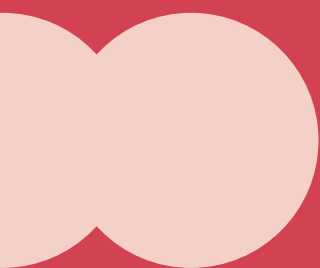




Flavor Trends – Prepared Meals



Flavor Trends & Demo

Today's Agenda



- 01 Human + Food Connection**
 - General Overview of Prepared Meals & Side Dishes
- 02 Flavor Trends in Prepared Meals & Beyond**

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PREPARED
MEALS &
SIDES
MARKET
OVERVIEW



BOLD &
EXCITING



INDULGENCE



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2025: The year diners

Foodmaxxed

for function & flavor

GRUBHUB

⚡ Electrolyte era

76,000+ electrolyte
drinks delivered
monthly

🍗 Protein lifestyle

5.2M nuggets, tenders,
and strips ordered

💎 Micro-luxuries

Cold foam upgrades
jumped 75%

🐟 New pantry staple

Tinned fish orders
surged 209%

🚩 Green flag

Matcha orders
climbed 34%

🌿 Gut-health trend

1.5+ tons of beans
delivered



DOORDASH



Global
Flavor
Interest!

DoorDash Top Ten Foods 2025

1. French Fries
2. Garlic Naan
3. Tacos
4. Pad Thai
5. Miso Soup
6. California Roll
- 7. Chicken Tikka Masala**
- 8. Edamame**
9. Chips
- 10. Burrito**

TOP GUILTY PLEASURES BY GENERATION



DOORDASH for Merchants

DoorDash Delivery Trends Report
2025 US EDITION

Social Bar

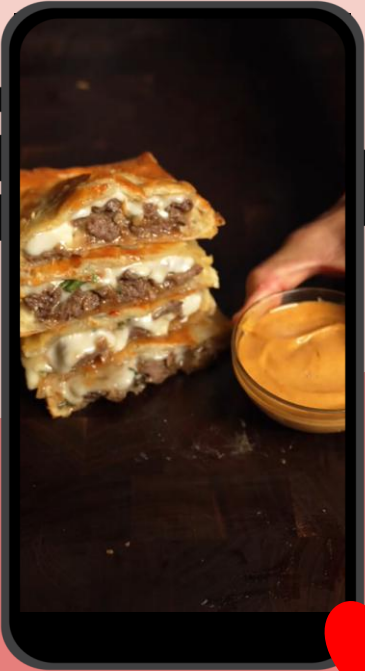
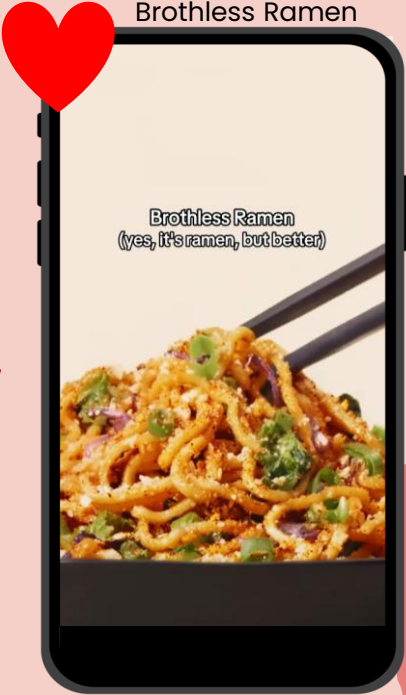
Gen Z

87%

Of US Gen Zers have bought food or drink products because they saw them on social media



Noodles & Company
Brothless Ramen



Korean
Bulgogi
Hot Pocket



Lundberg x Fly by Jing



43% Of Gen Z survey respondents' express interest in trying collaborations between brands



Fabalish x Mr. Bing

dsm-firmenich

BRAND COLABS



Pizza is experiencing a "glow up" with more examples of wood fire, gourmet frozen and flavor fusion mashups.

43%

Of Gen Z survey respondents' express interest in trying collaborations between brands



50%

of diners say social media influences their restaurant choices



Cooking at home

Convenience rules

Busy home cooks want scratch-made flavor without the scratch-made effort.

54%

of US consumers use frozen meals as a side dish for a meal



Tabitha Brown by McCormick has mixed up a whole new line of vegan seasoning blends with McCormick



Spice & Sauce packs simplify preps

Convenience & Faster flavor boost for at home food enthusiasts

65%

of US consumers use frozen meals as a weekend convenience meal



63%

of US consumers use frozen meals as a quick weekday meal

Younger Consumers cooking methods

A variation of Appliances and Methods



86% 78%



ages 18-34 cook with small appliances (e.g. Instant Pot, Air Fryer)



81% 74%



ages 18-34 cook or heat-up prepared meals (e.g. frozen meals)



59% 35%



ages 18-34 use meal kits (e.g. Hello Fresh, Blue Apron)



82% 79%



ages 18-34 cook meals that combine prepared raw ingredients (e.g. add meat to premade sauce)



Fakeaway with sauces

Restaurant style dining conveniently made at home.

