

McCormickInspire

This document is strictly
confidential and may not be
reproduced or circulated without
McCormick's prior consent



THE OMMMMMM
OF MMMMMMM





*Take a look ahead,
On the flavourful blend,
That's making a trend*

MEXICANA VEGANA, THE NEXT TRENDING FLAVOUR!

To keep you ahead in knowing the fresh flavourful insights and inspiration from around the globe, we are delighted to introduce the next flavour in focus for this year!

Here, we highlight the flavour innovation in sauces & condiments, as well as the current happenings in its market and consumers in the Asia Pacific.

Also, we'll discover a whole new look to one of the most beautiful, fresh and flavourful cuisines around the globe that continues to grow in popularity --- Mexican cuisine.

As most people are now leaning into more plant-based meals with a conscious focus on their wellness goals, now's the time to explore and discover a whole new side of Mexican vegan food in your kitchen!

Sincerely,
McCormick Flavour solutions ASIA PACIFIC, Marketing and Insights Team



TABLE OF CONTENTS

I. THE FOODTURE / What's Trending in Condiments?

Trends in Sauces, Dips and Spreads..... **1-5**

II. EATSIGHTING / Latest Market and Consumer Trends on Condiments

NEA and SEA **7**

India..... **8**

Australasia **9**

III. THE FLAVOURACLE / Flavour Forecast 2019 Qtr. 2

Why Mexicana Vegana **11**

Mexican Distinctive Herbs & Spices **12**

Vegan Meat Alternatives **13**

Formats & Techniques **14-15**

Channels **16**



I. THE FOODTURE

What's Trending in Condiments?

Sauces from mainstream and more niche brands alike continue to look to international cuisines for flavour inspiration.



Trends in sauces, dips, and spreads

1. Look to street food for inspiration

Consumers around the world use street food markets as a way to 'try' new flavours.

Sauce brands are beginning to look to the trend to brand their products.

Street food, a buzzword for flavour



SCHWARTZ STREET FOOD SEASONING

The range is designed to help consumers recreate their favourite street food dishes at home, and includes Baharat, Chimichurri, Korean BBQ and Sriracha varieties.

Tapping into the growing popularity of street food is a win-win for brands targeting a younger audience.

Street food-inspired sauces



KOREAN STIR-FRY

Yogiyo Korean Sesame Soy Sauce

Rich and tangy authentic Korean street food made with twice-brewed soy sauce infused with garlic and a hint of fruit.

AUSTRALIAN OUTBACK BARBECUE

The Original Australian Lumi Lumi Marinade

A spicy teriyaki-style sauce from outback Australia using baby ginger and soy sauce, for authentic Australian BBQs.



PENANG

Way Authentic Penang Prawn Mee

Premium, savoury noodle dish tinged with sweetness of shrimps in the popular Penang street food.

2. Tap into SEAsian Flavours

This untapped market is known for a wide variety of condiments and dishes. Sambals, rendang and sate are all flavours that consumers have already tried in foodservice and which may work in retail.

A new range of 'spicy' condiments

SAMBAL

The traditional condiment to South East Asia can use a variety of chilli peppers and combinations of fish, meat and vegetables.



REMPAH NUSANTARA SAMBAL, ANCHOVY CHILLI SAUCE.

Based on an authentic traditional Indonesian recipe to make delicious home cooking. Launched in Indonesia.

Rendang and satay combine sweet and spicy

RENDANG

A curry dish from Indonesia that contains four key ingredients: meat, coconut milk, chilli and spices.

AH RENDANG PADANG WITH RICE

Indonesian stew with cooked beef in a lightly spicy coconut sauce with cooked rice.



SATAY (SATE)

Probably the most common of Indonesian flavours for the global community.

CONIMEX STREET FOOD INDONESIAN AYAM SATAY WITH NASI GORENG

Indonesian-style meal kit inspired by street food markets.



3. Use emerging ingredients for a point of difference

Certain countries use particular ingredients (such as sesame in the Middle East, or chamoy in Mexico) as central flavours to advertise their cuisine. Brands can tap into these regional ingredients to flavour sauces as a tag of authenticity.

