

## **15 CUISINE**

### **15.1 Overview**

According to Taylor Nelson Sofres Intersearch and *American Demographics*, the percentage of Americans eating at various types of restaurants in 1999 was as follows:

- American/Continental: 69.2%
- Italian: 61.7%
- Chinese: 59.4%
- Mexican: 56.5%
- Japanese: 17.8%
- Thai: 11.2%
- French: 9.8%

### **15.2 American/Continental**

According to Taylor Nelson Sofres Intersearch and *American Demographics*, 69.2 percent of Americans dined at an American/Continental restaurant in 1999. The percentage by age group was as follows:

- 18 - 34 years old: 68.9%
- 35 - 44 years old: 74.5%
- 45 - 54 years old: 72.2%
- 55 - 64 years old: 69.6%
- 65 years and older: 54.9%

### **15.3 Ethnic Cuisines**

The global economy, immigration, and the increasing propensity of Americans to dine away from home have accelerated the impact of once obscure global cuisines, according to a study by the National Restaurant Association. Cuisines such as Mexican, Italian, and Cantonese Chinese are so ubiquitous that most Americans no longer consider them ethnic foods.

The 2000 study, Ethnic Cuisines II, is a follow-up to a 1994 consumer survey by the NRA. According to the research, 90 percent of consumers say they are familiar with the above cuisines and 50 percent eat them regularly. Perhaps more significant is the rise of so-called Tier II ethnic foods, which are appearing more frequently on menus. Examples include regional Chinese

(Mandarin, Hunan, Szechwan, etc.), German, French, Greek, Cajun/Creole, Japanese, Indian, Scandinavian, Caribbean, and Spanish. According to NRA research approximately 70 percent of consumers have at least tried these cuisines in a restaurant visit.

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**“American diners no longer differentiate these foods as being ‘different’ than any other kind of mainstream American cuisine.”**

Hudson Riehle, Vice President of Research  
National Restaurant Association  
*FoodserviceCentral.com Newsletter, 6/8/00*

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More esoteric, Tier III cuisines include Thai, Vietnamese, Middle-Eastern, Korean, Mediterranean, and Latin American. Even here, three out of five consumers have been exposed to these foods.

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**“These (Tier III) are the cuisines that restaurant operators will be watching closely over the next couple of years to see which ones really take hold.”**

Hudson Riehle, Vice President of Research  
National Restaurant Association  
*FoodserviceCentral.com Newsletter, 6/8/00*

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Not surprisingly, the most likely and frequent users of ethnic foods tend to be what Mr. Riehle described as internationalists, typically young (under age 40), urban professionals who pro actively seek out foreign experiences and emphasize the importance of authenticity in dishes. Those least interested in ethnic cuisines were so-called ‘social diners’ and ‘convenience diners,’ typically older consumers who emphasize dining as a time-saver or social occasion, but show little interest in experimenting with new foods.

The following are some additional findings of the National Restaurant Association's Ethnic Cuisines II study:

- Compared with 1994 data, six cuisines have enjoyed significant growth in

popularity: Italian, Mexican, Japanese (sushi), Thai, Caribbean, and Middle Eastern. In contrast, four cuisines show a decline in popularity: French, German, Scandinavian, and Soul Food.

- Because of increased familiarity, ethnic foods are continually becoming more mainstream. Except in Korean, Indian, Thai, and Japanese (sushi) cuisines, the importance of authenticity has also lessened.
- For restaurateurs, the most important outcome of assimilation of ethnic cuisines into American culture is that consumers now judge ethnic restaurants by the same yardstick that they apply to other establishments. At one time, it seemed that consumers were willing to trade off less-than-excellent service and atmosphere for an opportunity to try something new and exotic. However, this is no longer the case.
- 'Internationalists' and 'urban professionals' are the two segments most involved with ethnic cuisines. They tend to be younger consumers living predominantly in major metropolitan areas. Internationalists are people who seek out foreign experiences. They are the most likely to seek out authenticity and are more inclined than others to have a taste for hot, spicy foods. Urban professionals tend to be somewhat older than internationalists. They like to experiment with new restaurants and cuisines, but they watch what they are eating and want menus to specify clearly what it is that they are eating.
- Friendly, attentive service, flavorful food, and a good atmosphere are just as critical to the success of an ethnic restaurant as they are to any establishment.

