



TREND OUTLOOK:

Middle Eastern, North African and Balkan Cuisines

Like in other global regions, the cuisines of the Middle East, North Africa and the Balkans are diverse with a degree of homogeneity. Cereals like bulgur and couscous, vegetables and pulses, herbs and spices, and grilled meats and stews are all staples in the region. But each region—and each country within the greater area—has its own specialties, preparation techniques and influences.

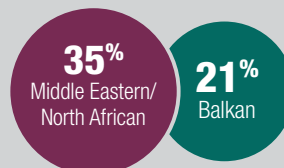
More than a third of consumers (35%)—and almost half of Gen Zers (47%) and Millennials (46%)—would like to see more Middle Eastern and North African influences on restaurant menus. About a quarter of consumers (24%)—and 41% of Gen Zers and 37% of Millennials—seek out different regional Middle Eastern and North African cuisine experiences, such as Tunisian and Yemeni, while only 19% (including 30% of Gen Zers and 29% of Millennials) know the culinary differences among the various countries of the Middle East and North Africa.

Slightly fewer consumers—but still a noteworthy amount—would like to see more Balkan influences on restaurant menus, with 21% of consumers agreeing, including 31% of Gen Zers and Millennials. Some 16% of consumers seek out different regional Balkan cuisine experiences (e.g., Albanian, Bulgarian, etc.), and the same percentage of consumers say they know the culinary differences among the numerous Balkan countries.

Despite the lower interest in Balkan cuisine compared to Middle Eastern and North African cuisines, additional research shows that a greater proportion of consumers are interested in trying specific Balkan countries' cuisines (such as Bulgarian and Croatian) over gastronomies of Middle Eastern and North African countries. This implies that operators shouldn't overlook Balkan cuisines as potential up-and-comers.

Consumer Opinion, Action and Knowledge on Middle Eastern/North African and Balkan Cuisines

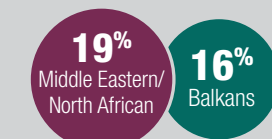
I would like to see more _____ influences on restaurant menus.



I seek out different regional _____ cuisine experiences.



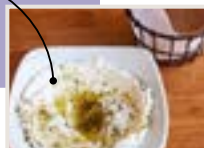


I know the culinary differences among the various countries of the _____.



Dishes

Specialty dishes from the Middle East, North Africa and the Balkans are abundant. Here are three that we see having opportunity at restaurants, based on increasing menu mentions and consumer support.

Dish	What is it?	Menu support	Consumer support	Example
Shakshuka	Tunisian egg dish with tomatoes and chili peppers	Mentions are up 30.8% on menus overall year over year	57% of consumers have either tried and like it or want to try it	Shakshuka with chorizo (Seasons 52) 
Tabbouleh	Middle Eastern vegetarian dish made of tomatoes, parsley, mint, bulgur and onion	Mentions are up 16.0% in appetizers year over year	61% of consumers have either tried and like it or want to try it	Quinoa Crunch Bowl with quinoa tabbouleh (Lyfe Kitchen) 
Labneh	Middle Eastern strained yogurt with slightly salty and sour flavors	Mentions are up 20.0% in entrees year over year	51% of consumers have either tried and like it or want to try it	Labneh side dish (Nanoosh) 

Source: Q1 2016-Q1 2017 MenuMonitor, Technomic

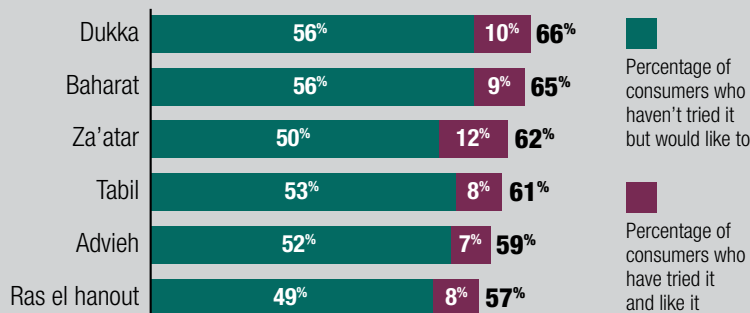
Base: 1,000 consumers aged 18+ who purchase food or beverage away from home on weekdays or weekends

Herb and Spice Blends

We asked consumers to tell us their attitudes toward various herbs and spices of the Middle East, North Africa and the Balkans. Interestingly, with the exception of advieh and ras el hanout, consumers have a more positive view of spice blends over standard spices. Why might this be the case? Consumers increasingly want more complex flavors: 71% of consumers say that flavor imparted by the overall combination of ingredients is appealing, according to Technomic's *Flavor Consumer Trend Report*.

