

ASIAN CUISINE



“The long history of Chinese food in the U.S. and its resulting ubiquity ensures its role as the most consumed Asian cuisine. Trends have come and gone, but there continues to be room for additional uptake of lesser-known types of Asian food including regional and emerging cuisines. Much of Asian cuisine is built on ingredients and flavors that are not part of mainstream use, highlighting opportunity for brands and operators to use familiar flavors and formats as a base to encourage trial of less-familiar flavors and ingredients.” – Amanda Topper, Director - US Research

KEY TAKEAWAYS

1

RESTAURANTS REMAIN THE KEY PATH TO TRIAL FOR ASIAN CUISINE

Restaurants will be the impetus for the broadening trend toward emerging and regional Asian cuisines and their corresponding dishes, flavors and ingredients. As dining out trends upward, special menus and events can help attract customers.

2

ASIAN CUISINE POPULARITY CAN GROW ON FOUNDATION OF HEALTH AND ADVENTURE

While Asian food is generally perceived to be healthy and offers good flavor variety, ample opportunity exists to broaden its appeal on a number of fronts. Plant-based dishes can boost the cuisine’s health halo and messaging that instills a sense of adventure and excitement will help draw attention.

3

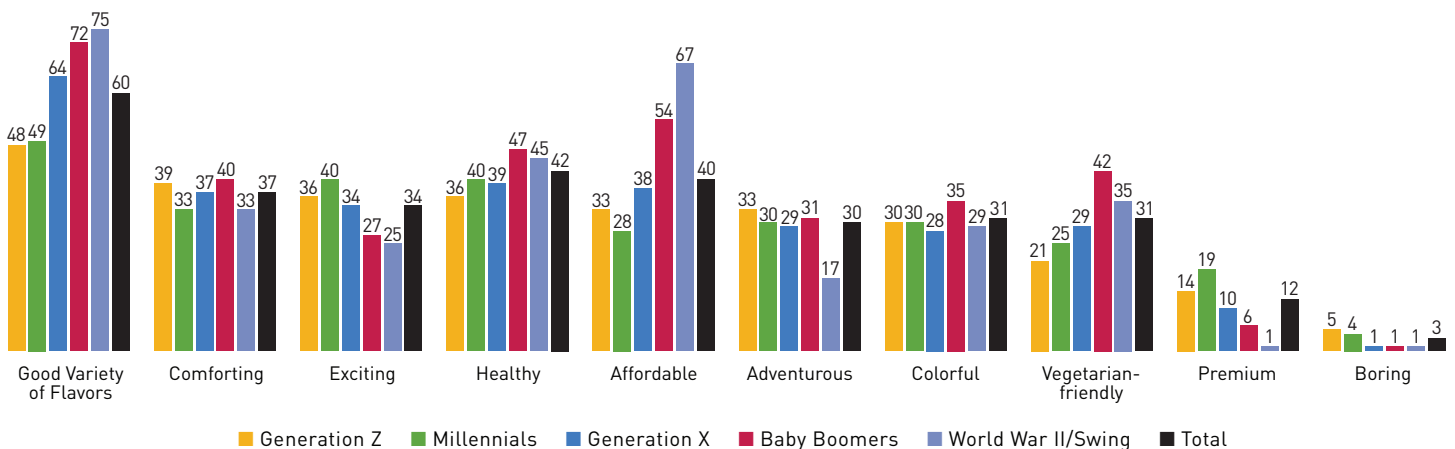
WIDER RANGE OF APPLICATIONS CAN BOOST FLAVOR AND INGREDIENT TRIAL AND USE

Many flavors and ingredients used in Asian cuisine tend toward the obscure. Combining the lesser known with the more popular and using them in a wider range of applications can increase trial and therefore familiarity and use.

FLAVOR VARIETY AND HEALTH ATTRIBUTES ARE THE FOUNDATION FOR BUILDING ENGAGEMENT

Asian cuisine garners strong marks for its variety of flavors and also its relatively strong associations with being healthy and affordable, but there is certainly room for growth on a number of factors that may help boost consumption rates, particularly for some of the dishes that are not chosen as frequently.

