

# Store cupboard & world foods





**Analysis**

# A taste for travel

**World foods sped off the shelves in lockdown as consumers used a palette of flavours to recreate restaurant and travel experiences at home**

 It's a recipe that was just waiting to happen. The ingredients? Locked down consumers with travel freedoms restricted and no opportunity to visit their local Chinese, Indian or Mexican restaurant, plus the need to create far more meals at home. The result? A dish that could be called 'The Hunt for World Flavours' and a scramble to stock up the store cupboard with all sorts of international delights to perfect a restaurant-equivalent outcome.

So it's little wonder that suppliers of the more exotic products and ingredients from around the globe have seen a surge in interest for their wares.

"Initially, we saw consumers rushing to stock up on commodity products – canned meat and fish, pasta, rice, pulses and similar," says George Phillips, commercial director of Wanis International Foods, UK distributor of Tropical Sun Foods. "As lockdown progressed, we saw a rise in products such as seasonings, condiments, sauces and coconut milk, together with speciality products from around the world that indicated consumers had moved on from 'must-have' to 'want to have'. Our strength is in products and brands from the Caribbean, West Africa, South-east Asia and the Far East, and the growth in ingredients and 'flavour' products for these cuisines has been across the board."

That said, he noted strong growth for West African and Caribbean products, which he describes as "two of the smaller international food categories compared to, for example, south-east Asian... and we see this as a growing

acceptance of the products and consumer demand for new cuisines and flavours outside the traditional market for such products".

Asian cuisine has been a particular beneficiary of the lockdowns. "Eating Asian food is continuously growing and is expected to increase at a CAGR of 7.2% between now and 2028<sup>1</sup>," says Maria Chong, managing director of Lee Kum Kee (Europe). "The pandemic further accelerated the process, especially when lockdown restricted consumers from eating out in their favourite Chinese restaurant. Hence, Chinese sauces have turned into essentials in British home kitchens."

Recent research has found that 69%<sup>2</sup> of consumers would opt for Asian cuisine when eating out, she adds. "There is a new wave of consumers who are inspired by travel and actively want to explore new flavours and authentic ingredients from the country of origin." While Cantonese is the most popular regional Chinese cuisine in the UK, Sichuan cuisine is gaining attention, she notes. "With the pandemic limiting opportunities for first-hand travel, consumers have sought alternative ways to gain cultural experiences and dining out, cooking at home or ordering home delivery from restaurants provide the perfect outlet for this."

Both nostalgia and the desire to travel will have influenced shopping lists, says Maeve Judge, marketing manager, meals & baking at General Mills, owner of Mexican brand Old El Paso. "This, plus the resurgence of home cooking, saw consumers both replicating dishes



they have eaten abroad on their travels and experimenting with world food-inspired dishes from the comfort of their home."

She notes that, in the Old El Paso portfolio, components (tortillas, seasoning mixes, tacos) and accompaniments (salsas and toppings) have seen the biggest increase, growing to £383m<sup>3</sup> and explains that component shoppers are likely to be scratch cooks or fans of eating out, while kit shoppers tend to be less confident cooks, using the kits to assist their cooking and grow confidence.

"Food and flavour remain among the biggest reasons for travel, and cuisines that deliver in these areas will have seen increased sales," she adds. "A



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recent survey says 39% of shoppers are cooking new and different meals more frequently, with world foods fuelling these new skills and behaviours<sup>4</sup>.”

All About Food, meanwhile, is tapping the out-of-home eating trend by bringing kits from familiar pan-Asian and Afro-Portuguese names, Wagamama and Nando’s, into grocery, as part of its bid to make restaurant brands successful in retail. This, it says, is attracting completely new incremental young shoppers.

Lockdown has also played into the hands of world food when it comes to traditional communities who are settled in the UK – for example, Jamaican, where signature dishes such as ackee and saltfish are consumed within

a family setting, points out Wanis International’s Phillips. He says: “Lockdown played its part in keeping many families together as much as it kept others apart.”

Lee Kum Kee’s Chong agrees, noting: “Of course, during the pandemic, Chinese consumers were also buying from the mainstream supermarkets for convenience, with essential sauces – oyster sauce, soy sauce and sesame oil – all seeing substantial growth.”

