



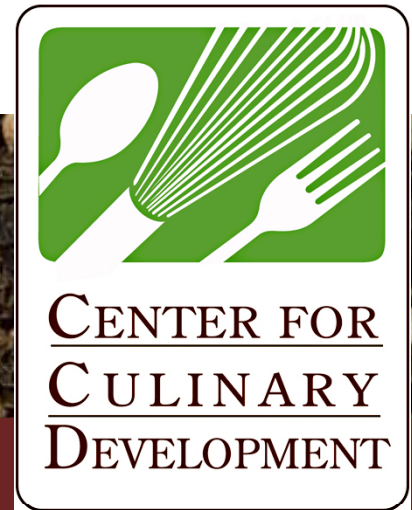
ASTA 2007 Annual Meeting

The Spiceman Cometh:

Emerging Trends in Spices & Seasonings



product innovation • consumer & trend insights • commercialization



mmmm...



Who We Are

a full service team of talented and dedicated culinary and business professionals with a 15-year track record of food and beverage innovation

What We Do

consumer, trend and culinary-driven innovation for food and beverage companies. We deliver breakthrough solutions that drive marketplace success for our clients.

Why We're Unique

- CCD Chefs' Council[®]
- Proprietary Trend Mapping[®] process
- Wharf Research[®] - national testing, single location



Product Innovation

pairs culinary creativity with strategic thinking
proven methodology to accelerate innovation

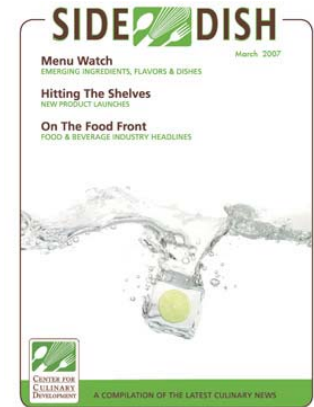
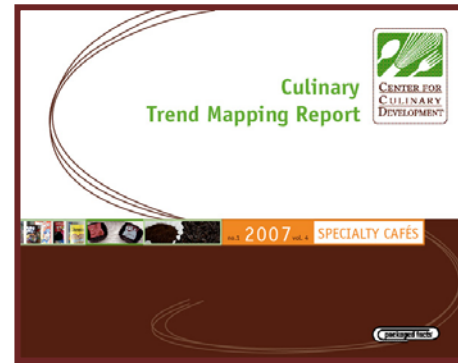
Consumer & Trend Insights

Wharf Research[®] - national testing, single location
proprietary Trend Mapping process

Commercialization

team of food scientists, nutritionists and
manufacturing experts
creative solutions for manufacturing challenges

CCD Trend Mapping®



trend publications

Culinary Trend Mapping Report
Side Dish

trend immersion

trend tours

ideation & product development

What is driving trends in spices?



taste for ethnic foods



restaurant chefs



sophisticate palates



love of heat, bold flavors

DRIVERS



media exposure



new flavor profiles

Evolution of a Trend

CHIPOTLE: the whole picture

1



1989

2



1993

3



1995



4



1998

5

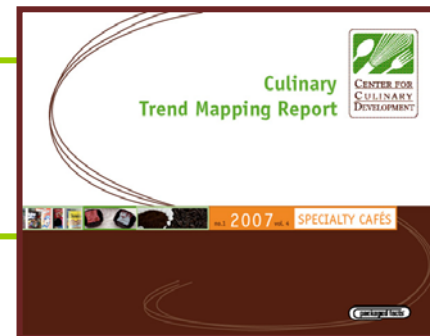


2002

Spice Trends

What's new?

what CCD is talking about



Culinary Trend Mapping Report: Spices vol. 4, no. 2

- Stage 1 **sumac, za'atar**
shichimi togarashi (Japanese 7 spice)
exotic peppers:
Sichuan peppercorns
peri-peri
grains of paradise
- Stage 2 **ras el hanout, harissa**
star anise
- Stage 3 **Chinese five-spice**
- Stage 4 **saffron**
- Stage 5 **ancho chile**

on our radar



rosemary

smoked paprika/pimenton

sansho in Vietnamese, Asian

Mexican oregano

varietal peppercorns:

