



**National Mango Board
Mango Menu Trends Research Summary
2017**

Background:

The National Mango Board (NMB) conducts menu mention research to track mango usage in foodservice and provide direction regarding mango trends. The NMB uses a Mango MenuTrends™ Report from Datassential. Datassential measures penetration (% of restaurants that serve that food, flavor or ingredient) and incidence (% of menu items that feature that food, flavor or ingredient). Penetration is a measure of adoption, while Incidence is a measure of versatility. Datassential tracks menus from 7,000 national, regional, and independent chains that accurately represent the U.S. restaurant industry.

Please note that not all mango menu mentions use fresh mango. Mango menu mentions include fresh, frozen, chopped, sliced, puree, juice, flavorings and other forms of mango.

Key Findings

- **Fruit is essential on U.S. restaurant menus.** Fruit is a key ingredient featured on 9 out of 10 restaurant menus. Across segments, fruit penetration is higher at casual and fine dining operations than Quick Service Restaurant (QSR), midscale, and fast casual. **Mangos are the 9th most commonly menued fruit.** Fruit, as a menu ingredient, is growing overall, with mangos as the 12th most popular fruit, featured on one-third of menus. Within the Menu Adoption Cycle, which consists of inception, adoption, proliferation and ubiquity, mango falls in the proliferation stage. This finding positions mango as a powerful ingredient for menu innovation.
- **Mango usage continues to grow in all restaurant segments and types.** The largest growth for mangos through 2016 occurred at QSR and midscale operations. Usage of mango is expanding rapidly on both regional and national chain menus.
- **Mangos have increased penetration across all regions (34.8%), with a slightly higher increase (38.9%) in Western U.S.**
- **Mangos have increased penetration across all day parts.** One-third of mangos are served on all day menus, followed by dinner (15%), lunch (7%) and breakfast (5%) menus; with breakfast showing the fastest growth (17%).
- **Mangos have increased penetration across all menu parts.** Mango is featured most often on alcoholic and non-alcoholic beverage menus. Apart from desserts, mango usage continues to expand across food menus, with appetizers experiencing the most rapid growth (30%).
- **Mangos are often paired with neutral proteins, ethnic ingredients and spicy flavors.** Within appetizer, entrée and side menu items, mango is most common in salad and fish

entrées. Results show that mango is also noticeably versatile in savory menu items. Nearly half of menu items with mango are featured on mixed ethnicity dishes.

- **The future of mangos look bright with favorable trends.** Operators can use the promising trends of street/global food, condiments, all-day dining/snacking, breakfast, blurred day parts, bold spice, healthy kids' meals, hand crafted, plant based/vegetable, along with timeless trends including flavor, fresh, wholesome, and health halo to bring mangos to life in innovative menu items.

Data Summary

MANGO ON APPETIZER, ENTRÉE & SIDE MENUS

- **Mango is the 9th most common fruit on appetizer, entrée and side menus with 16.7% of restaurants serving menu items with mango in 2016, a 12% increase from 2012 and an 83% increase since 2005.**
- **The greatest mango menu penetration on appetizer, entrée and side menus was in casual dining (23.9%), followed by fine dining (22.5%), midscale (16.6%), fast casual (13.2%) and QSR (5.5%).** Midscale and QSR show the greatest growth since 2005 (both +100%), followed by casual dining (+85%).
- **16.7% of restaurants feature mangos in appetizer (6.7%), entrée (12.6%) and side (3.1%) menus.** Appetizers showed the strongest growth (+30%) followed by entrées (+10%) since 2012. One quarter of appetizers, entrées or sides with mango featured the fruit as a salsa/topping.
- **Mango as an appetizer, entrée, or side is experiencing increased menu presence in all regions across the U.S.,** with the greatest increase in the Northeast (18.6%) followed by the West (17.2%). Mango penetration increased in the South (+22%) and the Midwest (+18%) since 2012.
- **Mango menu penetration as an appetizer, entrée, or side is greatest on “all day menus” at 14.1% in 2016, an increase of 18% since 2012.** Mango penetration on other day part menus: dinner (10.5%), lunch (6.3%) and breakfast (3.1%).
- **While independent restaurants continue to menu mango most often (19.1%), usage has expanded at both national (+44%) and regional chains (+24%) since 2012.** Most trends originate in fine dining/independent restaurants.
- **The most common types of cuisines associated with mango on menus (the incidence of use) in 2016 were American (20%), Mexican (17%), Indian (14%), Chinese (7%), Sandwich (4%) and Japanese (4%).**
- **Mango is featured across the menu, but the incidence of its use is most common in salad entrées (13%) and fish entrées (11%).**
- **Mango is featured in salads (37.7%) far more than any other dish, followed by tacos (12.6%).** Other menu items that pair mangos and have increased growth since 2012: pulled pork (+100%), ceviche (+72%), wings (+50%), tartare (+41%), and sushi (+31%).