### Health in mind

With consumers increasingly focused on fitness and wellbeing, healthy options are playing a role in world foods as much as any other sector.

General Mills’ Judge says Oriental

food has overtaken Italian, which is seeing a decline “possibly because Italian is considered a carb-heavy meal offering”.

“Oriental and Mexican grew the most over the last year and this is likely to be because we are seeing growth come through foods that are light and flavoursome and either naturally implement an abundance of vegetables or can incorporate them easily and conveniently,” she notes.

“In general one-third of older shoppers and 50% of younger shoppers intend to live healthier lives after lockdown,” she adds. Just over 40% of shoppers intend to eat more healthily and exercise more once lockdown has been lifted, rising to more than half of

## Analysis

18- to 34-year-olds saying they would<sup>5</sup>. This insight, combined with demand for bigger and more substantial portions of Mexican meal centres, like burritos for gluten-intolerant consumers, fuelled the thinking behind launching our Gluten-free XL Wraps.”

Wanis International’s Phillips reveals that Tropical Sun’s single most widely distributed product within the multiples is canned jackfruit, joined last year by canned banana blossom. “Whether in the world food aisle or vegan/free-from aisle, these are among our fastest-growing products, reflecting a broad consumer demand for meat-free alternatives. We are also seeing strong demand for dairy-/lactose-free products, following the launch of Tropical Sun Condensed Coconut Milk and Condensed Evaporated Milk, both virtually identical to their conventional counterparts, but dairy-free.”

He also points to continued demand for items free from artificial additives with the company’s seasoning herbs and spices range numbering more than 100 different flavours and blends, all free of additives and MSG. “There will always be a place for indulgence and treats – perhaps where taste and experience come ahead of health – but in the wider food market, we see attention to ingredients, additives, allergens and alternatives as absolutely key to the future of many food categories.”

“Plant-based is a major topic now,” says Lee Kum Kee’s Chong. “Eating green and rainbow are on-trend and should continue.” However, she notes: “A healthy diet to us actually means a balanced diet, which has a good mix of ingredients. Chinese food is all about a harmony of vegetables, protein and carbohydrates – such as Broccoli Beef in Oyster Sauce, a typical Cantonese dish, with rice as a side dish.”

### What shoppers want

World food suppliers have a distinct view on what consumers are seeking from their category in grocery retail.

“Shoppers want to see more fresh and modern cues, similar to what they are experiencing out-of-home overall,” says General Mills’ Judge. “This is why we launched the Fajita Melt Kit and our new Pulled Meat seasoning mix, to replicate familiar out-of-home flavours of a traditional Mexican recipe, but



offering convenience by reducing the cooking time.”

Meanwhile, Lee Kum Kee’s Chong believes supermarket chains should consider expanding their range of noodles and Chinese vegetables. “The current portfolio is too limited and there are so many varieties they should consider. They should also put noodles into the pasta section, as they belong to the same family.”

### Future potential

So, how do suppliers see the prospects for world foods across the year ahead?

“There is massive headroom for growth where Mexican penetration is at 59% in the UK, with the potential to grow further as 94% of UK shoppers are open to buying in the category<sup>6</sup>,” says Judge. “Channel relevancy will be a big driver across the world category. E-commerce is growing exponentially and convenience stores again have a place in the top-up shop, which is as high as main shop missions in supermarkets.”

“Knowledge, experience and trust”

will all play a role in influencing future consumer purchasing on world foods, believes Chong. “Consumers these days are much less influenced by advertising. They will seek out experiences themselves. Also, a lot of chat groups on social media spread news by word-of-mouth and this can influence first-time purchasing decisions. However, at the end of the day, only the products can truly speak for themselves through real consumer experience.”

Health and wellbeing, the reduction or elimination of additives and the drive to reduce intake of animal-derived ingredients will be key to bringing world foods into a more mainstream environment, says Phillips. “All this is underlined by an increasing consumer view of world foods as exciting, innovative and something different.”

In other words, a recipe for success.

