



Trends and Predictions



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While this is foodservice data, the insights go further than that...

65% of consumers say their food preferences are shaped primarily by RESTAURANT experiences

MenuTrends are a leading indicator of what will happen in the grocery aisle and perimeter

MenuTrends generally follow four phases

certain segments typically join in at different stages of the trend



Inception

- Fine Dining
- Ethnic independents
- Differentiating applications

Adoption

- Casual dining independents and fast-casual
- Quick to react
- Risk takers

Proliferation

- Casual Dining & QSR chains
- Well-accepted trends
- Mass audience validation

Ubiquity

- Firmly established across all segments
- Midscale dining typically last
- Trends may be watered down

The “Science” Aspect

four classic examples of MAC stages

Item	QSR	Midscale	Casual	Fine Dining	TOTAL	STAGE
YUZU	0%	1%	1%	10%	1%	INCEPTION
REMOULADE	1%	3%	9%	20%	6%	ADOPTION
GORGONZOLA	6%	10%	18%	30%	13%	PROLIFERATION
CHIPOTLE	12%	12%	28%	20%	19%	UBIQUITY

Variances in penetration across the major segments indicate not only the trend’s stage, but also its likelihood for continued growth.

Menu Adoption Cycle: Ethnic Influences

Peruvian
North African
Vietnamese

Thai
Japanese
Indian
Spanish / Tapas

Korean

Mediterranean
Cuban
Caribbean
Brazilian Steakhouse

Regional Italian
Regional Mexican
Southern

Chinese
Italian
Mexican

Inception

Adoption

Proliferation

Ubiquity

MenuTrends

- 6,500 distinct US restaurants
 - 2,500 chains
 - 4,000 independents
 - plus 500 food trucks
-

Trends often take **years** to mature.

Let's take a look at a few we've tracked over the past decade.

2004 2005 2006 2007 2008 2009 2010 2011

- tapas
 - mini-desserts
 - lemongrass
 - vanilla accents
 - spanish cheeses
 - plank cooking
 - applewood smoked bacon
 - chutney
 - papayas & mangos
 - bruschetta
 - flavored mayo
 - brining
 - pomegranate
 - savory chocolate
 - figs
 - fennel
 - braising
 - gratin
 - root vegetables
 - molten chocolate cake
 - wasabi
-

2004 2005 2006 2007 2008 2009 2010 2011

- local, organic & all-natural
 - new citrus
 - flavored salts
 - indian fusion
 - organic foods
 - retro desserts
 - unique beverages
 - prix fixe meals
 - flavored vinegars
 - sage
 - chaat
 - house-cured meats
 - wild mushrooms
 - las vegas
 - lavender
 - harissa
 - churrascaria
 - kobe beef
 - sushi
 - whole grains
 - crepes
 - sundried tomatoes
 - micro-greens
 - ceviche
 - amuse bouche
 - chocolate café
 - cream puffs
 - pork belly
 - sous vide
 - upscale mexican
 - brunch with a twist
 - fruit in entrees
 - spice rubs
 - beignets
 - ciabatta
-

2004 2005 2006 2007 2008 2009 2010 2011

- yuzu
 - **savory spices in desserts**
 - upscale southern food
 - gremolata
 - souffles
 - branded meats
 - polenta
 - espresso
 - deconstructed dishes
 - **sustainable seafood**
 - quinoa
 - cheese course
 - fondue
 - **truffle oil**
 - tea
 - cheek meat
 - crudo
 - artisan ice cream
 - gourmet doughnuts
 - black cod
 - poaching
 - interactive dining
 - quince
 - **mediterranean spreads**
 - upscale noodle shops
 - blood orange
 - chai flavored foods
 - fancy fried foods
 - **quinoa**
 - **upscale burgers**
-

2004 2005 2006 2007 2008 2009 2010 2011

- food & fashion
 - cardamom
 - tagine
 - langoustines
 - heirloom produce
 - mandarin oranges
 - butternut squash
 - balsamic vinegar
 - panini
 - new surf & turf
 - upscale cuban food
 - tarts & crumbles
 - meatballs
 - chorizo
 - ginger
 - kids' menus
 - miso
 - bagel shops
 - black foods
 - innovative meat cuts
 - farm to table
 - jicama
 - avocados
 - hibiscus
 - superfoods
 - sweet potato
 - kebabs / skewered foods
 - goji berries
 - beets
 - ethnic fried chicken
 - tart frozen yogurt
 - monkfish
 - coffee infused foods
-

2004 2005 2006 2007 2008 2009 2010 2011

- burrata
 - acai
 - smoked paprika
 - farro
 - dumplings
 - tofu
 - eco-eateries
 - beer-infused foods
 - flatbreads
 - guerrilla dining
 - edible weeds
 - toum
 - upscale eggs
 - banh mi
 - upscale fish n' chips
 - kale
 - flan
 - mint
 - gastropubs
 - kimchee
 - brussels sprouts
 - maple syrup
 - mango
 - new tuna
 - cupcakes
 - new hot dogs
 - basque cuisine
 - poutine
 - pupusas
 - rouget
 - lentils
 - goat cheese
-

2004 2005 2006 2007 2008 2009 2010 2011

-
- pho
 - mezze
 - black garlic
 - foam
 - rare pig breeds
 - broccoli rabe
 - curry
 - chick peas
 - shallots
 - cowboy cuisine
 - almojabana
 - salt bricks & hot rocks
 - slow food
 - peruvian cuisine
 - persimmon
 - food trucks
 - smoked meats
 - better burgers
 - hummus
 - kohlrabi
 - cactus
 - vanilla in savory dishes
 - goat meat
 - portuguese cuisine
 - small fish
 - naan bread
 - butterscotch
 - hanger & skirt steak
 - macaroni & cheese
 - winter vegetables
 - new superfruits
 - empanadas
 - protein shakes
-

2004 2005 2006 2007 2008 2009 2010 2011

- bacon in desserts
 - nouveau vegetarian
 - yucca
 - macaroons
 - beer in desserts
 - wild game
 - egg on everything
 - farofa
 - five spice
 - carnival foods
 - marshmallow
 - brick oven
 - fast-casual mediterranean
 - entertainment venues
 - oatmeal
 - pennsylvania dutch cuisine
 - ice pops
 - upscale BBQ
 - korean cuisine
 - red velvet
 - pickling
 - edamame
 - authentic tacos
 - savory cocktails
 - brittle
 - restaurant gardens
 - anise
 - charcuterie
 - kitschy breakfast
-

2004 2005 2006 2007 2008 2009 2010 2011

- non-meat carpaccio
 - parfaits
 - arancini
 - reconstructed
 - agave nectar
 - upscale sandwich shops
 - new meatballs
 - nordic cuisine
 - pop-up restaurants
 - arctic char
 - upscale soft serve
 - coconut water
 - pretzel rolls
 - artichokes
 - izakayas
 - kombucha
 - tater tots
 - ramps
 - new brew pubs
 - sriracha
 - new caramel
 - adult grilled cheese
 - pates / rilletes / terrines
 - new citrus
-

We're not here to tell you what you already know.

