Foodservice and retail explore regionalized international fare, while emerging and increasingly popular ingredients promote relaxation and gut health.
Mintel’s 2019 US Flavor and Ingredient Trends spotlight the flavors and ingredients that are influencing the foodservice and packaged food and drink categories today. In a nutshell, Mintel links the relationship of consumer behavior to foods that you see on restaurant menus and store shelves and explains the significant momentum that has led to this moment.

Building on our 2018 Flavor Trends, international flavors are examined from India, Japan and the Eastern Mediterranean, where we explore the spirited and unconventional avenues that have driven these unique ingredients to dishes and menus in the US.

Seeking out ingredients that provide sustenance for healthy eating will always be top of mind (at least for the foreseeable future). However, consumers today are also looking beyond the balanced diet. Flavors that tap into relaxation and support a healthy gut are satisfying consumers that are looking for ingredients that will feed the mind, body and soul.

The 2019 US Flavor and Ingredient Trends were developed by Mintel’s team of cross-category expert analysts, and backed by Mintel’s proprietary consumer, market and product innovation research.

EDITOR’S NOTE

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In an increasingly stressful world, consumers are taking a moment to wind down and chill out with the aid of botanical flavors and ingredients and adaptogenic herbs.

Ayurvedic-inspired ingredients and adaptogens—herbs like turmeric, ashwagandha, and tulsi that are thought to help the body adapt to stress—are appearing in more packaged foods and drinks, from ice cream to kombucha. Meanwhile, operators are getting creative with cannabidiol, or CBD, adding it to a variety of menu items.
As a growing number of consumers are looking to manage stress and focus on their overall well-being, they are choosing to ditch alcohol—at least some of the time. Spirit-free cocktails are proving to be a suitable alternative to alcoholic beverages, and are often prepared with premium ingredients like juices, housemade bitters, and seasonal herbs.

1. Ayurveda Inspired Artisanal Chocolate contains turmeric and sea salt. The curcumin in turmeric stimulates the body’s own antioxidant mechanism. (Source: Elements Truffles)

2. Suja Organic Kombucha is boosted with adaptogens, including ashwagandha, schizandra and reishi. It also supports the immune system and is made with cold-pressed juice. (Source: Mintel GNPD)

3. CBD-Infused Chocolate Chip Cookie, Warm Belly Bakery (Chicago, IL) Individually wrapped chocolate chip cookie with 30 mg of CBD oil. (Source: Eater Chicago)

4. No New Friends, Young American (Chicago, IL) Turmeric tonic tea, hibiscus, lime, aquafaba, CBD oil. (Source: Young American Instagram)

45% of US Millennials would give up alcoholic beverages in order to improve their health.

WHAT’S HAPPENING ON THE MENU?

Botanical flavors and beverages are growing on US menus (Q4 2015-2018):

- Hibiscus +55%
- Mocktails +43%

Source: Mintel Menu Insights
of cannabis users in states where recreational cannabis use is legal have reduced their consumption of alcohol since legalization.

of consumers in cannabis-legal states say they often feel stress/anxiety.

of cannabis users in cannabis-legal states say they use cannabis to relax.

Source: Mintel Reports

WHY NOW?

With cannabis now legal in several US states, and industrialized hemp production legal nationwide, consumer curiosity in alternative forms of stress release and relaxation is piqued. Whether it is tetrahydrocannabinol (THC), CBD, karkade (hibiscus tea) or other botanicals that have purported relaxation benefits, consumers are interested in trying foods and drinks that support the desire to slow down.
A variety of Japanese ingredients and dishes are appearing on US menus and diners are sharing them with their peers on social media. Some of these ingredients are increasingly popping up in dishes that are already familiar to diners, such as pancakes and sandwiches.

Social media is helping to drive awareness of several Japanese menu items that some Americans may not be familiar with, including jiggly souffle pancakes topped with matcha butter, or souffle cheesecakes stamped with a restaurant’s logo.

Restaurants and retailers are drawing on the popularity of Japanese foods and ingredients like sushi, ramen, and matcha as tourism to, and overall interest in, Japan grows.
Katsu sandos ("cutlet sandwiches") consist of fluffy Japanese milk bread (shokupan), fried pork or Wagyu cutlets, cabbage, and tonkatsu sauce.

Seasonings are also seeing increased popularity, including katsuobushi—also known as bonito, a dried flaked fish that, paired with kelp, forms the base of dashi. Furikake, meanwhile, is a dry seasoning that typically consists of dried fish, sesame seeds, chopped seaweed, sugar, salt, and monosodium glutamate, or MSG.