- Balinese long pepper

- Lampong

- Tellicherry

- Sarawak

piment d'Espelette – Basque

aleppo pepper – Syrian

smoked peppers & salts

gourmet salts

bolder • sophisticated flavors • ethnic nuance

Where spice trends are appearing

restaurants

Stage 1 source - ethnic, fine dining



Tabla • Floyd Cardoz, NYC

Momofuku • David Chang, NYC

Oleana • Ana Sortun, Cambridge, MA

Spice Market • Jean Georges, NYC

Wave • Kristine Subido, Chicago

Dining Room, Ritz-Carlton, SF • Ron Siegel

...myriad other fine dining and ethnic restaurants

source of early exposure



cocktails

Stage 1 - restaurant related



modern mixology taking cocktails to new places

infusions – lemongrass,

spices, herbs

house-made bitters

black pepper

cinnamon bark

allspice

nutmeg

Chinese five-spice

spicing up the bar

in the media

Stage 2 - magazines

magazines

Gourmet

Bon Appétit

Food & Wine



industry publications

Chef

Restaurant Business

Nation's Restaurant News

Restaurants & Institutions

CIA Worlds of Flavor

tempting recipes . restaurant inspiration

specialty shops

Stage 2 & 3

**WILLIAMS-
SONOMA**
the place for cooks



- Dean & DeLuca
- The Spice House
- Penzey's
- Le Sanctuaire
Jing Tio: spice whisperer
- Sur La Table
- Williams-Sonoma
- ethnic grocers
Indian, Middle Eastern

internet & mail order access for all

in the media

Stage 2 & 3 - TV cooking shows



TV shows

Food Network cooking shows

PBS travel, culture, cooking show

- **Meaning of Food, Marcus Samuelsson**
- **Diary of a Foodie, Gourmet**

Cable travel and dining shows

- **No Reservations A. Bourdain**
- **Bizarre Foods - Travel Channel**

visual & tantalizing inspiration

in the media

Stage 2 - cookbooks



Marcus Samuelsson

The Soul of a New Cuisine:

A Discovery of the Foods and Flavors of Africa

Ana Sortun

Spice: Flavors of the Eastern Mediterranean

Floyd Cardoz

One Spice, Two Spice: American Food, Indian Flavors

James Oseland

Cradle of Flavor: Home Cooking from the

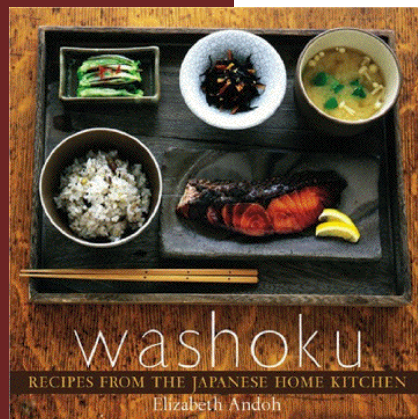
Spice Islands of Indonesia, Singapore and Malaysia

Aliza Green

Field Guide to Herbs & Spices

Elizabeth Andoh

Washoku: Recipes From the Japanese Home Kitchen



cooking classes

Stage 2 & 3



at specialty stores, grocery stores,
cooking schools, on vacation

Sur La Table
Williams-Sonoma
Central Market (TX)
Wegman's
local cooking schools
travel trips to Indonesia, Thailand,
Japan



**hands-on exposure
leads to purchases**

packaged specialty foods

pre-mainstream. artisan



new spice collections -

Vann's Taste of Africa
McCormick's Gourmet
So! Gourmet - South Africa
Tom Douglas spice rubs