Nutrition, twisted comfort, and ethnic flavors all still matter but are mostly old news.
So let's instead take a look at some of our more cutting edge predictions...

2012

Culinary Platforms

- Designer Tacos
- Bone Marrow
- Pork shoulder
- Skinny cocktails
- Smoked cheeses
- Cauliflower
- New berries:
lingonberry, loganberry & elderberry
- Pine
- New ancient grains:
freekeh, millet & faro
- Pioneer plants:
chicory, sorghum & sassafras

2012

Major Trends

- **Breakfast food trucks**
 - **Democratized Fine Dining**
 - **One last year of menu contraction**
 - **Historic inspirations**
 - **High flavor health**
-
- Enhanced menu descriptions
 - Trucks develop brick & mortar outposts
 - Pop-up restaurants
 - Extreme local sourcing
 - Foraged foods
 - Location based apps
 - Technology at the table

BREAKFAST food trucks



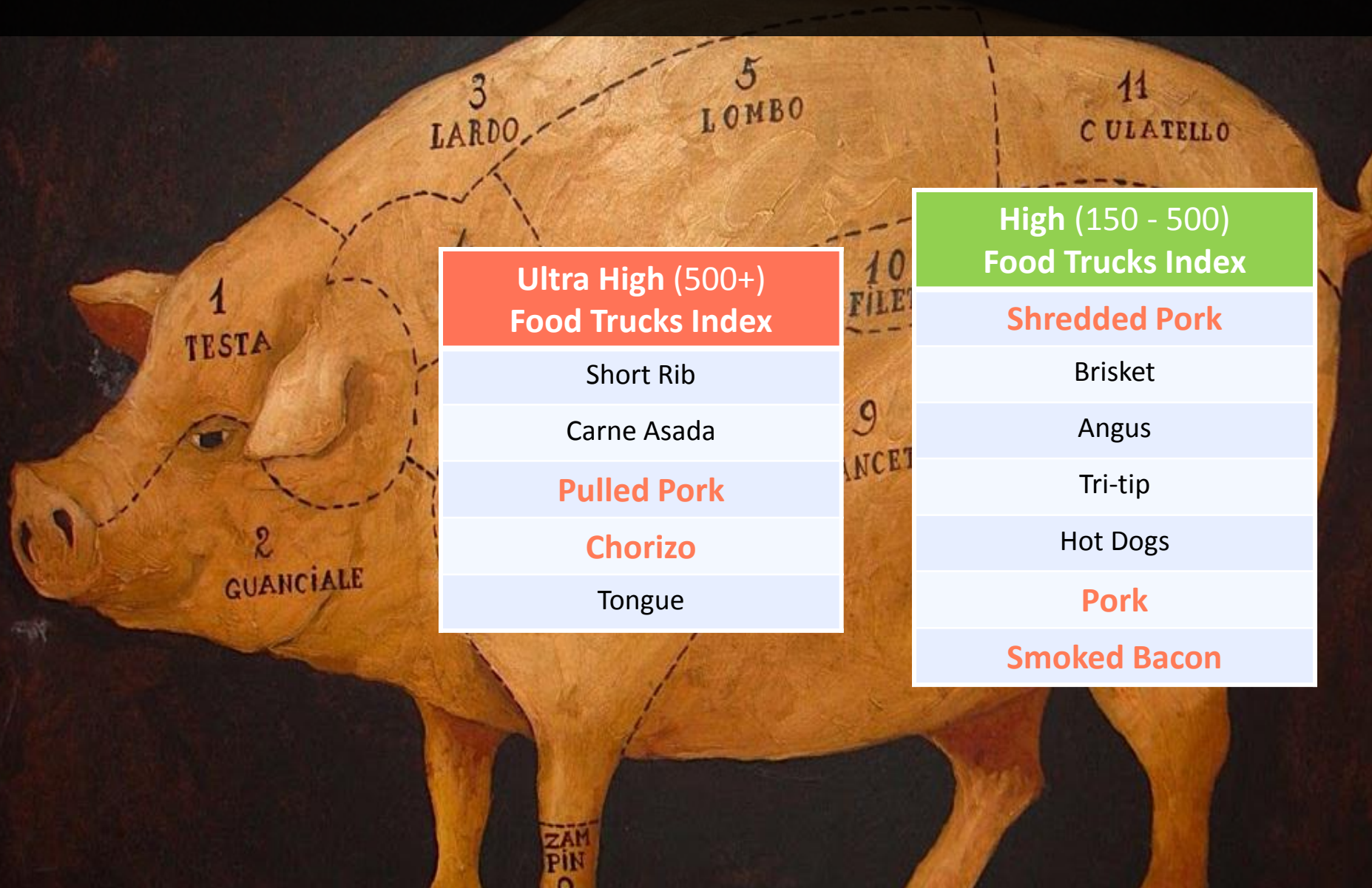
By now, food trucks are old news...
but we believe the segment will evolve with a new focus on **breakfast**.



Why we think it'll happen:

- As the market saturates, operators will need to diversify into new dayparts
- Breakfast is still a fertile ground for innovation
- Pork is a natural fit with breakfast, and is a truly beloved protein by food truck operators

Food trucks operators really, really love pork...



Ultra High (500+) Food Trucks Index

Short Rib

Carne Asada

Pulled Pork

Chorizo

Tongue

High (150 - 500) Food Trucks Index

Shredded Pork

Brisket

Angus

Tri-tip

Hot Dogs

Pork

Smoked Bacon

Buttermilk [Los Angeles, CA]

Hawaiian Bread Breakfast Sliders

Portuguese sausage, sauteed onions and shoyu scrambled eggs on Hawaiian bread



Look for breakfast to get a lot more interesting...

Breakfast Menu:

Rice crepes - \$3⁵⁰

mushroom, scallion & coconut milk

Add chicken, shrimp or tofu (+1.50)

Thai Omlette \$3⁵⁰

Omlette with scallion & bean sprouts. Choice of sauces.

