



SEPTEMBER 2014

FoodBytes

WHAT'S ON TAP?

THE LATEST BREWPUB TRENDS AND OPENINGS



A TOPICAL TREND REPORT FROM

 DATA SSENTIAL

BARREL HEAD BREWHOUSE

SAN FRANCISCO, CA

At San Francisco's Barrel Head Brewhouse opened in March of this year, the house brews include the **Silence Dogwood Porter** brewed with pumpkin, corn, and molasses (and based on Ben Franklin's historic recipe) and **Nicholas Tipples' Roggenbier**, an Old Bavarian-style rye beer. At Barrel Head the beers are also used in the house "brewtails," or beer cocktails. The gastropub menu features classics (**French onion soup, fish and chips**) and more innovative options (a "**Fresh to Death Risotto**" with sweet corn, heirloom baby tomatoes, broccolini, shaved goat gouda, and house-grown pea tendrils, the "**Totally Worth \$4 But Is Only \$3.50 Toast**" with chicken liver pate and balsamic cherries).



AN UNQUENCHABLE THIRST FOR CRAFT BEER

Brewpubs continue to open across the country, introducing new brews and an evolving menu

According to Berkeley, California's Triple Rock Brewery & Ale House, when the original founders opened the brewpub in 1986, there were only five brewpubs operating in the entire U.S. Times have changed. Today a new brewpub opens seemingly every week, and even some of the smallest towns in the country have a small pub or restaurant brewing their own beers. Today there are well over 2,500 craft breweries across the U.S., including a new generation of microbreweries and tiny, often experimental, nanobreweries. Craft beer has become big business, with even long-time producers surprised by the ever-increasing annual sales.

This increased number of breweries means there are now a wider variety of beer styles available, catering to every taste, from trending ciders, saisons, and fruit beers to a new generation of drinkable, low-alcohol beers introduced as a reaction to the hoppy, bitter styles that prevailed for a number of years. Seasonal beers have also skyrocketed, often using unique local ingredients sourced from nearby farmers. With Oktoberfest and football season on the horizon, pumpkin beer continues to explode in popularity – the Brewers Association noted that pumpkin beer even outsold IPAs, the most popular year-round beer style, last October, according to *USA Today*. According to Datassential MenuTrends, pumpkin beer is up 186% on beer menus over four years ago.

The brewpub menu is also evolving, with more innovative dishes and globally-inspired cuisines found on today's menus. Lighter fare and more vegetable-focused dishes have earned a prominent place at brewpubs, and now you'll find roasted beet sandwiches and cauliflower gratins next to charcuterie boards and more unusual cuts of meat like pig knuckles and beef shins. Brewpubs are also updating classic European cuisines, adding innovative spaetzles or updated pierogis, while others are taking inspiration from Japanese izakayas, Latin street foods, and beyond.

In this month's edition of FoodBytes, we take you on a tour of some of the most recent brewpubs that have opened across the country, from the new brews found on today's taps to current trends on the brewpub menu. We travel from Coral Gables, Florida to Portland, Oregon – home to more breweries than any other city on earth, with even more brew pubs on the horizon (and stay tuned for our upcoming issue of *Dine Around: Portland*, releasing this November, and *World Bites: Germany*, releasing next month).



Wicked Weed Brewing Company's "Funkatorium" is dedicated to producing sour beers.

WICKED WEED BREWING CO.

ASHEVILLE, NC

Opened only last year, Asheville, North Carolina's Wicked Weed Brewing Co. is growing fast – last month the company announced it will invest in a brand new, \$5 million facility capable of producing 50,000 barrels of craft beer a year, which comes on the heels of their new 9,000-square-foot "Funakatorium," dedicated to producing sour beers. At the original brewpub, the company's flavorful, hop-forward beers (the "hop-monster" **Freak of Nature Double IPA**, the "big, hoppy" gluten-reduced **Gluten FREEk**) are paired with a traditional, yet seasonal, menu featuring dishes like **peanuts boiled with IPA and sumac**, a **tea egg with bacon lardons**, a **turkey and brie sandwich with grilled peaches**, and **crimson snapper with fennel, grapefruit, and lemongrass**.



