

Flavor Innovation on the Menu - US - September 2019

Report Price: £3695 | \$4995 | €4400

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

This report looks at the following areas:

Operators will also need to invest more in international ingredient research and development to keep pace with the quick-moving retail market.

- Sweet flavors fall from favor
- Retail raises the bar for flavor innovation
- Cater to Millennials and Hispanic consumers with flavor innovation
- Appeal to Cautious Eaters with beverages and desserts
- Don't shy away from bitter and sour flavors or seafood sauces



"Demand for flavor innovation on the menu is already high, and it's poised for continued future growth alongside the population growth of the most Adventurous Eaters: young and Hispanic consumers. Millennials in particular are hungry for less-common flavors and ingredients on the menu, spanning everything from sour flavors to seafood sauces."

– Jill Failla, Foodservice Analyst

Buy this report now

Visit store.mintel.com

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

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

- **Key takeaways**
- **The issues**
- **Sweet flavors fall from favor**
Figure 1: Flavor statement agreement, July 2019
- **Retail raises the bar for flavor innovation**
Figure 2: Percentage point change in international cuisine consumption, November 2017–August 2019
- **The opportunities**
- **Cater to Millennials and Hispanic consumers with flavor innovation**
Figure 3: Consumer eater types, by generation, July 2019
Figure 4: Consumer eater types, by Hispanic origin, July 2019
- **Appeal to Cautious Eaters with beverages and desserts**
Figure 5: Flavor trial motivators by type of menu item – NET any rank, by consumer eater types, July 2019
- **Don't shy away from bitter and sour flavors or seafood sauces**
Figure 6: Flavor statement agreement, by generation, July 2019

THE MARKET – WHAT YOU NEED TO KNOW

- **Young consumers are quickly growing and diverse**
- **Millennials make up bulk of parents now**
- **Select CPG categories demonstrate fast-paced flavor innovation**

MARKET PERSPECTIVE

- **Foodservice must keep close eye on retail flavor innovation**
Figure 7: Percentage point change in international cuisine consumption, November 2017–August 2019
- **Innovative CPG food flavors**
Figure 8: Directionally fast-growing flavors in new US food* product launches, July 2016–June 2019
- **Innovative CPG drink flavors**
Figure 9: Directionally fast-growing flavors in new US drink* product launches, July 2016–June 2019
- **Innovative CPG snack flavors**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Report Price: £3695 | \$4995 | €4400

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

Figure 10: Directionally fast-growing flavors in new US snack* product launches, July 2016–June 2019

MARKET FACTORS

- **Young consumers are the fastest-growing populations**
Figure 11: Population by generation, 2014–24
- **Young consumers are the most diverse and will dictate future flavor trends**
Figure 12: Distribution of generations by race and Hispanic origin, 2019
- **Millennials now represent the bulk of parents**
Figure 13: Households with own children under age 18, by age of householder, 2018
- **International travel takes off**
Figure 14: Fastest-growing destinations of US residents traveling abroad, 2014–17

KEY PLAYERS – WHAT YOU NEED TO KNOW

- **Sugar is out, fat is in**
- **Sour flavors grow for their fermented benefits**
- **Umami is here: MSG and seafood sauces are growing vehicles for delivery**

FLAVOR AND INGREDIENT TRENDS FROM MINTEL MENU INSIGHTS

- **Fusion menu items showed triple-digit growth from Q2 2016–Q2 2019**
Figure 15: Fast-growing food menu incidence, by menu item cuisine type, Q2 2016–Q2 2019
- **Fermented preparations are quickly growing on menus**
Figure 16: Fast-growing food menu incidence, by preparation of ingredient, Q2 2016–Q2 2019
- **Spicy and naturally sweetened sauce ingredients grow quickly**
Figure 17: Fast-growing food menu incidence, by sauce ingredients, Q2 2018–Q2 2019
- **Spicy and tropical sauce flavors also grow fast year over year**
Figure 18: Fast-growing food menu incidence, by sauce ingredient flavor, Q2 2018–Q2 2019

WHAT'S WORKING?

- **Fat is back**
- **International flavors are in flux**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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



Report Price: £3695 | \$4995 | €4400

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

- **Japan**
- **India**
- **Eastern Mediterranean**
- **Sour flavors grow with rise of fermented fare**
- **Operators position plant-based marketing around flavor**
 Figure 19: Sweetgreen’s email, “3 days — the future is flavor,” October 2018
 Figure 20: TGI Fridays’ email, “7 meal options—no sacrifice of flavor,” April 2019
 Figure 21: Qdoba’s email, “Veggie burritos loaded with flavor!” April 2019

WHAT’S STRUGGLING?

- **Sugar is vilified**

WHAT’S NEXT?