Add chicken, shrimp or tofu (+1.50)

Menu Contraction and then new growth



Salads
HIGHWAY 61
CESAR SALAD
Road House Salad
JUNIOR GUMBO
BIG BAYOU BLUE
LEGENDARY ETOUFFADE

Favorites
ROAD HOUSE SALAD
JUNIOR GUMBO
BIG BAYOU BLUE
LEGENDARY ETOUFFADE

House Specialties
PASTRIES & TOAST
SANDWICHES

TRADITIONAL PANCAKES
SANGRIA
CROISSANT
PASTRY

Deutsche Hauptspeisen
(Authentic German)
Bayerische Schweinshaxe
Riesling

House of Pancakes
Pancakes
Waffles
French Toast

SANDWICHES
BLINZES
SOUPS

SOUPS
CHICKEN SOUP
TOMATO SOUP
CORN CHOWDER

APPETIZERS
SMOKED POLISH
JACKIE'S EGG
GRILLED CHICKEN

APPETIZERS
GRILLED CHICKEN
SMOKED POLISH
JACKIE'S EGG

BRASSERIE
4 Washington St
Zauly, NY 07070

BRASSERIE
4 Washington St
Zauly, NY 07070

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DELI SANDWICHES
COURT STREET CLUB
CHICKEN DELI
REUBEN KINCAID

DELI SANDWICHES
COURT STREET CLUB
CHICKEN DELI
REUBEN KINCAID

DELI SANDWICHES
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CHICKEN DELI
REUBEN KINCAID

DELI SANDWICHES
COURT STREET CLUB
CHICKEN DELI
REUBEN KINCAID

CHARCUTERIE
Prosciutto San Daniele
Jamon Serrano
Coppa di Parma

ESPRESSO AND COFFEE
Espresso
Espresso Con Panna
Cappuccino

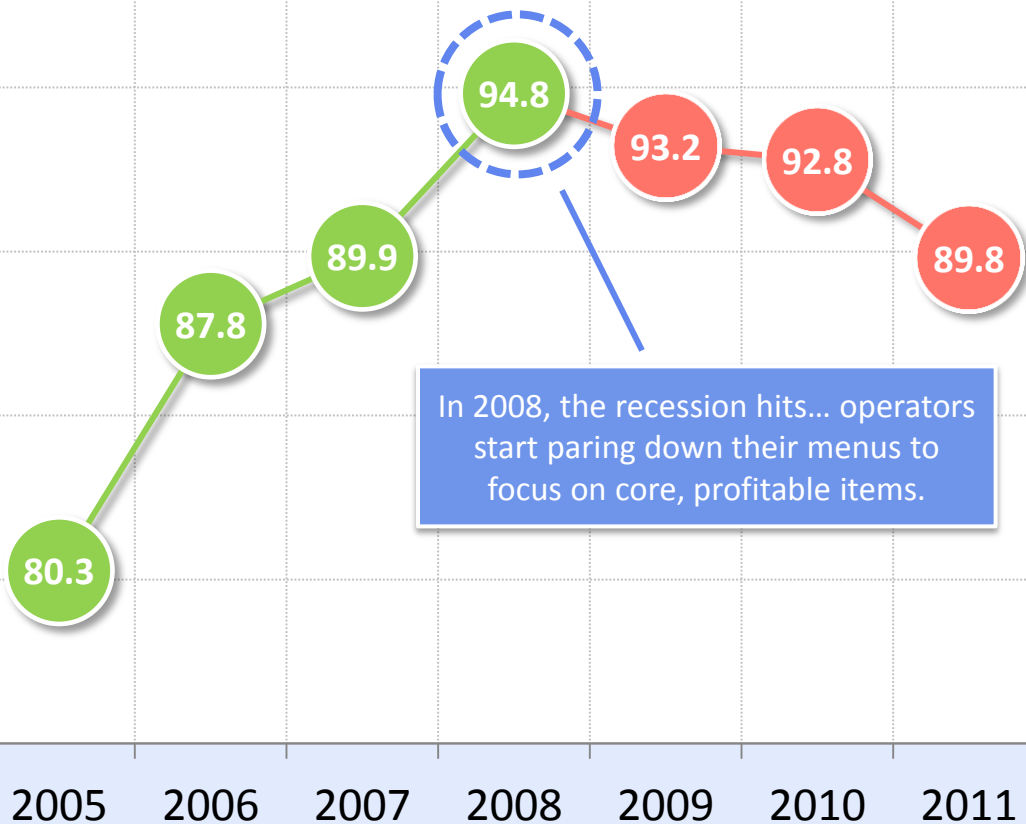
NON-ALCOHOLIC
Fruit Juice
Singer Beer
Speicher Refresh Soda

ESPRESSO AND COFFEE
Espresso
Espresso Con Panna
Cappuccino

We expect one more year of menu contraction...

Average Menu Size (items per menu)

[excludes beverages; "all day menus" only]



- Restaurants continue to focus on core profitable items
- But influence of trucks, fast-fine, and other segments will spur adoption of new trends
- Look for innovation to again accelerate...
- ... and potential menu growth in 2013 and beyond

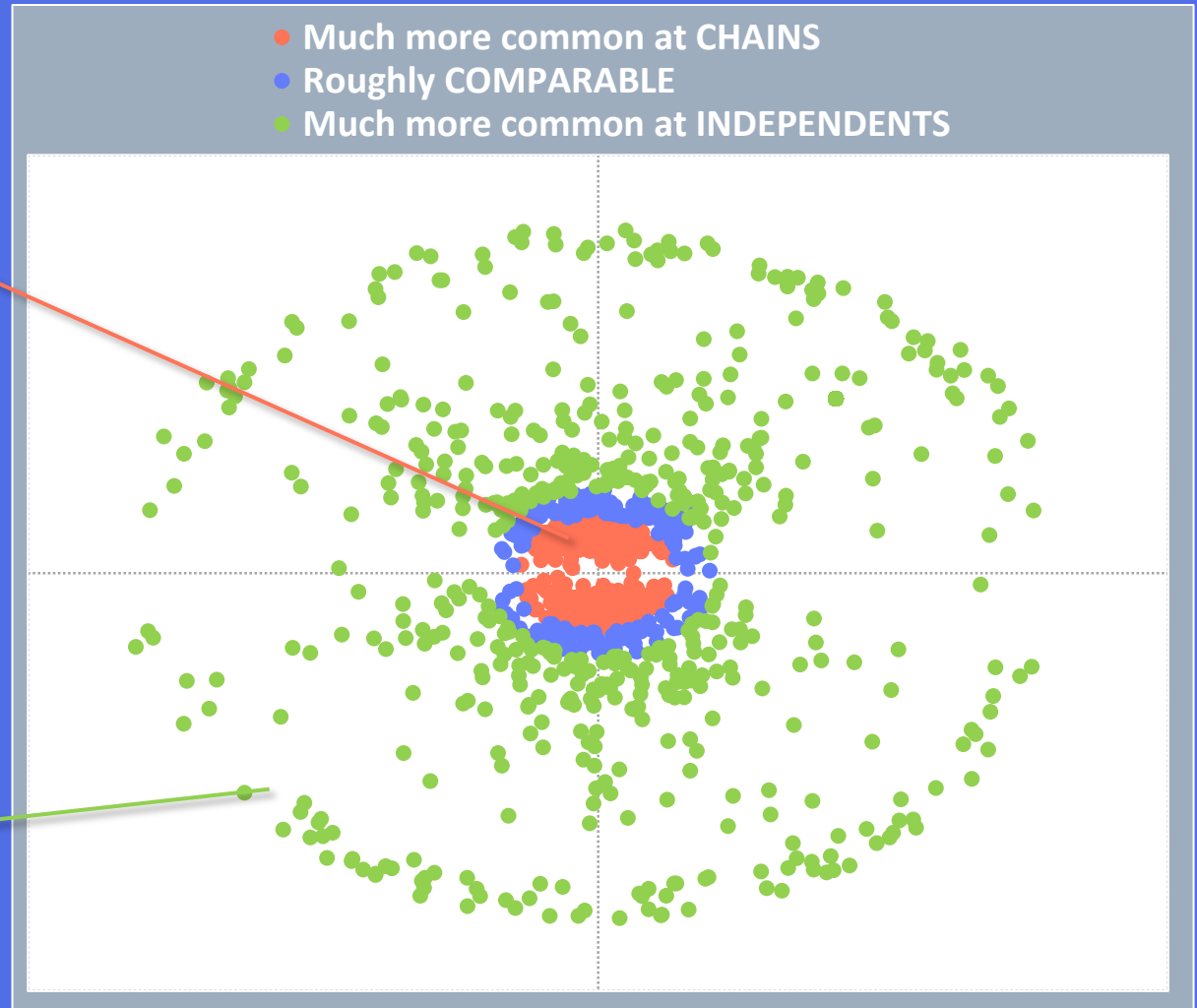
There are a vast array of trends that chains have yet to tap into...

