

# TRENDS ON THE MENU

The foodservice industry has been one of the most significantly impacted by COVID-19 and the subsequent fallout. Operators have been forced to adapt business models to keep traffic flowing as consumer priorities have shifted regarding on-premise dining, takeout and delivery, health and spending. Here we explore opportunities to keep menus exciting and diners engaged.

## KEY TAKEAWAYS

1

### CHANNEL THE ON-PREMISE EXPERIENCE AT HOME

Consumers are hesitant about returning to restaurants, particularly indoor dining. The FSR segment faces the highest hurdle for recovery and will need to continue to offer affordable, convenient take-out and delivery options to provide consumers with an experience that competes with retail and LSRs.

2

### CUSTOMERS ARE GOING GREEN

The COVID-19 pandemic has left consumers placing higher priority on health and wellness and shifting to more plant-based ingredients and flavors in their diet. Key players in foodservice have been exploring vegetables as protein, carbohydrate replacements and a focus on functional ingredients.

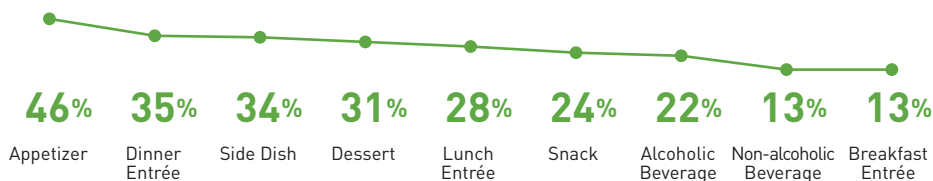
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### RESTAURANTS CAN PROVIDE A GLOBAL EXPERIENCE

Due to the absence of travel and consumers spending much more time in a geographically small area, restaurants can provide the opportunity for consumers to explore global flavors and dishes. Gen Z and Millennial consumers have diverse palates and show the strongest interest in international cuisine.

## DINERS MORE LIKELY TO TRY NEW FLAVORS IN APPETIZER PORTIONS

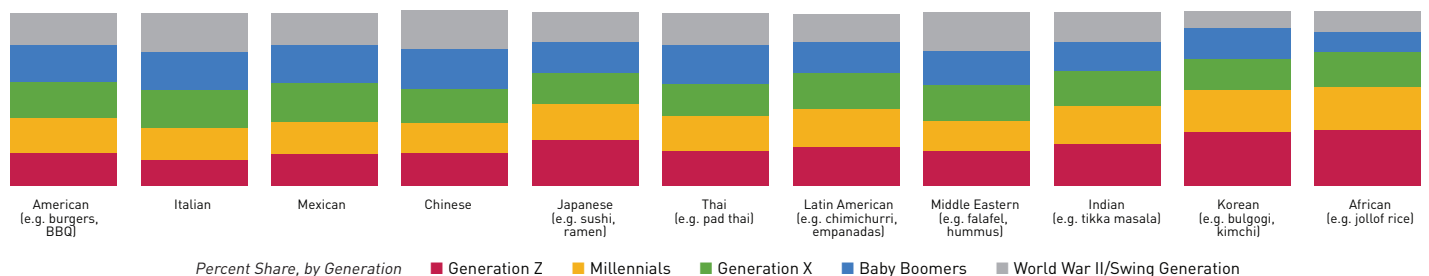
“WHAT TYPES OF FOOD/DRINKS WOULD YOU BE MOST LIKELY TO TRY UNFAMILIAR FLAVORS OR INGREDIENTS IN AT A RESTAURANT?”



## DINERS SEEK GLOBAL INNOVATION FOR THEIR PALATES TO SUPPLEMENT “LOST” EXPERIENCES

Research finds that 71% of U.S. consumers love trying new experiences, including food and drink and flavor discovery. The need for adventure is likely intensified by current limited travel, events and social gatherings. Operators looking to attract new diners or increase frequency can tap into flavorful Limited Time Offerings (LTOs) featuring less conventional cuisines to fill other experiential voids.

