



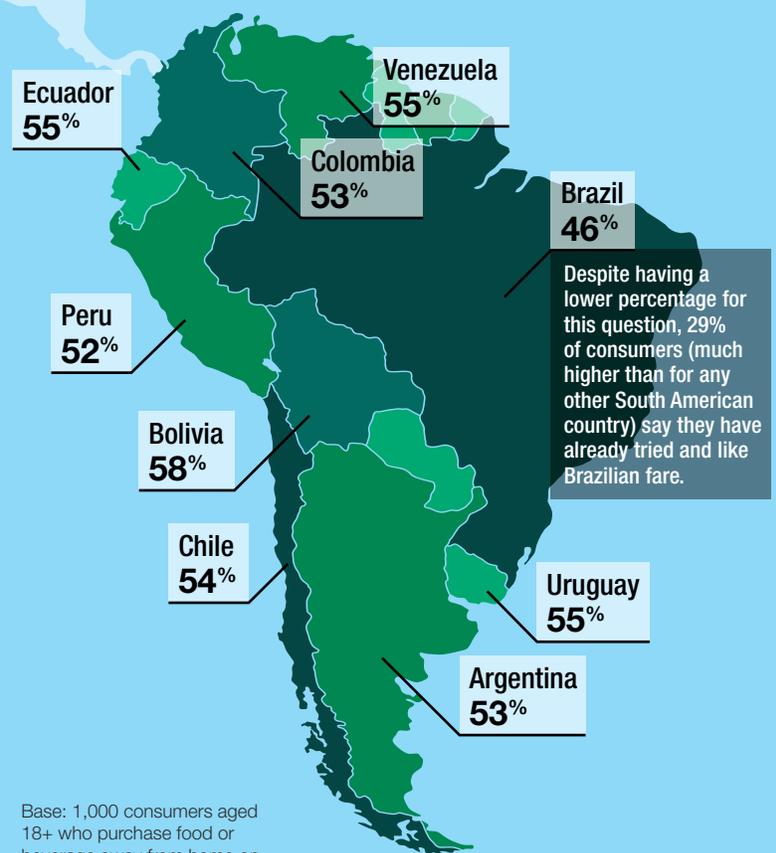
TREND OUTLOOK: South American Cuisines

Although mainstream Latin cuisines like Mexican and Caribbean have the largest influence on U.S. menus, emerging Latin fare is on the rise, and much interest lies in the gastronomies of South America.

Some 73% of consumers say they are open to trying new Latin cuisines. While the majority of consumers say they've tried and like Mexican (91%) and Caribbean (60%) foods, when consumers were asked to describe their attitudes toward foods and flavors associated with various South American countries, the majority say they haven't tried but would in fact like to try the foods of Bolivia (58%), Venezuela (55%), Uruguay (55%), Ecuador (55%), Chile (54%), Colombia (53%), Argentina (53%) and Peru (52%).

This proves that operators have a lot of opportunity to introduce diners to the foods of these lands by way of spices and spice blends, sauces and other flavorings or dishes.

% of consumers who said they haven't tried, but would like to try the following South American cuisines.



Base: 1,000 consumers aged 18+ who purchase food or beverage away from home on weekdays or weekends

Ingredient Close-Up

We asked 1,000 consumers about their attitudes on specific South American spices, spice blends, sauces and pastes to gauge familiarity and interest. Allspice—a spice native to South America and an essential ingredient in Jamaican jerk seasoning that tastes like a combination of cinnamon, nutmeg and cloves—is one of the few ingredients with which consumers are already familiar. Some 55% of consumers say they’ve tried and like allspice, while 26% say they haven’t tried it but would like to. However, there are a number of ingredients that at least half of consumers are not familiar with, yet express interest in sampling. **Let’s look at five:**

Ingredient	What’s in it	How it’s used	% of consumers who haven’t tried it but would like to
Llajua sauce	Bolivian sauce made with tomato and locoto chilies	Featured on meat, veggies or soup, or used as a dip for potatoes	54%
Pebre	Chilean condiment that includes onion, olive oil, garlic and aji peppers	Used on bread or meat	53%
Guasacaca	Venezuelan sauce made from avocado, vinegar, parsley, cilantro, garlic and chilies	Served with barbecued meat, fish, veggies or chips	52%
Sazon	South American spice blend made with achiote, cumin, oregano, coriander, garlic powder, salt and pepper	Seasons stews, rice, fish and poultry	51%
Salsa ocopa	Peruvian black mint sauce with white cheese, onions, aji amarillo and milk	Dresses potatoes, meats and fried foods	50%



Guasacaca is like guacamole, but with vinegar instead of lime juice and lots of garlic

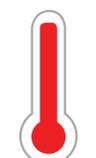
There are a number of interesting demographic skews when it comes to consumer preferences for specific South American ingredients.

