Asian Noodles: U.S. Market Trends and Opportunities

Description: Asian Noodles: U.S. Market Trends and Opportunities

Asian Noodles: Trends & Opportunities assesses how food and foodservice industry participants are adding—and can add—to product development and marketing strategies of Asian noodles. Four primary themes emerge: variety, healthfulness, authenticity, and innovation. With respect to each of these themes, this report trends related consumer preferences and attitudes over time; ties each theme to pertinent foodservice (restaurant and prepared foods) menu trends supported by a wealth of examples; assesses related foodservice marketing strategies; and identities implications and applications for the packaged groceries segment of the market.

In doing so, the report addresses a wide range of noodle trends and opportunities. Primary data sources include metrics from our consumer surveys and from menu item analysis, as well as hundreds of menu item examples and related visual images. By section:

The report begins with an overview of foodservice and food retail noodle usage in the past 30 days, including at-home usage and restaurant usage. We also analyze usage by demographic, provide comparisons between Asian noodle usage and Italian noodle usage to provide context as well as shedding light on noodle knowledge and attributes desired.

In the Variety section, we analyze consumer attitudes toward variety in Asian noodle dishes as reflected by the nuances of ingredients, shape, texture, preparation, and culinary application. We also assess variety on the menu with consideration of these same attributes, and highlight a restaurant operator that is leveraging variety via customization. Finally, we present implications and applications for the grocery aisle, focusing on how packaged goods marketers are increasing variety of Asian noodles for at-home consumption by leveraging convenience attributes (time/speed and package size) as well as flavor expansion. By doing so, these companies and brands are better positioned to compete against mainstream Asian takeout.

In the Healthfulness section, we trend and analyze consumer attitudes toward health and diet, and provide applications to the Asian noodle market with a focus on health attributes that prove to be a decision influencer. We also assess health on the menu with consideration of these same attributes with the understanding that Asian noodle dishes strike a strong alignment as being inherently healthy, and in most cases, positive health associations are simply a secondary benefit. In addition, we highlight a restaurant operator that is successfully applying health to its Asian-focused menu. Finally, we present implications and applications for the grocery aisle, focusing on how health and wellness trends are causing some consumers to eschew heavily processed foods, carbs and gluten—making the category vulnerable to stagnant sales.

In the Authenticity section, we trend and analyze consumer attitudes toward willingness to try new foods/recipes. Then, we provide applications to the Asian noodle market with a focus on the impact of authenticity, and more specifically heritage/culture of noodles, as a decision influencer—both at home and at restaurants. We also assess authenticity on the menu with consideration of these same attributes with the understanding that Asian noodle dishes at restaurants are often the first exposure many Americans have to this cuisine. In addition, we highlight a restaurant operator that has had success mainstreaming Asian cuisine from an authentic position. Finally, we present implications and applications for the grocery aisle, focusing on how authenticity becomes an important distinction for differentiation in the competitive package noodle category.

In the Innovation section, we trend and analyze consumer attitudes related to innovation—whether on the menu or in marketing. We begin by assessing overall attitudes relating to culinary experiences and food adventurousness. In addition, we explore culinary innovation with consideration to noodle crossing boundaries. We also consider innovation as it applies to marketing strategies and leveraging online and social media as applied by leading Asian-centric chains. Finally, we present implications and applications for the grocery aisle.

Contents:

Chapter 1: Executive Summary
Report Scope
Report Summary
Introduction
Asian noodle usage
Asian versus Italian noodles
Noodle knowledge
Implications for menu developers and packaged noodle marketers
Noodles on the menu
Important attributes in Asian noodles
Variety
Variety: attributes that influence choice
Noodle variety on the menu
Moving beyond the generic “noodle” term
Shape and texture increase noodle variety
Noodle variety across the menu
Applying variety to the menu: ShopHouse Kitchen
Implications and applications for packaged groceries
Healthfulness
Healthfulness: attitudes toward food and diet
Healthful attributes sought in noodles
Health by subtraction
Health by addition
Organic/natural claims
The gluten connection
Healthy noodle dishes on the menu
Healthy noodle types
Growth in more unique veggies
Healthy proteins are most often menued in Asian noodle dishes
Healthful noodle dish preparation methods
Applying health to the menu: Noodles & Company World Kitchen
Implications and applications for packaged groceries
Authenticity
Authenticity: Attitudes toward noodle dishes
Authentic attributes sought in noodles
Authenticity on the menu
Asian noodles have modest penetration on restaurant menus
Asian restaurants utilize noodles from several countries of origin
Midscale restaurants have highest penetration for Asian noodles
Chinese noodles and noodle dishes
Japanese noodles and noodle dishes
Thai noodles and noodle dishes
Applying authenticity to the menu: P.F. Chang’s
Implications and applications for packaged groceries
Innovation
Innovation: Attitudes toward culinary experiences
Relationship to Asian noodle usage
Relationship to Asian noodle knowledge
Culinary attributes sought in noodles
Innovation: Noodles crossing boundaries
Innovation: Marketing strategies
Implications and applications for packaged groceries
Chapter 2: Introduction
Asian noodle usage
Table 2-1: Asian Noodle Dish Eaten in Past 30 Days, by Demographic, 2015
Asian versus Italian noodles: at a restaurant
Table 2-2: Noodle Dish Eaten in Past 30 Days at a Restaurant: Asian vs. Italian, by Demographic, 2015
Asian versus Italian noodles: at home
Table 2-3: Noodle Dish Eaten in Past 30 Days at Home: Asian vs. Italian, by Demographic, 2015
Noodle knowledge
Graph 2-1: Asian Noodles and Noodle Dishes, Degree of Knowledge, 2015
Implications for menu developers
Implications for packaged noodles
Noodles on the menu
Introduction
Asian noodles versus Italian noodles
Table 2-4: Penetration of Asian and Italian Noodles on U.S. Menus, 2010 vs. 2014
Table 2-4: Incidence of Asian and Italian Noodles on U.S. Menus, 2010 vs. 2014
Important attributes in Asian noodles
Influencers when ordering at restaurants

Graph 2-2: Attributes Important to Choosing an Asian Noodle Dish on the Menu, 2015

Influencers when shopping the grocery aisle

Graph 2-3: Attributes Important to Choosing Asian Noodles at the Grocery Store, 2015

Chapter 3: Variety

Variety: attributes that influence choice

Variety via ingredients

Table 3-1: Attributes Important to Choosing an Asian Noodle Dish on the Menu: Ingredients, by Demographic, 2015

Variety via preparation method/style

Table 3-2: Attributes Important to Choosing an Asian Noodle Dish on the Menu: Preparation Method, Vegetarian and Vegan, by Demographic, 2015

Variety via customization

Table 3-3: Attributes Important to Choosing an Asian Noodle Dish on the Menu: Customization and Familiarity, by Demographic, 2015

Noodle variety on the menu

Moving beyond the generic “noodle” term

Table 3-4: Top Asian Noodle Dishes Served as Menu Entrées, 2014

Shape and texture increase noodle variety

Table 3-5: Asian Noodle Dishes: Shapes and Sizes, 2010-2014

Noodle variety across the menu

Table 3-6: Asian Noodles in Pasta/Noodle Entrées and Soup/Salads, 2014

Applying variety to the menu: ShopHouse Kitchen

Implications and applications for packaged groceries

Expansion in variety through convenience and flavor innovation

Quick prep and on-the-go convenience

Robust flavor offerings with development of spicy profiles

Chapter 4: Healthfulness

Healthfulness: attitudes toward food and diet

Table 4-1: Health, Food & Diet Attitudes, Any Agree & Strongly Agree, 2005-2015

Healthful attributes sought in noodles

Graph 4-1: Health Attributes Important in Asian Noodles, 2015

Health by subtraction

Table 4-2: Health Attributes Important in Asian Noodles, Low-/No- Claims, by Demographic, 2015

Health by addition

Table 4-3: Health Attributes Important in Asian Noodles, Added Protein, Fiber and Nutrients, by Demographic, 2015

Organic/natural claims

Table 4-4: Health Attributes Important in Asian Noodles, Organic and Natural, by Demographic, 2015

The gluten connection

Simmons: Presently watching diet?

Table 4-5: Percent of Adults Currently Watching Their Diets, 2015

Simmons: Reason for watching diet

Table 4-6: Reason for Watching Diet, 2015

Simmons: Types of foods bought when watching diet

Table 4-7: Types of Food Bought When Watching Diet, 2015

Implications

Healthy noodle dishes on the menu

Healthy noodle types

Table 4-8: Top Asian Noodle Dish Healthy Terms, 2010-2014

Growth in more unique veggies

Table 4-9: Top 25 Vegetables Served with Asian Noodle Dishes, 2010-2014

Healthy proteins are most often menued in Asian noodle dishes

Table 4-10: Top 15 Proteins Served with Asian Noodle Dishes, 2010-2014

Healthful noodle dish preparation methods

Table 4-11: Asian Noodle Dishes, Top Preparation Methods, 2010-2014

Applying health to the menu: Noodles & Company World Kitchen

Implications and applications for packaged groceries

Packaged noodles can capture healthy halo

Chapter 5: Authenticity

Authenticity: Attitudes toward noodle dishes

Graph 5-1: I Like Trying New Foods Products and New Recipes: Strongly Agree and Any Agree, 2006-2015