Omakase ("chef's choice") menus feature multiple courses of Japanese cuisine that are decided by the chef.

**WHAT'S HAPPENING ON THE MENU?**

Japanese ingredients and dishes are on the rise (Q4 2015-2018):

- **Yuzu** +10%
- **Ramen** +44%

Source: Mintel Menu Insights
AMERICANS ARE OPEN TO TRYING MORE JAPANESE CUISINE AT HOME AND AWAY:

- 45% of consumers are interested in eating Japanese cuisine from a restaurant or retail store.
- 41% of consumers have eaten Japanese cuisine at home or away.
- 19% of consumers are motivated to eat international foods because of their travels.

Source: Mintel Reports

WHY NOW?

Consumers can’t seem to get enough of street food, and Japanese street food is appearing more and more in the media via documentaries, foodie television series and industry influencers on social media. Street foods like takoyaki (“fried octopus balls”) and okonomiyaki (“savory pancakes”) have popped up across Instagram, exposing consumers to these traditional snacks. What’s more, the 2020 Olympics in Japan also brings a renewed focus to the country, and US tourism to Japan is growing.
As consumers have begun to understand the link between fermented foods and health, some restaurants and retail brands have turned to lesser-known or ‘old-fashioned’ fermented foods. These include drinking vinegars, pickles, kimchi, kefir (fermented milk), and kombucha—and their alcoholic counterparts. Some newer fermented foods are derived from soybeans, including miso, tempeh, and natto (sticky, slimy beans).

As consumers become more aware of the microbiome, they are seeking sour flavors and fermented and probiotic ingredients to help support a healthy gut.
Sour flavors are even making their way into frozen desserts and slushies, including pickle flavors.

Prebiotics are lesser explored in current product innovation and menu offerings, but Mintel expects these ingredients to grow, including tapioca, chicory, dandelion greens, tsampa, and guar gum.

1. Natto, Young American (Chicago, IL) Brussels sprouts with grapefruit, natto (fermented soybeans), yogurt. (Source: Yelp)

2. Pickled Veggies, Shaya (New Orleans, LA) At Shaya, the chicken schnitzel sandwich features pickled cauliflower, cucumber, and green tomato. (Source: Shaya)

3. Simple Mills Crunchy Double Chocolate Cookies are made with arrowroot, coconut sugar, and tigernuts, which contain prebiotic fiber that the brand claims fuels good gut bacteria. (Source: Simple Mills)

**WHAT’S HAPPENING ON THE MENU?**

Sour gut-friendly ingredients and preparations increase on US menus (Q4 2015-2018):

- Pickled: +27%
- Kimchi: +16%
- Fermented: +8%

Source: Mintel Menu Insights
One of the key indicators that fermentation is poised to reach fever pitch is that the founder of the world’s arguably most famous restaurant wrote a book on fermentation, calling it “a natural process and way of being, and ultimately the future of cooking.” René Redzepi, co-owner of Copenhagen’s Noma, published his book, “The Noma Guide to Fermentation,” in late 2018.

Probiotics have become familiar to consumers via vitamins and supplements and in fermented food and beverage retail products. And while fermentation is not new for restaurants, the marketing campaigns and product claims associated with its functional benefits are largely unexplored on restaurant menus.

US CONSUMERS LOOK TO PROBIOTICS FOR BENEFITS:

- 67% of probiotic-supplement users say they consume them for a healthy gut/microbiome.
- 39% of consumers say they try to include probiotics in their diets.
- 33% of diners are interested in dishes with ingredients that have digestive benefits.

Source: Mintel Reports

Source: J.B. Prince Company
Over the past few years, Indian cuisine has entered the spotlight. Traditional Indian flavors are appearing in modern retail products like chocolate spreads and on menu items, especially within the fast casual space. Kati rolls, dosas and parathas have been popularized by pop-up restaurants and food trucks.

Consumers are discovering more ingredient combinations and dishes native to different parts of India as they expand their knowledge about Ayurveda and seek authentic regional flavor experiences.
Within non-Indian restaurants, Indian flavors appear on menus regularly, such as Veggie Grill’s Masala Bowl with spiced chickpeas, turmeric-roasted cauliflower, and super grains. In retail, flavored ghees, simmer sauces, and packaged flatbreads have given consumers an easy way to experiment with Indian flavors at home.