The National Restaurant Association's Ethnic Cuisines II study segmented ethnic cuisines as follows:

- **Basic Family** appeal represents the "safe" core of the ethnic-cuisines market that appeals to almost all consumers. These cuisines include traditional Italian, basic Mexican, and Cantonese Chinese. Those cuisines are highly familiar and are perceived as a great value for the price, good for eating out with children and good for carry-out. Thus, they are chosen regularly by consumers.
- **Traditional Fine Dining** appeals with few specific cues, and it is not exclusive to ethnic cuisines, although some French and upscale Italian restaurants have this appeal. Generally, those cuisines attract an older urban clientele and are perceived as good for formal or social occasions; rich, indulgent food for a splurge; irresistible desserts; drinks are important; and not a great value.
- **Old-World Traditional** appeal is a segment that is losing interest, especially among younger consumers. German and Scandinavian cuisines are the clearest examples, although Soul Food and Greek, when perceived

in this manner, also run the risk of having declining interest from consumers. Perceptions suggest rich, indulgent foods; good, hearty portions; and irresistible desserts. On the other hand, those cuisines are not difficult to prepare at home, are fairly static in terms of offerings and don't appeal to adventurous diners.

- **Authentic & Mild** appeal is especially represented by Japanese cuisines (i.e., sushi and other dishes) and secondarily by Middle Eastern cuisine. Younger, upscale consumers are most interested in those types of foods. In terms of perceptions only, authentic restaurants do a really good job of preparing those types of foods; mild, pleasant flavors, and beautiful presentations characterize the food. Moreover, those cuisines are difficult to prepare at home.
- **Adventurous & Spicy** appeal is especially relevant to consumers most involved with ethnic cuisines. It can be found in Indian, Korean, Thai and, to a lesser degree, Vietnamese and Chinese (Hunan, Mandarin or Szechwan) restaurants. Those cuisines appeal to adventurous eaters and are perceived as full of surprises. The foods are characterized as hot and spicy with unique flavors and are difficult to prepare at home. Consumers believe that only authentic restaurants do a really good job of preparing those dishes.
- **Convenience & Value** appeal is inherent in all Chinese cuisines and, to a degree, other Asian cuisines as well as Mexican food. Those cuisines appeal to most consumers but are especially attractive to those people who use ethnic cuisines primarily for convenience. This appeal is associated with being a great value, good for carry-out, and good for vegetarians.
- **Festive Appeal** is an important driver in a number of ethnic cuisines, especially Mexican, Cajun/Creole, and Caribbean. Spanish restaurants appear to draw business with this appeal as well. The food and the mood at those types of restaurants seem to work together to create the positive experience that consumers enjoy. The festive appeal is characterized by being good for celebrations; drinks that go with the food; rich, indulgent food; good, hearty portions; and hot, spicy food. Places that have this appeal put consumers in a good mood.
- **Innovative & Trendy** appeal is inherent in upscale Italian cuisine, French cuisine and, to a degree, Spanish cuisine. Fusion cuisines-Mediterranean, Latin American, and Pan Asian-derive an important part of their appeal from this dimension. Consumers attracted to innovative and trendy ethnic cuisines tend to be upscale and are not devoted to authenticity. Those cuisines are perceived to be always changing as chefs invent new dishes or modify traditional ones. They have lots of variety-something for everyone.

## **15.4 Italian**

According to *Restaurants and Institutions*, the leading sellers among Italian foods are as follows:

- Spaghetti
- Pizza
- Pasta with red sauce
- Pasta with chicken
- Meat lasagna
- Pasta with vegetables
- Fettuccine/linguini
- Pasta with shrimp
- Pasta with sauce
- Ravioli/tortellini

According to the National Restaurant Associations's Menu Analysis, Italian is offered on 75 percent of menus, ranking first among ethnic cuisines. This does not include spaghetti, which is served on a little more than 50 percent of menus. However, this popular ethnic cuisine only accounts for 29 percent of all sales in the category for the top five Italian chains, according to Ron Paul, president of Technomic, Inc. Thus, these chains have room to take shares from independents gaining total market growth. Growth is feasible, furthermore, because Italian food offers variety which inhibits more frequent visits and its popularity covers most food categories including pasta, meat, seafood, and more.

According to Taylor Nelson Sofres Intersearch and *American Demographics*, 61.7 percent of Americans dined at an Italian restaurant in 1999. The percentage by age group was as follows:

- 18 - 34 years old: 69.0%
- 35 - 44 years old: 61.4%
- 45 - 54 years old: 62.2%
- 55 - 64 years old: 61.1%
- 65 years and older: 39.2%

While the spotlight may have moved onto other ethnic trends, the Italian segment continues to innovate and expand. Customers at Italian concepts are loyal and steady, fueling continued sales increases, according to *Restaurant Business*. Despite the success of the segment, Italian restaurants have not been getting a lot of attention lately. There are not a lot of new Italian concepts, nor are companies in the segment expanding imprudently. Nonetheless, many Italian restaurants feature specialty breads, larger portions, and family style service, which attribute to the number of return visitors, according to *Restaurant Business*. Thus, customers see their dining experience

in an Italian restaurant as full of value. Additionally, the advertisement of “authentic” food appeals to many in search of a genuine experience.