“WHICH OF THE FOLLOWING DO YOU ASSOCIATE WITH ASIAN CUISINE? PLEASE SELECT ALL THAT APPLY.” *In percent*

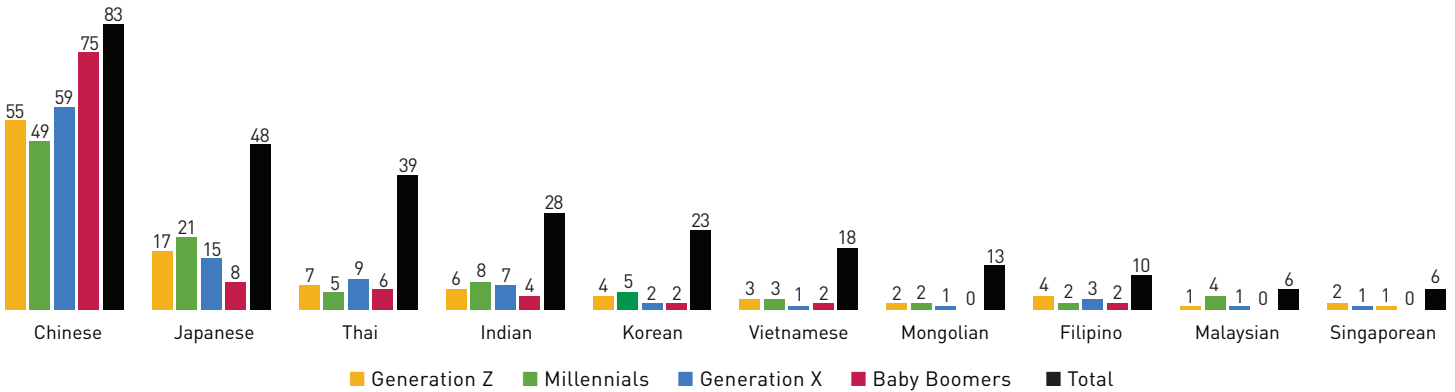


Base: 2,000 internet users aged 18+, April 2021. Source: Kantar Profiles/Mintel.

FAMILIAR FLAVORS CAN INSPIRE DEEPER TRIAL

A positive experience with an ingredient or flavor can influence trial and exploration in other Asian cuisines. Studies show that 45% of consumers are motivated to try a new cuisine that is similar to one they already enjoy.

“WHICH OF THE FOLLOWING TYPES OF ASIAN CUISINE DO YOU EAT? PLEASE SELECT ALL THAT APPLY.” *In percent*

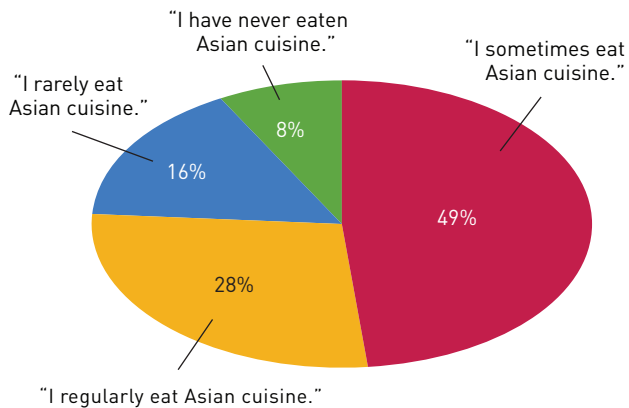


Base: 951 internet users aged 18+ who eat Asian cuisine, April 2021. Source: Kantar Profiles/Mintel.

INCREASE IN ASIAN POPULATION WILL FUEL REGIONAL CUISINE GROWTH

The diverse U.S. Asian population is growing quickly. Census data predicts a 23.8% increase in the U.S. Asian population between 2016 and 2026. Increased diversity will lead to an increased interest in lesser-known Asian cuisines as well as more region-specific flavors.

“WHICH OF THE FOLLOWING STATEMENTS BEST DESCRIBES YOUR RECENT ASIAN (E.G. CHINESE, JAPANESE) CUISINE CONSUMPTION?”



Base: 2,000 internet users aged 18+, April 2021. Source: Kantar Profiles/Mintel.



Handheld sandwiches and buns will come back into favor as more people venture out of the home. There is also opportunity for mixing up dayparts to encourage broader Asian cuisine adoption, such as Asian-inspired breakfast sandwiches. Associating Asian flavors with secondary dishes – such as salads, sandwiches, desserts and beverages – can be a way to meet the demand of flexible daypart dining as well as a means of flavor and ingredient introduction.