ECLIPTIC BREWING

PORTLAND, OR

Local brewing legend John Harris opened Ecliptic Brewing last year, where the beers are named for astronomy terms (the **Phobos Extra Red Ale**, brewed with eight different malts, is named after the Martian moon), while the seasonal menu includes snacks (**candied hazelnuts with black pepper, cauliflower escabeche**), burgers and sandwiches (a **beet melt with goat cheddar and granny smith apple**), entrees (**beer-brined pork loin with charred treviso and apricot jalapeno chutney**), and sweets (**cinnamon churros with chili chocolate, a stout float**).

EUROPEAN INFLUENCE

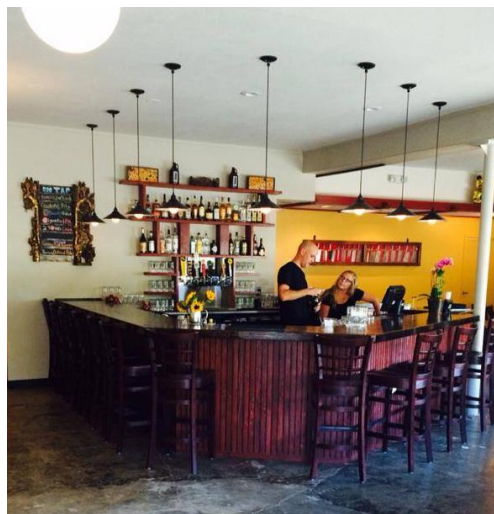
Brewpubs across the country continue to update traditional, beer-friendly European cuisines, taking inspiration from Germany, the UK, and Eastern Europe. In Coral Gables, Florida, The **Seven Dials** gastropub features "modern American cooking with a British twist" from the pub's London-born chef and owner. Menu items include fish and chips with "mushy peas," "proper" sausages with celery root-apple-potato gratin and onion gravy, and a charcuterie board with English cheeses like Welsh cheddar and white Stilton with apricots. At Detroit's **Atwater in the Park**, from Atwater Brewery, the traditional German biergarten menu features smoked knockwurst, schnitzels (including unusual variations like trout and eggplant), plus a three-pound Bier Garten Kielbasa Challenge. There are also 25 regular Atwater brews, plus 15 exclusive to the Park menu. After opening last year, New York's **Paulaner Brauhaus** from German beer company Paulaner, reconcepted and remodeled only five months later, reopening this year under new management. The new menu continues to focus on German foods, but with more innovative offerings like a **pretzel with obazda** (a Bavarian cheese and butter spread), **roggenbrote** (open-faced sandwiches), **kraut cakes** with a hefeweizen reduction, and **crispy pork knuckles with roasted potatoes**.