### Sources

- <sup>1</sup> www.zionmarketresearch.com/news/asian-food-market
- <sup>2</sup> Lee Kum Kee survey on attitudes to Chinese food. Base: 2,000 people
- <sup>3</sup> Nielsen Scantrack, Data to w/e

29.05.21

- <sup>4</sup> IGD Research, 21-22.02.21, Base: 2,001 British shoppers
- <sup>6</sup> Total GB - Old El Paso, Value, Long-term, 52-week fact, ending 19.06.21

## Tropical Sun Foods

# Bringing a world of flavours

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### KEY BRANDS

Tropical Sun

For Tropical Sun, the clue really is in the name. Offering coconut and vegan products, Golden Sella rice and herbal teas from Asia, hot sauce, ackee and jerk seasoning from the Caribbean, easy-cook rice and organic apple cider vinegar from the USA, gari and palm nut soup from West Africa and exotic snacks from South America, to name but a few, Tropical Sun is bringing its customers flavours and tastes from around the world.

The growing range of more than 800 products from the world's sunshine countries, as well as from those closer to home, reflects the true diversity of the flourishing world food category.

George Phillips, commercial director at Tropical Sun distributor Wanis International Foods, explains: "Having over 4,000 customers – including multiples, independent retailers and wholesalers served either directly or via our own cash & carry outlet in London – gives us a unique insight into buying patterns. Where once retailers tended to specialise in certain cuisines, they are now stocking a far wider range, reflecting the demand from their customers. With fewer foreign travel options available during recent lockdowns, Brits have been looking to bring sunshine and the exotic into their homes with the food they eat."

Meanwhile, the world food category's ability to embrace trends previously assumed to be more 'mainstream' is lifting it to another level, says Phillips. "We have seen increasing interest in organic, free-from and vegan," he notes. "Some of Tropical Sun's fastest-growing products are jackfruit, banana blossom, coconut flour (gluten-free)



“Where once retailers tended to specialise in certain cuisines, they are now stocking a far wider range, reflecting the demand from their customers”

and condensed coconut milk (lactose-free), driven by consumers seeking to reduce or eliminate their consumption of meat, dairy, allergens and food additives. This is bringing world food into the homes of a new and much wider consumer base than before.”

With the continued re-opening of hospitality and out-of-home, demand for at-home products might be expected to have declined, yet sales of kitchen cupboard staples such as Golden Sella rice, West African flours and powders such as gari and fufu, canned meat, fish and pulses remain strong. Tropical Sun's herbs, spices and seasonings (over 100-strong and free of additives and MSG) is also powering ahead.

Amid this, authentic and traditional foods remain key. "Consumers demand authenticity and Tropical Sun's commitment to quality and provenance ensures they get it. For example, our partner factory in Jamaica supplies ackee, callaloo, jerk seasoning and a range of sauces and condiments including yellow Scotch bonnet sauce and Jamaican honey thyme glaze."

With world food gaining acceptance among an increasingly diverse consumer base, the future looks bright. "Whether a consumer is looking for a 'taste of home', new and innovative ways to flavour food or add an exotic twist to a healthy lifestyle, Tropical Sun is a true one-stop solution," he says.



## All About Food

# Asian flavours brought home

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**Wagamama**  
Meal Kits, RRP £3.30  
Stir Fry, RRP £1.15  
Pastes, RRP £2.25

**Nando's Wrap Kits,**  
RRP £3.30.

After years of consumer demand, Wagamama, the UK's No.1 Asian restaurant<sup>1</sup>, has partnered with All About Food to launch into grocery, establishing an accessible and authentic tier into pan-Asian meal kits, stir fry and cooking pastes in grocery.

Pan-Asian cuisine continues to drive growth within the world foods category and is set to dominate eating trends in the near future, says the company. With shoppers becoming more familiar with, and adventurous in, trying new and exciting cuisines, it's not a surprise that pan-Asian/Asian cuisines feature in five of the top 12 fastest-growing cuisine trends in the next three to five years<sup>2</sup>.

