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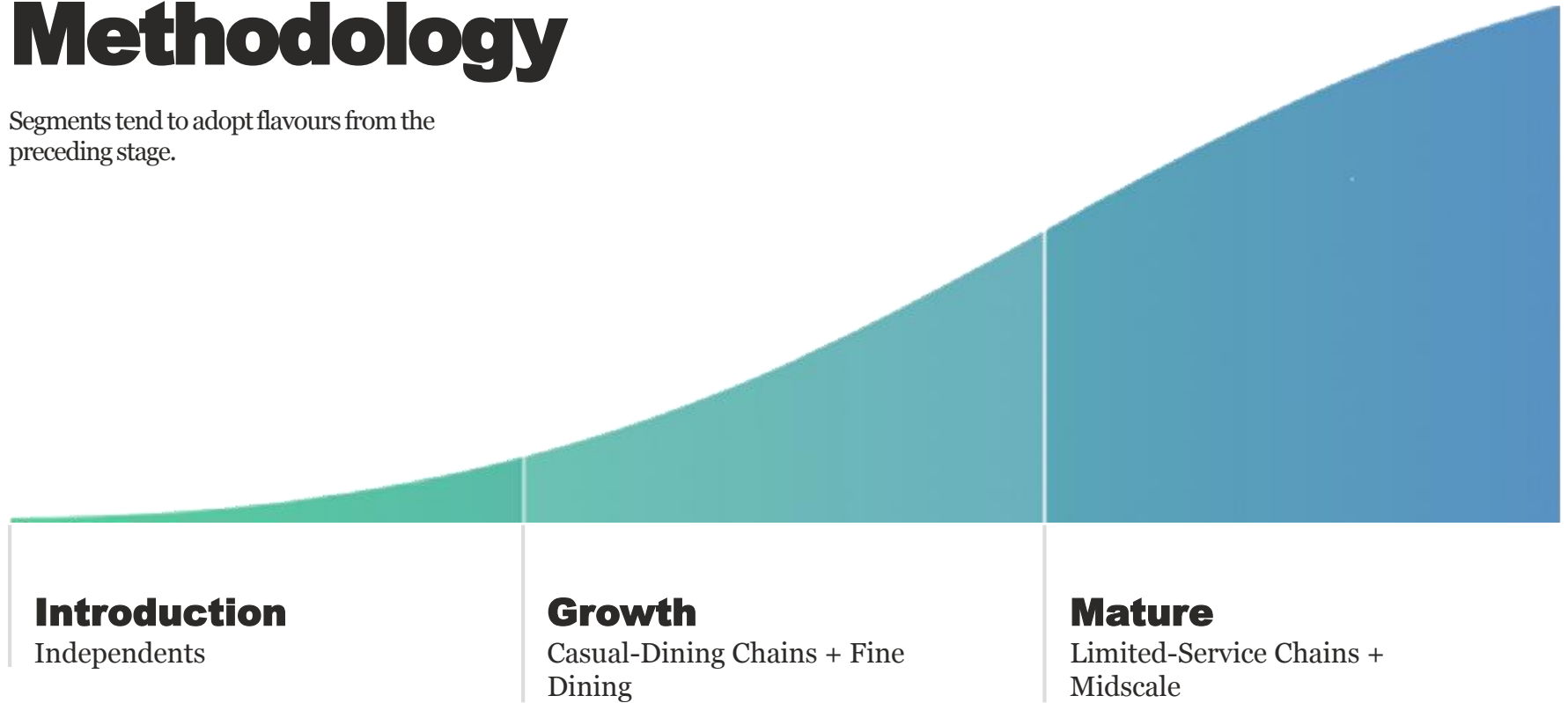
Flavour Lifecycle

Q3 2019



Methodology

Segments tend to adopt flavours from the preceding stage.



Appetizer

Lifecycle



Introduction

<u>Fennel</u>	14.2%
<u>Mint</u>	13.5%
<u>Ricotta</u>	11.8%
<u>Coriander</u>	10.4%
<u>Anchovy</u>	9.4%
<u>Caviar</u>	7.6%
<u>Hazelnut</u>	6.9%
<u>Yuzu</u>	6.9%
<u>Rosemary</u>	5.6%
<u>Lemon Grass</u>	5.2%

Growth

<u>Guacamole</u>	36.5%
<u>Lemon</u>	35.6%
<u>Dill</u>	32.7%
<u>Basil</u>	32.7%
<u>Sesame</u>	29.8%
<u>Avocado</u>	27.9%
<u>Lime</u>	26.9%
<u>Celery</u>	26.9%
<u>Cilantro</u>	25.0%
<u>Blue Cheese</u>	25.0%

Mature

<u>Onion</u>	41.4%
<u>Tomatoes</u>	39.3%
<u>Caesar</u>	35.5%
<u>Mediterranean</u>	35.5%
<u>Garlic</u>	35.5%
<u>Bacon</u>	25.3%
<u>Pepper</u>	24.2%
<u>Barbecue</u>	22.6%
<u>Parmesan</u>	22.0%
<u>Italian</u>	21.5%

Ranked by operator penetration (%)
Source: Technomic Ignite menu data, Q3 2019

Appetizer Forecast

Lemon Grass



**Simply Thai Cuisine in
Toronto**

soup with lemon grass,
sliced chicken breast,
galangal, lime juice and
coconut milk

Dill



Milestones

sliders with chilled lobster
and prawn salad and dill
avocado aioli, served on an
egg bun

