

LATIN CUISINE



“Mexican cuisine is by far the most consumed Latin cuisine, reflecting not only availability but also its profound influence on U.S. food culture. The mainstreaming of Mexican cuisine is nearing ubiquity, yet there is still room for Latin cuisine growth. The widespread popularity of Mexican cuisine suggests that there are similar opportunities for other Latin cuisines, as well as brand exploration with regional Mexican cuisines, especially beyond foodservice menus. A mix of both traditional and Latin inspired-options will be necessary from brands and operators to fulfill the needs of the total market, but in any case authentic ingredients and flavors will be essential to connect with both hispanic and non-hispanic consumers. Hispanic consumers expect authenticity from brands, yet non-hispanic consumers seek convenient ways (i.e. foodservice) to experience real Latin foods, flavors and ingredients too.” – Alyssa Hangartner, Mintel

KEY TAKEAWAYS

1

PACKAGED BRANDS, RETAILERS CAN PLAY A BIGGER ROLE IN ACCELERATING LATIN CONSUMPTION

For Latin foods, flavors and ingredients, foodservice is still one of the first stops in the flavor lifecycle, pointing to signs that they still have connections to indulgence, but also indicate where brands can get or stay competitive.

2

HIGHLIGHT THE LIGHTER, HEALTHIER SIDE OF LATIN CUISINE

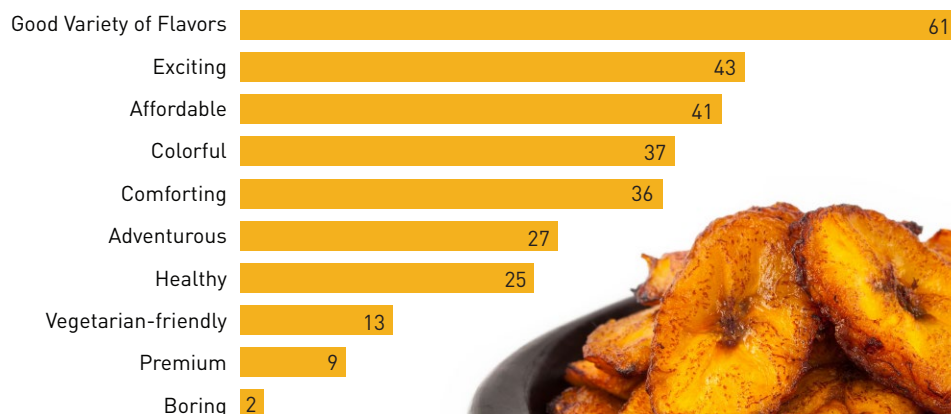
Some Latin cuisines and foods may come saddled with a less-than-healthy reputation, but brands can work to alter that perception by strengthening ties between whole and plant-based foods used in Latin cuisines and their nutritional benefits.

3

BREAK THE MEALTIME HABITS

Consumption of Latin foods is strongly tethered to lunch or dinner, yet consumers are most likely to try new flavors in smaller doses like snacks and appetizers because they require less commitment. Keeping it small – think snacks and beverages – can ease consumers into Latin flavors trial and break old habits.

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



Survey base is 2,000 internet users aged 18+, April 2021.



Although Latin cuisines often have shared flavor profiles and ingredients, they are not interchangeable. But a positive experience with an ingredient or flavor can influence trial and exploration.

Latin cuisines have origins in countries including Argentina, Brazil, Chile, Cuba, Colombia, Mexico, Peru, Puerto Rico and Venezuela.

LOTS OF ROOM TO MOVE BEYOND MEXICAN FOOD

Mexican cuisine is by far the most consumed Latin cuisine, reflecting not only the availability of Mexican cuisine but also the profound influence on U.S. food culture.

"WHICH OF THE FOLLOWING TYPES OF LATIN CUISINE DO YOU EAT? PLEASE SELECT ALL THAT APPLY."



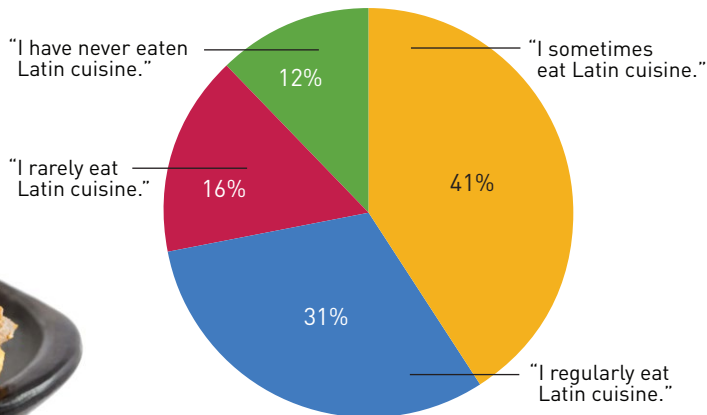
Survey base is 950 internet users aged 18+ who eat Latin cuisine, April 2021.