British consumers' familiarity with Asian food is long-established, starting with Cantonese and Taiwanese takeaway and independent restaurant scenes. Now, our horizons are much broader, with British home cooks looking to replicate the authentic and vibrant flavours of Japanese, Thai, Vietnamese and other south-east Asian foods they've fallen in love with in restaurants and while travelling. These cuisines have struck such a chord because not only are they delicious, but they also cater to consumer desires for nourishing, healthier alternatives to everyday dinners.

The UK's No.1 pan-Asian restaurant brand<sup>1</sup>, Wagamama, has been accelerating the growth of pan-Asian meal kits, stir fry and pastes since launching a range of eight products into the market with All About Food on 7 June 2021. The range, which includes three meal kits (katsu curry, pad thai, chicken ramen), three stir-fry sauces (teriyaki, firecracker and pad thai) and two curry pastes (katsu and raisukaree), is available in Morrisons, Waitrose, Tesco, Sainsbury's and Ocado.

Each comes with a simple step-by-step recipe to recreate Wagamama-inspired dishes at home, but also with ideas and tips on how to personalise them with quick and easy 'chef hacks'.

In just four weeks, Wagamama has become the No.1 pan-Asian meal kit brand based on value ROS<sup>4</sup>. Within Waitrose and Morrisons where the stir fry range is currently listed, these have



“Pan-Asian cuisine continues to drive growth within the world foods category and is set to dominate eating trends in the near future”

already hit the No.2 stir fry brand in the category<sup>4</sup>, attracting completely new incremental young shoppers.

Wagamama believes in nourishment and positive eating, from bowl to soul, and has launched the home cookery range with the belief that 'Every Bowl Makes A Difference'. The company has decided to donate all its profits from the first 12 months to support the important work of YoungMinds, a mental health charity for young people.

### Nando's wraps it up

Meanwhile, Nando's, the UK's No.1 Chilli Sauce Brand<sup>5</sup>, is enabling consumers to recreate their favourite Nando's experience at home with a new Wrap Kit range. Launched in March 2021 in Asda, Morrisons, Tesco, Sainsbury's and Iceland, the two-person Nando's Chicken Wrap Kits are driving growth within the category<sup>6</sup>, leading with Nando's PERi-PERi flavour and creating space for an Afro-Portuguese segment in the world foods category, as well as expanding the milder and accessible entry points into the Nando's brand.

With a hugely successful start to the year, Nando's has already become the 5th-biggest meal kit brand in the market and the Wrap Kit range has reached over £800k in value sales, in just five months since launch<sup>7</sup>. They are due to launch into Co-op and One Stop later this year.

## Source

<sup>1</sup> Lumina, 2021

<sup>2</sup> Lumina, 2020

<sup>3</sup> Mintel, 2020

<sup>4</sup> IRI, 4 w/e 17.07.21

<sup>5+6+7</sup> IRI, 52 w/e 17.07.21



# every bowl makes a difference



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General Mills UK

# Make more from Mexican

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KEY BRANDS

**Old El Paso**  
– Tortilla Pockets™  
– Tortilla Pockets™ Mild Kit  
– Tortilla Pockets™ Smoky BBQ Kit

↘ Across the Old El Paso portfolio, components (e.g. tortillas, seasoning mixes, tacos) and accompaniments (e.g. salsas & toppings) have seen the biggest increase over the last year, growing to £383m<sup>1</sup>, reveals Maeve Judge, marketing manager, meals and baking at General Mills, owner of Old El Paso. “For many, the past 18 months have seen appreciation and enjoyment for cooking at home grow and, more often than not, these products can serve as a shortcut into personalising and enhancing a lunch or dinner, without having to buy into a full meal solution,” she says.

Food and flavour remain among the top two biggest reasons for travel, and cuisines that deliver in these areas will have seen increased sales. With all the recent restrictions, people are seeking new solutions to expand their usual repertoire. A recent survey says 39% of shoppers are cooking new and different meals more frequently, with world foods fuelling these new skills and behaviours<sup>2</sup>. “The category is set to continue to inspire and drive excitement in the next year, and Old El Paso is particularly well placed to capitalise on this trend,” explains Judge.