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**“There’s a lot of opportunity out there, because compared to other segments, there are not as many national chains. It won’t stay that way long, because a lot of companies are getting aggressive.”**

Greg Masek, President  
Spaghetti Warehouse (Dallas, Texas)  
*Restaurant Business*, 5/15/00

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In general, Italian restaurants are strongest in areas with Italian ancestry. Of the 14.7 million Americans who claim Italian ancestry, 5.7 million live in New York, New Jersey, or Pennsylvania, according to *American Demographics*. Another 1.5 million live in Massachusetts or Connecticut, and 1.8 million live in Illinois, Ohio, or Michigan.

### **15.5 Latin American**

Americans hunger for Latin foods. From fast casual outlets to some of the United States’ most prestigious restaurants, satiating Americans’ appetites for the flavors and ingredients of Latin America is good business.

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**“But the reason for the enduring popularity of Latin and Latin-inspired food goes beyond our growing international sophistication and shifting ethnic demographics. The fact is, many Americans of every background can’t get enough of the diverse flavors and native dishes of Latin America. It’s part of our enduring desire for new experiences and new and exciting tastes.”**

*Restaurant Hospitality*, 5/02

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The notion of what constitutes Latin American foods is increasing. Previously, the North American dining public understood Latin American to refer to Mexican and Tex Mex, but now, restaurant diners extend their comprehensibility to include and identify Southern and Central American cuisines. Driving the demand for Latin foods is the United States' increasing Hispanic population. According to the 2000 U.S. Census, 35 million Hispanics reside in the United States. That's 12 percent of the population, 39 percent of which is foreign-born. By 2007, the Hispanic population will have risen by another five million people, to 40.4 million, representing 13.8 percent of the population.

Rick Bayless is widely credited for introducing 'authentic' Mexican regional cuisine to the United States in 1987 with his groundbreaking Frontera Grill in Chicago, Illinois. He earned the James Beard National Chef award, marking the first time an ethnic cuisine was given the honor. The milestone not only gave an air of legitimacy to Mexican cuisine, but illuminated the idea that great food can come from diverse backgrounds. Latin cuisine has been legitimized even further with the James Beard Society's recognition of Douglas Rodriguez in the form of nominations for the Rising Star Chef of the Year and Best Chef, New York awards; and with Guillermo Pernot's nomination for Beard's best Chef of the Mid-Atlantic award. Pernot was also given the honor of Esquire's "Chef of the Year" in 1999.

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**“We are becoming quite a Latin country, so this is not a play thing. It’s the food of a whole lot of people we share our country with. And we’re learning the integrity of Latin cultures, from their approach to life – their strong bond with family, that is often times cemented with food. We’re learning that sharing a meal with people not only satisfies our hunger, but our need for community.”**

Rick Bayless  
*Restaurant Hospitality*, 5/02

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According to an article by Karen Berman from *Foodservice central.com*, the Zagat Restaurant Guide Survey finds that many U.S. cities have

restaurants serving Latin American fare inspired by a single country or a combination and are growing. The restaurants are very diverse as well, ranging from white tablecloth restaurants to what Zagat refers to as “hole-in-the-wall” eateries.

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**“There’s something wonderful about Latin American food. It’s a symphony in your mouth.”**

Maricel Presilla, Ph.D  
Culinary Historian and Anthropologist,  
and Restaurateur, Zafra  
*Foodservice Central.com, 3/23/01*

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Fogo de Chao, a small chain in Brazil, opened U.S. locations in Atlanta, Dallas, and Houston in 2001 and 2002. All have long wait lists on weekdays as well as weekends. The restaurants serve Churrasco, a traditional Brazilian style, where a variety of fire-roasted meats are served to patrons direct from the skewer.

Philadelphia restaurateur Stephen Starr, who has a proven successful track record, picked a Cuban theme for Alma de Cuba, which opened in 2001.

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**“While restaurateurs can look to practically any corner of the world for culinary inspiration, many currently turn to Latin America for new concepts.”**

*Nation’s Restaurant News, 3/25/02*

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## **15.6 Mexican**

According to *Restaurants and Institutions*, the leading sellers among Mexican foods are as follows:

- Nachos
- Taco salad
- Tacos
- Chicken fajitas
- Quesadillas

- Burritos
- Beef fajitas
- Refried beans
- Mexican/Spanish rice
- Enchiladas

According to Taylor Nelson Sofres Intersearch and *American Demographics*, 56.5 percent of Americans dined at a Mexican restaurant in 1999. The percentage by age group was as follows:

- 18 - 34 years old: 60.9%
- 35 - 44 years old: 62.7%
- 45 - 54 years old: 55.2%
- 55 - 64 years old: 60.6%
- 65 years and older: 32.1%

According to the National Restaurant Association's Ethnic Food Study, 90 percent of Americans have tried Mexican food, and 85 percent eat it often or at least occasionally. Mexican cuisine is the second most popular ethnic favorite in America, as reported in *Restaurants and Institutions*. In fact, Mexican cuisine has much more to offer than the leading foods most popularly chosen. The foods of Mexico are regionally diverse and contribute to a complexity of different flavors.