Shiso



**Ki Modern Japanese +
Bar in Toronto**

grilled zucchini with shiso-
mint mustard aioli,
togarashi panko and chives

Entree

Lifecycle



Introduction

Saffron	11.6%
Hazelnut	7.9%
Thyme	7.6%
Anchovy	7.3%
Gruyere	6.3%
Cherry	6.3%
Yuzu	5.9%
Cider	5.0%
Lemon Grass	4.6%
Paprika	4.3%

Growth

Peppercorn	31.1%
Dill	28.2%
Roasted Garlic	27.2%
Beets	26.2%
Horseradish	26.2%
Mango	24.3%
Grape	22.3%
Citrus	21.4%
Salt	19.4%
Coconut	18.5%

Mature

Tomatoes	73.4%
Pepper	69.2%
Onion	67.8%
Bacon	67.3%
Mediterranean	60.3%
Italian	54.2%
Cheddar	48.1%
Barbecue	47.7%
Spicy	44.9%
Mexican	44.9%

Ranked by operator penetration (%)
Source: Technomic Ignite menu data, Q3 2019

Entree Forecast

Paprika



McDonald's

beef burger with chipotle aioli, cheddar cheese and tortilla strips, served on a sesame and paprika ciabatta bun

Gruyere



Pure Spirits Oyster House & Grill in Toronto

steak sandwich with roasted shallots and cremini mushrooms, Jamaican hot pickle, Gruyere, arugula and aioli, served on a rosemary panini

Tarragon



Earls Kitchen + Bar

scallops with tarragon, cauliflower and braised mushrooms

Dessert

Lifecycle



Introduction

<u>Pistachio</u>	10.3%
<u>Pear</u>	6.6%
<u>Lime</u>	6.6%
<u>Indian</u>	5.8%
<u>Shortbread</u>	5.8%
<u>Ricotta</u>	4.9%
<u>Passion Fruit</u>	4.9%
<u>Sour</u>	4.9%
<u>Sesame</u>	4.5%
<u>Dulce de Leche</u>	4.1%

Growth

<u>Creme Brulee</u>	19.2%
<u>Graham Cracker</u>	17.2%
<u>Cinnamon Sugar</u>	15.2%
<u>Toffee</u>	14.1%
<u>Espresso</u>	14.1%
<u>Mediterranean</u>	13.1%
<u>Custard</u>	12.1%
<u>French Vanilla</u>	11.1%
<u>Mexican</u>	11.1%
<u>Hazelnut</u>	11.1%

Mature

<u>Chocolate</u>	60.0%
<u>Brownie</u>	38.4%
<u>Cinnamon</u>	36.2%
<u>Strawberry</u>	34.1%
<u>Vanilla</u>	31.9%
<u>Caramel</u>	28.1%
<u>Cheesecake</u>	27.0%
<u>Apple</u>	26.5%
<u>Chocolate Chip</u>	23.8%
<u>Sugar</u>	23.8%

Ranked by operator penetration (%)
Source: Technomic Ignite menu data, Q3 2019

Dessert Forecast

Dulce de Leche



Toque Restaurant in Montreal

star anise cake with
poached pear, yogurt, dulce
de leche, white chocolate
crisp and pear sherbet

Custard



La Cage Brasserie Sportive

puff pastry with whipped
cream, custard and
raspberry jam, topped with
a vanilla and chocolate
fondant

Cashew



Cafe Lola Rosa in Montreal

mango pie with mango and
cashew mousse, mango jelly
and an almond-coconut
crust

Nonalcohol Beverage

Lifecycle



Introduction

<u>Asian</u>	8.9%
<u>Pear</u>	5.4%
<u>Almond</u>	5.0%
<u>Hibiscus</u>	5.0%
<u>Cucumber</u>	5.0%
<u>Rose</u>	3.9%
<u>Spiced</u>	3.9%
<u>Cinnamon</u>	3.9%
<u>Blood Orange</u>	3.5%
<u>Garam Masala</u>	3.5%

Growth

<u>Sugar</u>	9.9%
<u>Cranberry Orange</u>	8.9%
<u>Blackberry</u>	8.9%
<u>Passion Fruit</u>	7.9%
<u>Sweet</u>	7.9%
<u>Cherry</u>	7.9%
<u>Pomegranate</u>	7.9%
<u>Citrus</u>	6.9%
<u>Grenadine</u>	5.9%
<u>Peppermint</u>	5.0%

Mature

<u>Orange</u>	65.9%
<u>Coffee</u>	56.8%
<u>Chocolate</u>	52.4%
<u>Apple</u>	49.8%
<u>Strawberry</u>	35.8%
<u>Ginger</u>	34.5%
<u>Root Beer</u>	33.6%
<u>Mango</u>	33.2%
<u>Italian</u>	30.6%
<u>Cappuccino</u>	28.4%

Ranked by operator penetration (%)
Source: Technomic Ignite menu data, Q3 2019

Nonalcohol Beverage Forecast

Citrus



Tojo's Restaurant in Vancouver, British Columbia

mocktail with Seedlip
Garden 108, matcha, herb,
citrus oil and soda

Pomegranate



Freshly Squeezed

matcha green tea with
blueberry, pomegranate and
almond milk

Cardamom



Second Cup Coffee Co.

caramel latte with black tea,
cinnamon, cardamom,
ginger and clove, topped
with caramel drizzle



Since 1966, Technomic has produced in-depth research focused on the foodservice industry.

We provide insights into consumer, industry and menu trends in the U.S. and 25 countries around the world.