"The impact of immigration will undoubtedly continue to affect Canadians’ demand for and usage of ethnic foods."
- Joel Gregoire, Senior Food & Drink Analyst

This report looks at the following areas:

- Established Western brands need to adapt to a changing demographic landscape
- 'Authenticity' is important for Canadians when considering ethnic-inspired foods
- Many consumers see conventional mealtime options as 'monotonous'

Canadians agree that they are more open to eating ethnic-inspired foods compared to a few years ago. This suggests that a focus on providing options that allow consumers to explore other flavours and cultures through food does not need to be directed at only Canadians originally from other countries, but extends to the overall population.

DID YOU KNOW?
This report is part of a series of reports, produced to provide you with a more holistic view of this market.
Table of Contents

Overview

What you need to know
Definition

Executive Summary

The issues
Established Western brands need to adapt to a changing demographic landscape
'Authenticity' is important for Canadians when considering ethnic-inspired foods
Figure 1: Attitudes related to authenticity in ethnic-inspired foods, November 2015
Figure 2: Chocolate hawthorn sticks (China), September 2015 and milk flavoured wafer white chocolate (China), June 2015
Many consumers see conventional mealtime options as 'monotonous'
Figure 3: Percent of consumers who agree ethnic-inspired dishes help break the monotony at mealtime (any agree), by presence of children, November 2015
The opportunities
Less used yet highly demanded foods offer an opportunity to differentiate
Figure 4: Ethnic-inspired foods have not tried but interested in trying, November 2015
Areas of exposure for ethnic-inspired foods among Canadians
Figure 5: Attitudes towards eating ethnic-inspired foods (any agree), November 2015
Foreign-born consumers are open to ethnic-inspired foods
Figure 6: Attitudes towards eating ethnic-inspired foods, foreign-born consumers vs those born in Canada (any agree), November 2015

What it means

The Market – What You Need to Know

Canada’s growth supported by immigration
Inflation at grocery impacting Canadians

The Market – Market Factors

Immigration fuelling Canada’s population growth
Figure 7: Foreign-born share of population by G8 country and Australia
Canada is experiencing a "baby boomlet"
Figure 8: Projected trends in the age structure of the Canadian population, 2014-19
Canadians feeling the pinch of inflation at grocery
Figure 9: Historical Canadian/US currency rate comparisons, December 2011-December 2015

Key Players – What You Need to Know

Retailers adapting to service evolving consumer base
Asia can be a source of inspiration for innovation

Key Players – What’s Working?

Move by retailers to address demands of foreign-born Canadians

Key Players – What’s Struggling?
Ethnic Foods and Flavours - Canada - February 2016

Challenges ahead for ‘conventional’ banners

**Key Players – What’s Next?**

Asia as inspiration for flavour innovation

- Figure 10: Top cooking sauce flavours launched in Asia Pacific, 2011-15 combined
- Figure 11: Campbell’s Everyday Gourmet Soup (Canada), March 2014

Making ethnic-inspired foods relatable to Canadians

- Figure 12: Woolworths’ Kylie Kwong sauces and meal kits (Australia), 2015
- Figure 13: Compliments presents Jamie Oliver Discovers Canada, Indian Style Dip, December 2013 and Piri Piri Seasoning (Canada), January 2014
- Figure 14: President’s Choice World Flavours of Tex-Mex Beef Thin Crust Pizza (Canada), November 2015 and Lasagne, December 2013

The Consumer – What You Need to Know

Ethnic-inspired foods are a means for exploration

Opportunity to leverage African and Filipino cuisines

Fusion supports creativity and palatability

The Consumer – Canadians’ Perceptions of Ethnic Foods

Canadians see ethnic-inspired foods as breaking the monotony at mealtime

- Figure 16: Attitudes towards eating ethnic-inspired foods, November 2015
- Figure 17: VH Steamers green curry chicken (Canada), March 2012 and sweet and spicy dumplings, April 2013
- Figure 18: Chapman’s Amaretto Biscotti Gelato and Sour Cherry Tango Gelato (Canada), September 2015

Reasons why Canadians eat ethnic-inspired foods

- Figure 19: Reasons for eating ethnic-inspired foods, November 2015

Canadians look for authenticity

- Figure 20: Attitudes related to authenticity in ethnic-inspired foods, November 2015
- Figure 21: Innocent noodle pot: Malaysian rendang and Japanese ramen (UK), June 2014
- Figure 22: Spicy and creamy Indonesian stew (Netherlands), Feb 2014

The Consumer – Avenues for Exposure of Ethnic-inspired Dishes

Friends and family influence exposure to ethnic-inspired foods

- Figure 23: Agreement with the notion that friends and family influence consumers to try ethnic-inspired foods, by age, November 2015

Restaurants are a path to trying ethnic-inspired foods

- Figure 24: Avenues and barriers to trying/eating ethnic-inspired foods, November 2015

Television holds limited influence over consumption habits around ethnic-inspired foods

- Figure 25: Impact of television on trying new recipe as a reason for eating ethnic-inspired foods, mothers vs overall population, November 2015

Leverage ethnic food exposure in the kitchen

The Consumer – Interest in Ethnic Food Options

Interest in ethnic-inspired foods is on the rise

- Figure 26: Agreement with being more interested in trying ethnic-inspired foods now compared to a few years ago, by age, November 2015

Canadians are open to ‘fusion’ foods

- Figure 27: Interest in ethnic-inspired foods, November 2015

Convenience in ethnic-inspired foods is a consideration for a third of 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
APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com
The Consumer – Usage and Interest in Specific Ethnic Foods and Flavours

General openness across ethnic-inspired food types
Figure 30: Usage or interest in eating ethnic-inspired foods, November 2015

African and Southeast Asian foods represent a growth opportunity
Figure 31: Ethnic-inspired foods consumers have not eaten but are interested in trying, November 2015

Garlic, BBQ and savoury are the most 'liked' flavours
Figure 32: Popularity of ethnic-inspired food flavours, November 2015

Men gravitate towards spicy flavours, while women prefer sweet
Figure 33: Popularity of ethnic-inspired food flavours, by gender, November 2015

Age’s impact on flavour preferences
Figure 34: Popularity of flavours in select ethnic-inspired food, over-65s vs overall population, November 2015

The Consumer – Profiles of Population Segments

Those born outside of Canada have different priorities related to ethnic-inspired foods
Figure 35: Attitudes towards ethnic inspired foods, foreign-born consumers vs those born in Canada, November 2015
Figure 36: KitKat Orange Chocolate Wafer Bar (Canada), February 2015

Chinese Canadians generally more accepting of ethnic-inspired cuisines

Consumers in BC more open to ethnic-inspired dishes
Figure 37: Attitudes towards ethnic-inspired foods, BC vs overall population, November 2015

Appendix – Data Sources and Abbreviations

Data sources
Consumer survey data
Consumer qualitative research
Abbreviations and terms
Abbreviations