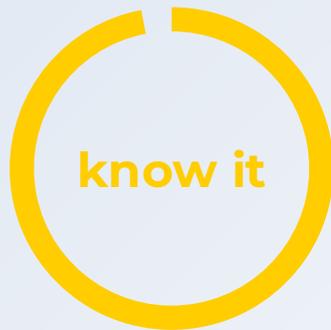
underperformer overall



Consumer Preferences Metrics

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

Experience



AWARENESS

How well known is this item?



TRIAL

Have consumers tried it?



CONSUMPTION

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

Affinity



AFFINITY

How do consumers feel about this item?

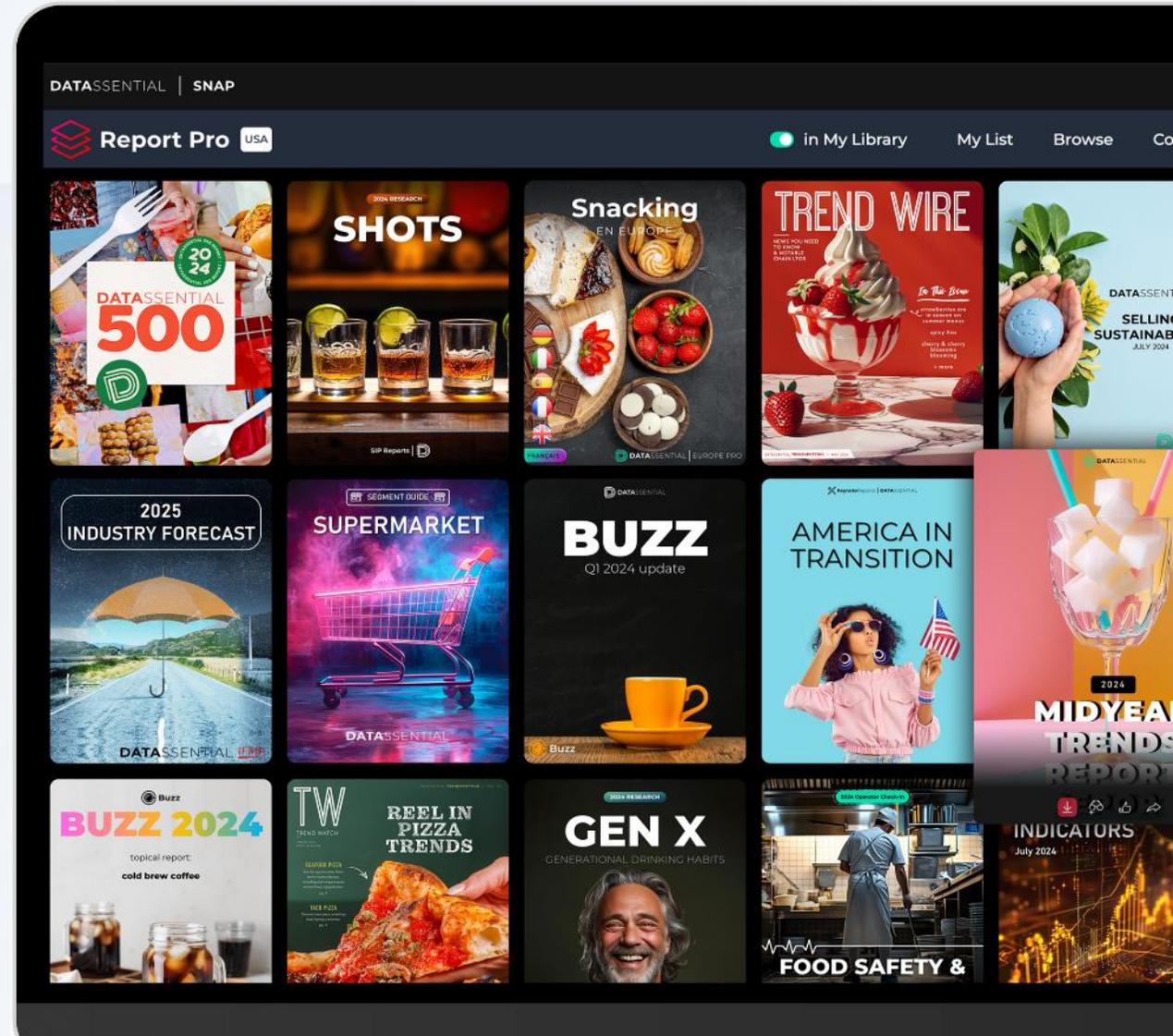
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Datassential is your best source for food industry insights, from the latest menu trends to the products shoppers want at the grocery store.