Most analysts view the casual and quick service Mexican segment as having room for expansion. It is a strong sector with good consumer appeal. According to Alan Hitchcock, Restaurant Analyst at Piper Jaffrey (Minneapolis, Minnesota), there is lots of room to open Mexican units. Except for the Southwest, the segment is under penetrated.

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**“Mexican food has become so mainstream that salsa beats out ketchup in sales, and the margarita is the No. 1 cocktail in the U.S. No wonder operators are expanding and investors are spending.”**

Jacqueline White Kochak  
*Restaurant Business*, 4/1/00

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While the numbers are not as strong as in recent years, industry experts predict that Mexican food will continue to grow in popularity. In the quick

service segment, Mexican food is often an alternative that slides in between casual. Baby boomers, the fastest-growing age segment, have the most discretionary income. Focus groups show that customers prefer the idea of being waited on for a higher level of service, according to *Restaurant Business*. The younger sets tend to eat more Mexican than older groups, especially in a more quick service to fast casual atmosphere. Thus, Technomic, Inc. reports that the trend in fast casual Mexican, while risks the chance of becoming a short-term fad, has positive opportunities for growth because it is relatively new compared to quick service dinner restaurants and dinner houses. Another reason for growth in this field relates to the large immigration of Central and Latin Americans.

Hispanics, which include Mexicans, are the fastest growing ethnic segment, accounting for 44 percent of the population growth in the United States. According to *Restaurants and Institutions*, industry experts also see room for restaurants showcasing regional Mexican food, a trend similar to the way Italian cuisine has evolved with distinctive fare from Tuscany to Sicily.

### **15.7 Asian**

According to *Restaurants and Institutions*, the leading sellers among Asian foods are as follows:

- Stir-fry chicken
- Stir-fry vegetables
- Fried rice
- Stir-fry beef
- Teriyaki chicken
- Sweet & sour
- Stir-fry seafood
- Stir-fry pork
- Chop suey/chow mein
- Teriyaki beef

According to the National Restaurant Association, 21 percent of Americans reported eating sushi in 1999, a 40 percent increase over the 15 percent figure in 1994. There were 5,000 sushi bars in the U.S. in 1999, according to The National Sushi Society (Tokyo, Japan); five times the number a decade earlier. In fact, sushi is becoming so popular and so intertwined into the American eating culture, a child's *First Book of Sushi* has hit the press, according to *Nation's Restaurant News*. Supermarkets and convenience stores sell packaged sushi rolls. However, many traditional Japanese chefs recognize that sushi has "been painted with an American brush," according to Phillip Yi, director of the California Sushi Academy.

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**“In the U.S., in the year 2000, sushi is the new pizza. Long appreciated by seafood-savvy Californians, this traditional Japanese cuisine has burst into popularity in the past few years across the country – from Fairbanks to Fargo to Ft. Lauderdale – becoming the latest American staple.”**

*Restaurant Business, 4/1/00*

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According to Taylor Nelson Sofres Intersearch and *American Demographics*, 59.4 percent of Americans dined at a Chinese restaurant in 1999. The percentage by age group was as follows:

- 18 - 34 years old: 65.1%
- 35 - 44 years old: 64.3%
- 45 - 54 years old: 55.0%
- 55 - 64 years old: 52.6%
- 65 years and older: 46.4%

An estimated 17.8 percent of Americans dined at a Japanese restaurant in 1999. The percentage by age group was as follows:

- 18 - 34 years old: 24.7%
- 35 - 44 years old: 14.6%
- 45 - 54 years old: 17.9%
- 55 - 64 years old: 13.2%
- 65 years and older: 10.8%

According to the Wall Street Journal, there are more than 5,000 Thai restaurants outside Thailand, with over 2,000 of them in the U.S., up from about 500 since 1990. The popularity of Thai food is sweeping over America shifting many diners away from the more traditional ethnic cuisines such as French, Greek, and German, according to the National Restaurant Association. Thailand's government plans to start a chain of more than 3,000 Thai restaurants worldwide over the next five years, with more than 1,000 slated for the U.S. as a way to promote the country's cuisine. The three different restaurants will range from fast-food, mid-priced, and higher-priced eateries. Thailand's deputy commerce minister, Goanpot Asvinvichit wants the fast food restaurants “to be like the McDonald's of Thai food. And [they] want to show

the world what genuine Thai food should taste like.” The restaurants are believed to be the first restaurants started by a government.