ROOM TO MAKE LATIN FLAVOR AND INGREDIENT CONSUMPTION PART OF THE ROUTINE

For brands, retailers and operators, innovation on menus, in formulations or product mix, is an opportunity to upgrade occasional Latin cuisine eaters to more regular consumption.

"WHICH OF THE FOLLOWING STATEMENTS BEST DESCRIBES YOUR RECENT LATIN CUISINE CONSUMPTION?"



Latin ingredients and flavors featured on menus with varieties that add complexity and nuance (think smoky Oaxacan black bean spread, tomatillo salsa, poblano rajas, añejo cheese) have likely contributed to elevated perceptions among avid foodservice patrons.

MILLENNIALS DRIVE THE PROLIFERATION OF LATIN CUISINE ON MENUS

The mainstreaming of Mexican cuisine is universal and suggests that there are similar opportunities for other Latin cuisines, especially on mainstream menus. Millennials are the most avid patrons of foodservice, and their interest in menu diversification with Latin foods points to signs that there is room to grow less-frequently consumed Latin cuisines and also that operators have some room for Latin menu innovation.

"I EXPECT TO SEE LATIN FLAVORS ON NON-LATIN MENUS."

22%

Generation Z

25%

Generation X

21%

Millennials

16%

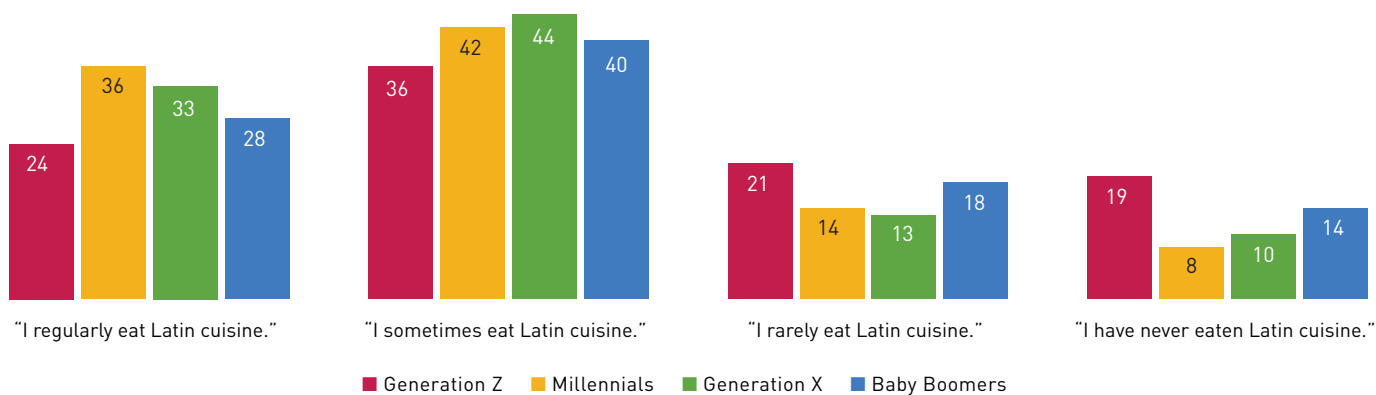
Baby Boomers

Survey base is 1,765 internet users aged 18+ who eat Latin cuisine, April 2021.

GEN X+ MADE MEXICAN POPULAR, MILLENNIALS ARE DRIVING EXPLORATION

Debunking the myth that Millennials are solely responsible for driving cuisine exploration and food trends, Gen X are nearly as engaged with Latin cuisines, both in regular and occasional consumption, as their slightly younger counterparts.

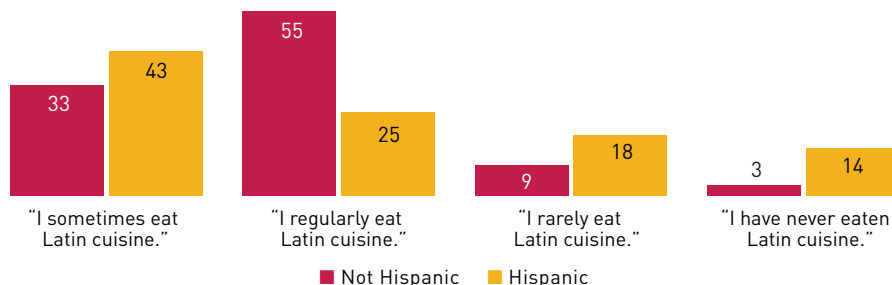
"WHICH OF THE FOLLOWING STATEMENTS BEST DESCRIBES YOUR RECENT LATIN CUISINE CONSUMPTION?" In percent



NON-HISPANIC CONSUMERS ARE A STRONG TARGET FOR GROWTH

A mix of both traditional and Latin-inspired options will be necessary from brands and operators to fulfill the needs of the total market. Authentic ingredients and flavors will be essential to connect with both Hispanic and non-Hispanic consumers. Hispanics expect authenticity from brands, yet non-Hispanic consumers seek convenient ways to experience real foods, flavors and ingredients too.

