

Culinary Trends

Worldly Flavors

As the American palates have diversified, patrons have become more intrigued with global cuisine. As the popularity of a cuisine increases, authentic ingredients and cooking techniques begin to emerge.

Far away cuisines have sparked many restaurants to call out the source of the ingredient, dish or cooking methods on the menu. Whether it's Tuscan Chicken Penne or a Southern Sweet Tea Martini, people love to feel that they can explore the world through flavor.

The use of regional cuisine claims on the menu has grown 9% between Q1 2005 and Q1 2008.

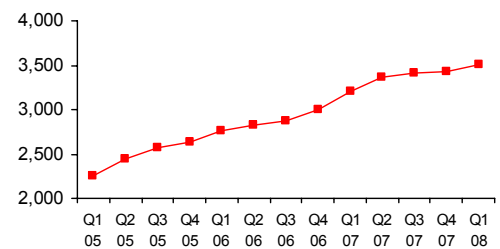


Mapping out the Regions

Casual Dining Restaurants represent the bulk of regional menu claims with a 36% share. They are followed by Family/Midscale, and Fine/Upscale/Gourmet Dining each with 27% and 18% share respectively. Fast Casual and Quick Service Restaurants (QSR's) have 11% and 8% respectively. Casual Dining and Fast Casual saw the strongest growth from same quarter a year ago each increased by 17%.

North American cuisine represents the majority of the regional claims with a 53% share, while Mediterranean and Asian represent 18% and 16% shares, respectively. Mexican and Fusion rank 4th and 5th with 8% and 5% share respectively.

Incidence of Regional Ingredient Claims on Restaurant Menus



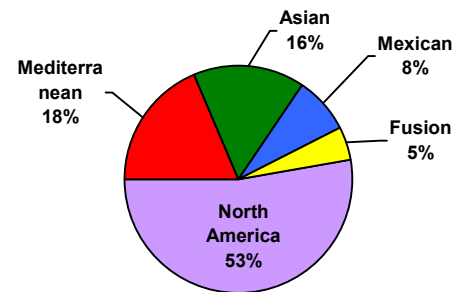
Traditional American

The menu is no stranger to Traditional American menu items like burgers and meatloaf. However, different flavors within the U.S. are being explored on the menu.

Popular American Regional Claims

Texas	New England
New York-Style	Cajun-Style
Southwestern	Boston-Style
Southern-Style/Southern	Santa Fe
California	American

Regional Claims by Cuisine



Mediterranean

Italian cuisine is the most popular Mediterranean cuisine. Four of the top five regional claims were Italian-based with three of its most popular regions represented. The top four regional claims were Italian, Sicilian, Neapolitan-Style and Tuscan. These claims bring romance to menu items.

Top Mediterranean Regional Claims

Region	Growth
Italian-Style	6%
Sicilian-Style	-10%
Neapolitan-Style	-4%
Tuscan	-16%

Asian

Asian is hugely popular on U.S. menus. Asian cuisine is very diverse and spread over a wide region. The top five regional claims were Chinese, Thai, Szechuan, Cantonese-Style and Japanese. Look for Southeast Asian claims to make their way to the menu in the future.

Top Asian Regional Claims

Region	Growth
Chinese	-6%
Thai	34%
Szechuan	-7%
Cantonese-Style	8%
Japanese	19%



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Latin

Mexican and Mexican-Style foods command a significant share of the Latin region claims with a 7-to-1 lead over the next region. The top regional claims were Mexican, Spanish, Cuban and Jalisco-Style. Southwestern, San Antonio, and Santa-Fe ranked in the top 10, although they are not shown in the chart below one can argue that they are heavily influenced by Mexican cuisine.

Top Latin Regional Claims

Region	Growth
Mexican-Style	6%
Spanish	0%
Cuban	0%
Jalisco-Style	0%

Street Food

From Spanish Tapas to Chinese dumplings and all-American hot dogs, the streets and public marketplaces of the world are becoming one great, big global buffet. Indigenously, this is the food of the workingman: quick, filling, tasty, cheap and portable. But for chefs and food lovers seeking the next new thing, these attention grabbing snacks are a bonanza of flavor and fun. Like all ethnic food, street foods follow a predictable path into the American mainstream: first being introduced by immigrants, then sought out by foodies, then eventually getting slightly “Americanized” for the mainstream.

The following are examples of Street Food Cuisine menu items:

Huarache - A traditional street food in Mexico City, our masa tortilla is filled with steak al-pastor style, queso requeson (Mexican Ricotta) grilled pineapples and frijoles, then cooked until golden brown. Served with rice and frijoles (refried beans) with ancho and shredded carnitas - *El Torito Mexican Grill*

Empanadas de Pescado - Fish turnover, a cornmeal turnover filled with cheese, herbs, meat, or fish - *La Serenata de Garibaldi*

Chicken Satay - Asian chicken skewers with quick stir-fry vegetables. Served with Thai peanut sauce and sweet soy dressing - *Champps Americana*

Menu Direction: Crossover Menus

Crossover menus, unlike authentic global or regional cuisines like Tuscan and Thai, are not grounded in the culture, climate or ingredients of specific geographies. In fact, crossover is not a cuisine. It is a technique — a movement, even — combining ingredients from disparate cuisines into new taste sensations, presenting favorite dishes in such innovative preparations as salad-topped pizzas. Crossover menus combine ingredients into totally new flavors, forms and aromas in ways that can't be traced to any existing cuisine.

Given the many spices, ingredients, techniques and menu ideas that are emerging, crossover clearly is a not a cuisine; rather, it is a culinary approach that can take diners' flavor experiences well beyond the realm of current ethnic foods and global or regional boundaries.

Here are some predominately North American menu items with blended ingredients and ethnicities:

Fried Green Beans - Breaded green beans deep-fried and served with seasoned sour cream and tangy Asian dipping sauce - *Green Mill Restaurant and Bar*

Bonefish House Salad - Crisp chopped greens, tomatoes, Kalamata olives, Brazilian organic heart of palm and roasted pine nuts. Tossed with citrus herb vinaigrette. Danish Bleu cheese or Romanian Feta cheese available - *Bonefish Grill*

Gold Coast Coconut Shrimp - Dipped in beer batter, rolled in coconut and fried golden. Served with Creole marmalade - *Outback Steakhouse*

Top 10 Regional Claims

1. Italian
2. Texas
3. New York-Style
4. Southwestern
5. Chinese
6. Southern-Style
7. Southern
8. Thai
9. Sicilian
10. Mexican

Top 10 Growth Regional Claims

1. Colorado
2. San Antonio
3. Irish
4. French-Style
5. Grecian
6. Carolina-Style
7. Australian
8. Pacific
9. Genovese Style
10. Mexico City

Top 10 Marketing Claims Made With Regional Claims

1. Fresh
2. Homemade
3. Old-Fashioned
4. Crispy
5. Tender
6. Crisp
7. Traditional
8. Real
9. Classic
10. Creamy

Top 10 Categories for Regional Claims

1. Pizza
2. Sandwich
3. Bread
4. Vegetable
5. Salad
6. Meat
7. Poultry
8. Seafood
9. Pasta
10. Rice

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