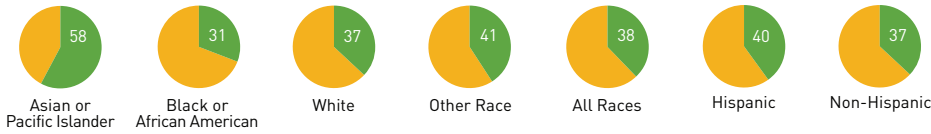
“WHICH OF THE FOLLOWING CUISINES INTEREST YOU WHEN ORDERING FROM A RESTAURANT? PLEASE SELECT ALL THAT APPLY.”



For this report, Mintel includes a wide range of restaurants, including FSRs (full-service restaurants) as well as LSRs (limited-service restaurants), that include both fast food and fast casual venues. Data Source: Lightspeed/Mintel. Unless otherwise indicated, survey base is 1,897 internet users aged 18+ who order food from restaurants (21+ for alcohol questions) and conducted July 2020.

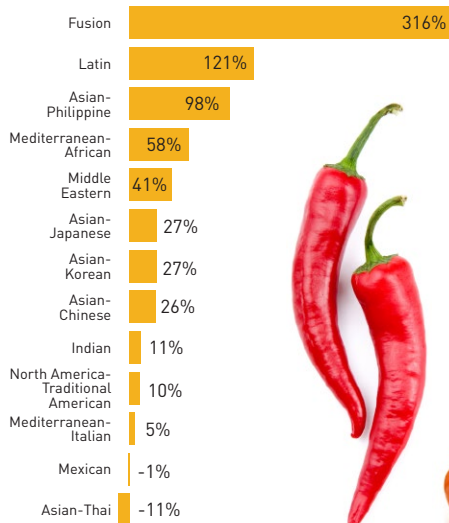
## ASIAN CONSUMERS MOST INTERESTED IN INTERNATIONAL FLAVORS

"INTERNATIONAL FLAVORS (E.G. SRIRACHA, CURRY) APPEAL TO ME ON A RESTAURANT MENU." ● Yes, in Percent



## HIGHLY POPULAR FUSION CUISINE REPRESENTS GROWING DIVERSITY

Operators are leaning into the cultural melting pot that consumers across ethnicity and race are interested in through cuisine and flavor innovation. Fusion cuisine is by no means new to menus yet it continues to grow simply by constantly evolving. Growth of fusion foods and drinks on U.S. menus outpaced all other cuisines, indicating that chefs continue to get creative with unexpected flavor combinations and formats to keep menus exciting and drive traffic.



Percentage change in cuisine type on U.S. menus, Q4 2015-19

## RETAIL FLAVOR TRENDS

Many consumers have shifted a larger share of their food budget from food-service to retail, opting to harness cooking skills over restaurants. In addition to consumers being cautious with spending, 34% of consumers will only return to a restaurant once there is a vaccine.

Among Consumer Packaged Goods (CPG) flavor innovation over the last year, there has been an increased emphasis on classic and nostalgic flavors, particularly within desserts and bakery.

Chili pepper has continued to trend in sauces and snacks, along with natural flavors that can offer wellness properties, both mental and physical.

Other directionally fast-growing flavors in U.S. food product launches include:

- |                   |                      |
|-------------------|----------------------|
| Maple             | Vanilla Bean         |
| Blackberry        | Oregano              |
| Apricot           | Asiago               |
| Coffee/Cappuccino | Truffle/Mushroom     |
| Cookies & Cream   | Rosemary             |
| Whiskey/Bourbon   | Sage                 |
| Birthday Cake     | Lavender             |
|                   | Cardamom             |
|                   | Lemongrass           |
|                   | Black Currant/Cassis |
|                   | Black Garlic         |
|                   | Pink/Himalayan Salt  |
|                   | Habanero             |



## POPULAR FLAVOR OFFERINGS

### ASIAN

- Black Sesame
- Butaman
- Cherry Blossom
- Gochujang
- Kimchi
- Kokuto
- Miso
- Natto
- Orange Chicken Sauce
- Pandan
- Ponzu
- Samyang
- Sesame Ginger
- Shoyu Soy Sauce
- Sichuan Pepper
- Stir Fried Basil
- Tan Tan Noodle
- Togarashi
- Unagi
- Wasabi