Paulaner Brauhaus



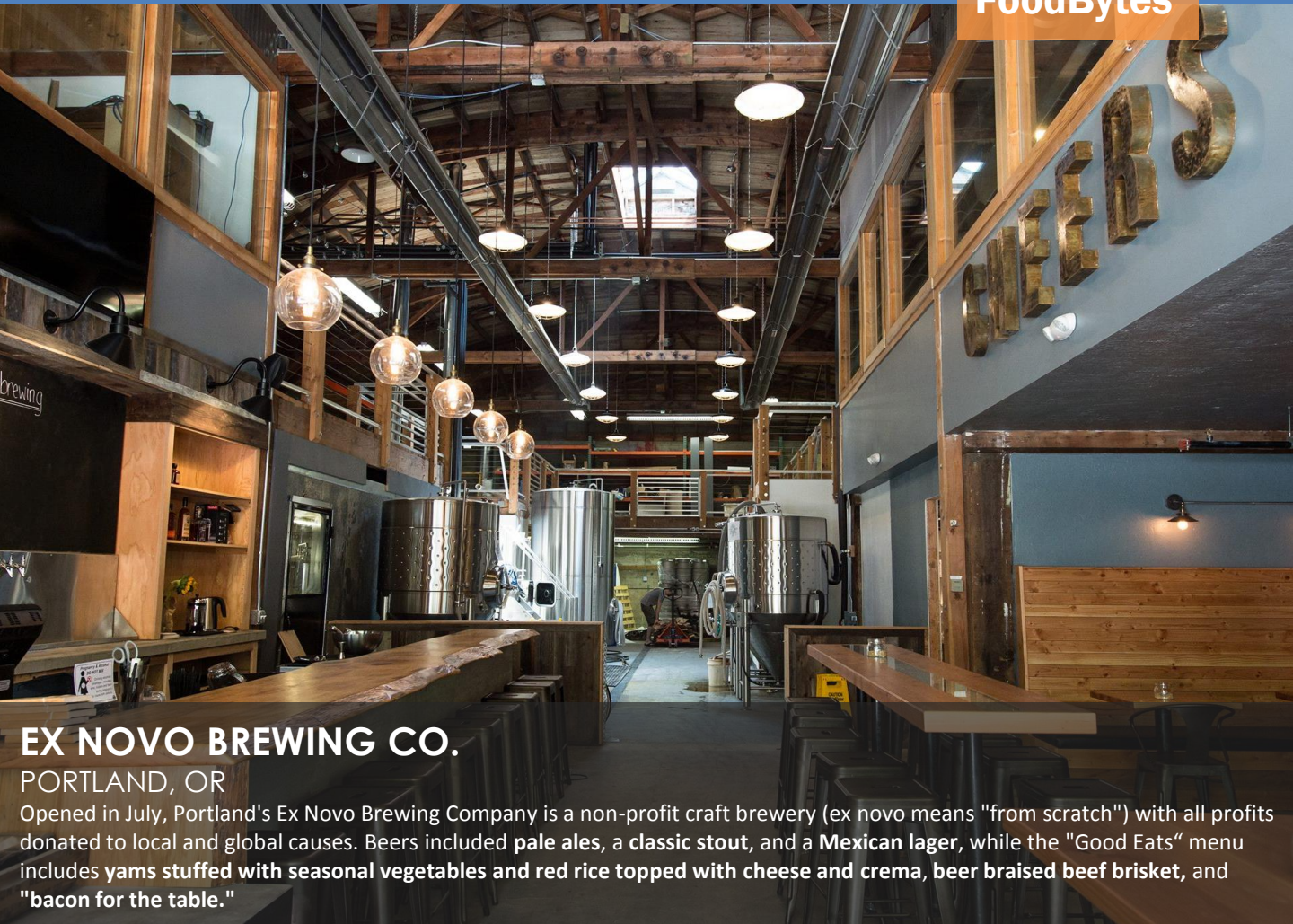
BLUEJACKET WASHINGTON, DC

Opened last fall, Washington D.C.'s Bluejacket is a "brewery without boundaries," experimenting with a variety of flavors and styles. The **Twee Horsen**, for instance, is a Belgian Ale spiced with marash peppers, grains of paradise, and Belgian endive, and finished with a dose of table salt, while the **Gander** is infused with kosher salt and both coriander seeds and flowers from the rooftop garden of a local restaurant. The brewpub menu ("The Arsenal") features a global assortment of dishes, from **Louisiana head-on shrimp with Tillamook grits and bourbon bacon** to **Kona kanpachi crudo with lemon creme fraiche and dragon's tongue beans**, plus options like a **beef heart tartare with Worcestershire sauce**, a "mids" menu of pastas, and entrees like the **twelve-hour brined chicken with pretzel stuffing**.



BTU BRASSERIE PORTLAND, OR

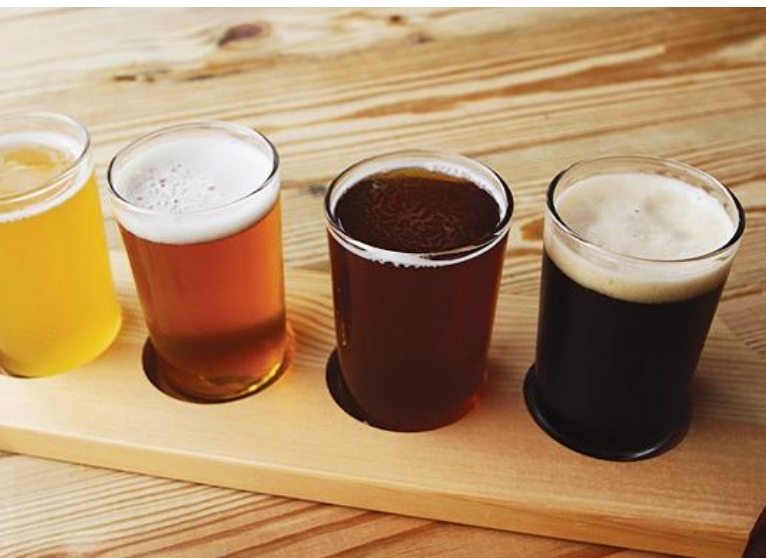
Opened late last month, Portland, Oregon's BTU Brasserie features a seven-barrel in-house brewery and a small restaurant featuring an authentic Chinese menu. You'll find **tempura fried walnuts in a sweet and pungent sauce**, **baos filled with options like smoked duck and pork belly**, and "mock eel" **fried shiitake mushrooms in a sweet soy sauce**. The beers, like their flagship Chinese rice beer, are specifically designed to pair with the menu.