Overstated:

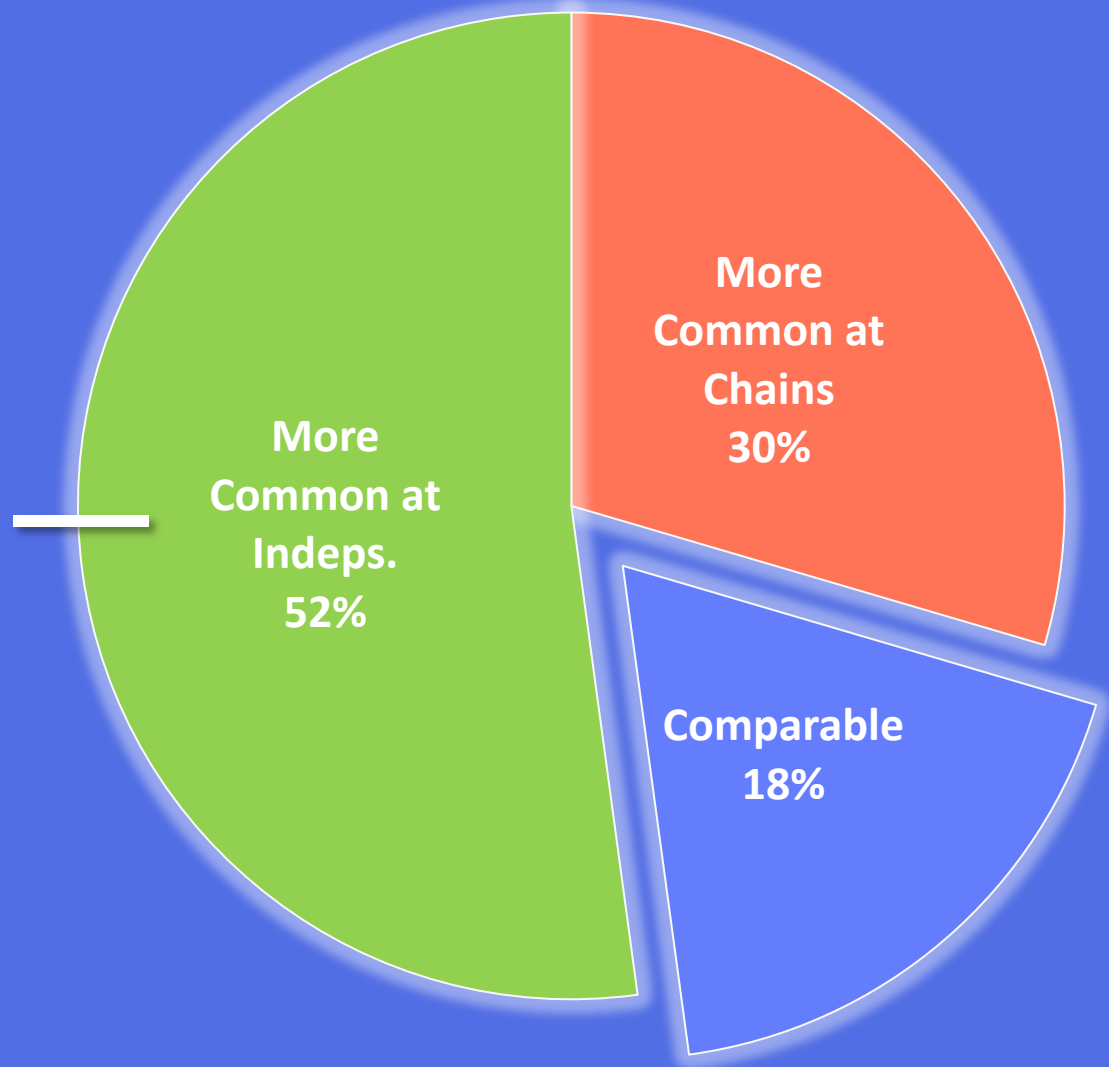
Southwestern (+308%)
Pot Roast (+268%)
Pepperjack (+220%)
Ciabatta (+214%)
Honey Mustard (+197%)
Chipotle (+193%)

Understated:

Pork (-198%)
Gorgonzola (-241%)
Aioli (-238%)
Picatta (-138%)
Tomatillo (-182%)
Wasabi (-117%)



There are literally hundreds of advancing trends at independents that have yet to be tapped by chains.



Just a few example of trends at independents... that chains haven't yet responded to quite as quickly

	Pen.	% Gain
Queso Fresco	3%	+209%
Harissa	2%	+175%
Blood Orange	2%	+175%
Guajillo	2%	+164%
Sea Salt	3%	+155%
Sweet Potato Fries	4%	+140%
Yuzu	2%	+110%
Butternut Squash	5%	+109%
Dried Cranberries	6%	+90%
Brioche	6%	+84%
Short Rib	8%	+83%

	Pen.	% Gain
Organic	9%	+70%
Gruyere	5%	+64%
Terrine	1%	+63%
Sweet Potatoes	11%	+60%
Deviled Eggs	2%	+59%
Marmalade	3%	+58%
Fennel	10%	+57%
Aioli	14%	+57%
Serrano	3%	+53%
Arugula	15%	+52%
Truffle	8%	+49%

	Pen.	% Gain
White Bean	5%	+46%
Pear	10%	+46%
Poblano	7%	+46%
Radish	9%	+41%
Leek	8%	+39%
Caprese	10%	+36%
Skirt Steak	7%	+35%
Cherry Tomato	9%	+34%
Braised	19%	+34%
Seared	25%	+33%
Goat Cheese	19%	+33%

and there are literally hundreds more to explore...