### ITALIAN

- Alfredo
- Balsamic
- Vinegar
- Chianti
- Italian Herb
- Marinara
- Mozzarella
- Parmesan
- Pecorino
- Prosciutto
- Romano
- Mediterranean
- Feta Cheese
- Harissa
- Kalamata Olive
- Tahini
- Tzatziki
- Dill

### AFRICAN

- Harissa
- Za'atar
- Zhug
- Saffron
- Coriander
- Cumin
- Preserved
- Lemon

### LATIN

- Aji Amarillo
- Ancho Chili
- Chimichurri
- Chipotle
- Churro
- Fire Roasted Pepper
- Hatch Chili
- Queso
- Lager
- Michelada

### VEGETABLE/ ALLIUMS

- Mushroom Varietals
- Porcini
- Chaga
- Lion's Mane
- Shiitake
- Oyster
- Shallot
- Chive
- Smoked Garlic
- Charred Onion
- Black Garlic
- Sweet Onion
- Roasted Garlic

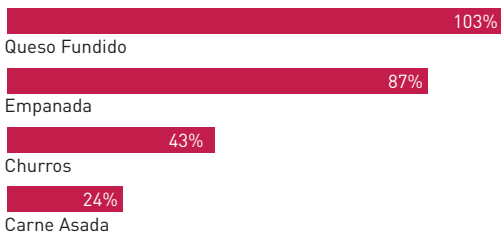
### COMFORT

- Applewood Smoked
- Carolina BBQ Sauce
- Chicken and Waffles
- Fried Chicken
- Macaroni and Cheese
- Nashville Hot
- Pulled Pork
- Smoked Brisket

## LATIN FLAVORS OFFER DISHES BOLD SPICES AND RICH SMOKINESS

The incidence of Latin cuisine increased 121% on menus from Q4 2015-19. Although they share many common flavor profiles and ingredients, Latin cuisine does differ from Mexican cuisine.

Trending menu items include:

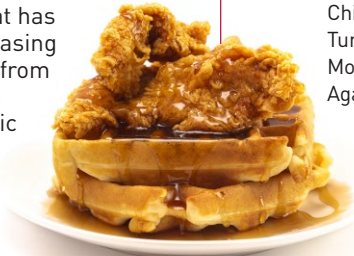


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## WHAT'S TRENDING IN FAST FOOD AND FAST CASUAL: SOUTHERN COMFORT FOODS

Comfort foods top the list of consumer interest in menu innovation, appealing to nearly 6 out of 10 consumers. The incidence of fried chicken sandwiches has doubled and chicken and waffle pairings have increased 81% on menus since 2016. Nashville-style chicken is another preparation that has been on the rise – increasing 83% in menu mentions from Q2 2018-20. A Southern household staple, classic pimento cheese gained traction on chain and independent menus as a summer LTO.



## WHAT'S TRENDING IN CASUAL AND FINE DINING: GLOBAL FLAVORS THAT TAKE CONSUMERS ON AN ADVENTURE

Foodservice is driven by offering customers an experience, something that is unique to their location whether it's the menu, the environment or the opportunity for socialization and this has remained true despite limitations impacting on-premise dining during 2020. Flavors that have been growing directionally over the last three years bring global flavors to dishes, incorporating new chili pastes, Latin and Middle Eastern seasoning blends and emerging Asian ingredients. Other fast-growing flavors on U.S. menus from Q4 2016-19 include:

Hatch Green Chili  
Turmeric  
Mojo  
Agave

Fire-Roasted Tomato  
Achiote  
Piri Piri  
Tomatillo

Whiskey  
Kimchi  
Togarashi  
Chimichurri  
Mole  
Tres Leches  
Cilantro  
Lychee

Calabrian Chili  
Sesame Seed  
Shiso  
Truffle (Mushroom)  
Za'atar  
Roasted-Garlic  
Kale  
Aji Amarillo  
Bulgogi  
Tamari

Miso  
Sambal  
Shallot  
Shoyu Soy Sauce  
Passion Fruit  
Ponzu  
Harissa  
Black Sesame Seed  
Adobo Seasoning  
Furikake