Approximately 11.2 percent of Americans dined at a Thai restaurant in 1999. The percentage by age group was as follows:

- 18 - 34 years old: 17.0%
- 35 - 44 years old: 10.0%
- 45 - 54 years old: 10.8%
- 55 - 64 years old: 7.7%
- 65 years and older: 4.0%

Asian food, traditionally in the form of a takeout, is evolving into one of the nation’s trendiest dinners. According to NPDFoodworld, the number of casual-dining establishments offering Asian cuisine increased by nearly 800 units to 34,731 in the U.S., with about 140 fewer quick service Asian restaurants now open than in 1998. Changing tastes attribute to the reason for the incline. As a result, a new variety of flavors and dishes are appealing to a wider audience. Thai, Japanese, Vietnamese, Korean, and Indonesian flavors are appearing as accents to many American dishes as well as appearing alone in more traditional dishes.

According to NPDFoodworld, the following numbers of restaurants in 2000 represent the segment’s growth:

- Casual-Dining: 34,731
- Quickservice: 4,922
- Total: 39,653

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**“Americans are more willing to try new things and are open to new flavors.”**

Joel Schwartz, President  
Benihana  
*Restaurant Business*, 1/15/01

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### **15.8 French**

According to Taylor Nelson Sofres Intersearch and *American Demographics*, 9.8 percent of Americans dined at a French restaurant in 1999. The percentage by age group was as follows:

- 18 - 34 years old: 10.5%
- 35 - 44 years old: 11.1%
- 45 - 54 years old: 8.5%

- 55 - 64 years old: 10.7%
- 65 years and older: 7.7%

Chef Daniel Boulud of Daniel's (New York, New York) identified the following as some of his favorite French restaurants in the United States (source: *USA Today*):

- Bernard's Inn at Ridgefield (Ridgefield, Connecticut)
- Bouchon (Yountville, California)
- Brasserie Perrier (Philadelphia, Pennsylvania)
- Brasserie Le Coze (Atlanta, Georgia)
- Citronelle (Washington, D.C.)
- L'Absinthe Restaurant (New York, New York)
- LaFolie (San Francisco, California)
- Le Colonial (Chicago, Illinois)
- Pinot Bistro (Studio City, California)
- Tapenade (La Jolla, California)

Although not a part of Chef Daniel Boulud's list, La Madeleine restaurants have been in business since 1983. Founded by Tours (France) native Patrick Esquerre, using his mother's recipes, the chain has 62 locations in seven states, according to *Forbes*. However, La Madeleine went under new ownership in December of 2001, by Paris-based Groupe Le Duff. The restaurant will remain French, but business plans for expansion will follow American traditions under the direction of Wallace Doolin, former chief executive of Carlson Restaurants, parent company of T.G.I. Friday's. Groupe Le Duff hopes their plans for expansion will be profitable, since they own La Brioche Doree, a quick service bistro similar to La Madeleine. Doolin has big plans for La Madeleine including adding more expensive French wine labels and hosting wine tastings on weekends and evenings, as well as introducing new items. Groupe Le Duff is also considering a Petite La Madeleine offering limited takeout plus bakery for the future (source: *Forbes*, May 13, 2002).

### **15.9 African Cuisine**

Just as hard as it is to combine ethnic cuisines which are made up from a multitude of different countries within a continent, restaurateurs have found a similar difficulty in marketing "African" food. While African restaurants are fairly new in this country, African influence has played a key role in American food for centuries. On the ships which carried African slaves, also came okra, collard greens, and many other vegetables and starches, according to *Nation's Restaurant News*. Much of the cuisine of the Southern United States and the Caribbean, as well as Brazil is based on recipes inspired from Central and Western Africa.

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**“The fried plantains of Latin American countries are made lighter at Sosinna’s in New York, where chef-owner Sosinna Degefu bakes them instead of frying them. [She] adds an African flair to the dish by adding a rich dressing of ginger, olive oil, salt and pepper, and finishes with a dusting of cayenne pepper.”**

*Nation’s Restaurant News, 8/6/01*

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Not only has African-influence food appeared in the city and suburbs of America, Disney’s Animal Kingdom Lodge associated with the theme park, opened three African-themed restaurants. Much African food is stewed, which makes buffet-style a perfect choice for these ethnic restaurants. Common flavors include tamarind, cinnamon, and cumin and ginger. The most common African cuisine is Ethiopian-based and became established in the United States in the mid-1980s. Most African restaurants try to cover the pan-African culinary experience, while mixing Caribbean and African-American soul food flavors.

### **15.10 Indian Cuisine**

In the opinion of many trend-watchers, the flowering of Indian food in the United States is happening now, as international commerce, travel, and immigration result in more cultural exchanges with India, and interest in Asian flavors and healthful, vegetable-based meals escalates.

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**“In the next 20 years you’ll see Indian food everywhere.”**

Kul B. Kalra, owner  
Tandoor Restaurant (Minneapolis)  
*FoodserviceCentral.com Newsletter, 7/24/00*

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One of the most ancient and complicated cuisine, Indian flavors are

becoming more common on U.S. menus. Chefs are now experimenting more with typically Indian spices and more restaurants are opening featuring Indian-fused themes. In the past, Indian food has not been translated well in America because of the lack of close ties to India as found in Great Britain, however, Indian dishes are becoming more mainstream, especially in the upper-crust restaurants, according to chef/owner Nella Paniz.

