

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"International cuisines, flavors, and ingredients continue to be an area of opportunity in both foodservice and retail. Young consumers in particular represent a key opportunity as they show high interest in international foods but lack the skills required to actually cook international cuisine at home."

- Caleb Bryant, Senior Foodservice Analyst

This report looks at the following areas:

- Interest in Americanized foods is fairly high
- Lack of skills/knowledge remain barriers to cooking international foods at home
- International foods/flavors are not a silver bullet

While many consumers still prefer Americanized international foods, brands that highlight the authenticity and cultural history around international foods are poised to connect with many consumers.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

_{АРАС} +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know Definition

Executive Summary

The issues

Interest in Americanized foods is fairly high

Figure 1: International food attitudes, by gender and age, October 2017

Lack of skills/knowledge remain barriers to cooking international foods at home Figure 2: Barriers to cooking international foods, October 2017

International foods/flavors are not a silver bullet

The opportunities

Grocery-branded meal kits and authentic cooking techniques are opportunities in both retail and foodservice Figure 3: Interest in international offerings in retail/restaurants, October 2017

Highlight the cultural experience of international foods

Figure 4: International food attitudes, October 2017

International baked goods may be a white space opportunity

Figure 5: Interest in international flavors by retail food, any cuisine type, by age, October 2017

What it means

The Market – What You Need to Know

Demographic changes favor international cuisines

Interest in home cooking grows

Plant-based meals are trending

Market Factors

The US is becoming more diverse

```
Figure 6: Population by race, 2012-22
```

Figure 7: Population by Hispanic origin, 2012-22

Consumers are increasingly interested in international food

Figure 8: Food attitudes, any agree, summer 2013-17

Nearly 9% of consumers are vegetarian

Figure 9: Vegetarian self-identification, summer 2013-17

The number of cooking enthusiasts continues to grow

Figure 10: Share and approximate number* of Cooking Enthusiasts, 2014-17

Figure 11: Motivations for cooking at home, by all cooks and Cooking Enthusiasts, September 2017

Small kitchen appliances see AH penetration growth

Figure 12: At home penetration of appliances

Over half of parents are foodies

BUY THIS REPORT NOW



Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Key Players – What You Need to Know

International influences boost packaged yogurt and frozen meals

International breakfast comes to restaurants

International flavors alone can't save a category/restaurant

Bridge the gap between from scratch and fully prepared meals

Private label is an opportunity for growth

What's Working?

Feelin' hot and the search for the next sriracha

The contenders

It's not all Greek for yogurt

International flavors bring excitement to frozen meals

Breakfast/brunch goes international at restaurants

Figure 13: Internationally inspired breakfast/brunch meals

Bowls are the go-to platform for international flavors in foodservice

What's Struggling?

International flavors can't save all categories

Mainstream casual dining chains get back to the basics

What's Next?

CPG brands offer convenient products to make any meal international

Nice rice

Figure 14: Interest in flavored rice or grain mixes, January 2016

Sensational sides

Sauces and seasonings provide convenience/versatility

Build butcher sales with value-added meats

Restaurant concepts to watch

Indian concepts

Mediterranean concepts

Chefs innovate vegetarian/vegan dishes

International flavors make their way to private label

Peppers proliferate

Figure 15: Growth of select peppers/chilies as an ingredient on menus, Q3 2015-Q3 2017

International Cuisine Trends

Korean

Figure 16: Food products launched with "Korea" or "Korean" in product name/description, 2013-17

Figure 17: Korean dishes on menus, Q3 2015-Q3 2017

Figure 18: Korean-inspired restaurant dishes

Korean cuisine Flavor Matrix

Figure 19: Menu flavor matrix, top 10 Korean ingredient flavors, Q3 2015-Q3 2017

BUY THIS REPORT NOW



Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

African

Figure 20: African-inspired restaurant dishes

African cuisine Flavor Matrix

Figure 21: Menu flavor matrix, top 10 African ingredient flavors, Q3 2015-Q3 2017

Filipino

Figure 22: Warm Belly Bakery Ube Cookie

Figure 23: Filipino-inspired restaurant dishes

Filipino cuisine Flavor Matrix

Figure 24: Menu flavor matrix, top 10 Filipino ingredient flavors, Q3 2015-Q3 2017