60%

Of US households own an air fryer, reinforcing demand for sauces and seasonings designed for crispy, quick prep style.



73% of category users agree that a prepared meal is a great way to try a new cuisine



Premium Seasonings mixes & Sauces

Restaurant-inspired flavors are fueling growth in sauces and seasonings, with Korean BBQ, buffalo ranch, garlic parmesan, hot honey, and sweet chili driving quick-prep meal solutions.



Air Fryer Expansion

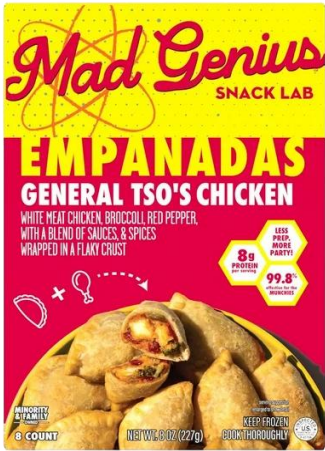
Air fryers are fueling innovation in sauces and seasonings, driving demand for crispy coatings, sticky glazes, and heat-stable flavors designed for convenient, texture-focused cooking.

Source: Mintel GNDP, The future of cooking and pasta sauces 2025, Air Fryer Expansion, Cooking sauces 2025, Trendhunter
dsm-firmenich Tastelounge 2026 MC 256 respondents

Snacking & On-The-Go Convenience

Smaller Portions, Bigger Impact

Reflecting consumers constant busyness, the average American spends just **52 minutes** a day on meals—and a third have less than **30 minutes**.



57%
of consumers seek snacks to eat on the go

46%
Of consumers usually skip at least one meal a day or replace it with snacks

82%
of American Gen Z are snackers



Bold & Exciting



Sweet Heat: The Magic of Swicy Flavors

The rise of swicy flavors is igniting a new taste revolution – a bold balance of sweet and spicy profiles that create craveable, unexpected combinations, elevating every bite with a fiery twist.



Bring on The Heat

Spicy flavors are taking center stage, with heat and boldness shaping a new culinary landscape – from smoky chili to zesty peppers, these flavors are adding excitement and adventure to the everyday palate.



Fusion Frenzy: Where Cultures & Flavors Blend

The fusion-fusion trend is blending cultures and flavors in unexpected ways – traditional ingredients meet modern twists, creating innovative combinations that bring the best of both worlds to consumers plates.



A Whole New World of Flavor

Global inspiration is redefining flavor innovation – from vibrant street food to aromatic spices, culinary traditions from around the world are fusing into bold, unforgettable taste experiences that transport your senses.

Flavor Layering

From Swicy to Swangy to "Cricy"
The Next Evolution of Flavor

Sweet heat is evolving into more complex, craveable flavor experiences.

- **Swicy** (Sweet + Spicy): Hot honey and sweet-heat sriracha flavors have moved from trend to mainstream across snacks, meals, and condiments.
- **Swangy** (Sweet + Tangy + Umami): The next wave adds tanginess and savory depth for a more layered taste experience.
- **Cricy** (Creamy + Spicy): Creamy dairy, mayo, cheese, and sauce bases for dips help balance heat, creating rich, approachable spicy flavors.



70%

of consumers who enjoy spicy foods are eager to explore sweet heat sensations such as hot honey-flavored dishes and beverages.



Sweet, tangy, spicy, delicious. The mangonada is bold and the perfect SWANGY treat.



Organic Non-GMO Popcorn with a mild fruit flavor candy coating and dusted with chili lime and a touch of sea salt



Mexican-Asian fusion siracha



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Bold & Exciting

Bring on the Heat (... and then cool it down ☺)



American Gen Zers are **66%** more inclined to buy items advertised as 'spicy' and **44%** would pay more for them



