Flavor Profiles and Flavored Meat Trends

Provided by:
National Pork Board
2005
Today’s consumer is more flavor oriented

- Consumers like to try new things when dining out and are getting more sophisticated in tastes.
- Drivers for changing tastes:
  - Nutrition is less important
  - Taste is most important
  - Convenience plays a major role
- As shoppers seek something different, they are experimenting more with non-traditional flavors. This trend stems from the influence of restaurant dining and exposure to different cuisines.
Influence of Restaurant Dining
Restaurant flavors in 2004

- Currently, America’s “Big Four” bold flavor basics are:
  - Barbeque
  - Cajun
  - Buffalo
  - Caesar
“Big Three” ethnic cuisines driving flavor development in restaurants

Ethnic Platform

- Italian
- Mexican
- Chinese

Ethnic Extensions

- Mediterranean
- Middle Eastern
- North African
- Regional Italian
- Caribbean/Island
- Cuban
- Sunbelt/Latino
- Thai
- Vietnamese
- Korean
- Japanese
- Regional Chinese

Flavor Notes

- Italian: Savory-Herbal, Aromatic
- Mexican: Hot, Savory & Sweet
- Chinese: Clean, Crisp Flavors, Bold & Spicy Profiles, Pungent Condiments
Ethnic cuisines currently on the menu in all types of foodservice operations

- Type Of Ethnic Cuisine
  - Mexican: 47%
  - Northern Italian: 37%
  - Southern Italian: 35%
  - Tex-Mex: 29%
  - Cajun/Creole: 29%
  - Chinese: 28%
  - Mediterranean: 23%
  - Spanish: 19%
  - Greek: 17%
  - Caribbean: 14%
  - Japanese: 10%
  - Latin American: 8%
  - Others:
    - Thai: 8%
    - Indian: 5%
    - Other Asian: 5%

Source: Flavor & the Menu magazine
Flavor fortification

Flavor fortification is delivered by flavor-laden alternatives to basic traditional ingredients.

Flavors impacting 2004 menus:
- Sun dried tomato
- Pesto
- Flavored butters and mayos
- Infused oils
- Flavored vinegars/wine vinegars
- Cheeses/Farmhouse cheeses
- Tortillas/Flavored tortillas
- Broths
- Rustic breads
- Wasabi
- Ginger
- Basil
- Lemongrass
- BBQ sauces
- Roasted garlic
- Roasted peppers
- Coarse ground pepper
- Balsamic vinegar
- Soy/Teriyaki sauce
- Olive oil
- Lemon-dill
- Sesame
- Fruit glazes
- Bold marinades
- Fruit & veggie salsas
- Sea salt
- Hot peppers (jalapeno, chipotle, chile)
- Hot pepper sauces
In-home Flavor Trends
Italian and Mexican foods are ethnic favorites

- The majority prepare Italian and/or Mexican foods at home.
- Expert cooks who love to prepare food are more likely to make ethnic dishes.

**Favorite Ethnic Flavor**

<table>
<thead>
<tr>
<th>Ethnic Flavor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italian</td>
<td>43%</td>
</tr>
<tr>
<td>Mexican</td>
<td>36%</td>
</tr>
<tr>
<td>Asian</td>
<td>13%</td>
</tr>
<tr>
<td>Mediterranean</td>
<td>2%</td>
</tr>
<tr>
<td>Caribbean</td>
<td>1%</td>
</tr>
</tbody>
</table>

**Prepare in Home...**

<table>
<thead>
<tr>
<th>Ethnic Flavor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italian</td>
<td>87%</td>
</tr>
<tr>
<td>Mexican</td>
<td>75%</td>
</tr>
<tr>
<td>Asian</td>
<td>38%</td>
</tr>
<tr>
<td>Mediterranean</td>
<td>15%</td>
</tr>
<tr>
<td>Caribbean</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: NPB Kitchen Report III
America’s favorite “flavors”