Kettle Brand Chips
artisan chocolates – spice flavors
ethnic frozen dinners
dried mixes – rice, sides, meals
Sources: Whole Foods, Trader Joe's

an exciting way to try new flavors

Ethnic Spice Trends

Pan-Asian

Chinese



aromatic with new sensations

Sichuan peppercorns

gourmet magazines: “100 tastes to try 2007” - *Food & Wine*

Belgian chocolate bar

star anise

soups, braises, poached fruits

Woo City Ice Cream

Chevre de Nord goat cheese

spice rubs

Chinese five-spice

P.F. Chang's, fine dining

Menu sighting: Valrhona chocolate and wasabi fondant with **five-spice** tuile and chocolate curry cookie (\$8) - **Uchi, Austin, TX**

Pan-Asian

Japanese



authentic accents

shichimi togarashi – 7 spice

chile sansho citrus peel
nori ginger poppy seeds
white & black sesame seeds

- traditional noodle soup condiment
- used in: spiced nuts aioli
 crusting scallops, tuna

**McCormick Far East Sesame
Ginger Blend**

**Tom Douglas Rub with Love
Spicy Tokyo blend**

Menu sighting: Ahi carpaccio with wasabi pesto, creamy avocado and togarashi aioli - **Cheesecake Factory (107 units)**

Pan-Asian

Southeast Asian



growing interest in Vietnamese, Indonesian, Thai flavors

sansho

star anise

lemongrass

sambal oelek - *chiles, sugar, salt, garlic paste*

Indonesian peppercorns

cubeb peppercorns

Menu sighting: Sansho savarin with caramelized apples and ginger ice cream (\$8) - **Ono, Japanese Tea Salon, NYC**

Indian



a wealth of spices

chai - *cardamom, cinnamon, cloves, pepper*

garam masala

turmeric

nigella seed

panch phoron (five-spice mixture):
cumin, fenugreek, black mustard, fennel seed, onion seed

- found in tandoori, legume & rice dishes

Menu sighting: Cardamom spiced pork belly, with **madras curry** scented fresh garbanzo bean puree (\$9.50) - **Rioja, Denver**

Middle Eastern



zesty & exotic

sumac - sour, citrusy, seed

za'atar: *wild thyme, sesame, sumac*

- sprinkled on flatbreads, yogurt dips, olives, chicken
- in U.S.: flavors aioli, fries, flatbreads

3 C's - cumin, coriander, cardamom

paprika

curry, turmeric, fenugreek

baharat (curry equivalent, 5-11 spices)

- cumin, cinnamon, cloves
- for lamb, veggies

Menu sighting: Roasted Scottish salmon with Israeli couscous, tarragon, grapefruit, **Moroccan** black olives, **sumac** vinaigrette (\$19.50) - **Firefly, San Francisco**

North African



spicy & sweet flavors

“Moroccan spiced” - cumin, cinnamon, ginger, allspice, etc.

ras el hanout - “top of the shop” blend

harissa – Tunisian chile paste

- U.S. chefs making milder versions
- marinade on fish, seafood
- drizzled over goat cheese bruschetta
- Sahale Snacks - Ksar blend

Egyptian dukkah

- nut, sesame, spice dip for breads
- 3 new products in 2006



Menu sighting: North African-spiced hot-smoked salmon with preserved lemon, mint and parsley salad - **Hamersley's Bistro, Boston**

African



potent, assertive flavors

peri-peri – hot sauce, peppers

grains of paradise

Ethiopian **berbere** blend: *chile, fenugreek seeds, cardamom, allspice, clovers*

Vann's Taste of Africa line

Mpuntu - spice line developed by Agribusiness in Sustainable Natural African Plant Products

Menu sighting: Grains of paradise-crusted Pacific halibut with braised fennel and **Hawaiian sea salt** - **Rendezvous Inn, Mendocino, CA**

Mediterranean



warming spices

smoked paprika - Spain

- used for potatoes, fries, vegetables, fish, stews



saffron - various

present in many cuisines: Spanish, Persian, Italian, Indian

-used often for rice (paella, risotto)
but also integral to French
bouillabaisse

Menu sighting: Warm Dungeness crab cupcakes, crème fraîche frosting, **saffron** salt sprinkles (appetizer) - **Boka Kitchen and Bar**, Seattle, WA