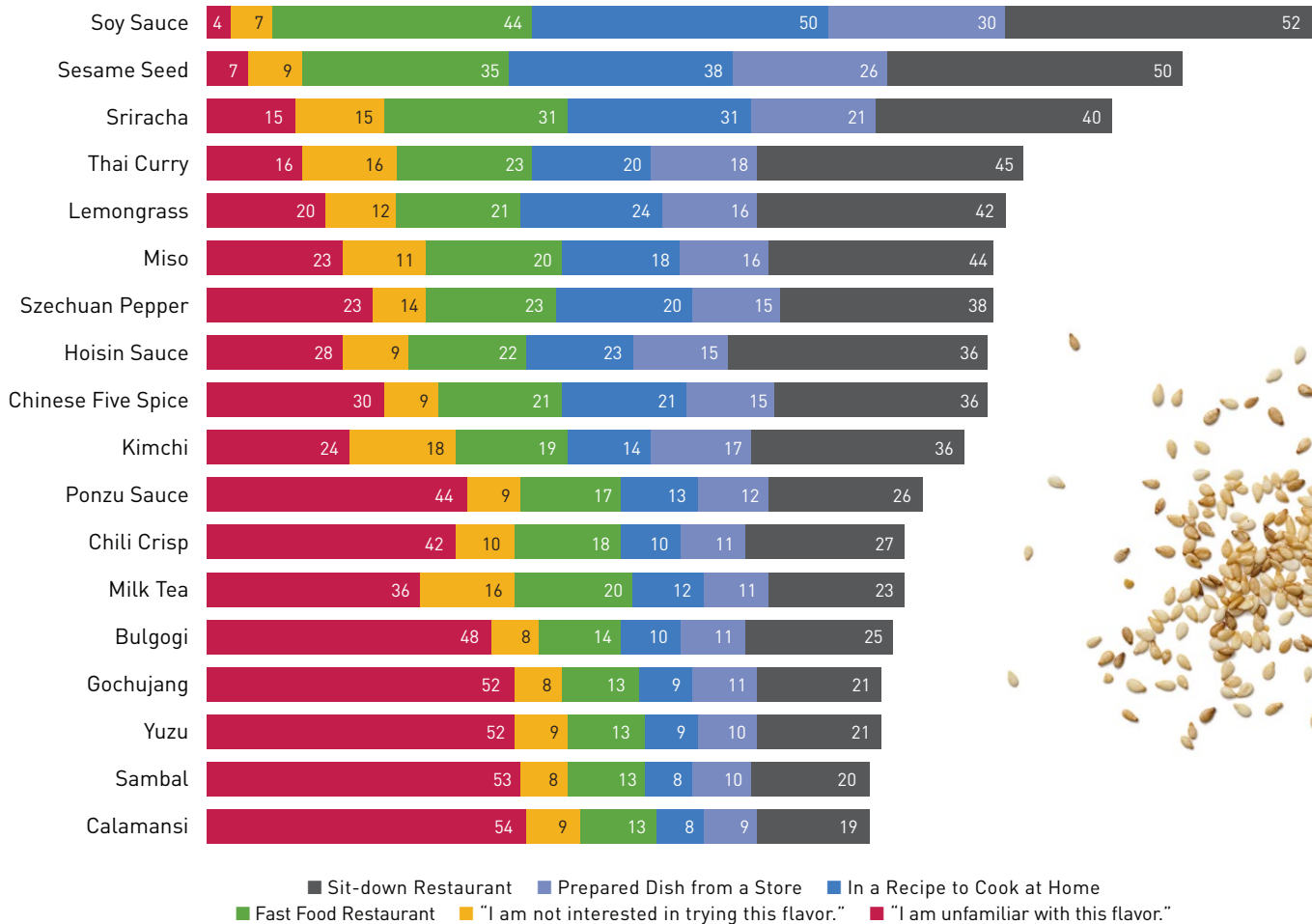
Beverages are an underrepresented area of opportunity for advancing Asian flavors. Beverages lend themselves as a platform for fruit introduction, and yuzu is seen in flavored alcoholic and non-alcoholic drinks.