EX NOVO BREWING CO.

PORTLAND, OR

Opened in July, Portland's Ex Novo Brewing Company is a non-profit craft brewery (*ex novo* means "from scratch") with all profits donated to local and global causes. Beers included **pale ales**, a **classic stout**, and a **Mexican lager**, while the "Good Eats" menu includes **yams stuffed with seasonal vegetables** and **red rice topped with cheese and crema**, **beer braised beef brisket**, and **"bacon for the table."**



CHILLY WATER BREWING CO.

INDIANAPOLIS, IN

Chilly Water opened in Indianapolis' Fletcher Place neighborhood in June, the dream of long-time local brewer Skip DuVall. The beers are focused on seasonal **pale ales**, **classic lagers**, and special brews like the **PeterPaul Coconut Porter**, while the food menu includes house-made hummus, panini (the **"Tangled Up in Cheese"** features **cheddar, smoked gouda, Monterey jack, and apple slices**), salads (the **"Chick Corea"** combines **cooked quinoa with heirloom spinach, sun dried tomatoes, chick peas, and feta cheese**), plus **"Skip's Balls"** for dessert – a combination of **cookies and cream cheese dipped in an ever-changing variety of flavors**.



BAGBY BEER CO.
 OCEANSIDE, CA

Oceanside, California's Bagby Beer Co. opened earlier this month in a huge, 8,500-square-foot space with multiple bars and dining areas. Beers include an English-inspired **Back Garden Pale Ale**, the **Continental Cream Ale**, and an Irish stout called **Asphalt Jungle**, named after the asphalt that had to be removed from the former car dealership and repair shop which now houses the brewery. The menu includes flavorful takes on bar classics, like **pork belly sliders with jalapeno jelly**, **peanut butter**, and **crispy leeks on a sweet roll**, "gringo tacos" with a choice of **seasoned ground beef** or **roasted cauliflower**, and an **ice cream sandwich sampler**.



DIRCK THE NORSEMAN
 BROOKLYN, NY

Dirck the Norseman opened in Brooklyn's Greenpoint neighborhood earlier this year, with 10 of their own beers joining a variety of imports, plus a menu featuring both European specialties (**chicken schnitzel in beer-peppercorn sauce**, **potato pierogi**) and more global inspirations (**vegetarian moussaka**, **elote**). The restaurant is named after a 17th century Scandinavian ship builder who first settled in the area.



URBAN GROWLER
 ST. PAUL, MN

Calling itself Minnesota's "first woman-owned and -brewed microbrewery," Urban Growler brews traditional beers plus a "Plow to Pint" series of beers featuring local ingredients from area farmers, like a **Rhubarb Wit** or the soon-to-be-released **Blueberry Wheat**. The small menu ranges from "Rabbit Food" (salads) to small plates and main courses, with an emphasis on sandwiches, like the **Cubano with roasted pork braised in Urban Growler Porter**.



TRADITIONAL PUB FARE

At Smylie Brothers Brewing Co., which opened earlier this year in the Chicago suburb of Evanston, they consider their **pale ale** and **IPA** "soon-to-be classics," and there are dedicated taps for **Belgian-inspired** and **"dark and roasty"** beers. They also brew **Cali Common**, a variation of California Common, a beer variety popular during the gold rush that the brewery calls the "only 100% American style of beer." The menu features options like a **warm pretzel with gouda and farmhouse ale fondue**, **white pissaladiere with IPA-melted onions and white anchovies**, and **spoon bread topped with truffle-honey butter**. At Right Proper Brewery, which opened in Washington D.C. last year, the menu combines traditional American pub fare (**wood-grilled burger**, **house-fried kettle chips**) with Southern favorites, like **fried sweet onions with spicy honey chow-chow** or **blueberry jalapeno corn muffins**, paired with beers like their **Songlines**, an Aboriginal farmhouse ale aged for four months or the **Hallogallo**, an American Primitive beer brewed with mugwort, yarrow, and anise hyssop. Opened last year, Barren Hill Tavern & Brewery, located near Philadelphia, features a variety of house brews, like the new **Lemongrass Saison**, brewed with two pounds of fresh lemongrass, or the **Good & Plenty**, brewed with star anise and aged on La Colombe coffee. The elevated gastropub menu features dishes like the **duck fries, with gravy**, **duck confit**, and an **IPA cheese sauce** and **diablo mussels, with wheat beer, shallots, hot sauce, and bacon**.