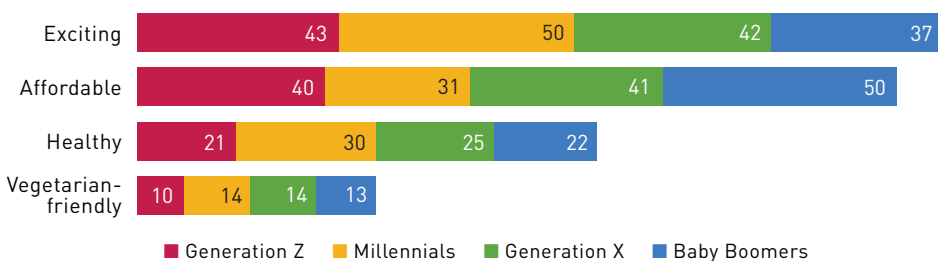
"WHICH OF THE FOLLOWING STATEMENTS BEST DESCRIBES YOUR RECENT LATIN CUISINE CONSUMPTION?" In percent



REINFORCE HEALTHY CONNECTIONS WITH LATIN FOODS

To accelerate the mainstreaming of many Latin cuisines and to help consumers put these foods in the consideration set more frequently, brands will have to position foods to align with contemporary trends that younger adults embrace: health that is derived by nutrient density and plant-based options.

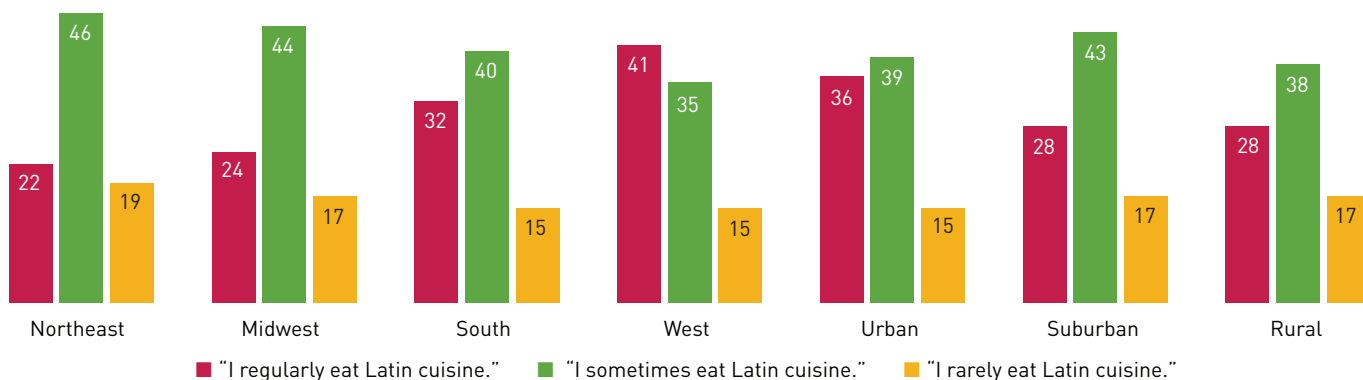
"WHICH OF THE FOLLOWING DO YOU ASSOCIATE WITH LATIN CUISINE? PLEASE SELECT ALL THAT APPLY." In percent



WEST COAST CITY DWELLERS ARE THE MOST ENGAGED IN LATIN CUISINE

Region and city size are positively correlated to frequency and engagement in Latin cuisine consumption, which is representative of the demographic breakdown and availability of these cuisines through grocery retailers and foodservice. Innovators targeting West coast regions and urban metropolises may consider pushing the boundaries of innovation into more regionalized Mexican cuisine and other, less common Latin cuisine varieties.

"WHICH OF THE FOLLOWING STATEMENTS BEST DESCRIBES YOUR RECENT LATIN CUISINE CONSUMPTION?" In percent



POPULAR FLAVOR OFFERINGS

LATIN	Fire Roasted Tomato	Michelada
Adobo	Flan	Mole
Aji Amarillo	Grilled Corn	Papaya
Ancho Chili	Grilled Pineapple	Piquillo Chili
Arbol	Habanero	Plantain
Avocado	Hatch Chili	Poblano
Carne Asada	Horchata	Queso Fundido
Chimichurri	Jalapeño	Salsa Verde
Chipotle	Lager	Serrano Chili
Chorizo	Lime	Shrimp
Churro	Lobster	Tajin
Cilantro	Mango	Tamarind
Cotija Cheese	Margarita	Tequila
Cumin	Masa	Tomatillo
Dulce de Leche	Mexican Hot Chocolate	Tortilla
Elote	Mezcal	Tres Leches