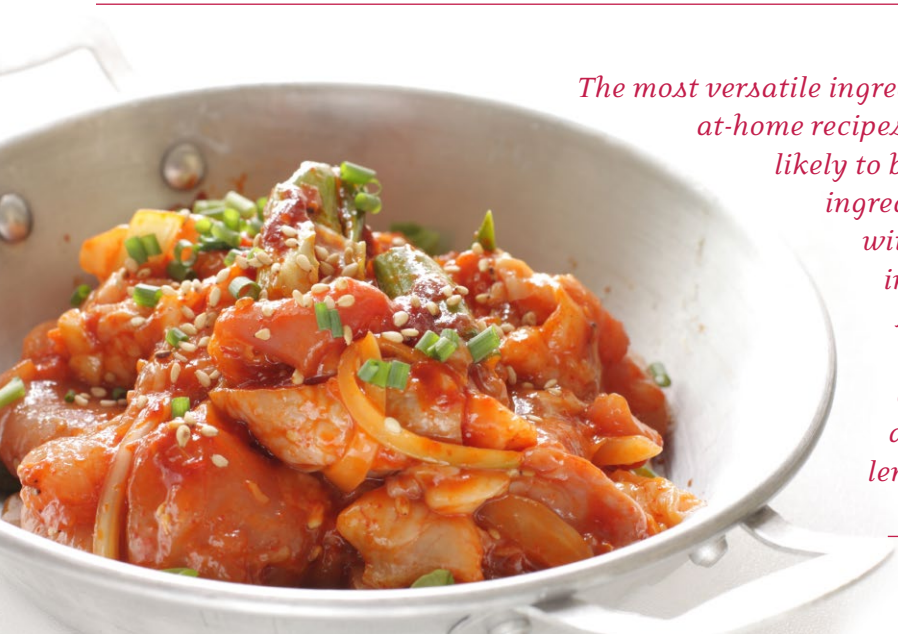
FLAVOR AND INGREDIENT VERSATILITY CAN BOOST USAGE

Sit-down restaurants remain the greatest path to entry for Asian flavors, with the most versatile ingredients of soy sauce, sesame seed and sriracha being the most likely to be used in home cooking. Miso, Thai curry and lemongrass are also among the most familiar flavors but are less likely to be used at home, which could be remedied through increased knowledge of ways to more widely incorporate them. Combining the lesser-known flavors with more popular ones is always a solid method for increasing trial and awareness. Regional flavors and heat are next-generation flavors, including Szechuan, demonstrating strong potential for future trial. Indeed, across the spectrum, heat is trending. Trending hot chili crisp fits the bill, with its blend of oil and chili flakes, delivering a spicy, garlicky umami flavor without being overpowering. It's used to complement a wide variety of dishes, from eggs to ice cream.

"WHERE ARE YOU LIKELY TO TRY THE FOLLOWING INGREDIENTS OR FLAVORS? PLEASE SELECT ALL THAT APPLY." *In percent*



Base: 2,000 internet users aged 18+, April 2021. Source: Kantar Profiles/Mintel.

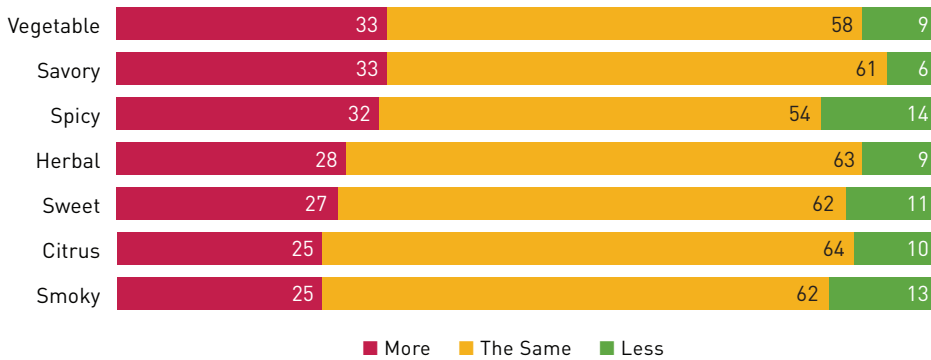


The most versatile ingredients have the highest interest for use in at-home recipes. Soy sauce and sesame seed are especially likely to be used in a recipe to cook at home. These ingredient mainstays can be used in combination with other lesser-known flavors as a means of introduction, such as soy with calamansi or sriracha with gochujang. The distinction between channels for trial widens in favor of restaurants for key popular Asian flavors and ingredients such as Thai curry, miso, lemongrass and Szechuan pepper.

DIVERSIFYING PALATES INDICATE POSITIVE FUTURE FOR EMERGING CUISINES

As consumers were hunkered down at home with limited access to restaurants, travel and entertainment throughout 2020, they turned to food and drink not only for diversion but also enjoyment and exploration. A quarter or more of consumers cite increased consumption of most flavor families. This suggests that at least a portion was in the form of trying new foods, ingredients and flavor profiles, which points to evolving palates and experience with Asian cuisines going forward. Hot and spicy flavors, for example, are emerging in Asian cuisine on U.S. menus. Flavor and ingredient inspiration shifted more toward retail during the pandemic; as consumers return to restaurants, they will be influenced by those dining experiences and are likely to bring that inspiration home.

“ARE YOU EATING MORE, THE SAME, OR LESS OF THE FOLLOWING FLAVORS COMPARED TO THIS TIME LAST YEAR?” *In percent*



Base: 2,000 internet users aged 18+, April 2021. Source: Kantar Profiles/Mintel.

Many Asian cuisines are vegetarian-friendly or allow for flexible preparation methods that could include meat substitutes. The call for plant-based options is getting louder, both on menus and at retail, based on dietary concerns as well as increased focus on the negative impact that animal protein production has on the environment. Coupled with the benefits of the gut-healthy fermented flavors in products such as kimchi, miso and tempeh, there is opportunity to better leverage Asian cuisine as a part of the greater overall health message.