**Category innovation is key**

There is massive headroom for growth where Mexican penetration is at 59% in the UK, with the potential to grow further as 94% of UK shoppers are open to buying into the category<sup>3</sup>, notes Judge. “Old El Paso, the most salient brand for consumers within the entire world food category<sup>3</sup>, is currently at 32% penetration and aiming to grow on this<sup>10</sup>,” she adds. “This creates a wealth of opportunity for our core range, where the brand will continue to focus on opening this portfolio to increase penetration and help drive the total world food category forwards.”

The brand recently extended its category-leading Old El Paso Tortilla Pockets range with a new Smoky BBQ variant. “This exciting new product combines the innovative first-to-market sealed bottom wraps with its classic and best-selling smoky BBQ flavour



“A recent survey says 39% of shoppers are cooking new and different meals more frequently, with world foods fuelling these new skills and behaviours<sup>2</sup>”

profile, the number one in Mexican<sup>3</sup>, and aims to build on the outstanding success of Old El Paso Tortilla Pockets to date,” she says. “Since launching last summer, the platform has been 64% incremental to the category, driving 13% of all value growth in Mexican over the last year<sup>4</sup>.

“The flagship Old El Paso Tortilla Pockets Mild Kit, now worth £2.3m<sup>6</sup>, is the number one NPD in world foods<sup>5</sup>. Along with the Old El Paso Tortilla Pockets carrier eight-pack, it has contributed 24% NPD value to the category<sup>7</sup>. Both products rank in the top two NPDs in world foods, with the new Smoky BBQ kit set to grow this success.”

Being instantly recognisable on-shelf works as a strong and easy navigation point into the category for shoppers, as people will buy from what they know, notes Judge. “Out-of-home suppliers and manufacturers such as Wagamama’s, Wahaca and Nando’s are particularly seeing growth as they steadily make their way into stores.

As with Old El Paso, which gained over 2,000,000 new shoppers during Covid<sup>11</sup>, there is a pre-existing level of trust, which shoppers respond well to, allowing brands to leverage their reputations and rapport among shoppers to drive growth.”

Source

<sup>1</sup> Nielsen Scantrack, data to w/e 29.05.21  
<sup>2</sup> IGD Research, 21-22 February 2021. Base: 2,001 British shoppers  
<sup>3</sup> Nielsen Scantrack, World Foods database 01.06.21  
<sup>4</sup> Dunhumby, Source of Value, 26 week(s) from 31.08.20 to 28.02.21  
<sup>5</sup> Nielsen Scantrack, World Foods database 01.06.21  
<sup>6</sup> Nielsen Scantrack, data (MAT) 01.05.21  
<sup>7</sup> Nielsen Scantrack, World Foods database 01.06.21  
<sup>8</sup> Total GB – Old El Paso, Value – Long Term – 52 weeks facts, period ending 19.06.21  
<sup>9</sup> IPSOS study, Brand Relevance Tracking 2020  
<sup>10</sup> Total GB – Old El Paso, Value – Long Term – 52 weeks facts, period ending 19.06.21



# Stock NEW Smoky BBQ Tortilla Pockets.

And watch your sales go through the roof.

- Old El Paso, the leading brand in World Food<sup>1</sup>, brings you mess-free Mexican.
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- Every kit contains our delicious Smoky BBQ spice mix, the category's no.1 flavour<sup>4</sup>, our clever sealed wraps and chunky salsa.

[www.oldpaso.co.uk](http://www.oldpaso.co.uk)



1. Nielsen Scantrack | World Foods Database | Data to 31.01.21. \*Excludes Pasta & Rice offerings. 2. Dunhumby. Source of Value. 26 WEEKS! FROM 31/08/2020 TO 28/02/2021  
3. Nielsen Scantrack | World Foods Database | J16.2.1 4. Nielsen Scantrack | World Foods Database | J16.2.1