REQUEST A SAMPLE TODAY

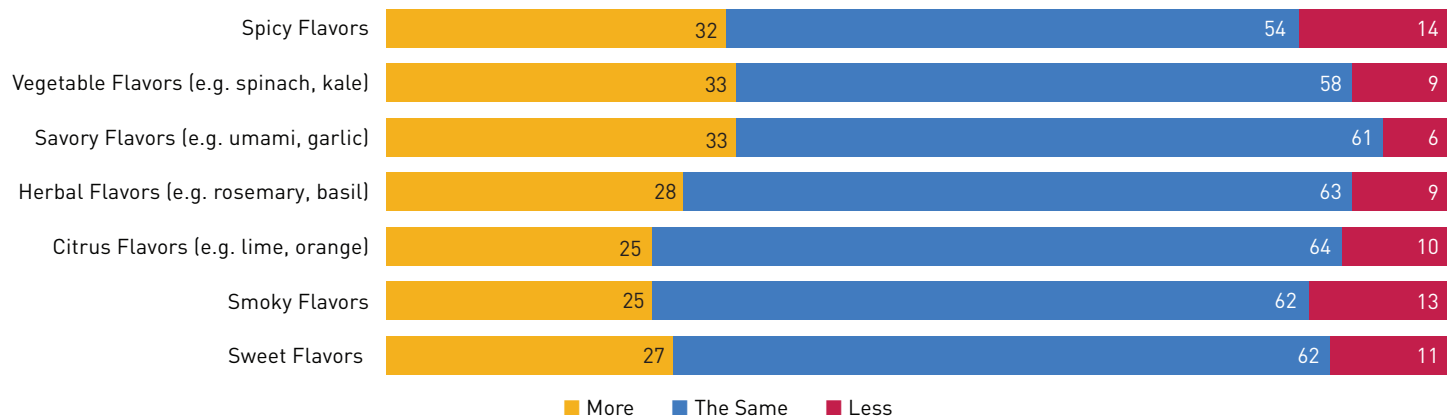
thasegawa.com/contact-us

Flavorful innovation featuring not only meat substitutes but also plant-based ingredients including plantains, beans, avocados, rice and potatoes can keep authenticity intact while maybe even elevating the perceptions of premium.

DIVERSIFYING PALATES INDICATES 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 as not only a source of diversion but also as enjoyment and likely exploration. A quarter or more consumers cited increased consumption of most flavor families, suggesting 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 Latin cuisines going forward. Interest in deeper engagement with Latin cuisines is clear: according to Regional and International Flavors and Ingredients – U.S., November 2020, more than a third of consumers expressed interest in trying Mexican, Peruvian, Brazilian and Argentinian cuisine.

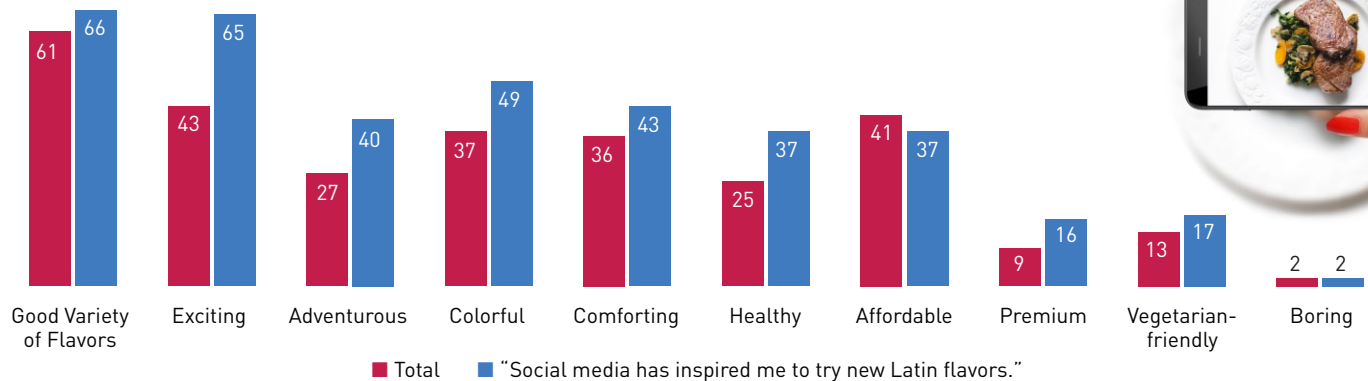
“ARE YOU EATING MORE, THE SAME, OR LESS OF THE FOLLOWING FLAVORS COMPARED TO THIS TIME LAST YEAR?” *In percent*



COLORFUL DIGITAL STRATEGIES CAN CONNECT YOUNG ADULTS WITH EMERGING LATIN CUISINES

According to Mintel's Global Food and Drink survey, 38% of 18-34 year olds in the U.S. have tried a new food or drink that they've discovered on social media in the past three months. Young consumers who learn about new Latin flavors on social are more likely to perceive Latin cuisine as exciting, colorful and adventurous, indicating that a picture (or a video) can be a powerful tool.