The next tropical flavours



PINEAPPLE

MasterChef Pineapple and Mango Tropical Sauce

Hailed as 'the fruit of the moment' in the media, toppling avocado. Pineapple and mango mixed with ginger and curry sauce.

+362% growth in pineapple flavour as a share of cooking and table sauces in Latin America, 2017 vs 2018 (Jan-Sept)



CHAMOY

Chilim Balam Hot Chamoy Sauce

Chamoy refers to a range of sauces linked to Mexican cuisine. This Mexican launch comprises chillies, tamarind and apricot.

+208% growth in chamoy flavour in cooking and table sauces in Latin America, 2017 vs 2018 (Jan-Sept)

ANNATTO

La Anita Annatto Condiment Sauce

Contains achiote seed (annatto) mixed with spices. The sauce is mostly found in Latin America and the Caribbean.

+131% growth in annatto flavour in cooking and table sauces in Latin America, 2017 vs 2018 (Jan-Sept)



4. Dipping

Dips are a fun, shareable, and craveable appetizer and add-on option on restaurant menus. Leading types of dip menu dishes include hummus (by a long shot), spinach artichoke dip, cheese or queso dip, and salsa.

Pizza dips become the new norm



AL PASTOR PIZZA WITH PINEAPPLE DIPPING SAUCE AT SAUCE PIZZERIA

Pizza dip options have become an expectation at restaurants now, with Papa John's, Pizza Hut, Little Caesars, and Domino's all offering ranch dressing and other dips on their menus.

INNOVATIVE DIPS



LASAGNA DIP Olive Garden

This LTO features layers of cheese and housemade meat sauce, topped with smoked mozzarella and baked. Served with housemade pasta chips tossed with Parmesan and garlic salt.



VAMPIRE DIP Slater's 50/50

Roasted garlic and artichoke hearts blended with creamy melted cheese, served in a sourdough bread bowl with crispy pita and veggies for dipping.

BUFFALO CHICKEN DIP Elephant Bar Restaurant

Shredded chicken, Gorgonzola cheese, mozzarella cheese, cream cheese, Buffalo sauce, and tortilla chips.



II. EATSIGHTING

Latest Market and Consumer Trends on Condiments.

Discover what's trending in East Asian, Indian, and Australasian table sauces.





SEA is ripe for sodium reduction in sauces and seasonings.

Consumers in Southeast Asia (SEA) are concerned about excessive salt in their diet. It is time for sauce and seasoning brands to lead the way in salt-reduced products.

Consumers do want to avoid salt

In Thailand, salt is consumers' third most avoided food ingredient; in Indonesia, salt takes fifth place. Most Thai (69%) and Indonesian (65%) consumers say the reason they avoid salt is to stay healthy.



SEA IS HOME TO A HIGHER-THAN-AVERAGE DEATH RATE ATTRIBUTED TO A HIGH-SODIUM DIET.

Source: Institute for Health Metrics and Evaluation

Leave out the salt in seasonings

Manufacturers can choose to leave salt out when formulating seasonings.



BU NIRAH BUMBU AYAM GORENG (FRIED CHICKEN SPICES) (INDONESIA)

Free from MSG, colourings, preservatives or salt.

HOM-GROON PORK HOMEMADE STOCK (THAILAND)

Made with six hour-stewed pork back bones and vegetables. The stock is designed for young picky eaters.



STREET FOOD ASIA

Each episode explores a city's culture and history through the food locals are eating and sharing. The Asian cities documented in the show are Bangkok, Osaka, Delhi, Yogyakarta, Chiayi, Seoul, Ho Chi Min City, Singapore and Cebu.

WHAT'S NEXT?

As more Asians travel around the region, there is a potential opportunity for big brands to tap into the growing interest in local specialities, providing wider audiences with access to such delicacies.



The Indian table sauces market has been growing positively for the past few years with an average growth rate of **16.9%** in value terms from 2013 to 2017.



Flavour blends that appeal to Indian consumers

Given that tomato ketchup is the most preferred table sauce among Indian consumers, companies are making blends using tomato sauce as the base.

Also, Indian consumers like their kitchen herbs such as coriander, chili, lemon and mint. Most Indian households use at least one of these fresh herbs while preparing a meal.