Pan-Latin



adding authentic flavor & color

Mexican oregano

Mexican bay leaf

annatto seeds

cinnamon

cumin, coriander, cloves

chiles of all kinds - ancho, chipotle

epazote - pungent herb

allspice - Caribbean foods



Menu sighting: Ensalada de Tomate - Heirloom tomato and "ARC Greenhouses" baby greens, homemade octopus bacon, **cumin-orange** vinaigrette (\$9) - **Pasion, Philadelphia**

Specialty Trends in Spices

specialty trends

varietals. terroir



consumer value in variety

- food lovers are learning to differentiate flavors thanks to wine, local produce

***terroir*: the taste of place**

- where a product is grown can influence taste now seeking out varietal spices, salts, peppers

specialty salts - Himalaya, Hawaii, Portugal

cinnamon vs. cassia - can you tell the difference?

- four types at The Spice House - Saigon, Ceylon True, China Tung Hing, Korintje Indonesia

peppercorns - Indonesia, Malabar (India), Reunion Islands; multicolored



“I feel connected and ‘in the know’ about my food”

specialty trends

□ organic. natural



organic, natural spices on the rise

- 90 new spices tagged “natural”
- 31 tagged “organic” out of 236 new spices introduced between July ‘05 & July ‘06

(ProductScan Online)

brands

- Spicely Organic
- Watkins
- Oskri
- Ambassador Biodynamic

organics extending to the pantry

specialty trends

convenience. elevated experience



convenience always key

seasoning blends

McCormick Slow Cook Seasoning Mix

rub and marinades

flavor sprays - David Burke

experience more

spice grinders - salts, peppers, blends

So! Gourmet:

Chinese five-spice sold at Williams-Sonoma

Callison's seasoned skewers: Mexican Fiesta,

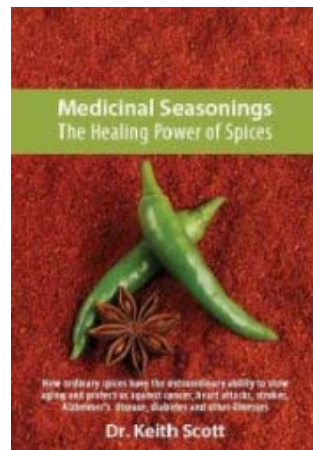
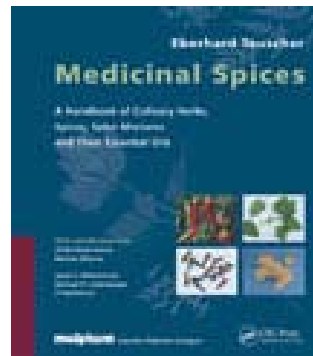
Indian Mango Curry

Using spices is fun, interactive, easy

Health & Wellness Spice Trends

healing spices

health boosts from spices



U.S. consumers discovering medicinal uses

Medicinal uses are an ancient practice in cultures around the world

Asian, Indian cuisines - essential elements; had cooling, heating properties

Turmeric - digestive aid, antibacterial anti-inflammatory; Alzheimer's

Ginger - helps nausea, digestion

Cinnamon - boosts brain activity, anti-inflammatory; anti-oxidant; regulates blood sugar levels

Healthy lifestyle goes with eating great tasting food

low sodium

replacing sodium with spicy flavor



sodium - the new trans-fat?

growing concern of AMA, govt.

□□□aging population –hypertension;
will affect 1 in 3 adults

food companies responding
soups, cereals, sauces, gravies

How to ensure flavor with low sodium? spices and seasonings!

- specialty salts
- umami boost
- better fats in nuts and seeds

Spices now a go-to solution for adding flavor

Translating Trends

Cross spice trends for new product opportunities

Specialty + Ethnic



CONVENIENCE



NORTH AFRICAN

ras el hanout spice blend + quick couscous

pre-made tagines + harissa condiment packet



Healthy + Ethnic



HEALTHY



ETHNIC

Low sodium Vietnamese pho soup + star anise

Indian rice biryani + turmeric flavor



Conclusion

**The Spiceman truly cometh
to the American culinary scene
and it's about time**



mmm ...
strategic product development solutions with taste