Parents, many of whom are Millennials, are adventurous eaters, more prone to choose a lesser-known Asian cuisine as a favorite. Positioning less-popular Asian dishes as a form of adventure the family can enjoy together, whether at home or away, and expressing a message with an undercurrent of excitement could appeal to parents. Elevated dining experiences and celebrations are experiential ways to highlight Asian flavors and ingredients, especially those from emerging cuisines and regional dishes.



POPULAR FLAVOR OFFERINGS

- | | |
|------------------|-----------------|
| Adobo | Miso |
| Ahi Tuna | Mushroom |
| Asian Pear | Natto |
| Basil | Oolong Tea |
| Bibimbap | Oyster Sauce |
| Black Bean | Papaya |
| Bonito | Peanut |
| Bulgolgi | Pho |
| Calamansi | Pickled Radish |
| Cardamom | Ponzu |
| Chashu Pork | Ramen |
| Cherry Blossom | Ramune |
| Coconut | Red Bean |
| Crab | Sake |
| Cumin | Sambal |
| Curry | Sesame Seed |
| Dumpling | Shrimp |
| Edamame | Szechuan Pepper |
| Fish Cake | Soju |
| Fish Sauce | Soy |
| Five Spice | Star Anise |
| Fried Chicken | Stir Fry |
| Garlic | Sudachi |
| Ginger | Taro |
| Gochujang | Teriyaki |
| Green Onion | Thai Chili |
| Green Tea | Thai Tea |
| Hoisin Sauce | Tofu |
| Jasmine | Togarashi |
| Kimchi | Tonkotsu |
| Konbu | Turmeric |
| Korean BBQ Sauce | Ube |
| Lemongrass | Ume |
| Mango | Uni |
| Matcha | Wagyu |
| Mikan | Wasabi |
| Milk Tea | Wok Oil |
| Mint | Yuzu |
| Mirin | |

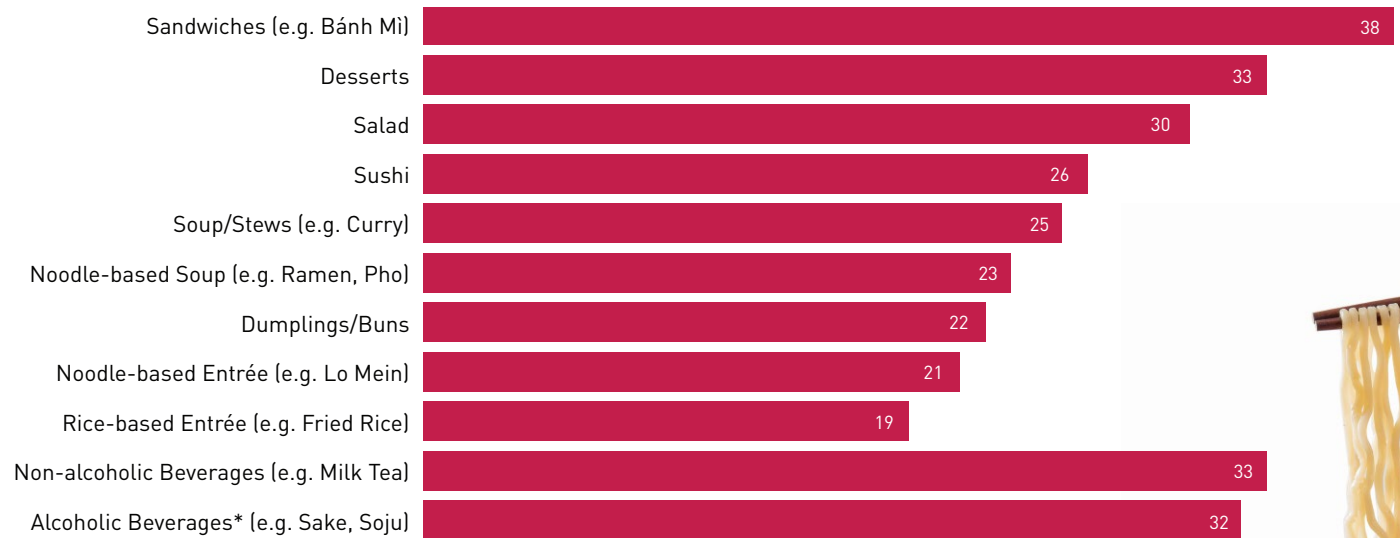
REQUEST A SAMPLE TODAY
thasegawa.com/contact-us

SOCIAL MEDIA IS KEY FOR INSPIRATION AND INSTRUCTION

The importance of utilizing social media when targeting younger consumers of Asian cuisine cannot be overstated. Consumers are more likely to say that social media has inspired them to try dishes typically less often consumed.