Blends with tomato ketchup as the base



CHEESY KETCHUP Wingreens Farms Cheesy Ketchup

Said to be traditionally handmade and can be drizzled on pizza, spread on hot toast, used to dip fries and chips.

Using Indian kitchen herbs

CHILLI & LEMON TOPPING Santa Maria Latin American Kitchen

The vegetarian product is gluten-free and said to feature a sharp, fiery and hot taste.



Sweet and spicy variants



SWEET HONEY & HOT CHILLI CHUKH Himachilli Sweet Honey & Hot Chilli Chukh

It is made according to a 200 year old recipe and can be used as a dip or sauce to add flavour to snacks and meals.



Australasian flavour adventure can inspire global dip innovators.

The wide range of ingredients used in Australasian dip launches may be of interest to global manufacturers given the importance of new flavour trial among Millennials .

Australasian dips celebrate flavour diversity



Lisa's World of Flavours
Thai Sriracha with Roasted Capsicum, Sweet Chilli & Butter Beans, New Zealand



Yumi's Sweet Potato & Fresh Ginger
Classic Dip, Australia



Roza's Beetroot, Walnut and Pomegranate
Dip, Australia



Turkish Kitchen
Hot Smoked Salmon Dill & Cashew Dip, New Zealand

// The breadth and diversity of dip innovations in Australia and New Zealand could act as a pointer to future global flavour trends. //

VEGAN BURGER HYPE



+308%
increase of social media mentions of burgers that also mention "vegan" 2014 vs 2017 (full year)

Sauces for vegan burgers would be welcomed

New meat-based burgers should not be the only target for burger sauce brands. Burger launches are moving away from meat completely, many using meat substitutes/only plant-based ingredients. The hype for vegan burgers has developed.

SAUCE SHOP SMOKY CHIPOTLE KETCHUP

This suggests an opportunity to offer deeper smoky sauces that are reminiscent of barbecue flavours, but to target vegan burgers.



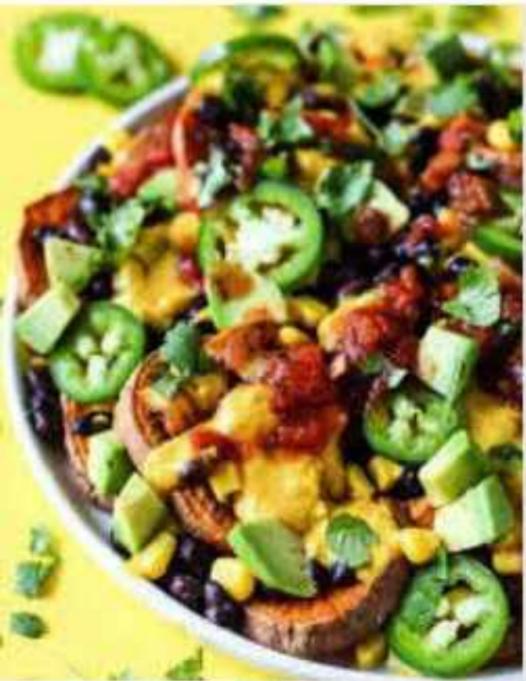
28% of Australian consumers show interest in smoked flavours in savoury food.



III. THE FLAVOURACLE

McCormick Flavour Forecast 2019 Qtr. 2

Mexican + Vegan! These two powerful foodie styles have finally become one.



WHY MEXICANA VEGANA?

With the essential spices and easy home-cooking techniques, you can recreate the taste, texture and appeal of Mexican-inspired meat entrees.

And, don't forget your sweet tooth with coconut, cashew & almond milks.



INCREASING POPULARITY

Mexican cuisines is one of the fastest growing globally.



HEALTH & WELLNESS

More than ever, people are eating more plant-based meals.



FLAVOUR FUSION

The perfect pairing for flavour exploration.