(From Top) The Diablo Mussels at Barren Hill Tavern & Brewery; the Session Salad, with beets, breakfast radishes, and hop pickled vegetables at Smylie Brothers; beers from Washington DC's Right Proper Brewery.



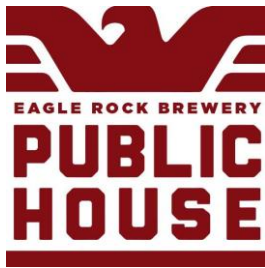
COMING SOON

The craft brewpub market isn't slowing down anytime soon – a number of new breweries are scheduled to open in the upcoming months in cities across the U.S. and Canada. Here are a few notable openings to look out for:



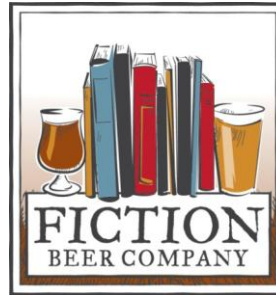
STEEL TOAD VANCOUVER, BC

In Vancouver, stay tuned for Steel Toad Brewing Company, scheduled to open in the next few weeks, which will feature both a dining room and dining hall, the latter featuring small plates like **cauliflower beignets** and full dinners like **beef shin ragu**, with more substantial offerings in the dining room, including lunch and brunch.



EAGLE ROCK PUBLIC HOUSE LOS ANGELES, CA

Los Angeles' Eagle Rock Public House, the soon-to-open brewpub from local microbrewery Eagle Rock, will feature a menu that purposefully steers away from pub staples like burgers and pizza, instead opting for a **raw bar oyster and crudo program** and **large-format cuts of meat to be shared by groups of people**, while a subsequent attached brewhouse will brew small-batch brews exclusive to the location.



FICTION BEER COMPANY DENVER, CO

At Denver's Fiction Beer Company, opening later this month, all of the beers are inspired by categories of fiction (the "fantast/sci-fi" creations are experimental brews) all served on a bar made from hundreds of hardcover books.



GATEWAY BREWING PORTLAND, OR

Portland, Oregon's Gateway Brewing will serve craft beers, like an ale inspired by **Czech lagers**, plus a pizza-focused menu, in what the owners are calling the city's first "family-friendly" brewpub. Brewer Joel Sheley is currently brewing beers under the Gateway label from his garage nanobrewery.



HALF DOOR BREWING CO. SAN DIEGO, CA

In San Diego, Half Door Brewing Co. is set to open this winter with a menu of updated Old World dishes and New World comfort food, plus a beer menu inspired by traditional **Irish stouts and lagers**. Co-owners (and siblings) Stacy and Dan Drayne are remodeling a 1906 house with a wrap-around patio and double-decker dining room and brewhouse.

BREW PUB INSIDER

What are top brewpub chains adding to the menu? We leveraged MenuTrends INSIDER, which gives you an always-up-to-date view of the latest menu additions and LTOs at top chain operators across the country, to check out the beers, ingredients, dishes, and trends that you'll find on brewpub menus across the country.



BJ'S RESTAURANT & BREWHOUSE

Just in time for football season, BJ's added three brand new shareable "Deep Dish Dips" to the menu last month. Options include **BJ's Fritos Nachos**, made with Piranha Pale Ale Chili; **Pepperoni Pizza Dip** made with herb-infused cream cheese, pizza sauce, and topped with cheese and pepperoni and served with rosemary focaccia crostinis; and **Carnitas Fries with Chile Verde**, which smothers crispy thin fries with twice-cooked shredded pork and green chile sauce. And this month the chain brought back their **Field Day IPA**, brewed with hops picked fresh from the fields.



RAM RESTAURANT & BREWERY

Ram added 25 new items to the menu last month, many on their all-new happy hour menu. New dishes include **Pickle Chips** with rosette sauce; **"Vampire Fries"** with garlic oil, fresh grated garlic, and garlic sour cream; house-made **Corn Dog Lollipops** with beer mustard; and **"Smotherload" Waffle Fries** with Amber Ale cheese sauce, bacon, jalapenos, and green onion. Last month the chain added a Belgian-style farmhouse ale, the **Sunday Saison**, to the menu, and this month sees the reintroduction of their **Oktoberfest** beer and related menu.