Here are some findings:

- Women (61%) and older generations (58% of Gen Xers and 57% of matures) are much more likely to have tried allspice, a common ingredient in baked goods like gingerbread cookies and spice cakes. However, about a third of Gen Zers (32%) and men (30%) expressed interest in trying allspice.
- Consumers in the West are much more likely than those in all other regions to say they haven’t tried but would like to try various spicy chili pepper-based sauces and pastes. For example, 53% of Western consumers (compared to just 39% of Northeasterners) haven’t tried but would like to try aji Peruvian green sauce, and 50% of Westerners say the same regarding hot Peruvian aji amarillo paste (compared to just 40% of Northeasterners).
- For almost every ingredient listed, millennials and Gen Xers were the least likely to say they wouldn’t consider trying them. The same is true regarding Asian consumers, compared against Caucasians, Hispanics, African Americans and other ethnicities.

Trending South American Ajis

Arguably the most important ingredient in South American cooking, ajis (meaning chili peppers in Spanish) range from sweet to super spicy and can be found in a variety of dishes. **Here are several types of aji peppers that are increasing on U.S. menus:**



60k-100k
Scovilles*

Malagueta—an extra-hot chili heavily used in the Bahia state of Brazil. With double the heat of a cayenne pepper, it's commonly found in stews and light soups, as well as hot sauces and salsas.

+200% over five years



30k-100k
Scovilles*

Rocoto—a red, orange or yellow pepper common in Peruvian and Bolivian cuisines. It looks like a small bell pepper but has medium-hot heat. Rocotos are often stuffed with beef, ground to season soups and sauces or used as a paste.

+25% year over year



Base: Q4 2011
to Q4 2016 MenuMonitor,
Technomic



30k-50k
Scovilles*

Aji Amarillo—a deep yellowish-orange pepper commonly used in Peruvian cooking. It has a fruity taste and a medium to hot heat. In its dried form it's called aji mirasol. It can be used whole or ground into powder, and serves as a seasoning for sauces or soups.

+50% over five years



30k-50k
Scovilles*

Aji Limo—a small, medium-hot Peruvian chili that comes in red, yellow, orange, purple and white colors. It is used to season ceviche and other seafood dishes, as well as salsas.

+20% over three years



500
Scovilles*

Aji Panca—a dark red-burgundy colored pepper considered the second most common (behind amarillos) in Peruvian cooking. It has a berry-like flavor and an aromatic, smoky taste with a mild lingering heat. It can mostly be found dried as a whole chili pepper, prepared into a paste or ground, and is often used to season seafood, rice dishes, soups and sauces.

+6.3% year over year

*Source: Chili Pepper Madness

Opportunities around South American Fare

- ❖ Peruvian cuisine is trending in U.S. restaurants. With dishes such as ceviche, cocktails like pisco sours and ingredients like Peruvian chili peppers becoming more mainstream, we'll likely continue to see Americans embrace other Peruvian specialties, such as lucuma (a Peruvian fruit that can be turned into a sauce) and huancaína (a sauce similar in texture to salsa ocapa and also served with potatoes).
- ❖ The spotlight on Peruvian cuisine has paved the way for increased interest in other South American cuisines. Attention is now being given to the cuisine of Bolivia, notably paired with increased tourism in the country (markedly after UNESCO named La Paz a wonder city in 2015). Since consumers are drawn by Bolivian fare (with 58% saying they haven't tried but would like to try food from Bolivia), we should expect to see more restaurants experimenting with specialties from that country.
- ❖ Concepts launching South American specialties should really aim their marketing toward those aged 25 to 51. These millennials and Gen Xers are most open to trying unfamiliar ingredients from South America, and have significant and growing spending power.