The Consumer – What You Need to Know

Consumers find inspiration all around them

Connect with young consumers

Authenticity is important, but subjective

Restaurants provide an entry point to new cuisines

International Cooking Inspiration

Inspiration comes from many sources

Figure 25: International cooking inspiration, October 2017

Women often utilize websites and magazines

Figure 26: International cooking inspiration, by gender, October 2017

Social media is the go-to source of inspiration among the youngest consumers

Figure 27: International cooking inspiration, social media, by age, October 2017

Figure 28: Top five sources of inspiration (indexed against all consumers), by age, October 2017

Foodies are highly engaged with cooking

Figure 29: International cooking inspiration, by foodie status, October 2017

Parents are on the hunt for new recipes

Figure 30: International cooking inspiration, by parental status and age, October 2017

Figure 31: International cooking inspiration, by parental status (any age) and gender, October 2017

Barriers to Cooking International Foods

Lack of access and knowledge are major issues

Figure 32: Barriers to cooking international foods, October 2017

Opportunity to educate food fans

Figure 33: Barriers to cooking international foods, by foodie status, October 2017

Getting men in the kitchen

Figure 34: Barriers to cooking international foods, by gender, October 2017

Youngest consumers are interested in international foods but lack confidence

Figure 35: Barriers to cooking international foods, by age, October 2017

Foodservice options are ideal for those who prefer Americanized meals

Figure 36: Barriers to cooking international foods, by international food attitudes, October 2017

BUY THIS REPORT NOW



Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Interest in International Flavors by Retail Food

Consumers interested in spicing up everyday meals

Figure 37: Interest in international flavors by retail food, any interest, October 2017

Figure 38: Interest in international flavors by retail food, by cuisine type, October 2017

Figure 39: Interest in international flavors by retail food, by cuisine type, October 2017

From conchas to baklava, strong opportunity for international baked goods

Figure 40: Interest in international flavors by retail food, any cuisine type, by age, October 2017

Figure 41: Interest in international flavors by retail food, baked goods by cuisine type, among 18-24-year-olds, October 2017

Reaching Hispanic and Asian consumers with international foods

Figure 42: Interest in international flavors by retail food, any cuisine type, by race/ethnicity, October 2017

Interest in International Food Retail Offerings

Prime opportunity for meal kits at grocers

Figure 43: Interest in international offerings in retail, October 2017

Interest in International Flavors by Menu Items

International flavors are common in foodservice but be cautious with consumer favorites

Figure 44: Interest in international flavors by menu items, any cuisine, October 2017

Figure 45: Interest in international flavors by menu items, by cuisine type, October 2017

Figure 46: Interest in international flavors by menu items, by cuisine type, October 2017

Younger multicultural consumers drive international flavor interest

Figure 47: Interest in international flavors by menu items, any cuisine, by age and by race/ethnicity October 2017

Interest in International Offerings in Restaurants

Authenticity is key when serving international foods

Figure 48: Interest in international offerings in restaurants, October 2017

Authenticity is most important to moms

Figure 49: Interest in international offerings in restaurants, by parental status, age, and gender, October 2017

International Cuisine Tracker

Most international cuisines are sourced from restaurants

Figure 50: Emerging international cuisine purchase, November 2017

International food consumption related to age/location

Figure 51: Emerging international cuisine purchase, any consumption, by generation, November 2017

Figure 52: Emerging international cuisine purchase, any consumption, by area, November 2017

International Food Attitudes

Highlight the exploratory nature of international foods

Figure 53: International food attitudes, October 2017

Americanized products appeal more to men

Figure 54: International food attitudes, by gender and age, October 2017

Simplicity is important to both foodies and food fans

BUY THIS REPORT NOW



Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 55: International food attitudes, by foodie status, October 2017

Figure 56: CHAID analysis – International food attitudes, October 2017

Black and Hispanic consumers connect food with their heritage

Figure 57: Latin Food Feud ad, Coke, May 2017

Figure 58: International food attitudes, by race/ethnicity, October 2017

Appendix – Data Sources and Abbreviations

Data sources Consumer survey data Consumer qualitative research Mintel Menu Insights Mintel Purchase Intelligence Abbreviations and terms Abbreviations Terms Appendix – The Consumer

CHAID analysis methodology

BUY THIS REPORT NOW