GRANITE CITY FOOD & BREWERY

At Granite City, the monthly "Chef's Features" LTO menu for August included something for every taste, from a **Sausage, Pepperoni, and Mushroom Flatbread** on crispy lavash to a **Taco Burger**, plus seafood options that included **Ahi Tuna Wontons** and a **Prosciutto-Wrapped Salmon** entrée in lemon butter. They also tapped their **Blue-Eyed Brunette Bourbon Brown Ale**, which begins in the chain's Elijah Craig bourbon whiskey barrels and is finished with bourbon-infused oak spirals. And this month the brand introduces **Oktoberfest Lager** to the beer menu.



GORDON BIRSCH BREWERY RESTAURANT

Last month's new small plates menu saw a number of new additions to Gordon Biersch restaurants, from seafood options like the **Lox & Blue Crab Melt** and **Ahi Tuna Carpaccio** to slider options that include **Beef Tenderloin** on a garlic-butter grilled bun and **Pecan-Crusted Chicken & Pear** topped with a pear chutney. And this month's Oktoberfest menu encompasses a wide variety of German favorites, from a **Traditional Sausage Platter** with sauerkraut-bacon potato croquettes to **Black Forest Cake** for dessert, plus **Fest Bier** amber lager on tap.



ROCK BOTTOM RESTAURANT & BREWERY

At Rock Bottom, the "Rocktoberfest" menu combines traditional German favorites with global inspiration. The **Rocktoberfest Combo** features jalapeno pretzel stix, beer-simmered sausages, and jalapeno spinach cheese dip, while both the sausage platters and mac n' cheese menu have three options – German, American, and Latin. The **Latin Mac 'N Cheese**, for example, simmers chorizo sausages in Rocktoberfest beer, which is sliced and served in mac n' cheese with mushrooms, tomatoes, Swiss cheese, breadcrumbs, and onions.

Datassential Releases
Next MenuTrends Keynote Report

sandwiches

Datassential is proud to release the next report in the new MenuTrends Keynote series delving into sandwich behaviors and trends. MenuTrends Keynotes combine the extensive detail of MenuTrends with the opinions and behaviors of over 1,000 sandwich consumers nationwide and insights from hundreds of operators from Datassential's OPERA panel, the industry's largest with over 30,000 restaurant, retail and on-site operators.

DISCOVER ALL OF THE FOLLOWING INSIGHTS ON SANDWICHES:

- **Details on the current sandwich landscape** – what sandwiches are consumers eating and how are they eating them at-home and away-from-home (types, motivations and frequency)
- **Sandwich drivers and barriers both at-home and away-from-home** – motivations and selection criteria for locations and ingredients
- **Deep dive into sandwich megatrends** – consumer awareness, appeal and interest in specific carriers, ingredients and menu examples
- **Extensive menu detail** – menu adoption cycles for sandwich varieties, carriers/breads, proteins, cheeses and sauces/flavors, top menued sandwiches and ingredients along with the fastest growing ingredients and flavors
- **Carrier and ingredient deep dives** – extensive detail on top trends by segment, region, generation and more for breads/carriers, meats/proteins, cheeses, toppings and vegetables and sauces/condiments and flavors
- **Operator usage detail** – which products and formats they purchase for carriers, proteins, cheeses and sauces/condiments
- **Retail opportunities for sandwiches** – opportunities for breads/carriers and other areas for innovation.

**Reports in the MenuTrends Keynote series are priced at \$6,500 per topic.
Discounts are available with the purchase of multiple topics.**

TOPICS COVERED IN LAST MONTH'S TRENDSPOTTING REPORTS

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DINE AROUND

In August's issue of Dine Around, we traveled to Santa Fe, NM, a town with its own unique culinary culture— and it all starts with the **chile**. In fact, New Mexico is the only state with an official question – red or green? – referring to the choice between red or green chile on almost every dish. You'll find everything from **tamales** to **sopaipillas**, **green chile cheeseburgers** to **bacon-wrapped elk tenderloin**.

UPCOMING: We travel to Hudson Valley, New York for their American regional cuisine.