DEMOCRATIZED FINE DINING

the new CHEF-CASUAL segment

sandwiches

pork bbq \$8

pork belly, root beer, creamy slaw, dill pickles, corn bread

lamb gyro \$9

english cucumber, heirloom tomato, red onion, tzatziki sauce, pita pocket, feta

mediterranean veggie \$7

red peppers, smoked eggplant, basil pesto, herb cheese, sliced focaccia

waldorf chicken \$8

flame grapes, candied walnuts, crumbled gorgonzola, shaved celery, multi grain

pastrami reuben \$9

homemade sauerkraut, toasted caraway, grape fondue, 1000 island, marble rye

wagyu beef \$10

gruiny mustard, baby arugula, yukon potato, onion rings, pretzel roll

grilled cheese \$7

wisconsin cheddar, italian prosciutto, tomato marmalade, cheese curds, pullman loaf

pacific tuna \$10

roasted pineapple, wasabi peas, yuzu aioli, sweet soy, housemade bun

sodas \$3

vanilla kola

lemon lime

orange ginger

root beer

diet coke

snacks \$3/5

g'wich popcorn

great popcorn, topped cheese, no oil, crushed potato, 1/2 tsp oil

g'wich salad

mixed greens, shaved fennel, roasted chickpeas, olive oil, balsamic

g'wich chips

potato potatoes, fresh herbs, house line, cheddar cheese, sour powder

g'wich pickles

assorted eggs, pickled beet, garlicky remoulade, housemade pickles, no vinegar

soft serves \$4

vanilla bean

cinnamon stick

breakfast \$5

croissant panini

croissant panini

croissant panini

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croissant panini

croissant panini

pastries \$3

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croissant

coffee \$4

croissant

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The 90's and early 2000's were about the growth of **Fast-Casual**



1993
Chipotle opens
its first store



1999
**Panera Bread
Company** is
formed



2004
Fast Casual
concepts total
\$10B in sales



2011
Panera Bread
surpasses 1500
stores

1990

1995

2000

2005

2010



1997
**Fast Casual
Magazine** is
published



2003
Qdoba is
acquired by
Jack in the Box



2010
Five Guys
nears 750 units

In 2008, the conversation turned to **Food Trucks**



2008
Kogi BBQ fuses Mexican and Korean cuisine



2009
Gourmet lists 72 "Great Street-Food Vendors" in 9 major cities.



2010
The Food Truck Spot debuts at the **NRA Show**



2011
Major chains such as Jack in the Box launch their own trucks

2008

2009

2010

2011



2009
MobiMunch launches its website



2010
"The Great Food Truck Race" airs on Food Network



2011
Zagat adds Food Truck Reviews

Today, we're also seeing the emergence of a **new segment**



2004
Hubert Keller
opens Burger Bar
at the Mandalay
Bay Resort



2006
**Laurent
Tourondel** opens
BLT Burger in
New York



2008
**Marcus
Samuelsson**
opens Marc
Burger



2010
Graham Elliot
opens
Grahamwich

2004

2006

2008

2010



2005
Tom Colicchio's
'wichcraft adds
four kiosks in
New York City



2007
Keller opens his
2nd Burger Bar in
St. Louis



2009
Rick Bayless
opens XOCO, an
upscale Mexican
street food QSR



2011
Bobby Flay
opens his 8th
Bobby's Burger
Palace

the new **Chef Casual** segment

High-end chefs opening their own quickserve
and casual dining outposts...
democratizing fine dining for the masses.

Fast Casual

- **Familiar, customizable**, made-to-order dishes such as burritos and salads; higher quality ingredients than traditional QSR's

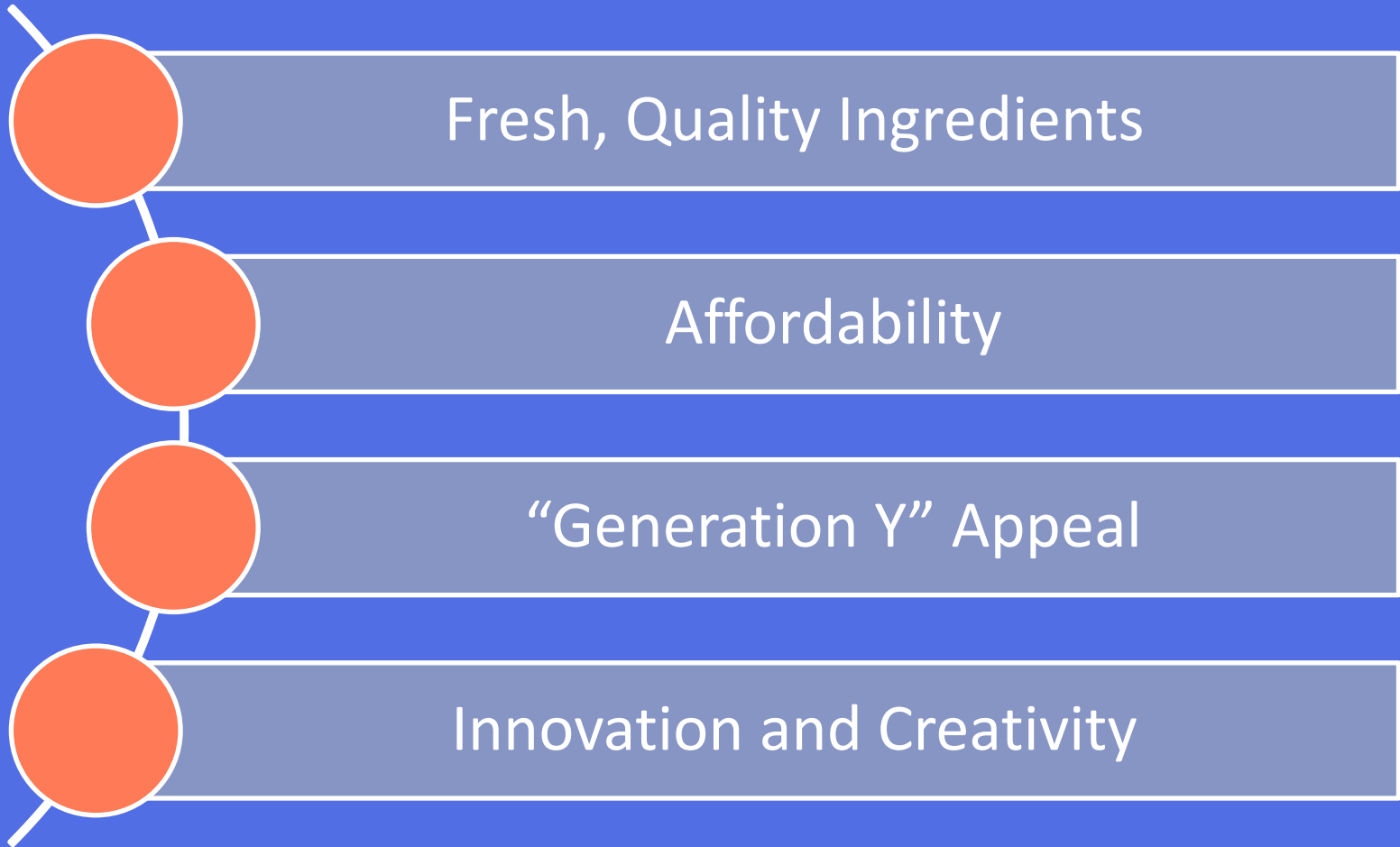
Food Trucks

- **Creative, unusual fusions** of ethnic flavors and specialties with classic comfort food for adventurous foodies and curious palates

Chef-Casual

- Small and focused; **high-end ingredients at more affordable prices** (think kobe beef and truffles)

What Fast-Casual, Food Trucks, and Chef-Casual have in common...