MANGO ON DESSERT MENUS

- **Mango is the 10th most common fruit on dessert menus with 8.8% penetration on menus overall in 2016**, down slightly (-1%) from 2012. Penetration by segment: fine dining (12.3%), midscale (11.7%), casual (9.5%), fast casual (5.8%) and QSR (5.3%).
- **Mango dessert menu penetration has grown 35% overall since 2005**. Menuing of mango in desserts has been growing most rapidly at fast casual and QSR, both at +100% during that time, followed by midscale (+37%), casual (+14%) and fine dining (-6%).
- **Mango menu penetration on dessert menus by restaurant type was greatest in independents (12.2%) in 2016**. The biggest increase since 2012 was seen among regional chains (+3%).
- **Most mango desserts are frozen treats (53%), followed by ethnic desserts (15%), and cake (6%)**. Ice cream is by far the most popular dessert item featuring mango in 2016 at 40.4%. Mango is increasingly included in menus in gelato (+94%) cake (54%) and mochi (+8%) since 2012.
- **50% of all desserts that feature mango are menued by operators serving desserts and snacks, Thai or Indian cuisine**.

MANGO ON NON-ALCOHOLIC BEVERAGE MENUS

- **Mango menu penetration on non-alcoholic menus increased 18% since 2012 as the 9th most popular and the 13th fastest growing fruit flavor**.
- **The overall increase of mango in non-alcoholic beverages since 2005 is being driven by substantial growth in the midscale and QSR segments, both showing increases over 100%**. Fast casual grew +55% and casual +26% during that same time.
- **Regional differences in non-alcoholic beverages are minimal, with menu penetration averaging at 15.4% in 2016 and growth averaging at 18% since 2012**.
- **One-fourth of all mango non-alcoholic beverages are featured on American (13%) or Indian (13%) cuisine menus, followed by dessert/snack (12%) and sandwich (10%)**.
- **The most common uses of mango by item type in 2016 include: blended drink (49%), juice (17%) and iced tea (16%)**. Beverage applications with mango showing growth since 2012 include bubble tea (+33%), lemonade (+23%), green tea (+18%) and soda (+14%).
- **55.4% of restaurants serving smoothies offer a mango option**. This makes mango the third most commonly used fruit in smoothie recipes. The menuing of mangos in smoothies has doubled since 2005.

MANGO ON ALCOHOLIC BEVERAGE MENUS

- **19.5% of alcoholic beverage menus feature mango**. Alcoholic drinks are growing on all full-service restaurant menus: casual (25.7%), fine dining (16.8%) and midscale (13.1%). Casual and midscale chains have experienced growth over 100% since 2005.

- **Growth is occurring in all regions (+22% since 2012), with mango alcoholic beverages menued most in the Midwest (25.3%) and South (24.1%).**
- **Of chains serving alcoholic beverages, four out of 10 feature a mango beverage, with growth occurring at regional (+33%) and national (+22%) chains since 2012.**
- **More than half of all mango alcoholic beverages are found on Mexican (27%) and American (25%) cuisine menus.** Margarita is the most popular drink featuring mango with penetration in 2016 at 40.7%. Mango mimosas on menus have grown (+79%) since 2012.

Implications

1. Position fresh mango use on all day menus to increase usage across all day parts. Leverage fresh mango applications and flavor pairings that show steady growth, and show the versatility of fresh mango for innovative applications.
2. Focus on appetizer, entrée and side menu applications parts of the menu with the highest likelihood for fresh mango usage vs processed formats typically used on beverage menus. On an opportunistic basis, pursue fresh mango applications in beverages and desserts.
3. Target regional and national chains. Identify fresh mango usage in chains with mango on the menu and increase mango usage in those chains.
4. Continue to leverage fresh mango usage in fine dining restaurants to influence foodservice menu development.