

INTERNATIONALLY INSPIRED FOODS – CANADA – 2023

Global foods offer Canadians new culinary experiences. The challenge lies in ensuring that innovation within this expansive space aligns with consumer demand.



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Internationally Inspired Foods - Canada - 2023

This report looks at the following areas:

- The types of internationally inspired foods that consumers are more likely to eat or express interest in, categorized by region.
- Reasons why consumers choose to eat international foods and reasons why some avoid them.
- Where consumers are most inclined to try international foods that are new to them.
- Preferred formats for experiencing international foods.
- Attitudes towards exploring and experimenting with internationally inspired foods.
- Perceptions around internationally inspired foods' connection to heritage.
- Perspectives on internationally inspired foods and retail experiences.



Global foods offer Canadians new culinary experiences. The challenge lies in ensuring that innovation within this expansive space aligns with consumer demand.

Overview

Defining internationally inspired foods can be challenging due to varying perceptions. However, this culinary category holds great significance in Canada for several reasons. Firstly, as the country's population growth is primarily driven by immigration, many Canadians have grown up with food traditions from outside of Canada, regardless of whether they are first or second-generation citizens. Additionally, the increasing interconnectedness of the world through media and social platforms has made diverse cultures more accessible.

Given these dynamics, retailers, manufacturers, and restaurants face the question: what's next in the realm of global foods? This report provides insights to address this question, covering

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topics such as consumer preferences and aversions towards international foods, potential development opportunities from different regions and countries, consumer openness to trying unfamiliar offerings, emerging flavour possibilities, and attitudes across various fronts.

The lasting impact of global foods is undeniable, emphasizing the importance for businesses to develop strategies that resonate with consumers of different ages and backgrounds in order to be competitive in this area.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities

CONSUMER INSIGHTS

Consumer fast facts

Usage/interest in international foods by country/region

- Predictable cuisines top the list of international foods
 - Graph 1: consumption and interest in international foods, 2023
- Opportunity to develop novel international cuisines
 - Graph 2: international foods Canadians have not eaten but are interested in trying, 2023
- Bolster international foods with novelty and familiarity
- Stand out in the frozen aisle with a taste of Africa
- New Canadians gravitate to South Asian and African cuisines
 - Graph 3: consumption of and interest in South Asian and African foods, new Canadians vs overall, 2023

Reasons for eating international foods

- International foods provide novel eating experiences
 - Graph 4: reasons for eating or showing interest in international foods, 2023
- Provide easy access to novel experiences
- Help new Canadians connect with their heritage
 - Graph 5: reasons for eating or showing interest in international foods, new Canadians vs overall, 2023
- Private label sub-brands helps retailers connect with specific population segments
- Gen Zs seek cultural connections through international foods and influencers
 - Graph 6: select reasons for eating or showing interest in eating international foods, by generation, 2023
- Heritage matters less to Quebecers when it comes to international foods

Reasons for avoiding international foods

- Overcoming intimidation can help break down barriers
 - Graph 7: reasons for avoiding certain international foods, 2023
- Awareness and education matter
- Older generations are more likely to cite taste and smell as barriers

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- Graph 8: select reasons for avoiding certain international foods, by generation, 2023
- Don't bring the heat for Boomers
 - Graph 9: appeal of flavours in sauces and marinades, by generation, 2023
- Parents are constrained by their families' preferences; moms are more concerned with preparation
 - Graph 10: select reasons for avoiding certain international foods, moms vs dads vs overall, 2023

Where consumers try new international dishes

- The link between travel and international food experiences is undeniable
 - Graph 11: where consumers try new international foods, 2023
- Grocers can build an experience around culinary exploration
- Fast food opportunities: expose younger generations to international foods
 - Graph 12: try new international foods at fast food restaurants, by generation, 2023
- McDonald's BTS meal elevated international flavours through connection
- Fast food can attract 'new Canadians' with internationally inspired menu options
 - Graph 13: locations for new trial of international foods, new Canadians vs overall, 2023
- 'Ethnic' QSR chains can inspire larger operators to fuse international cuisines
- More money, more travelling: affluence enhances exposure to global foods
 - Graph 14: locations for new trial of international foods, by household income, 2023

Interest in international foods

- International cuisine is not confined by borders
 - Graph 15: areas of interest in international foods, 2023
- Focusing on a specific ingredient can promote authenticity
- Start small: ingredients, snacks and kits open doors to global trial
- International meals and snacks made easy
- Promote international snacks, desserts and drinks to reach young consumers
 - Graph 16: areas of interest in international foods, by generation, 2023
- Areas of interest evolve with age
- Fusion dishes matter more to moms, and heatable meals to dads
 - Graph 17: areas of interest in internationally inspired foods, moms vs dads vs overall, 2023
- International snacks, beverages and desserts hold more appeal with new Canadians...
 - Graph 18: areas of interest in internationally inspired foods, new Canadians vs overall, 2023
- ...and more specifically with South Asians and Chinese consumers
 - Graph 19: areas of interest in internationally inspired foods, South Asian vs Chinese vs overall, 2023