Authentic attributes sought in noodles
Table 5-1: Importance of Authenticity and Heritage when Eating Asian Noodles: At Restaurant vs. At Home, 2015

Authenticity on the menu
Asian noodles have modest penetration on restaurant menus

Table 5-2: Noodle Dish Menu Penetration, by Noodle Country of Origin, 2014
Asian restaurants utilize noodles from several countries of origin

Table 5-3: Noodle Dish Menu Penetration, by Noodle Country of Origin and Primary Menu Cuisine, 2014
Midscale restaurants have highest penetration for Asian noodles

Table 5-4: Noodle Dish Menu Penetration, by Noodle Country of Origin and Restaurant Segment, 2014
Chinese noodles and noodle dishes

Table 5-5: Top Chinese Noodle Dishes, 2010-2014

Table 5-6: Top Japanese Noodle Dishes, 2010-2014

Table 5-7: Top Thai Noodle Dishes, 2010-2014

Applying authenticity to the menu: P.F. Chang’s

Implications and applications for packaged groceries
Packaged noodles leverage authenticity

Chapter 6: Innovation

Innovation: Attitudes toward culinary experiences
Graph 6-1: Culinary Innovation Attitudes, Mean Responses, 2015

Relationship to Asian noodle usage
Table 6-1: Food Adventurousness, by Asian Noodle Usage at Home and at Restaurants, 2015

Relationship to Asian noodle knowledge
Table 6-2: Food Adventurousness, by Degree of Asian Noodle Knowledge, 2015

Culinary attributes sought in noodles
Table 6-3: Attributes Important to Choosing an Asian Noodle Dish on the Menu: Seasonal Ingredients, Flavor, Spices and Preparation Method, by Demographic, 2015

Innovation: Noodles crossing boundaries
Asian noodles crossing into the mainstream
Table 6-4: Restaurants Serving Asian Noodle Dishes, by Primary Restaurant Cuisine, 2014

Italian noodles crossing into Asian cuisine
Table 6-5: Restaurants Serving Italian Noodle Dishes, by Primary Restaurant Cuisine, 2014

Innovation: Marketing strategies
Limited service: Panda Express
Table 6-6: Panda Express vs. Any Fast Food Restaurant Usage, by Demographic, 2015

Full-service: P.F. Chang’s China Bistro
Table 6-7: P.F. Chang’s China Bistro vs. Any Full-Service Restaurant Usage, by Demographic, 2015

Implications and applications for packaged groceries
Setting the stage: Leading packaged brands struggle over time
Table 6-8: Maruchan Instant Lunch and Nissin Dry Soups: Household Usage in Past 7 Days, 2006-2015
Table 6-9: Maruchan Instant Lunch and Nissin Dry Soups: Household Usage in Past 7 Days, by Demographic, 2015

The popularity of the bowl

Appendix
Methodology
Consumer survey methodology
Report table interpretation
Color coding
Indexing
Terms and definitions
Noodles
Appendix: Table 1: Asian and Italian Noodles, by Search Term, 2015

Supermarkets
Restaurant categories
Limited-service restaurant definitions
Full-service restaurant definitions
Other definitions

Order by Fax - using the form below

Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Product Name: Asian Noodles: U.S. Market Trends and Opportunities
Web Address: http://www.researchandmarkets.com/reports/3619339/
Office Code: SCH3UGT5

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Product Format</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) - Single User</td>
<td></td>
<td>USD 2995</td>
</tr>
<tr>
<td>Electronic (PDF) - Enterprisewide</td>
<td></td>
<td>USD 5990</td>
</tr>
</tbody>
</table>

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title:  Mr ☐ Mrs ☐ Dr ☐ Miss ☐ Ms ☐ Prof ☐
First Name: ___________________________  Last Name: ___________________________
Email Address: * ___________________________
Job Title: ___________________________
Organisation: ___________________________
Address:  __________________________________________
City: ___________________________
Postal / Zip Code: ___________________________
Country: ___________________________
Phone Number: ___________________________
Fax Number: ___________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:

Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:

<table>
<thead>
<tr>
<th>Account number</th>
<th>Sort code</th>
<th>Swift code</th>
<th>IBAN number</th>
<th>Bank Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>833 130 83</td>
<td>98-53-30</td>
<td>ULSBIE2D</td>
<td>IE78ULSB98533083313083</td>
<td>Ulster Bank, 27-35 Main Street, Blackrock, Co. Dublin, Ireland.</td>
</tr>
</tbody>
</table>

If you have a Marketing Code please enter it below:

marketing Code: __________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:

(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World