- Percent of Americans who want to “try” a new flavor – which flavors?
  - Fresh Herbs 42%
  - Garlic Seasoning 37%
  - Cajun Spices 27%
  - Hot Mustard 21%
  - Dijon Mustard 21%
  - Creole 20%
  - Balsamic 19%
  - Thai 18%

Source: “What America Eats” Volume IX – 2003
### Generational eating trends

<table>
<thead>
<tr>
<th>Generational Segment:</th>
<th>Gen Y &amp; X</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flavor Profiles:</td>
<td>Cheesy, Tangy/Sour, Hot-Hot, Berry/Fruity</td>
<td>Hearty spices, savory flavors, smoky or charred, fruity, hot</td>
</tr>
<tr>
<td>Flavor Strength:</td>
<td>Layered “hot”, hot &amp; spicy, hot &amp; sour, sweet &amp; hot, complex hot, cool &amp; spicy</td>
<td>Sweet &amp; spicy, spicy hot</td>
</tr>
<tr>
<td>Ethnic Focus:</td>
<td>Pan-Asian, Cuban/Island/Latin, Mexican, Japanese</td>
<td>Regional Italian, Southwestern/Sunbelt, Chinese, BBQ, Nostalgia Food</td>
</tr>
</tbody>
</table>
**Seasoning blends are on the rise**

![Bar chart showing the growth of Mexican Seasoning, Italian Herb Seasoning, and Lemon Pepper from 1993 to 2002.](chart)

Source: NPD Kitchen Audit
Salsa and marinades continue to gain popularity

% of Households with Item on Hand

- Ketchup
- Mustard
- BBQ Sauce
- Mayonnaise
- Worcestershire
- Soy Sauce
- Steak Sauce
- Tabasco/Hot Sauce
- Salsa
- Marinades
- Teriyaki Sauce
- Tarter Sauce
- Horseradish

Source: NPD Kitchen Audit
Flavored Meats
Overall, flavored meat products* represent a small percentage of the total fresh meatcase

*Flavored product represents raw items that have been seasoned and/or stuffed
NOTE: "All Other" Value Added products include pre-cooked (heat & eat) items and specialty cuts such as kabobs, stir fry and stew meat
Source: NPB Composite; Calendar Year 2004 All Data (52 Wks)
This is consistent across species

**Fresh Pork**
- Flavored pork represents the majority of fresh pork value added business – outperforming all other value added pork products by double in pounds and 63% in sales.

**Chicken**
- Chicken has the greatest combined share of all value added products (5% in pounds and 9% in sales).

**Beef**
- While beef is the weakest in flavored products overall, it performs well with other value added products (due largely to stew meat).

Note: “All Other” value added products include pre-cooked (heat & eat) items and specialty cuts such as kabobs, stir fry and stew meat.
Source: NPB Composite; Calendar Year 2004 All Data (52 Wks)
Within species, flavored strength varies across segments

**Flavored Fresh Pork**
- Roasts: 35% $, 34% \$
- BL Chops: 16% $, 15% \$
- Ribs: 15% $, 15% \$
- BL Chops: 15% $, 11% \$
- Steaks: 15% $, 16% \$
- Ground: 3% $, 2% \$
- All Other: 2% $, 1% \$

**Flavored Chicken**
- Whole: 8% $, 3% \$
- Breasts: 73% $, 71% \$
- Leg Pieces: 11% $, 8% \$
- Wings: 8% $, 16% \$
- All Other: 1% $, 2% \$

**Flavored Beef**
- Roasts: 47% $, 43% \$
- Steaks: 36% $, 40% \$
- Ground: 15% $, 13% \$
- Ribs: 2% $, 4% \$
- All Other: 0% $, 0% \$

Note: Tenderloins are included in roasts

Source: NPB Composite; Calendar Year 2004 All Data (52 Wks)
New meat product flavors in 2004

- Smoked flavor: 69 new products
- Pepper flavor: 41 new products
- Roasted: 39 new products
- Barbecue: 38 new products
- Honey: 34 new products