1. 4th & Heart Chocti
Chocolate Ghee Spread

offers “a healthier alternative to ordinary, everyday chocolate spreads.” It is made from cacao, dates, and Madagascar vanilla bean ghee. (Source: 4th & Heart)

2. Kosha Mangsho Roll,
The Kati Roll Company (New York, NY)

Traditional Bengali spicy braised mutton wrapped on a flat paratha bread. (Source: Kati Roll Instagram)

3. Masala Bowl,
Veggie Grill (Chicago, IL)

Spiced chickpeas, turmeric roasted cauliflower, supergrains, steamed kale, hemp seeds, cilantro/ green curry sauce, raita. (Source: Veggie Grill)

WHAT’S HAPPENING ON THE MENU?

Indian-specific flavors are growing on US menus, with a clear standout:

Masala

+141%

Source: Mintel Menu Insights, Q4 2015-2018

Menu mentions of Indian dishes overall grew

15%
US CONSUMERS ARE DRAWN TO INDIAN FOOD, BUT THEY COULD GO DEEPER:

- 29% of consumers who eat international food are interested in buying Indian food.
- 49% of consumers who eat international food are interested in Indian sauces/condiments at retail.
- 25% of consumers want to know which region within a country a recipe is sourced.

Source: Mintel Reports

WHY NOW?

Pop-up restaurants, food trucks and retail products that celebrate local international flavors are giving consumers new understanding and changing their expectations of international foods. This treatment is just starting to play out with Indian food, but there is a tremendous opportunity to create dishes and products that explore the regional specialties of India, such as Keralan food. Kerala is known as the “land of spices,” and its food is rich with flavor. It also offers meat-based and vegetarian dishes, offering something for everyone.
The next wave of Middle Eastern flavors are emanating from the Eastern Mediterranean region with dishes and products that spotlight lesser-known sauces, spreads and the region’s cuisines.

More varied Mediterranean ingredients and flavors are expanding consumers’ palates and along with them, the possibilities for Middle Eastern food. Middle Eastern cuisine itself is now mainstream in US foodservice with menu mentions increasing 45% from Q4 2015 to Q4 2018, according to Mintel Menu Insights.
For example, hawaij is a Yemeni spice blend that can be savory or sweet. From Turkey, urfa biber is a chile pepper distinctive for its smoky/sour flavor and crunchy texture.

At the same time, familiar flavors are being used more widely. Sesame seeds and tahini, for example, can be found in everything from non-dairy milk to desserts. Zhug, labneh and toum—spreads identified in our 2018 Flavor Trend predictions—continue to show directional growth on menus and are increasingly appearing in retail launches.

1. Chevoo Urfa Chili & Lemon Marinated Goat Cheese blends goat cheese with Urfa chili peppers and marinates it in a lemon-infused EVOO blend. (Source: Chevoo)

2. Hope & Sesame Sesame Milk is made from organic sesame seeds. The brand describes it as being “perfect for enjoying on its own, or ... whenever you need a splash of non dairy refreshment.” (Source: Deliciousness.com)

3. Eggplant Sabich Hummus, Israeli salad, pickles, hard boiled eggs, garlic tahini. (Source: Serious Eats)

US menus increasingly mention Eastern Mediterranean ingredients (Q4 2015-2018):

<table>
<thead>
<tr>
<th>Ingredient</th>
<th>Percentage Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cardamom</td>
<td>+79%</td>
</tr>
<tr>
<td>Tahini</td>
<td>+14%</td>
</tr>
</tbody>
</table>

Source: Mintel Menu Insights
US CONSUMERS SHOW A DESIRE TO EXPERIENCE NEW DISHES:

- 75% of travelers prefer to eat local food rather than at chain restaurants while traveling.
- 50% of consumers who eat international food say they are motivated to eat them because they like trying new things.
- 39% of consumers are interested in trying different international street foods.

WHY NOW?

Consumers are widely familiar with staple Middle Eastern foods like hummus, falafel, and zhug as these options are now commonly found on fast casual menus and grocery store shelves. This familiarity sets consumers up to be more receptive to regional, specialized flavors from specific Eastern Mediterranean locations. What’s more, because the cuisines of Israel, Yemen, Lebanon, and Syria are getting more attention in the global food press and on social media, expect to see them on menus in more restaurants in major US cities.

Source: Mintel Reports
Techology and socially-conscious brands are making the biggest splashes in the restaurant industry. But what's next? Don’t get inundated by the fast-paced nature of new developments in US Foodservice. Menu Insights is your source for trends in the dining experience, menu optimization and new flavors, ingredients and food preparation.

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