And their key differences...

Attributes	Fast Casual	Food Trucks	Chef-Casual
Approach to Ingredients	Quality, healthy ingredients	Ethnic ingredients, locally sourced	High-end proteins
Ambiance	Comfortable, modern	Outdoors, lively	Comfortable, modern
Target Market	Young Families, Millennials	Young Professionals, Foodies	Professionals, Millennials
Menu	Customizable, made-to-order	Portable, unique takes on ethnic and comfort food	Small, focused menus
Price Points	\$7-\$10	\$2-\$10	\$10-\$15

Defining menu characteristics

Fast Casual

- Boneless Wings
- Breakfast Pastries
- Chinese Dishes
- Fruit Bowls & Trays
- Parfaits
- Pasta Entrees
- Pizzas
- Reduced/Low Fat
- Seafood Salads
- Traditional Soups

better, fresher, and healthier fast food

Food Trucks

- Arancine
- Arepas
- Bulgogi
- Crème Fraiche
- Curries
- Deep Fried
- Exotic Fruits
- Fusion Tacos
- Pork Belly & Cheek
- Saffron

focused menus and new ways to experiment

Chef-Casual

- Alcohol-Infusion
- Artisan Breads
- Beer, Wine, Liquor
- Fried Eggs
- Kobe Beef
- Handmade Granola
- Milkshakes
- Shrimp
- Truffles
- Veal

artisan crafting and dishes done “perfectly”

Expect to wait in line at Rick Bayless' XOCO (Chicago)



Ahogada

Golden pork carnitas, black beans, tomato broth, spicy arbol chile sauce, pickled onions



Churros with chocolate dipping sauce



TORTAS *Frontera* BY RICK BAYLESS



Another Rick Bayless restaurant... and this one's in an airport!

What you'll find on these chef-first menus...

Chef	Restaurant	Item	Description
Bobby Flay	Bobby's Burger Palace	Napa Valley Burger	Fresh goat cheese, watercress, Meyer lemon honey mustard
Graham Elliot	Grahamwich	G'wich Popcorn	Grated parmesan, chopped chives, sea salt, cracked pepper & truffle oil
Marcus Samuelsson	Marc Burger	Grilled Fish Sandwich	Miso soy marinated, citrus glazed Mahi Mahi, mirin mayonnaise
Tom Colicchio	'wichcraft	Roasted Red Pepper Frittata	Potatoes, braised leeks & cheddar on ciabatta
Rick Bayless	XOCO	Top Chef Torta	Braised beef tongue, chorizo, potatoes, avocado & salsa verde

Roy Choi's A-Frame

AFRAME MODERN PICNIC

ON THE TABLE

to munch on

FURIKAKE KETTLE CORN buttered Blazin' 'Is Hawaiian style.....	8
HEIRLOOM PICKLES with creamy dip and extra virgin olive oil.....	8
SESAME LEAF WRAPPED SHRIMP TEMPURA with fresh cucumber, herbs and shoyu dipping sauce.....	11

to pass around

ISLAND FARMER'S MARKET SALAD with shaved Maui onions, tofu, fried garlic, seasonal fruit and ginger shoyu vinaigrette.....	10
CHARRED BABY OCTOPUS with carrot kochujang puree, bok choy, pickled vegetables and nori seaweed.....	14
CLAM CHOWDER with green curry, lemongrass, pancetta, coconut milk and toasted sourdough.....	11
BLUE CRAB CAKES with lemongrass creme fraiche, bibb lettuce, and perilla leaf.....	16
WARM CORNBREAD AND CHICKEN SALAD with Italian sausage ragout, salsa verde and pickled red onion.....	10
BABY BACK RIBS air-dried and hoisin-chili glazed.....	12
WAGYU BEEF TATAKI with sliced pearl onions, ginger, pickled jalapeño and shoyu vinaigrette.....	14

to get your hands dirty

CRACKLIN BEER CAN CHICKEN with kimchi, century egg, salsa roja and verde.....	half 11 whole 19
SWORDFISH TACOS with flour tortillas, spiced yogurt, tomato confit, cilantro parmesan, toasted bread crumbs and red onion.....	18
ROASTED LAMB with toasted sesame oil, shoyu and garlic served with fresh herb salad and salsa verde.....	18
DOUBLE CHEESEBURGER with tomato confit, pickled red onions, butter lettuce, hot sauce sharp cheddar, and sesame mayo on a buttered brioche bun.....	11
KNUCKLE SANDWICH braised bowl of oxtail, tendons, knuckles and other forgotten pieces served with soy chili dipping sauce, and toasted bread.....	12
GRILLED BERKSHIRE PORK CHOP with fresh citrus, pickled scallion, and polenta cakes.....	21
WHOLE FRIED LOBSTER with garlic crumble, chives, kaffir lime, and crispy thai basil.....	45

to bring it all together

5-GRAIN PAN DE SAL served hot and crusty with Ugura butter and sea salt.....	4
KITCHEN FRIES wedges of purple Okinawan potato, yam, and Korean sweet potato with kimchi sour cream and sea salt.....	8
DYN-O-MITE butter and sour cream twice baked duchesse potato with chives and parmesan crust.....	4
PAN ROASTED BRUSSEL SPROUTS with rice cakes, kimchi bacon puree and diced apples.....	10