Consumer Views on Herb and Spice Blends

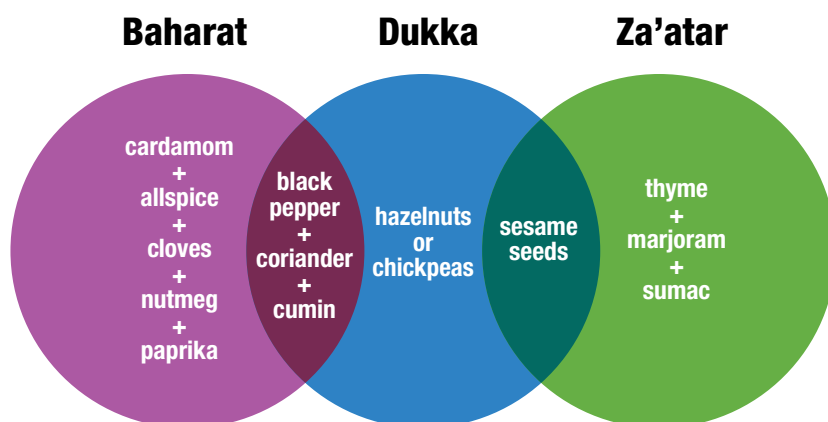
% of consumers with a positive view of _____.



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

Trendy Blends

The three blends to the right were ranked highest by consumers in a positive way (i.e., consumers have either tried it and like it or haven't tried it but think it sounds good). Although they each have different ingredients, all three have similar uses as seasonings on meats and vegetables or as a dip.



Sauces

In addition to herb and spice blends, we asked consumers their attitudes toward various sauces of the region. Top responses differ as far as the country of origin, type of ingredients included and use. Here are the top four sauces that the greatest proportion of consumers say they haven't tried but would like to.

1 Chermoula

The thick Moroccan sauce is made with cilantro, garlic, lemon juice, olive oil, parsley, pepper and salt. It's primarily used as a marinade for fish or shellfish but also occasionally for meat and vegetables.

2 Toum

The Lebanese sauce contains garlic, salt, lemon juice and oil. It's typically featured on shawarma, falafel and grilled foods and can be used as a dipping sauce.

3 Chraimeh

The Libyan sweet and spicy sauce is made with tomatoes and chili peppers. It's typically featured with fish.

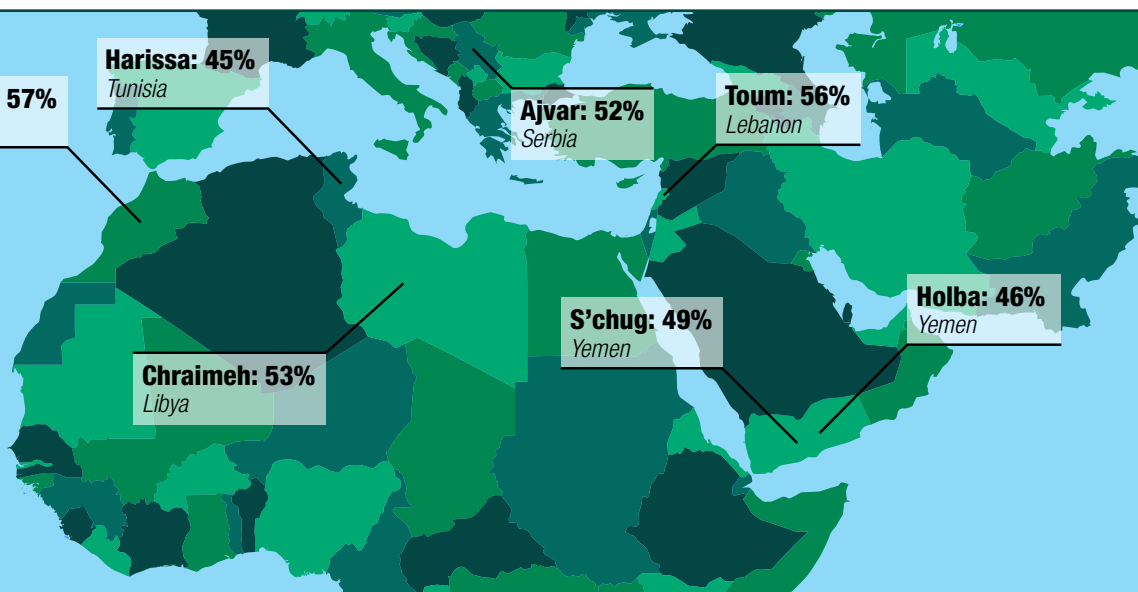
4 Ajvar

The Serbian relish spotlights red bell peppers and oftentimes garlic, eggplant and other chili peppers. It's typically spread atop bread or served as a side dish.



Opportunity Sauces

% of consumers who said they haven't tried but would like to try the following sauces



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

Opportunities Around Middle Eastern, North African and Balkan Fare

North African fare is arguably one of the hottest trends in foodservice right now. Looking at consumer data, we can see why: consumers show great interest in Moroccan chermoula, Libyan chraimeh, Egyptian dukka and Tunisian harissa. With these North African favorites getting greater attention, other specialties could emerge from the rest of the continent, such as berbere, an Ethiopian spice blend, or chakalaka, a South African relish.

Many of the more popular sauces from these regions have ingredients that are familiar to Americans. Operators should consider swapping in these sauces in place of familiar sauces. For example, try a cilantro-based S'chug where a traditional hot sauce might go for a greater kick of heat.

A plethora of the sauces and spices from the Middle East, North Africa and the Balkans are meant to be paired with bread. American should take note by offering a variety of different sauce and spice types at the table that can be dipped into bread as a pre-appetizer. This tactic will help introduce customers to some of the flavors of these regions in an approachable way.