“WHICH OF THE FOLLOWING TYPES OF ASIAN-FLAVORED DISHES DO YOU TYPICALLY EAT? PLEASE SELECT ALL THAT APPLY.”

Percentage of those who agreed that social media has inspired them to try new Asian flavors



Base: 1,846 internet users aged 18+ who eat Asian cuisine; *1,721 internet users aged 22+ who eat Asian cuisine, April 2021. Source: Kantar Profiles/Mintel.

Younger generations are looking for more interesting flavors than they perceive they are getting from Asian cuisines. The lag in perceived flavor variety could be corrected with a wider menu item or product range of regional cuisines available, especially when coupled with a connotation of excitement and adventure, attributes that appeal to younger consumers.

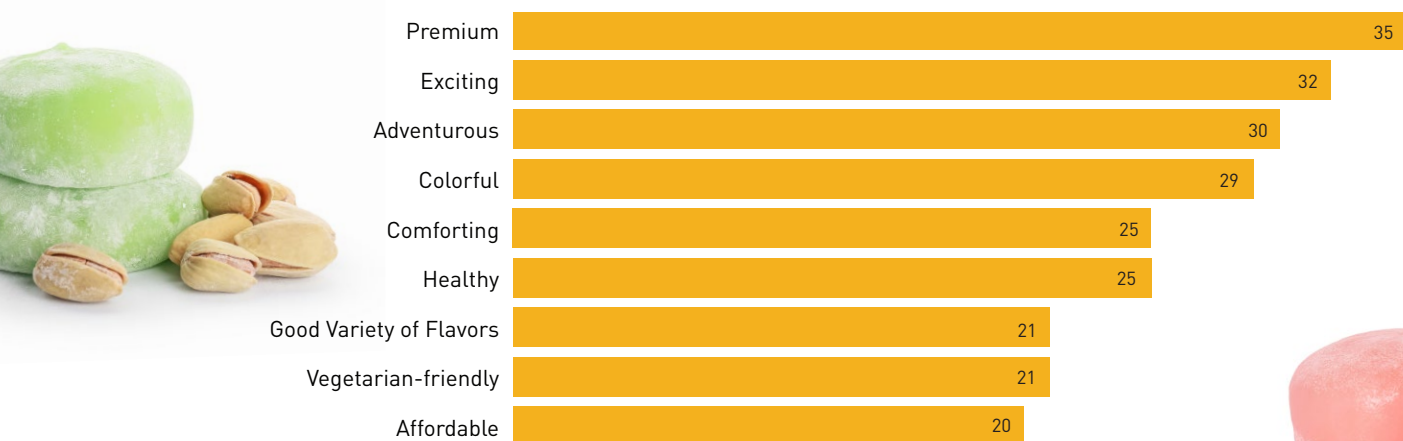


USE EXCITEMENT AND ADVENTURE THEMES ON SOCIAL MEDIA

Premium, exciting and adventurous themes will translate well when targeting social media devotees: Millennials and parents. Social media messages that create an air of excitement and adventure with the promise of unique flavor exploration will elevate the menu dish or CPG product to an experience. As consumers continue to head back into the world after an extended pandemic, they will be looking to make up for lost time and will respond well to messaging that associates Asian cuisine and its flavor profiles with adventure.

“WHICH OF THE FOLLOWING DO YOU ASSOCIATE WITH ASIAN CUISINE? PLEASE SELECT ALL THAT APPLY.”

Percentage of those who agreed that social media has inspired them to try new Asian flavors