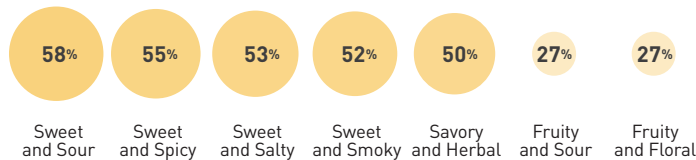


## SWEET FLAVOR COMBINATIONS ARE SET UP FOR SUCCESS

When developing flavor combinations, starting with a familiar and widely accepted foundation is key to appealing to the largest segment of diners. Those with a sweet base elicited the strongest interest levels, speaking to the power of familiarity as well as established product availability on menus and beyond.



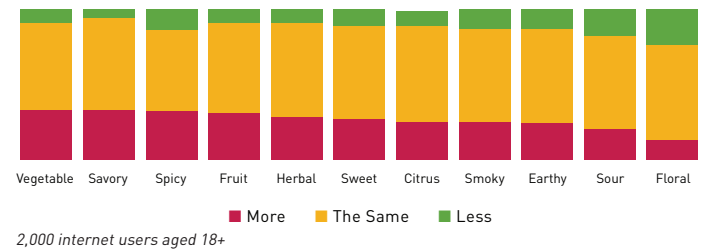
"WHICH OF THE FOLLOWING FLAVOR COMBINATIONS WOULD YOU BE INTERESTED IN TRYING FROM A RESTAURANT MENU? PLEASE SELECT ALL THAT APPLY."



## PLANTS, PEPPERS AND SAVORY FLAVORS ARE ON THE RISE

The rise of plant-based alternatives in both foodservice and retail led to consumers having more vegetable flavors and ingredients in their diets. It is becoming easier than ever to find plant-based substitutes and flavors both at home and away from home due to the fast-paced innovation taking place in the category.

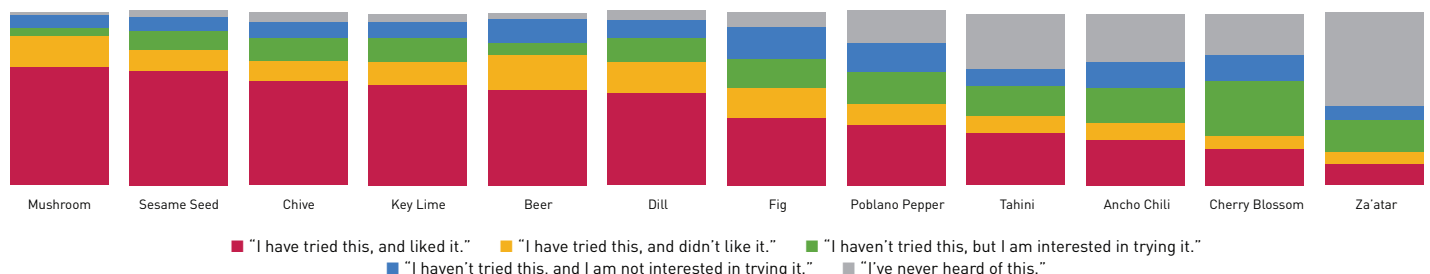
"ARE YOU EATING MORE, THE SAME, OR LESS OF THE FOLLOWING FLAVORS COMPARED TO THIS TIME LAST YEAR?"



## INTEREST AND EXPERIENCE IN EMERGING FLAVORS

Menu innovation is intended to drive both short- and long-term interest, trial and visitation yet it can also serve as a litmus test for CPG brands in their product development. Trending, globally-inspired flavors and chilies have more room to grow, yet are likely to appeal to consumers looking to expand their palates. Meanwhile, established flavors like mushroom, key lime and sesame have greater trial among consumers yet can still be new when moved around the menu to new menu items and dayparts. An outlier to this trend is cherry blossom, which is just breaking into the U.S. menu scene, yet has elicited extraordinary interest as an emerging flavor.

"HOW WOULD YOU DESCRIBE YOUR EXPERIENCE WITH, AND INTEREST IN, THE FOLLOWING FLAVORS AND INGREDIENTS WHEN IT COMES TO MENU ITEMS AT RESTAURANTS?" In Percent



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