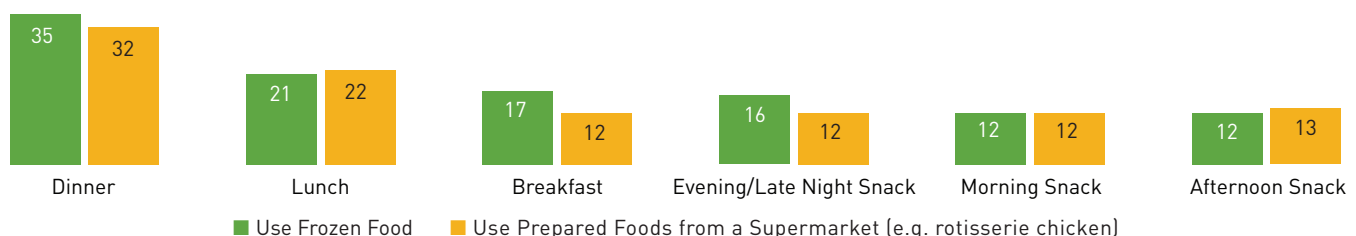
“WHICH OF THE FOLLOWING DO YOU ASSOCIATE WITH LATIN CUISINE?” AND “WHICH OF THE FOLLOWING STATEMENTS DO YOU AGREE WITH? PLEASE SELECT ALL THAT APPLY.” *In percent*



PROTEINS, PREPARED MEALS ARE A GOOD ENTRY POINT FOR LATIN INGREDIENTS

Some packaged brands are working concurrently with operators to accelerate the adoption of Latin dishes, flavors and ingredients. The value and convenience that younger consumers embrace in prepared meals and entrees is driving brands to draw inspiration from Latin menus to target not only the heaviest foodservice user but also those who may need the most help in the kitchen.

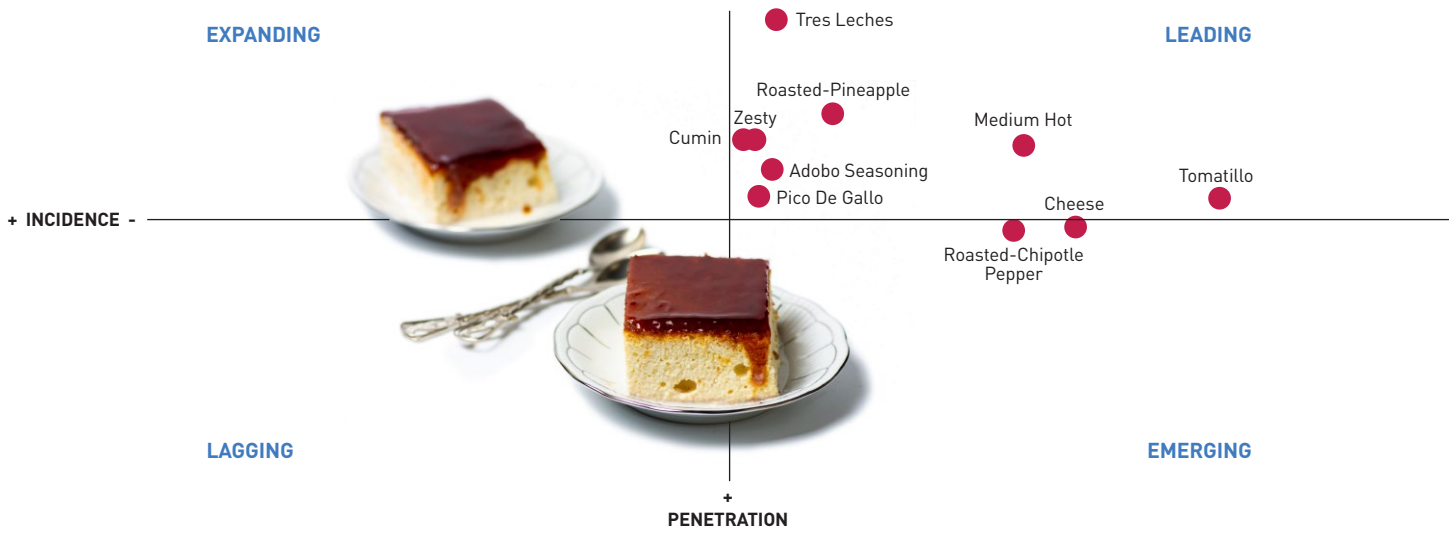
“WHICH OF THE FOLLOWING DESCRIBE HOW YOU TYPICALLY PREPARE OR OBTAIN EACH OF THE FOLLOWING MEALS/SNACKS? PLEASE SELECT ALL THAT APPLY PER MEAL/SNACK.” *In percent*



NUANCED INGREDIENT DESCRIPTIONS HAVE STREET CRED

Chefs and operators have been drawing inspiration from unique preparation styles and regional street food to lend authenticity and creativity to menu items with Latin accents. This is a menu development tactic that has been implemented by renowned cutting edge chefs like Rick Bayless and progressed to full- and limited-service multi-unit operators. Nuanced varietals are among the leading flavors on Latin menus, including roasted pineapple or chipotle and classic Latin seasonings like mojo, adobo and cumin.