- **Root-to-stem flavors**
- **MSG revival**
- **Seafood sauces start to take off**

THE CONSUMER – WHAT YOU NEED TO KNOW

- **Millennials drive flavor innovation on the menu**
- **Diverse populations also drive flavor innovation**
- **Operators can motivate Cautious Eaters with desserts, beverages and snacks**

CONSUMER EATER TYPES

- **Consumer eater type segmentation**
 Over a third of consumers now identify as Adventurous Eaters
 Figure 22: Consumer eater types, July 2018 and July 2019
- **Most consumers enjoy spicy foods**
 Figure 23: Consumer eater types, July 2018 and July 2019
- **Men are more likely to be Adventurous Eaters and love spicy foods**
 Figure 24: Consumer eater types, by gender, July 2019
- **Millennials drive flavor, spice innovation on menus**
 Figure 25: Consumer eater types, by generation, July 2019
- **Hispanic consumers also drive flavor and spice innovation**
 Figure 26: Consumer eater types, by Hispanic origin, July 2019

FLAVOR TRIAL MOTIVATORS

- **Menu description is key to new flavor and ingredient trial**
 Figure 27: Flavor trial motivators – NET any rank, July 2019

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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



Report Price: £3695 | \$4995 | €4400

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

- **Men are more likely than women to try a new ingredient or flavor because it's functional**

Figure 28: Flavor trial motivators – NET any rank, by gender, July 2019

- **Older generations are willing to try new ingredients for health benefits**

Figure 29: Flavor trial motivators – NET any rank, by generation, July 2019

FLAVOR TRIAL MOTIVATORS BY TYPE OF MENU ITEM

- **Consumers are most willing to try new flavors and ingredients in appetizers**

Figure 30: Flavor trial motivators by type of menu item – NET any rank, July 2019

- **Women are more likely to try new flavors and ingredients in smaller format dishes**

Figure 31: Flavor trial motivators by type of menu item – NET any rank, by gender, July 2019

- **Gen Z is most open to new ingredients and flavors in desserts, beverages**

Figure 32: Flavor trial motivators by type of menu item – NET any rank, by generation, July 2019

- **Black consumers are most likely to try new flavors and ingredients in desserts and snacks**

Figure 33: Flavor trial motivators by type of menu item – NET any rank, by race and Hispanic origin, July 2019

- **Cautious Eaters are most motivated to try new flavors in desserts, beverages and snacks**

Figure 34: Flavor trial motivators by type of menu item – NET any rank, by consumer eater types, July 2019

FLAVOR INTEREST BY TYPE OF MENU ITEM

- **Sweet flavors are the most expected across the menu**

Figure 35: Flavor interest by type of menu item – NET any interest, July 2019

- **Bitter and sour flavors are most accepted in alcoholic beverages**

Figure 36: Flavor interest by type of menu item, July 2019

- **Men drive interest in smoky and spicy flavors**

Figure 37: Flavor interest by type of menu item – NET any interest, by gender, July 2019

- **Consumers aged 18-34 are most interested in widest variety of flavors**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

Figure 38: Flavor interest by type of menu item – NET any interest, by age, July 2019

FLAVOR COMBINATIONS

- **Savory is the most popular base for flavor combinations**
Figure 39: Flavor combinations – NET any interest, July 2019
- **Spicy, smoky and savory flavor combinations are highly appealing to diners**
Figure 40: Flavor combination interest – Top Combination Analysis, July 2019
- **Women prefer sweet-based flavor combinations**
Figure 41: Flavor combinations – NET any interest, by gender, July 2019

FLAVOR STATEMENT AGREEMENT

- **Consumers are trading in sweet flavors for healthy fats**
Figure 42: Flavor statement agreement, July 2019
Figure 43: Flavor statement agreement, July 2019
- **Men drive consumption of sour flavors, such as fermented foods**
Figure 44: Flavor statement agreement, by gender, July 2019
- **Most Millennials are consuming more seafood-based sauces this year**
Figure 45: Flavor statement agreement, by generation, July 2019
Figure 46: Flavor statement agreement, by generation, July 2019
- **Asian consumers are the most likely to enjoy trying new flavors in international cuisines**
Figure 47: Flavor statement agreement, by race and Hispanic origin, July 2019
Figure 48: Flavor statement agreement, by race and Hispanic origin, July 2019
- **Young non-Hispanic parents living in cities are leading the fight against sweet flavors**
Figure 49: Flavor statement agreement – CHAID – Tree output, July 2019

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- Data sources
- Consumer survey data
- Direct marketing creative
- Abbreviations and terms
- Abbreviations

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

Report Price: £3695 | \$4995 | €4400

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

APPENDIX – THE MARKET

- **Market perspective – GNPD search definitions**

APPENDIX – THE CONSUMER

Figure 50: Flavor trial motivators – NET any rank, July 2018

- **CHAID methodology**
- **Top Combination Analysis methodology**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.