# OLD EL PASO

ESTABLISHED 1938

## Lee Kum Kee (Europe)

# Authentic Chinese cuisine

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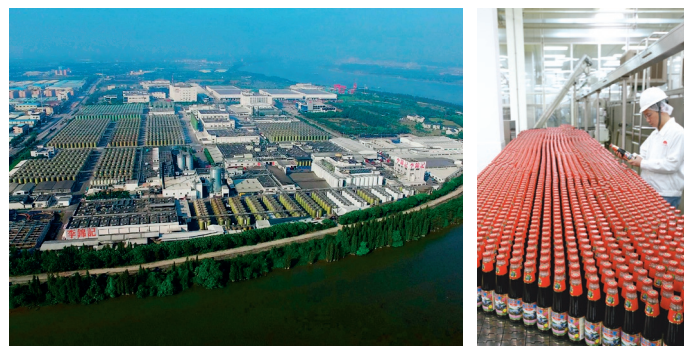
Premium Oyster Sauce  
Premium Light Soy Sauce  
Premium Dark Soy Sauce  
Chiu Chow Chilli Oil  
Char Siu Sauce (Cantonese  
BBQ marinade)  
Hot Chilli Soy Sauce  
Sweet Soy Sauce  
Honey and Soy  
Stir-fry Sauce  
Kung Pao Chicken  
Stir-fry Sauce

 Influenced by their experiences through the Covid-19 pandemic, British consumers have adopted a holistic approach to pursuing healthy lifestyles and are rethinking priorities, focusing on quality, new experiences and convenience.

The lockdown has turned them into experimental home cooks, and increased their demand for exotic flavours and Chinese sauces. In terms of world flavours, consumers value ‘authenticity’; so, a totally authentic experience, pleasing both the palate and the mind, is what Lee Kum Kee aims to bring to the market, says Maria Chong, managing director of Lee Kum Kee (Europe).

To this end, the company has made several product changes to meet this new consumer demand, including:

- Developing a new range of handy table-top sauces, such as hot chilli soy sauce, sweet soy sauce and seasoned rice vinegar, offering simple ways to uplift the taste of food by dressing or dipping at the table and add authentic Chinese flavours to a variety of dishes.
- Introducing a new line of retail classic Asian sauces in glass jars – such as satay, black pepper, coconut curry, Chinese five spice (chu hou), and Sichuan-style hot & spicy stir-fry.
- Offering a vegan line of cooking sauces to fulfil consumers’ demand for more plant-based cooking ingredients.
- Planning to relaunch a range of convenient stir-fry sauces in sachets in the UK later this year, targeting those consumers who seek easy-to-use sauces to prepare quick authentic Asian meals.
- Introducing a wide range of small sachet sauces to the UK, to cater to the takeaway, food delivery, fresh box and ready-meal sectors. These include light



**“The Covid-19 lockdown has turned consumers into experimental home cooks and increased their demand for exotic flavours and Chinese sauces”**

soy sauce, Japanese soy sauce, sauce for dumplings, Chiu Chow chilli oil, as well as chilli garlic and hoisin sauces. These small sachets can accompany meal kits or ready-meals, or can be used with dispensers on takeaway shop counters.

To promote to consumers the beauty of Chinese culinary culture and healthy cuisine, as well as market its brand, Lee Kum Kee has leveraged digital and social media platforms and collaboration with celebrity chefs like Ken Hom and Ching He Huang alongside mega social influencers, says Chong. It has also introduced a branded e-Shop, providing special packs and cookbooks, among other marketing activity.

As the market gradually reopens, Lee Kum Kee plans to meet consumers at key events and resume school programmes, educating young adults in how to cook healthy Chinese meals.

“As a well-established Chinese sauce brand, our high quality and authenticity make our products much-loved by home nationals, and set us apart from other brands,” she adds.



# DIP, DASH, DROP...



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  - The brand in every Chinese kitchen
- A wide range of products including gluten free and vegan friendly choices

\*Source: Nielsen 2020 MAT April



[www.LKK.com](http://www.LKK.com)

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# THE FLAVOURS OF THE WORLD TO YOUR TABLE



## #1 Jackfruit in World Foods

A vegan kitchen cupboard essential. Sold in the World Foods aisles of Asda, Co-Op and Sainsburys.



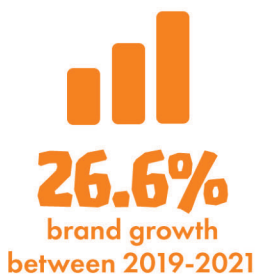
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