MENU MATRIX OF TOP 10 LEADING FLAVORS IN LATIN AND MEXICAN CUISINE ON U.S. MENUS, Q4 2017-Q4 2020

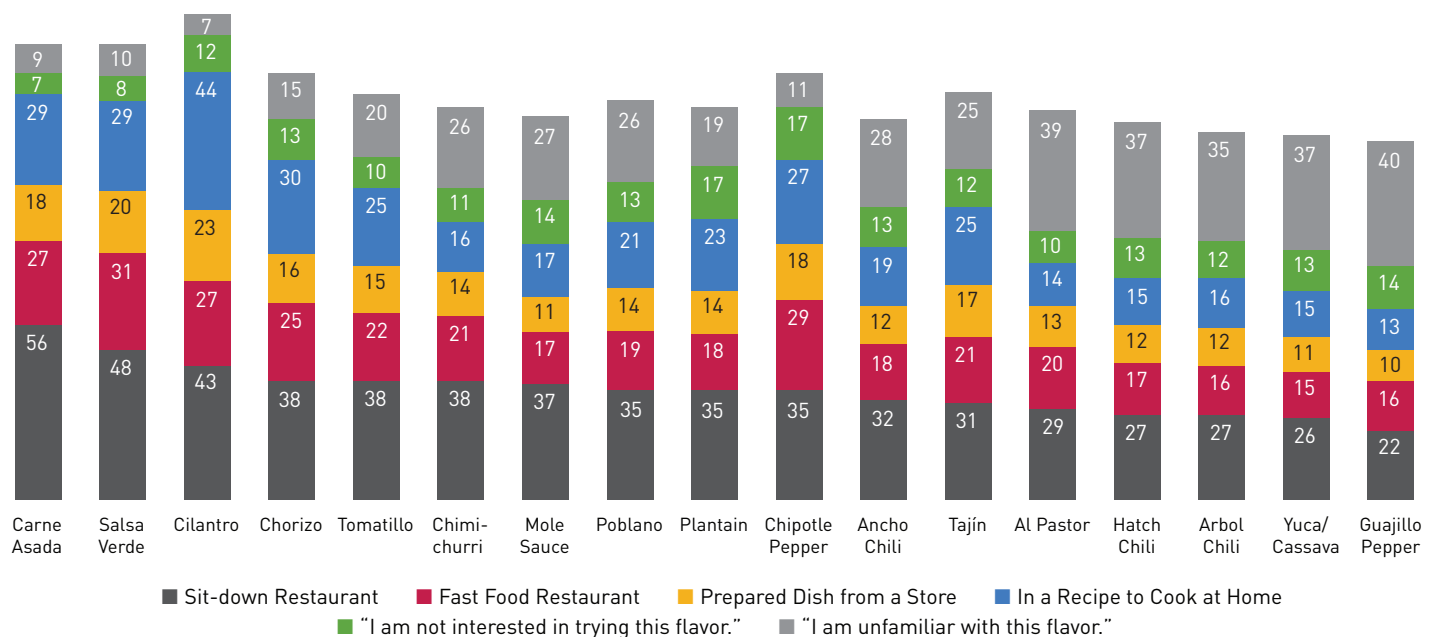


Source: Mintel Menu Insights

MAKE AUTHENTICITY ACCESSIBLE AT HOME WITH QUICK SCRATCH

Foodservice remains the primary path to purchase for many Latin flavors, but it may be a sign of the times that suggest retailers and brands can narrow the gap, especially in prepared offerings. Quick scratch solutions can offer customizability with less time investment and include less-familiar ingredients, especially as consumers try to hold on to some pandemic habits. Easy to use Latin sauces and seasonings that cut down on time preparing meals and make authentic flavor profiles and ingredients accessible can keep consumers engaged when planning and preparing meals at home.

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

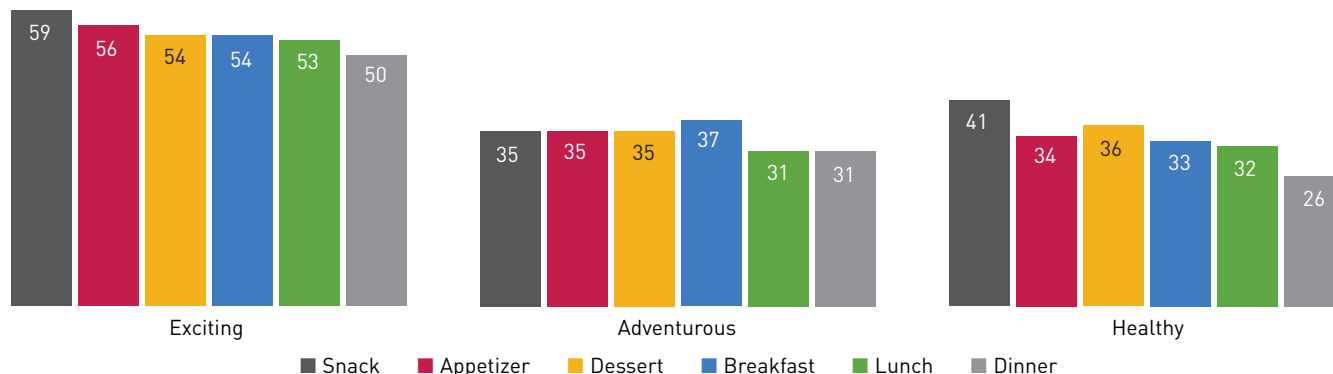


Data Source: Lightspeed/Mintel. Unless otherwise noted, survey base is 2,000 internet users aged 18+, April 2021.