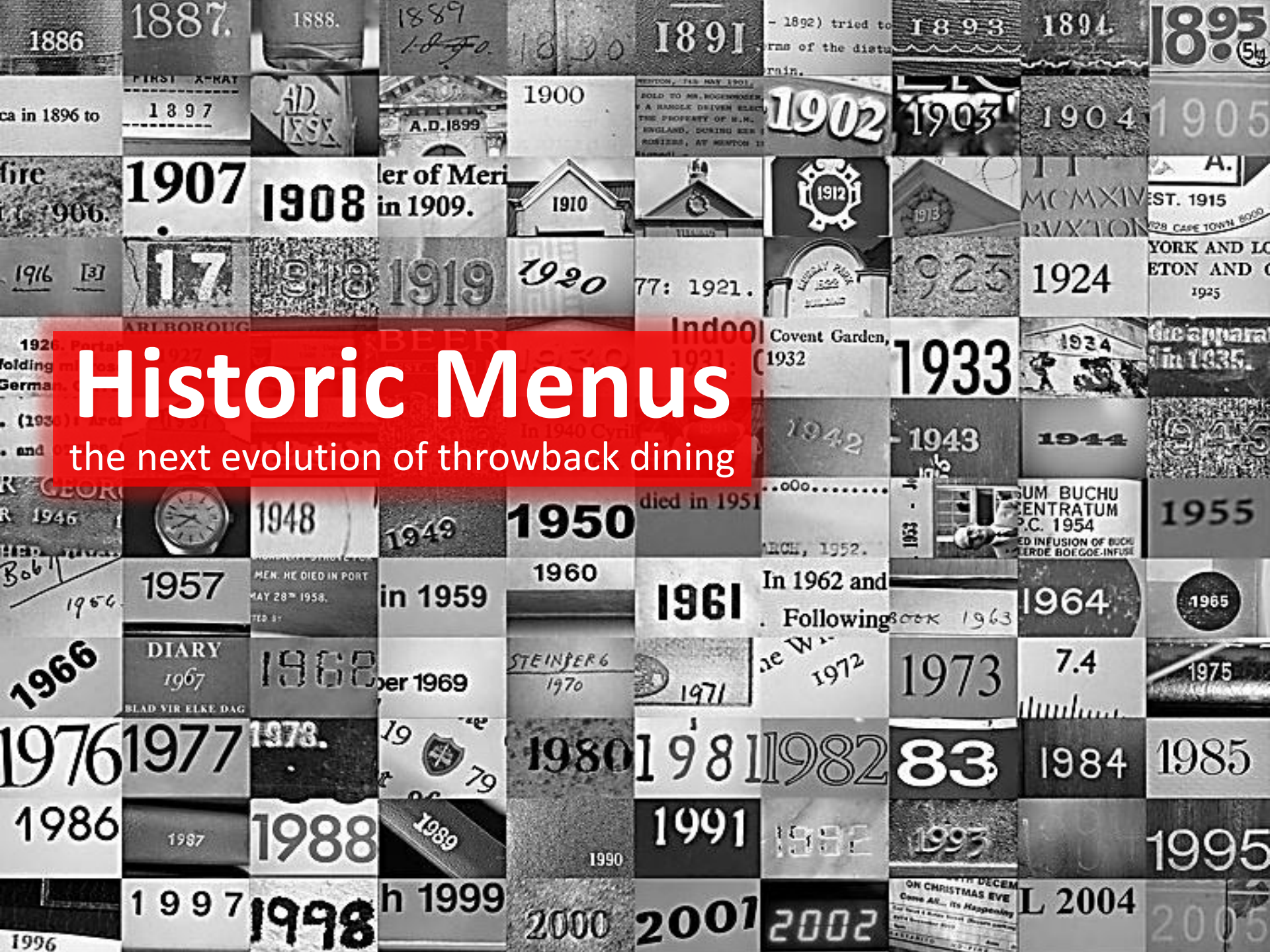
cavities

BANANA BACON CREAM PIE vanilla cream, caramel bananas, and bacon brittle.....	7
CHU-DON'T-KNOW-MANG pound cake cinnamon churros, with malted chocolate milk and vanilla ice cream.....	7
THICK ASS ICE CREAM SANDWICHES smoked porter ice cream and chocolate chip cherry cookie..... black pepper szechuan ice cream and salted chocolate cookie.....	6 6
PEAR SHORTCAKE with Riesling roasted pears, pecan oat crumble whipped cream and warm gingerbread biscuit.....	8

A-Frame is a place that came from the feeling I used to get when cracking crabs on Redondo Beach Pier as a youth. The salt air, the cement benches. Newspapers and wooden mallets. Family and friends. The kind of food that you wanted to eat then and there is re-imagined here and now. Eat with your hands, reach across the table, lick your plates clean and share food with some strangers. Walk around, talk with your mouth full and get ready to get dirty. We know what your spirit's hungry for. So bring it on over and let us feed it already.

-Papi Chulo

And in an ironic turn of events, food truck visionaries are today opening their own brick & mortar outposts



Historic Menus

the next evolution of throwback dining

Nostalgic foods have been a trend for a while now...

red velvet

twisted comfort foods

carnival foods

kitschy breakfast foods

s'mores

fondue

popcorn

pretzels

retro desserts

Progressive restaurants will push this trend forward with **historically-inspired menus**



Presents

A BITE THROUGH TIME

The evolution of American cuisine at

SMALLBAR

WEDNESDAY, DECEMBER 7 AT 7PM

Take a walk through American cuisine with Time Out Chicago's Dining & Libation Society at SmallBar. Chef Justin White, voted one of Chicago's rising chefs by Time Out Chicago, and owner Phil McFarland take guests through the evolution of American cuisine, course by course, from the 1960s–2000s. Each dish will be paired with beers by Greenbush Brewery, most of which have never been served in Chicago before. The evening will be hosted by Time Out Chicago's Food and Drink Editor, David Tamarkin.

Limited tickets available; reserve your seat today

CLICK HERE
FOR TICKETS **ONLY \$55**



Tickets are non-transferrable and non-refundable. Menu is prix fixe and dietary restrictions cannot be accommodated. Guests must be at least 21 years of age.



“the evolution of American cuisine”... one course at a time

TV Dinners from the 80's



First course (1960s)

Apple and white cheddar gougere with city honey glaze, paired with Greenbush Brewing Closure Pale Ale

Second course (1970s)

S.O.S. (***) on a shingle) foot-long crouton slathered in house-dried beef and drunken black currents with stacked romaine and 1000 island, paired with Greenbush Brewing Brother Benjamin Imperial IPA

Third course (1980s)

Baked Amish chicken thigh with glazed "rock n' roll" carrots, potato mash and red eye gravy, paired with Greenbush Brewing/SmallBar collaboration Mr. Hyde

Fourth course (1990s)

Molten local goat cheese with portobello skin and balsamic drizzle, paired with Greenbush Brewing Ursus

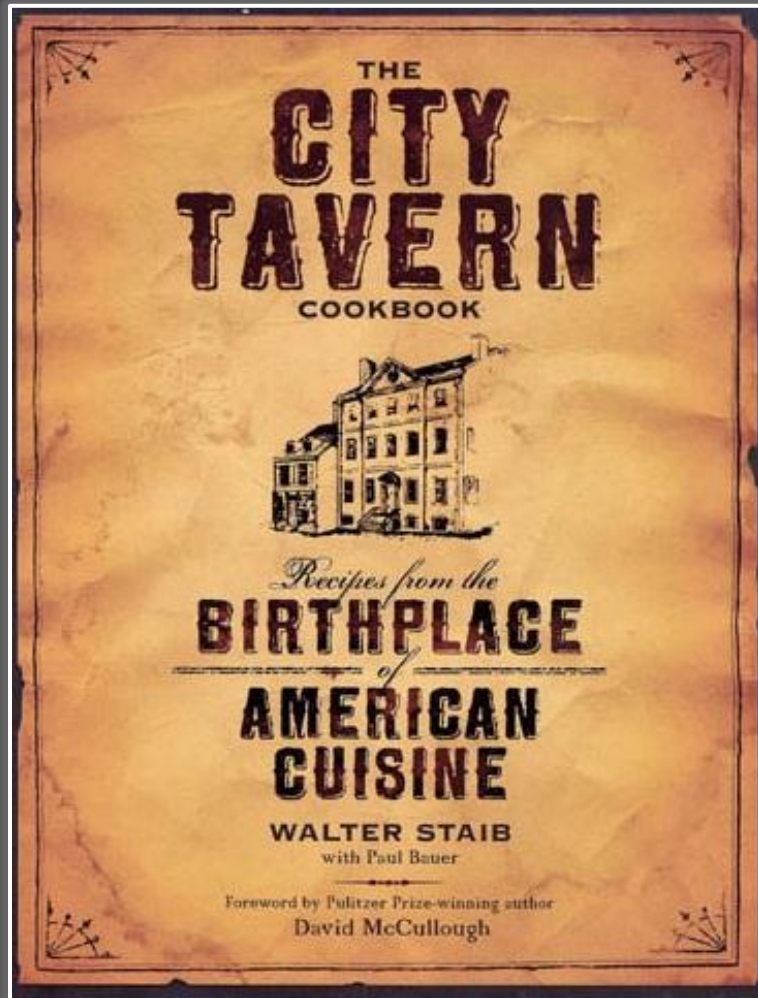
Fifth course (2000s)

