Ethnic Foods - US - January 2013

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"When it comes to ethnic food eaten and prepared at home, restaurants continue to pose a threat because of constant innovation that attracts consumers. In order to remain competitive, companies need to focus on product development that blends authenticity with familiarity, while offering unique flavor combinations."

– Carla Dobre-Chastain, Food Analyst

In this report we answer the key questions:

- How can ethnic food manufacturers better cater to households with kids?
- How can manufacturers encourage greater consumption of ethnic food at home?

The ethnic food category stands at an estimated $8.7 billion in 2012 after a strong performance seen during and after the U.S. recession. While the category showed a 12% increase in dollar sales from 2007-09, the trend softened a bit, with only 4.5% growth from 2010-12. While consumers were cooking at home more during the recession, a relatively more stable economic environment means many have returned to restaurant eating, when it comes to ethnic food. However, expected food price increases for 2013 may influence more consumers to again cook at home more.

Indeed, the ethnic food category is expected to grow by 20.3% from 2012-17; however, much is dependent on product innovation that meets consumers' needs. Therefore, companies need to consider better leveraging the diverse U.S. demographic profile, where multicultural groups are growing at a faster rate than the total population; additionally, striking a balance between authenticity and familiarity by expanding offerings into less-known cuisines is a strategy likely to appeal to an increased consumer interest in unique and traditional flavors.

This report builds on the analysis presented in Mintel's *Ethnic Food—U.S., January 2012* as well as the January 2011, September 2009, and June 2002 reports of the same title; in addition to research presented in *Sacred Foods and Food Traditions—U.S., January 2008*.

For the purposes of this report, Mintel has focused on a combination of two distinct sets of products in defining the size of the ethnic food market:

- Mexican and Asian food as defined by SymphonyIRI and tracked as distinct categories. These categories include many of the largest product segments such as salsa, taco sauce, refried beans, soy sauce, noodles, and other Mexican/Hispanic and Asian food.

- A custom universe of products identified by Mintel using SymphonyIRI data across categories
  including marinated vegetables, chutneys, other sauces, dry packaged dinners, noodles, refrigerated entrées and side dishes, rice (seasoned mixes and ready-to-serve), cooking oils, shelf-stable dinners, frozen dinners, and frozen prepared vegetables.

Because this market is created exclusively by Mintel, the total market size data are only based on FDMx (excluding Walmart), and do not incorporate other sources of data typically utilized by Mintel, such as the Bureau of Labor Statistics and the Consumer Expenditure Survey.

This report does not attempt to cover all ethnic food or all cultural cuisines across all food and beverage categories. In some cases, food categories were left out because they are either fully discussed in other

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market recent Mintel reports, and/or Mintel believes these categories or cuisines are so common to the typical American diet as to render them no longer truly ethnic food (e.g., Italian food).

The very definition of the ethnic food market is a gray area in the food industry. While supermarkets traditionally merchandise ethnic food in "international" aisles, additional products throughout stores often have either ethnic/cultural origins outside of the U.S. (e.g., green tea, tortillas), or are based loosely on ethnic food products (e.g., wasabi, teriyaki-flavored salad dressing). These additional items may be considered ethnic by some in the food industry, but not by others.

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