SNACKS GET HEALTH HALOS THROUGH LATIN SEASONING AND SUBSTRATES

Latin cuisines overall already have strong perceptions of excitement and even affordability and less-established connections to health, but brands in the snack aisle may be working to change those perceptions. The limited cost commitment of snacks makes them a great place to allow consumers to experiment with new flavors and ingredients, suggesting that Latin flavors and ingredients are ripe for brand exploration, especially if they can reinforce a relationship between enjoyment and BFY snacking.

“WHICH OF THE FOLLOWING DO YOU ASSOCIATE WITH LATIN CUISINE?” AND “WHEN DO YOU TYPICALLY EAT LATIN FLAVORS?” PLEASE SELECT ALL THAT APPLY.” *In percent*



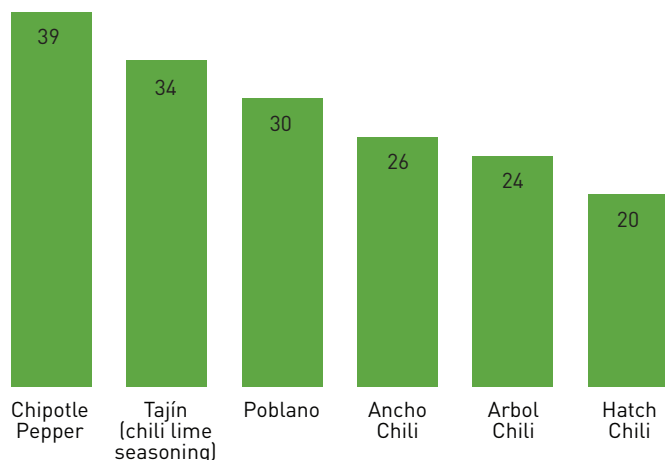
Survey base is 1,765 internet users aged 18+ who eat Latin cuisine, April 2021.

Brands are turning up the heat in some unexpected packaged foods to ease into not only the Latin trend but also to leverage consumers' continually growing interest in spicy flavors. Ingredients like poblano and chipotle are relatively familiar to most consumers but are used in a new way in classic comfort foods like pizza and pasta.

TRENDING PEPPER SEASONING BLENDS LEVEL UP AT HOME MEALS

Retailers and brands are heeding consumers' call for not only more complex flavor profiles and nuanced pepper varieties that deliver heat but also filling the need for easy solutions to help them elevate at-home cooking. About 4 in 10 consumers prefer Latin flavors that are spicy, a statistic that remains consistent across generational and ethnic groups. Chili peppers that generate the strongest interest aren't super-hot, but instead deliver dynamic and complex flavor profiles.

“WHICH INGREDIENTS ARE YOU LIKELY TO TRY IN A RECIPE TO COOK AT HOME? PLEASE SELECT ALL THAT APPLY.” *In percent*



Survey base is 837 consumers who feel comfortable cooking with Latin flavors at home, April 2021.



SNACK INNOVATION EXPANDS LATIN CUISINE OUTSIDE OF ENTRÉES

Small bites are prime for trying new flavors. Consumers are most likely to try new flavors in snacks and appetizers—handhelds and street food, including empanadas, small format tacos, elotes—because they are more affordable than committing to a full entrée.

“WHEN DO YOU TYPICALLY EAT LATIN FLAVORS?” PLEASE SELECT ALL THAT APPLY.” *In percent*



Survey base is 1,765 internet users aged 18+ who eat Latin cuisine, April 2021.



AUTHENTICITY MATTERS

Communicating authenticity in innovation can take several forms: highlighting indigenous ingredients, using nuanced regional cuisines, making connections between emerging cuisines dishes and ingredients to similar mainstream ones and tapping into genuine street foods in packaged product innovation or menu development.