When Tandoor Restaurant opened in Minneapolis in 1982, it was the only Indian restaurant for miles around. Today, the region boasts nearly a dozen, and Kalra predicts that in few years the figure will grow to 20. Raji Jallepalli-Reiss, a microbiologist, author, and chef has similar experiences to Kalra in the opening of her restaurant Raji, in Memphis, Tennessee in 1988. She helped create the menu for the recently opened Tamarind, an Indian-Fusion restaurant in New York.

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**“The American palate, as it’s becoming more familiar with East Asian, is starting to accept these flavors. It is also realizing that they blend really well with the foods that we are used to, such as lamb or lobster.”**

Raji Jallepalli-Reiss, author  
*Raji Cuisine: Indian Flavors, French Passion*  
*Nation’s Restaurant News*, 4/23/01

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More Indian immigrants create more exposure to Indian food through restaurants. The British Empire experienced Punjabi cuisine because restaurants were based on Northern Indian flavors. Immigration from all over India opens the experience to cuisines from all different regions with regional restaurants opening. Far from reaching its peak, Indian cuisine is only beginning to influence American culture. In a decade, Indian cuisine will move out of its tired standbys to more flavorful foods.

### **15.11 Seafood**

Seafood restaurants continue to gain popularity with the dining public, a trend operators attribute to several factors, including a perception that seafood is a healthier choice than meat. The popularity of dining out by the aging baby boomers who may be more health-conscious and more sophisticated market, becomes apparent in the fact that they are willing to try new vanities and

preparations. According to *Restaurant Business* and the National Oceanic and Atmospheric Administration, American consumers spend almost \$50 billion a year on seafood, with \$32 billion of that purchased in food service establishments. In addition, Americans eat about 15.3 pounds of seafood yearly. The National Fisheries Institute reports that Americans consume 8 percent of the world's total catch of fish and shellfish. Since operators are finding many creative ways of displaying fish in methods of baking, fish is growing in popularity among consumers. Fish and seafood can be baked, broiled, fried, stuffed, mixed in soups and chowders, and even served raw. The NFI reports the nation's top ten favorite fish and pounds per person consumed are as follows:

- Tuna: 3.5 lbs.
- Shrimp: 3.0 lbs.
- Salmon: 1.7 lbs.
- Alaskan Pollock: 1.57 lbs.
- Catfish: 1.16 lbs.
- Cod: 0.77 lbs.
- Crab: 0.54 lbs.
- Clams: 0.46 lbs.
- Flatfish: 0.39 lbs.
- Scallops: 0.2 lbs.

About 80 percent of dollars spent on seafood are spent at the food service level. The strong economy makes more expensive seafood entrees more acceptable. Fish imports have also been increasing. According to the U.S. Department of Commerce, U.S. landings of fish and shellfish declined three percent in the late 1990s, while imports increased five to six percent to account for approximately 60 percent of all seafood consumed.

Aquaculture has also helped to stabilize supplies and pricing. However, increasing prices and the declining supply of fish and shellfish are major concerns for seafood restaurants. In 1999, the Food and Agriculture Organization of the United Nations reported that more than two-thirds of the world's fish stocks are endangered—either fully fished, exploited, depleted or barely recovering from over-fishing. The domestic farming of seafood has increased dramatically in recent years. This allows restaurants a more seasonally- and price-stable supply. More than 100 different species of fish have their own farming industry. However, many chefs do not agree with the politics associated with fish farming, and some have taken advances in helping to preserve certain species of fish by not offering them on their menus.

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**“If we don’t preserve our seafood resources,  
then everything’s going to be farmed.”**

Rick Moonen, Chef  
Oceana  
*Sky Magazine*, 8/01

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Tuna is rarely farm-raised, while farmed shrimp increased to approximately 25 percent of U.S. shrimp consumption in the late-1990s. Shrimp grow fast enough to produce at least two crops per year, and sell to processors at an average of \$2.50 per pound, versus about \$0.75 per pound for farmed trout or catfish.

### **15.12 Kosher**

According to Marketing Communications (New York, New York), seven million U.S. consumers purchase kosher goods, distributed as follows:

- Jewish: 2 million (28%)
- Vegetarians and lactose-intolerant: 1.1 million (16%)
- Muslims, Seventh Day Adventists, other religious groups: 1.3 million (19%)
- Other, consumers who prefer kosher foods: 2.5 million (35%)

It is forecast that 11 million U.S. consumers will purchase kosher goods in 2007.

According to *Restaurants USA*, chefs and restaurateurs nationwide are answering the call for upscale kosher cuisine. Chris Hollis, executive chef at Le Marais (New York, New York) calls kosher “the biggest untapped area in the field.”