Squash and burnt-orange creamsicle with citrus vapor, paired with Mr. Hyde aged in Journeyman Distillery whiskey barrels

Molecular gastronomy from the 2000's



City Tavern (Philadelphia)



West Indies Pepperpot Stew

A spicy colonial classic. Beef, taro roots, and greens.



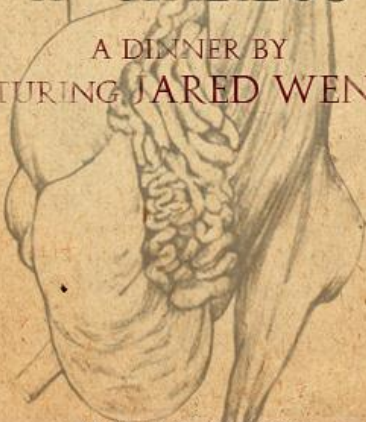
First Lady Martha Washington's Cake Recipe



MONDAY, OCTOBER XVII, MMXI

I ♣ EPIMELES
II ♣ SARCOPTES
III ♣ CEPUROS
IV ♣ PANDECTER
V ♣ OSPREON
VI ♣ AEROPETES
VII ♣ POLYTELES
VIII ♣ TETRAPUS
IX ♣ THALASSA
X ♣ HALIEUS

A DINNER BY
CRUX FEATURING JARED WENTWORTH



\$140 PER PERSON
ADDITIONAL \$60 OPTIONAL WINE PAIRING
FOR RESERVATIONS EMAIL CRUXRESTAURANT@GMAIL.COM
HOSTED BY PENSIERO RISTORANTE

the Apicius event

Crux / Pensiero Ristorante (Evanston, IL)

THE MEAT-MINCER

langoustine sausage, spelt, veal brains

THE GARDENER

bone marrow, peach, pennyroyal, caraway

PULSE

tripe, truffle, leek, amarynth

BIRDS

squab, smoked cheese fondutta

THE FISHERMAN

sweetbread crusted rouget, parsley root, fermented garlic

THE QUADRUPED

venison, textures of fruit

THE GOURMET

roasted foie, grape filled torchon, honey

THE CAREFUL HOUSEKEEPER

fig, ancient cheese, rue

MANY INGREDIENTS

sweet dish

So these examples might seem a little “out there”...

But remember, trends often start in fine dining... and then evolve into populist movements that are more accessible to the masses.

Look for historic menu inspirations to accelerate at cutting edge restaurants, ultimately influencing a new wave of “progressive nostalgia” for the broader market.



High-Flavor
HEALTHY

Consumers always SAY they want healthy options...

% who feel it is at least somewhat important to offer healthy choices at...

	Total	Men	Women
QSR	69%	67%	72%
Fast-Casual	81%	77%	86%
Midscale	80%	76%	84%
Casual Dining	82%	77%	87%
Fine Dining	76%	71%	80%

But this often gets derailed due to perceived taste concerns

	Total
Doesn't taste good	40%
More expensive	38%
Want to indulge when eating out	38%
"Healthy" claims not believable	35%
Not convenient	32%
Preferred foods aren't offered in healthy versions	31%
"Healthy" claims not believable (overall)	29%
Restaurants don't designate healthy options	26%
Healthy options not available on menus	25%
Healthy portions are too small	23%
Too busy	21%
Just eat small portions instead	14%
Embarrassing to order	4%

Healthy items often cost more, but offer less...

Average Prices	Total Burgers	Turkey Burgers
Quick Service	\$5.19	\$6.06
Midscale	\$7.25	\$7.99
Casual	\$8.34	\$8.91
Fine Dining	\$10.49	\$10.36
ALL	\$ 7.28	\$ 7.96

Incidence of Toppings	Total Burgers	Turkey Burgers
Cheese	62%	34%
Bacon	19%	5%
Cheddar	14%	6%
Swiss	11%	9%
Mushroom	9%	6%
BBQ	6%	2%

pay more...

...but get less

But healthy items don't have to be bland...

CHILE VERDE TURKEY BURGER

homemade half pound lean ground turkey patty, topped with **fire-roasted anaheim chiles**, **grilled onions**, **jack cheese**, lettuce, tomato and our **roasted pepper aioli**. served on a **brioche bun**.

TURKEY BURGER

100% ground turkey breast, no dark meat, no skin and no fillers. an 8 ounce free-range turkey breast patty seasoned with **apples**, **chipotle sauce**, onions, celery, **chutney** with **muenster cheese**, **grilled onion**, and **avocado slices**. served on a **brioche bun** with a side of ranch dressing.

TURKEY BURGER

red onion, **jam**, **brie**, **cranberry mayo** and **sweet potato crunch**.

BATALI & BASTIANICH

MM

MEATLESS MONDAY

Visionary chefs are taking on the challenge with healthier options that put taste and flavor first.

Mario Batali features
MEATLESS MONDAY
at 14 of his restaurants



Casa Mono (New York)

Bavette

with ramps, breadcrumbs and pecorino



Babbo Enoteca (New York)

Paffenroth Farm's beet salad

with chive cuajada (yogurt, minced chives, lemon, red onion), salted honey almond granola from Hawthorne Valley Farms and pea tendrils from Bohditree Farms.



Enoteca San Marco (Las Vegas)

Bon Breads Focaccia

drizzled with basil oil and stuffed with grilled eggplant and peppers. Finished with basil from Hydrogreens in Pahrump, NV and fresh mozzarella. Garnished with a small salad of mixed greens coming from Quail Hollow farms in Overton, NV.



Today, “healthy” means so much more than just fat, calories, and sodium.

Look for progressive chefs to deliver **high-flavor options that showcase healthy elements** (even if the dish wouldn’t be considered healthy by traditional standards):

- Powerfoods (kale, quinoa, etc.)
- New cooking oils
- Fresh, natural, and organic
- Ultra local
- Innovative veggie dishes

The road ahead...

- Industry returns to innovation
- Breakfast continually redefined
- Ethnic mash-ups
- History repeats itself
- Health and indulgence intersect