ON THE MENU

In the August issue of On the Menu, we discovered the global flavors of **bao** and **chorizo**, checked out pub fare with **Welsh rarebit** and operators using **beer as an ingredient**, and contrasted the light, mellow flavor of **oyster mushrooms** with the deep, rich flavor of **dark roast coffee**. And our extensive coverage of new menu items and LTOs covered operators who are **enticing Millennials with new menu options**.

UPCOMING: We cover bergamot, tatak, giardiniera, ginger beer, buttermilk, and grapefruit.



CREATIVE CONCEPTS

In the first of our two-part special series on recent restaurant revamps, we looked at chains across the country that **have updated their décor, concept, and menu**. You'll find all of the latest trends, from the design elements that are becoming standard at today's chains to the menu items that have become must-haves. We also brought you extensive consumer data, including dish appeal and reactions to revamped concepts.

UPCOMING: We look at recent revamps at independent operators across the country.



WORLD BITES

In World Bites, we sought out the refined-yet-rustic cuisine of **Greece**, inspired by thousands of years of history and influence. With consumers showing an interest in everything from the Mediterranean diet to Greek yogurt and tzatziki, now is the time understand the authentic flavors, dishes, and ingredients of Greece, including **saganaki**, **moussaka**, **souvlaki**, **pastitsio**, **baklava**, and **ouzo**.

UPCOMING: In October we check out the authentic dishes and flavors of Germany.



INTERNATIONAL CONCEPTS

August's International Concepts took you to **France**, where the culinary landscape is changing quickly. In this issue we covered a **steakhouse chain** with Texas ribs on the menu, the country's second most popular **burger chain** after McDonald's, and a chain of restaurants that specializes in "**French pizza**." And we brought you the ingredients and flavors that are ubiquitous on French menus – **chive sauce**, **macarons**, **tartares**, and more.

UPCOMING: We travel to South Africa, the gateway to the African market.

NEVER MISS OUT ON A TREND!

Contact Maeve Webster at 312-655-0596 or maeve.webster@datassential.com to subscribe.

A MAJORITY OF CONSUMERS SAY THEIR TASTES ARE SHAPED BY THEIR RESTAURANT EXPERIENCES

What's happening on the menu today can be a leading indicator of tomorrow's food trends.

Datassential MenuTrends tracks 7,000 distinct US restaurants and over one 1 million menu items. Because the database is designed to mirror the US restaurant census by segment, region, and menu type, MenuTrends is the only system that offers true projectable data. All segments and cuisine types are tracked extensively – from food trucks to fine dining.

MenuTrends INSIDER is also updated every month with Limited Time Offers (LTOs) and other new menu activity, with product photos that bring the listings to life. And with thousands of ready-to-use reports and simple trend detection tools, you can jump right into the database, identifying, measuring, and predicting the food and flavor trends that matter to your business.

Call us today to begin using the food industry's authoritative resource for flavor trends.

Call Jana Mann at 312-655-0595 or email jana.mann@datassential.com.

STARTERS

Fish soup, croutons, aioli
Shallot tart tatin, rocket and manchego
Spiced aubergine salad, crème fraiche, coriander
Warm smoked haddock rarebit, tomato s
Roast scallops, cauliflower purée, confit pork belly
Marinated sardines, beetroot, potato salad
Beet mustard dressing
Porteaux sausage, poached egg, fresh parsley potatoes
Chicken liver and foie gras parfait
Toasted brioche

AINS

amic roasted cherry tomato risotto, ef and parmesan
dory, parsnip purée, artichokes, t juices
of black bream,, boulangere potatoes, and pea broth
pollock, leeks and mussel sauce
of beef with creamy mash
pring greens
ed halibut, lemon potatoes, brown s, spring onions
alized red onion tart, seared courgette non Weaver blue cheese
hicken jardinière
ood pigeon, anna potato, savoy ge, thyme jus

like you to know that some of our dishes may contain nuts and that we do not
include VAT. A discretionary service charge of 10% will be added to your b



HUNGRY FOR MORE?

This is just a small taste of the research and data we have collected in order to make accurate, data-backed trend identifications. Now let Datassential take you deeper into the implications of these trends and what they mean for your company.

We can take you behind the data that shows how restaurant menus are shrinking and morphing, show you an in-depth look at the surprising demographic data on consumers (including Millennials) that informed these trends, and show you real-world examples of every trend covered.

And it's all backed by the industry's most accurate and trusted menu database, MenuTrends, and the industry's largest operator research panel, OPERA.

To start putting these trends to work for you, contact Datassential today:

1-312-655-0596
info@datassential.com