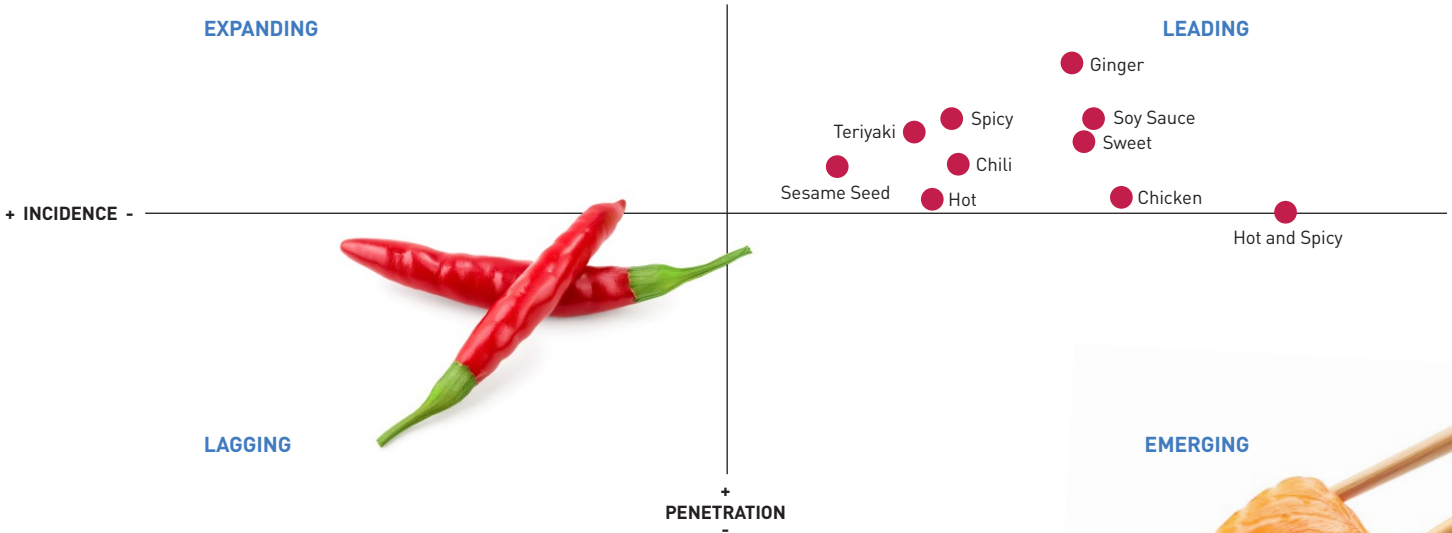
Base: 1,846 internet users aged 18+ who eat Asian cuisine, April 2021. Source: Kantar Profiles/Mintel.



LAYERING FLAVORS FOR MAXIMUM APPEAL

Asian flavors, ingredients and preparation styles have remained popular and steadfast over the course of the past three years. Korean and Japanese flavors have represented the bulk of directionally growing flavors on U.S. menus. Consumers are motivated by familiarity when trying new cuisines, so flavors that are closely related to existing favorites or are presenting in familiar formats are more approachable. Hot flavors are leading in Asian cuisine on menus, following trends seen across the restaurant industry. Over a third (36%) of consumers prefer spicy Asian flavors.

TOP 10 LEADING FLAVORS IN ASIAN CUISINE ON U.S. MENUS, Q2 2018-Q2 2021



Source: Mintel Menu Insights.

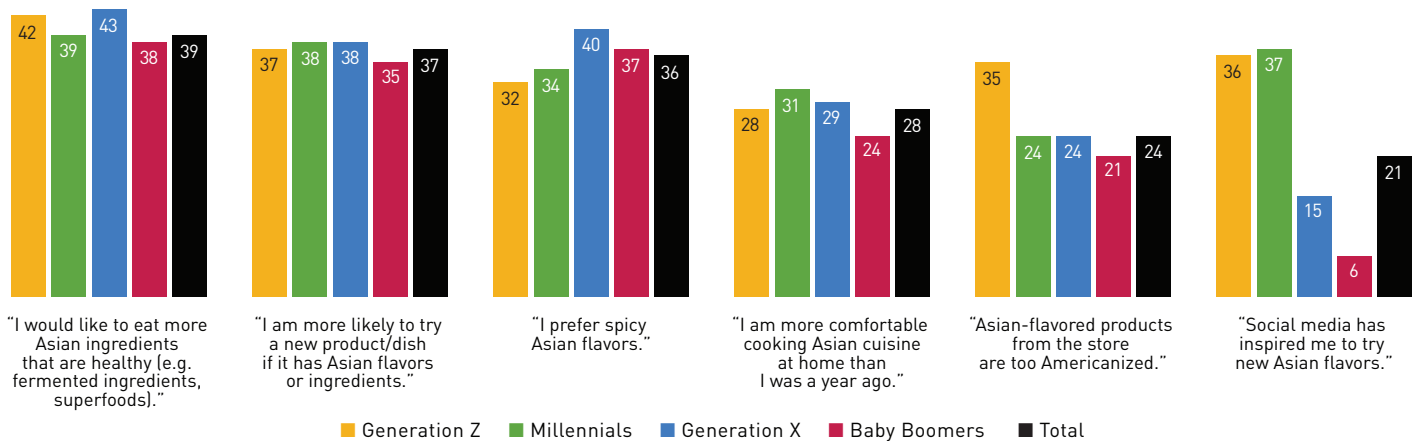
The pandemic-fueled home-cooking trend helped boost confidence in preparing Asian cuisine at home. Cooking sauces and marinades can help home cooks cut down on the number of ingredients needed for a recipe. These flavor supplements can also support flexibility when supply chain issues cause limited supplies of ingredients for both restaurants and retail.