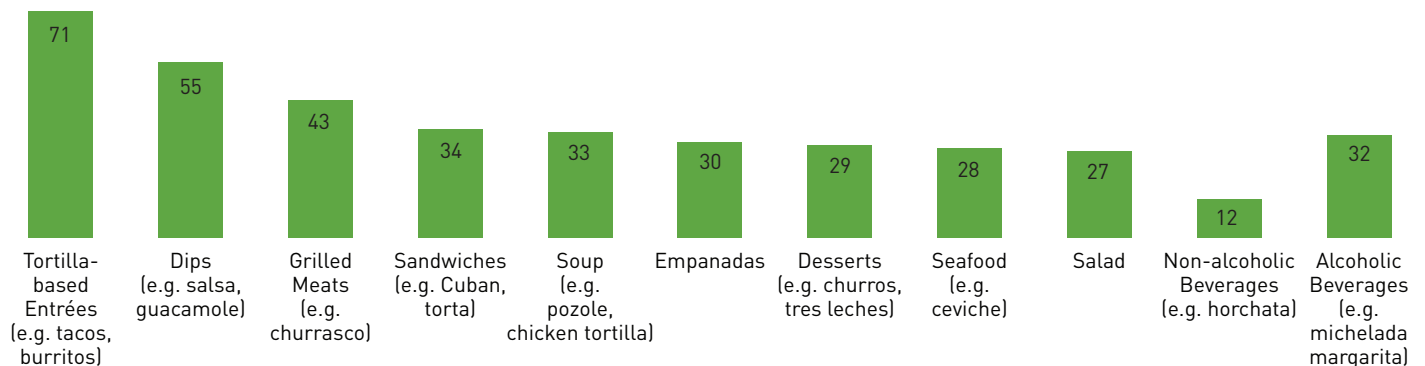
"WHICH OF THE FOLLOWING STATEMENTS DO YOU AGREE WITH? PLEASE SELECT ALL THAT APPLY."



LATIN FOODS RIPE FOR DISRUPTION, EXPANSION

Brands are helping consumers to expand their palates within their comfort zones for lunch and dinner with offerings featuring grilled meats, tortas and empanadas. Snacks, desserts and beverages can also be a gateway for consumer discovery for brands of all types.

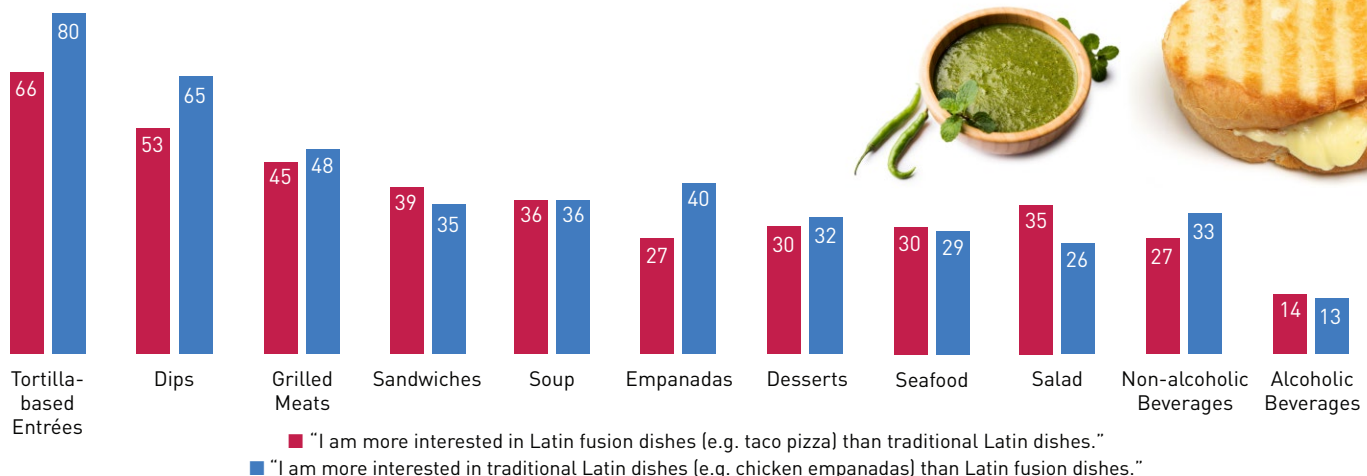
"WHICH OF THE FOLLOWING TYPES OF LATIN FLAVORED DISHES DO YOU TYPICALLY EAT? PLEASE SELECT ALL THAT APPLY." *In percent*



FUSION FLAVORS ARE AN OPPORTUNITY WITHIN SANDWICHES, SALADS

Sandwiches and salads are a prime area to create new flavor combinations featuring traditional Latin ingredients. These menu items can be a gateway to new flavor and ingredient trial by using a familiar base but are gaining a competitive edge through use of trending, emerging flavors. An example of this strategy in practice comes from Basset Street Brunch Club, which menus a green goddess grilled cheese with chimichurri and mozzarella on sourdough.

"WHICH OF THE FOLLOWING TYPES OF LATIN FLAVORED DISHES DO YOU TYPICALLY EAT?" AND "WHICH OF THE FOLLOWING STATEMENTS DO YOU AGREE WITH? PLEASE SELECT ALL THAT APPLY." *In percent*



Data Source: Lightspeed/Mintel. Survey base is 1,765 internet users aged 18+ who eat Latin cuisine, April 2021.