According to Joan Nathan, author of *Jewish Cooking in America* and *USA Today*, some restaurants serving notable Jewish food include the following:

- Barney Greengrass (New York, New York)
- Kohn’s Kosher Deli (St. Louis, Missouri)
- Manny’s Coffee Shop (Chicago, Illinois)
- Milk Street Café (Boston, Massachusetts)
- Moshe’s Falafel (New York, New York)
- Nate ‘n Al’s (Los Angeles, California)
- Saul’s Restaurant & Delicatessen (Beverly, California)
- Second Avenue Deli (New York, New York)
- Wolfie’s Restaurant (Miami Beach, Florida)

- Zingerman's Deli (Ann Arbor, Michigan)

### **15.13 Vegetarian**

More than 12 million Americans consider themselves vegetarians. According to *FoodserviceCentral.com Newsletter*, research from Kansas State University indicated mainstream Americans, even those in the overwhelming majority who did not consider themselves vegetarians, were eating more meatless meals than ever before. The National Restaurant Association reports that 20 percent of Americans are likely to look for a restaurant that serves some vegetarian items. That finding was consistent with that of several trade industry groups, including the National Restaurant Association and the Baltimore-based Vegetarian Resource Group. According to VRG figures, just one percent of the population considers itself vegetarian, but more than five percent say they 'always' order a dish without meat, fish, or fowl as an ingredient, and 57 percent say they at least 'sometimes' order a meatless meal while dining out. This market is growing. According to Mintel Consumer Intelligence, a Chicago, Illinois-based market research firm, predicts that the vegetarian food market will continue to grow for the next five years. As of 2001, this market segment was worth a projected \$1.25 billion (source: *Restaurant Business*, March 1, 2002).

The Kansas State study uncovered even more consumers who consider themselves vegetarians, seven percent of those surveyed, as compared with one percent in 1978.

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**“I feel strongly that there is a large interest in vegetarian foods. By including things like a turkey burger, we will have choices. This will not be the bark and twigs vegetarian, so it will appeal to mainstream America.”**

David Maltrotti, owner  
Healthy Bites Grill (Deerfield, Florida)  
*FoodserviceCentral.com Newsletter*, 6/5/00

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The Healthy Bites Grill, a “fast-food health food chain” opened in Deerfield Beach, Florida in spring 2000. The menu is full of items geared to appeal to all vegetarians. Healthy Bites offers soy cheese and other dairy-free ingredients for vegetarians, although most restaurateurs say they shy away

from specialty items like soy milk, instead focusing on vegetable-based dishes, with ingredients found in most Americans' pantries.

Chipolte Mexican Grill, a Mexican chain that focuses on healthy food, strives for a "good balance of non-meat items." Legumes, like black beans, take the place of meats in some of the chain's oversized burritos. Because menu items are made with the input of the consumer, vegetarian items can be customized to the diner's specific needs.

According to surveys by the NRA and VRG, the trend toward meat-free eating (at least some of the time) spans demographics. Seniors seem interested in vegetarianism for its perceived health benefits, teens and college kids see it as a trendy addition to their personalities, and baby boomers try it as a way to work moderation into their diets.

Of course, the term "vegetarian" means different things to different people. Strictly "orthodox" vegans avoid all animal foods including honey. But no matter the terminology, restaurant operators say the shifts means more flexibility for creative chefs and more opportunity to court new customers, while keeping food costs from rising. In fact, the most flavorful vegetarian dishes are often very cost-effective and a good moneymaker, according to David Shea, an executive chef of the restaurant Twelve 12.

#### **15.14 Salads**

Today, salads come in many shapes, and forms with a myriad of different fruits and vegetables. Lettuce, tomato, cucumber, and dressing were once the ingredients for a typical side salad or main course in a restaurant. Today, chefs consider contrasting texture and flavor, seasonal ingredients, and protein in these creations. Items such as watercress, endive, apples, pine nuts with bleu cheese compile the new notion of salad.

Salads are not just becoming popular in high-end restaurants as food artworks. In the quick service sector, many fast-food as well as fast-casual is locking onto the salad trend. For the right price, restaurants like Wendy's are offering gourmet salads in order to appeal to their current customers as well as draw in a new audience. For a quick service price and convenience, customers can get something with less of a quick service feel. In addition, these salads help to boost the notion of higher quality foods in the fast-food segment. Coffee and bagel cafes are also offering gourmet salads to compete in this field.

#### **15.15 Soup**

According to the *Chain Account Menu Survey Report* (June 2001), 133 of 200 chains menued soups, with seafood and Southwestern/Tex-Mex varieties leading the way.