Attitudes toward international foods: availability and trial

- Enjoyment trumps provenance when choosing international foods
 - Graph 20: attitudes toward international foods and exploration, 2023
- Familiarity bolsters demand for international foods, but it's a challenge for brands looking to stand out

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- Familiarity and acceptance has expanded across generations
 - Graph 21: attitudes toward international foods and exploration (% agree), by generation, 2023
- Region matters more to New Canadians
- Parents expanding the variety of international foods they eat opens opportunity for family meals
 - Graph 22: attitudes toward international foods and exploration (% agree), parents vs overall, 2023
- Parents are more likely to try flavours from established brands

Attitudes toward international foods and connection

- International foods help individuals connect with cultures
 - Graph 23: attitudes toward international foods and connection, 2023
- Connecting with food
- Relationships impact younger generations' food preferences
 - Graph 24: attitudes toward international foods and connection (% agree), by generation, 2023
- Use social circles to connect with new Canadians...
 - Graph 25: attitudes toward international foods and connection (% agree), new Canadians vs overall, 2023
- ...and with South Asians in particular
 - Graph 26: attitudes toward international foods and connection (% agree), Chinese vs South Asian vs overall, 2023
- Relationships hold more sway with Ontarians
 - Graph 27: attitudes toward international foods and connection (% agree), by region, 2023

Internationally inspired foods at retail

- International foods help drive traffic to grocery stores
 - Graph 28: attitudes toward international foods and retail experiences, 2023
- An underdeveloped assortment of international foods is a disadvantage
- Offer international foods to attract Gen Zs
 - Graph 29: attitudes toward international foods and retail experiences (% agree), by generation, 2023
- New Canadians' shopping habits are more complex ...
 - Graph 30: attitudes toward international foods and retail experiences (% agree), new Canadians vs overall, 2023
- ...as also reflected by Chinese and South Asian consumers
 - Graph 31: attitudes toward international foods and retail experiences (% agree), Chinese vs South Asian vs overall, 2023
- Grocers can employ different tactics to win over new Canadians
- International food selection matters more to urban and suburban shoppers
 - Graph 32: attitudes toward international foods and retail experiences (% agree), by location, 2023

COMPETITIVE STRATEGIES

Launch activity and innovation

- Easy meals make international foods more accessible
- Global inspiration from McCormick, with flavour guidance

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- Familiar private-label brands instill the confidence to try different offerings
- Internationally inspired beverage formats rely on added benefits
- Asia's influence is felt in coffee and (boba) tea: major QSR operators should take note
- Alcoholic beverages are another a way to experience global flavours

Marketing and advertising

- President's Choice leverages its cross-category presence to introduce international flavours
- T&T's expansion reflects the growing importance of international grocery formats
- Conventional banners switching to ethnic banners

Opportunities

- The evolving demographic landscape leads to an evolution in flavour preferences
 - Graph 33: appeal of flavours in sauces and marinades, new Canadians vs overall, 2023
- Flavourscape AI predicts international flavour opportunities in cooking sauces
- Emerging international flavours in action
- HMR can help grocery stores be a destination for international foods
- Elevate the most popular HMR categories with international flavours to add appeal
 - Graph 34: prepared/made-to-order foods from grocery stores typically purchased, 2022
- Bring culinary tourism to the grocery store
- Future focus: augmented/virtual reality can deepen the connection between food and travel
- United by Food: international foods can foster deeper understandings
- Brands can help new Canadians acclimate to their adopted home

THE MARKET

Market drivers

- Immigration reaches historic levels with the rise starting in the 1990s
 - Graph 35: percent of the population identified as immigrants, 1871-2021
- The impact of new Canadians from Asia cannot be overstated
 - Graph 36: distribution of immigrant population by region of birth, 1971-2021
- 40% of recent immigrants come from three countries
 - Graph 37: top 10 places of birth of recent immigrants, 2021
- Canadian immigration levels to stabilize, yet remain robust
 - Graph 38: overall planned permanent resident admissions, 2023-26
- Recent immigrants are more likely to be of working age
 - Graph 39: new immigrants vs overall population, by age group, 2021
- The rise in 'mixed unions' reflect the integration of cultures
 - Graph 40: proportion of mixed couples in mixed unions, 1991-2011
- Canada's birth rate experiences a notable drop

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- Graph 41: annual number of births, 2005-22
- Canada is made up of more than English and French speakers
 - Graph 42: languages predominantly spoken at home, 2021
- Canadians celebrate various holidays
 - Graph 43: holidays celebrated, 2021
- Confections celebrate Chinese New Year and Diwali
- Even as prices drop, grocers need to remain diligent in providing added value
 - Graph 44: annual change in the consumer price index and retail food prices, 2019-23
- Sales growth at full-service restaurants persist as economic growth flattens
 - Graph 45: monthly foodservice dollar sales, full-service, 2019-23

APPENDIX

- Consumer research methodology
- Flavourscape AI
- Consumer qualitative research
- Generations
- Abbreviations and terms

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