ENCOURAGE HOME COOKS WITH SHORTCUTS AND EDUCATION

Just over a quarter of consumers are more comfortable cooking Asian cuisine at home than they were a year ago. Products that help consumers simplify cooking Asian meals at home could encourage more cooks to take to the kitchen, particularly for the 37% of consumers who are more likely to try a new product/dish if it has Asian flavors or ingredients. Older generations are more heat tolerant and could be tempted to trial for lesser-known ingredients such as sambal and gochujang. Also notable, younger consumers are more responsive to authenticity, and heat in emerging and regional cuisines will be more likely to hit the mark.

“WHICH OF THE FOLLOWING STATEMENTS DO YOU AGREE WITH? PLEASE SELECT ALL THAT APPLY.” In percent

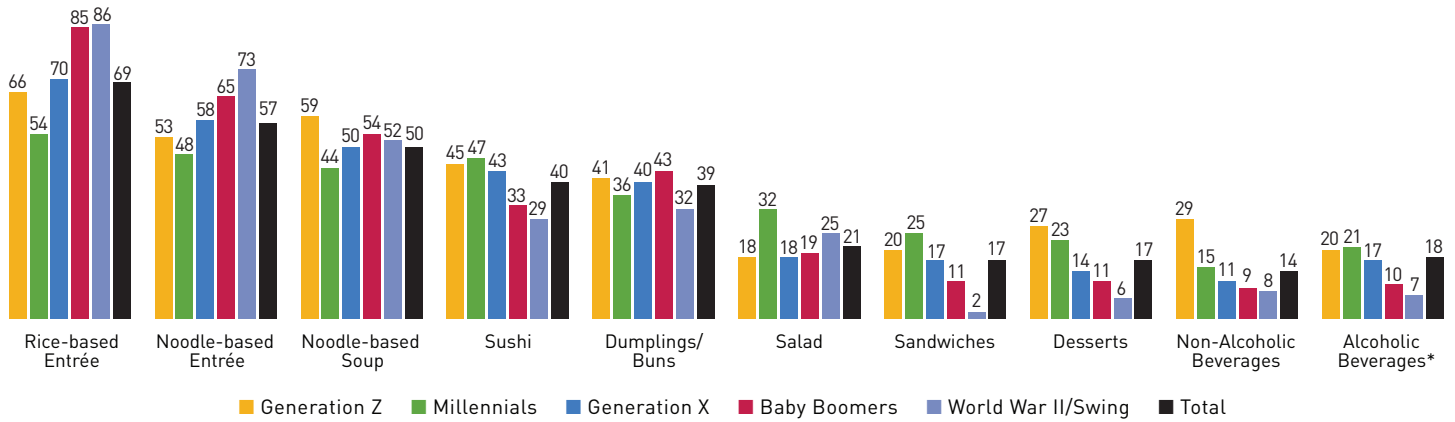


Base: 2,000 internet users aged 18+, April 2021. Source: Kantar Profiles/Mintel.

CONVENIENT FORMATS CAN EXPAND CONSUMPTION BEYOND NOODLES AND RICE

Noodle- and rice-based dishes are the types likely most aligned with Asian cuisine and are naturally the most eaten. Older adults are doing their part to keep noodles and rice in the mainstream and will continue to be drawn to more traditional dishes and flavors. Consumption of other types of dishes drops off considerably, opening the door of opportunity to use a greater variety of foods and beverages as delivery vehicles of Asian flavors. There is potential to cast a wider net and layer flavors such as sambal and gochujang with more mainstream ones like ginger and sesame. Younger generations are more likely to consume desserts, sandwiches and beverages. These platforms will be good points of entry for introducing new flavors or ingredients, particularly for lesser-known cuisines and regional specialties, as well as product types. RTE desserts, bottled salad dressings and grab-and-go sandwiches can be used to quell a craving or allow consumers to experiment with a flavor or ingredient without too big of a commitment. Milk teas, such as boba, are popular with younger generations and have benefitted from strong representation on social media.

“WHICH OF THE FOLLOWING TYPES OF ASIAN-FLAVORED DISHES DO YOU TYPICALLY EAT? PLEASE SELECT ALL THAT APPLY.” *In percent*



Base: 1,846 internet users aged 18+ who eat Asian cuisine; *1,721 internet users aged 22+ who eat Asian cuisine, April 2021. Source: Kantar Profiles/Mintel.

With fewer larger meals being eaten at morning, noon and night, brands, retailers, and operators can harness the snacking habit to put more Asian flavors into play. Less-often consumed Asian-flavored dishes and drinks can be a flavor point of entry. Trending hot flavors are evident in snacks, including gochujang and Szechuan. Incorporating familiar flavor profiles will draw attention and combining those with emerging ones can encourage trial of new dishes and flavors.