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**“Soups have slowly been inching their way down from the appetizer list into the entree category. The migration – which is nothing new on the home kitchen front – gives restaurant customers the often-appealing option of enjoying a big bowl of soul-satisfying soup for lunch or dinner. And it gives operators the chance to do a bit of cross-utilizing ingredients in the process.”**

*Restaurant Business, 4/1/02*

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Most chains offer a variety of soups; 66 percent of the major chains' menus have a different soup daily. In the survey, all offered more than one variety, and 89 percent listed three or more soups. There is a definite trend toward more robust, complex preparations, many of which have noticeable ethnic or regional roots.

Servings of soup as an entree were up 3.6 percent in the fourth quarter of 2001 compared with the same quarter of 2000, according to NPDFoodworld.

### **15.16 Sandwiches and Burgers**

According to *Restaurants and Institutions*, the leading selling sandwiches are as follows:

- Cheeseburger
- Hamburger
- Grilled chicken breast
- Turkey sandwich
- Bacon cheeseburger
- Club sandwich
- BLT sandwich
- Philly cheesesteak sandwich
- Grilled cheese
- Roast beef sandwich

Because of their universal popularity, burgers are served in restaurants with all types of cuisine.

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**“We serve hamburgers because people want them. Even though we’re known for our pizza, burgers are an important part of a restaurant concept like ours – casual, mid-priced, and family-friendly.”**

Laura Walter, Asst. General Mgr.  
J.P. Cranoli’s (So. Portland, Maine)  
*Restaurant Business*, 5/1/00

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### **15.17 Regional Cuisine**

Virtually every city and state in America has a dish that is its culinary signature. Some are unique, found exclusively in that city, some are regional throughout a state, while others are known nationally.

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**“Regional food lives, even in the land of strip malls.”**

*U.S. News & World Report*, 9/17/01

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*USA Today* provided the following list of ‘50 great plates from 50 states:’

- Alabama: Vegetable plate
- Alaska: King salmon
- Arizona: Chimichanga
- Arkansas: Catfish
- California: Fresh, seasonal organic vegetables
- Colorado: Lamb chops
- Connecticut: Whole clam bellies
- Delaware: French fries sprinkled with salt and malt vinegar
- Florida: Key lime pie
- Georgia: Peach cobbler
- Hawaii: Grilled mahi-mahi
- Idaho: Baked russet potato
- Illinois: Corn dogs
- Indiana: Perch

- Iowa: Grilled pork chops
- Kansas: Fried chicken
- Kentucky: Corn pudding
- Louisiana: Crawfish
- Maine: Lobster roll
- Maryland: Steamed blue crabs
- Massachusetts: New England clam chowder
- Michigan: Cherry pies
- Minnesota: Walleye
- Mississippi: Pecan pie
- Missouri: Prime rib
- Montana: Rainbow trout
- Nebraska: Strip steak
- Nevada: All-you-can-eat buffet
- New Hampshire: New England boiled dinner
- New Jersey: Diner fare
- New Mexico: Enchiladas
- New York: Reuben sandwich
- North Carolina: Grilled quail
- North Dakota: Cinnamon rolls
- Ohio: German chocolate cake
- Oklahoma: Chicken-fried steak
- Oregon: Marionberry cobbler
- Pennsylvania: Shoo-fly pie
- Rhode Island: Jonnycakes
- South Carolina: Shrimp and grits
- South Dakota: Buffalo rib-eye steak
- Tennessee: Buttermilk biscuits
- Texas: Chili con carne
- Utah: Brownie chocolate sundae
- Vermont: Pancakes and maple syrup
- Virginia: Country hams
- Washington: Olympia oysters
- West Virginia: Ramps (wild onions)
- Wisconsin: Grilled bratwurst slathered with brown mustard
- Wyoming: Western breakfast

One of the most exciting recent advances in dining has been the availability of regional specialities at restaurants across the country.

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**“The current excitement in cuisine is . . . not in haute but in the middle. Where soft-shell crabs, things that were once very regional in nature and that most of the country had no access to or interest in, are now being served in, say, St. Louis. And in exciting ways.”**

John Mariani, Food Columnist  
*Esquire*

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*Sky Magazine* identified the following local specialities:

- Albuquerque, New Mexico: Blue corn enchiladas
- Atlanta, Georgia: Pot likker
- Boston, Massachusetts: Indian pudding
- Buffalo, New York: Buffalo wings
- Charleston, South Carolina: Creamy grits
- Chicago, Illinois: Italian beef
- Cincinnati, Ohio: Double-decker sandwich
- Dallas, Texas: Barbeque brisket
- Kansas City, Missouri: Fried chicken dinner
- Memphis, Tennessee: Pig sandwich
- Milwaukee, Wisconsin: Frozen custard
- Mobile, Alabama: West Indies salad
- Nashville, Tennessee: Ham and red-eye gravy
- New Orleans, Louisiana: Oyster loaf
- New York, New York: Pastrami sandwich
- Portland, Oregon: Oyster stew
- San Diego, California: Fish tacos
- San Francisco, California: Sourdough French toast
- Tampa, Florida: Cuban sandwich
- Tucson, Arizona: Chimichanga