MEXICAN DISTINCTIVE HERBS & SPICES



CUMIN



GARLIC



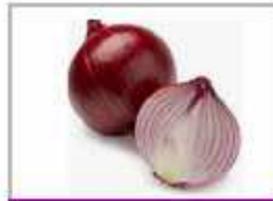
RED PEPPER



CLOVE



CORIANDER



ONION



HOJA SANTA



BAY LEAF



OREGANO



SESAME



VANILLA



EPAZOTE



BLACK PEPPER



CHIPOTLE &
ANCHO CHILI PEPPER



CINNAMON



PAPALO
(HERB)

VEGAN MEAT ALTERNATIVES



TVP- TEXTURED VEGETABLE PROTEIN



OKARA-SOY BEAN PULP



MUSHROOMS



JACKFRUIT



BUTTERNUT SQUASH



AUBERGINE



TOFU



POTATOES



CAULIFLOUR



NUTS



LENTILS



SEITAN



TEMPEH

NON-DAIRY CHEESE

- Mock Nacho cheese sauce
- Crumbly Cheese
- Non-dairy Crema/ cashew crema

FORMATS & TECHNIQUES



RAW SAUCES

- Topping - always accompany tacos, salads, or a protein.
- When mixed with veggies or a protein, become a main dish.



COOKED SAUCES

- Mixing different ingredients with Chiles is "new Mexican" cuisine (plums, mangos).
- Consistency determines whether used as a topping or a dip.



DAIRY-FREE, PLANT-BASED MOLES MADE WITH NUTS

- Most common: peanuts, almonds, walnuts, pumpkin seed, pine nuts.
- Cashews and pistachios also used (goes well with avocado).



A variety of sauce/dips found in Vegan Mexican Restaurant in Toronto – avocado pistachio crema, tamarind-anchó dip, poblano salsa, cashew crema, herb salsa verde, poblano tomatillo salsa, cucumber pico de gallo, mole almendrado, salsa macha.

Source: McCormick Flavour Forecast 2019 Quarter 2

@flavorforecast

Visit our Flavour Forecast website and Instagram for more information and recipes.
www.mccormick.com/flavor-forecast-2019



FORMATS & TECHNIQUES

Use these fillings in traditional meat-based entrees – like Enchiladas, Burritos, Stuffed Chilies, Tacos, Flautas & Tostados, for an Authentic Mexican Vegan Meal:

BARBACOA

Traditionally a preparation of meat that is steam cooked in an underground oven/pit until very tender and succulent.



BARBACOA-STYLE "MOCK MEAT" (mushrooms, eggplant, squash or other veg)

Mushrooms & eggplant are spiced, then charred on the grill. To serve, the mushrooms are sliced into very thin strips & the eggplant is "shredded" to create a meat-like texture.

MEXICAN CHORIZO

Chorizo is usually used in relatively small quantities to add a great flavour boost to countless Mexican dishes.



"CHORIZO" CRUMBLED SAUSAGE (chickpeas, lentils or other grain)

For vegan version, chickpeas are tossed with spices & some vegetables, then broken up to a crumble & sautéed.

QUESO CHEESE SAUCE

This melted cheese sauce can be used as a dip or topping for tortilla chips and Mexican entrees.



QUESO "MOCK CHEESE" SAUCE (cauliflower, cashews, nutritional yeast)

For vegan version, cauliflower, onion, cashews and coconut milk are pureed with spices then hot sauce & salsa is added to achieve desired heat level.

Source: McCormick Flavour Forecast 2019 Quarter 2

 @flavorforecast

Visit our Flavour Forecast website and Instagram for more information and recipes.
www.mccormick.com/Flavor-forecast-2019

FORMATS & TECHNIQUES

QSR

Quick Service Restaurants are offering plant protein burgers and sandwiches made from coconut, mushrooms, beetroot, corn and aubergine. Loaded with 100% vegan bun and fresh salad for the same mouth-watering indulgence.



MAKE IT AT HOME TECHNIQUES

With the just-right combination of spices, chilies and simple cooking techniques, vegan ingredients can be the star of any Mexican-inspired dish in your kitchen.



STREET FOOD

The vibrant streets and food halls are alive with vendors offering small, fulfilling Mexican Vegan bites, called antojitos. Tortas, tacos al pastor, street corn and tostadas are portable, inexpensive, customizable to your tastes, and layer flavour upon flavor for a satisfying snack.



DESSERTS

Coconut, almond, cashew and rice milks are simple swaps combined with vanilla and cinnamon that make horchata ice cream, Tres Leche cake and more irresistible.





JULY 2019 | ISSUE 5