

Trends in Pasta

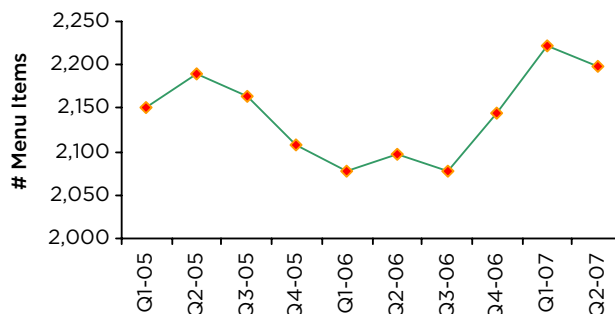
Highlights

Pasta has become a universal dish. With so many varieties of pastas available and just as many methods of preparing it, pasta lends itself for artistic inspiration.

The restaurant menu has been like a roller coaster for pasta. Pasta dropped off during the low-carb trend. However, at the end of the low-carb frenzy pasta was the height of its popularity (7% increase since the introduction of low-carb). The resurgence in popularity illustrated that consumers really do like to eat pasta and carbohydrates, but were fascinated by the potential benefits of eating less of them.

Pasta menu items have decreased slightly (1%) since the height of their popularity, mainly to make room for other type of menu items such as appetizers. But there will always be room for pasta and pasta innovation on the restaurant menu as it will continue to be a favorite for American consumers.

Incidence of Pasta on the Menu Item



Pasta's Presence

As a whole, pasta has the strongest presence among full service restaurants. Casual dining, family/midscale and fine dining restaurants hold 38%, 27% and 26% percent of menu items and growth of 11%, 1% and 2%, respectively.

Fast casual restaurants and quick service restaurants (QSR) represent a smaller piece of the pie, with 5% and 4% percent of menu items and experienced had growth of 27% and -13% respectively from a year ago.

While fast casual and QSR make up a small portion of pasta offerings, there are many restaurants within these dining types that focus solely on pasta. Such restaurants include Fazoli's, Nothing But Noodles, Noodles & Company.

Pasta within Dining Types, Q2 06 vs Q2 07

Dining Type	% of Menu Items	Growth
Casual Dining	38%	11%
Family/Midscale	27%	1%
Fine Dining	26%	2%
Fast Casual	5%	27%
QSR	4%	-13%

Culturally Diverse

Cultural influences have inspired and contributed to diverse pasta dishes. Italian cuisine reigns with 88% of the menu items across all menu types and has increased by 7% from a year ago. American cuisines collectively represent an 11% of menu items, down 8%. Although Asian cuisine only accounted for 1% it showed strong growth of 32%.

Pasta Cuisine Types, Q2 2007

Cuisine Group	Growth	Share
Mediterranean (Italian, French, Greek)	7%	88%
American (Traditional American, Cajun, BBQ, Tex-Mex, Southern, Hawaiian, California)	-8%	11%
Asian (Japanese, Pan-Asian, Chinese, Thai, Vietnamese)	32%	1%



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Culinary Trends

Acting as a universal medium, pasta is capable of handling flavors from around the world. The following are examples of pasta menu items with a cultural influence.

American – Traditional American, Cajun, BBQ, Tex-Mex, Southern, Hawaiian, California

- Spicy Chicken Chipotle Pasta – Honey glazed chicken, asparagus, red and yellow peppers, peas, garlic and onions in a spicy chipotle parmesan cream sauce – The Cheesecake Factory
- Bayou Shrimp Pasta – A heaping portion of tender bite size shrimp sautéed with green peppers, diced tomatoes and onions. Tossed with linguine pasta in a spicy Cajun Alfredo cream sauce – O’Charley’s

Mediterranean – Italian, French, Greek

- Papparadelle Saffron Pasta – Spring vegetables and baby spinach, Kenny’s asiago cheese and pure olive oil & garlic. Add grilled chicken or shrimp. – Limestone Restaurant
- Greek Pasta – Sliced chicken, pepperoncinis, diced tomatoes, black olives, green peppers and onions tossed with toasted herbs and penne pasta in a garlic basil olive oil. garnished with feta cheese & green onions – Mazzio’s Italian Eatery

Asian – Japanese, Pan-Asian, Chinese, Thai, Vietnamese

- Indonesian Curry Pasta – With Asian vegetables and chopped peanuts, crispy organic coconut shrimp and baby shrimp. Panko herb crusted chicken breast. – Blue Ginger Restaurant
- Kung Pao Spaghetti – A classic Kung Pao sauce with garlic, green onions, peanuts and hot red chilies. Also available with chicken, shrimp and both chicken and shrimp. – California Pizza Kitchen

Get Saucy

What is pasta without the sauce? For ages, numerous types of sauces have been used to add flavor and texture to pasta, resulting in many favorite dishes. Red sauces such as marinara sauce, tomato sauce and meat sauce have long been the norm for pasta, but other types like alfredo sauce, cream sauce and cheese sauce are also among the leaders. Cheese sauce grew by 42% in the past year, and is most popular with dishes such as macaroni and cheese.

On the emerging front, there are a number of sauces that are increasing in popularity. Unlike the leading sauces, the growth sauces tend to be lighter in nature, with roasted tomato, olive oil, garlic, puttanesca, and white wine sauces leading the growth.

Pasta Sauces, Q2 2007

Leaders	Emerging
Cheese Sauce	Roasted Tomato Sauce
Marinara Sauce	Olive Oil Sauce
Tomato Sauce	Garlic Sauce
Alfredo Sauce	Puttanesca Sauce
Cream Sauce	Wild Mushroom Sauce
Meat Sauce	White Wine Sauce

Top 10 Pasta Sauces, Q2 2007

1. Cheese Sauce
2. Marinara Sauce
3. Tomato Sauce
4. Alfredo Sauce
5. Cream Sauce
6. Meat Sauce
7. Pesto Sauce
8. Rosa Sauce
9. Sauce
10. Butter Sauce

Mac & Cheese All Grown Up

It would not be fair if we did not pay tribute to a favorite pasta based comfort food – macaroni and cheese. Mac & Cheese is a favorite for all ages. The creamy cheese sauce makes the dish. Cheddar cheese is the clear leader of cheesy goodness. Other cheeses that are being menued with Mac & Cheese included mozzarella, fontina, gorgonzola, American and bleu.

Top 10 Proteins Menued with Mac & Cheese, Q2 2007

1. Chicken
2. Shrimp
3. Tofu
4. Beef
5. Prosciutto
6. Scallop
7. Pepperoni
8. Mahi Mahi
9. Lobster
10. Ham



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