Taco Bell Spicy Loaded Nacho Fries



Chipotle Honey Chicken



Spicy Cheese Collabs



Hot Honey Chicken & Waffle Biscuit



dsm-firmenich



Burger King Fiery Menu



Cooling Sauce for Hot Sauce



Spicy Cheese Stuffed Hot Dogs

Global Profiles & Textures

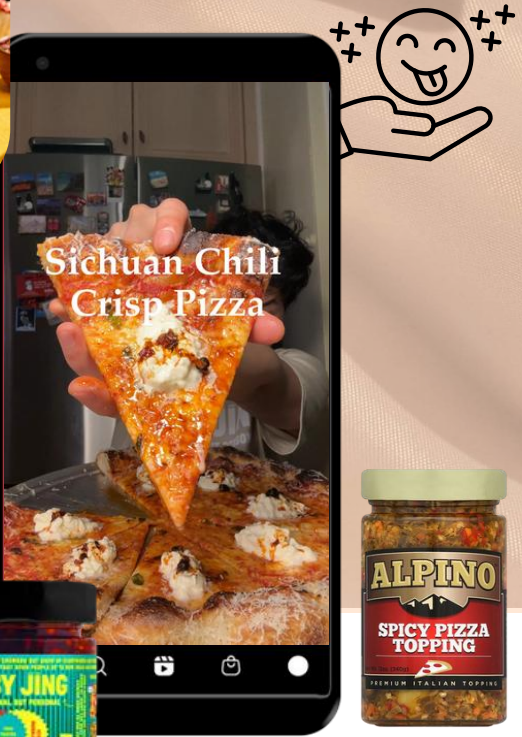
72% of consumers globally seek out foods with diverse textures



Globally-inspired
Co-branded
“Real Sichuan ingredients”
Tingly Chili
sauce packet



Happy's Pizza, MI
Asian BBQ Pizza
Szechuan BBQ Sauce



Spicy Calabrian
Pasta Sauce from
Trader Joe's



73% of category users agree that a prepared meal is a great way to try a new cuisine

Bold & Exciting

Globally Inspired

TREND WATCH



73%
Of surveyed consumers find that craving bold flavors motivates them to try Asian-inspired meals



Pokeworks
Black Garlic Aioli

Umami flavors naturally enhance taste and sensorial indulgence

- Consumers' desire for more savory, less sickly-sweet snacks and food is driving their move towards umami and Asian inspired flavors.
- The umami craze is globally-inspired but with Asian roots.
 - **Gochujang, furikake and tamarind** flavors are particularly popular.
 - Infusing traditional snacks / sauces with **miso, soy or kombu** can reframe these products as '**better for you**' options.

37%

Of US adults say they are more likely to try a new product or dish if it has Asian flavors or ingredients

Global flavor fusion is driving innovation in snacking and food products



Jinya Ramen Bar, CIAO Ramen



La Fe Pizza Empanadas



Japadog California

61% of surveyed consumers are interested in trying Asian + American Comfort food global cuisine combination in a frozen meal

Source: dsm-firmenich
Tastelounge – 2026 MC 256
respondents

dsm-firmenich ●●●

Italian trends on menu

Italian-Asian Fusion

51% of surveyed consumers are interested in trying Asian + Italian global cuisine combination in a frozen meal



Wafu Italian at pastaRAMEN Fuses Japanese & Italian flavors in Montclair



Cacio e pepe dumplings



Jules Honey Sriracha Chicken – roasted all-natural chicken, bacon, caramelized onions, honey sriracha drizzle, arugula, ricotta, mozzarella



Dairy Indulgence



Indulgent
+13.5% YoY
for
condiment
s

Consumers are drawn to indulgent condiments for their ability to deliver **rich**, **buttery**, and **cheesy** comfort. At the same time, textural experiences like **creamy**, **silky**, and **gooey** elevate indulgence into multi-sensory satisfaction. These qualities highlight that indulgent sauces and dips are not only about taste but about creating memorable, layered experiences that transform everyday dishes or mini meals into rewarding moments.



Locatelli
Crema Cacio e pepe Cheese Spreadable Cheese & Pasta Sauce

Source: Tastewise, Indulgent Condiments Report, 2025
Black Swan Data, 2025



♥ 4,076

Chicken University

Upgrade your Friday dinner with a twist! Indulge in our Korean Fried Chicken wrapped in **luscious cheese fondue**. It's a cheesy, crispy delight that's sure to make your Friday night unforgettable. 🍗🧀
#KoreanFriedChicken
#CheeseFondueWrap
#FridayFeast #CrispyAndCheesy
#DinnerDelight



♥ 10,314

Cow & Cheese

This meal's built different 🍔🔥
Smashburger, Kwame B fries, and **scratch-made beer cheese**. Pull up and treat yourself 🍷 (...)



33% of US consumers associate the melt-in-your-mouth texture with overall indulgence

Spicy rules... followed by Garlicky , Creamy and Umami

Consumers clearly want Bold & indulgent flavor attributes when buying prepared meals.

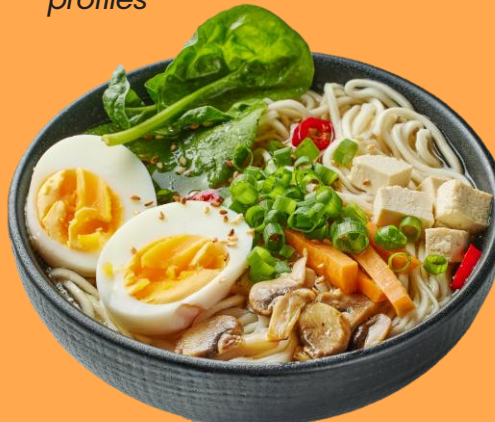
62%

of respondents want
Creamy and rich
Prepared meals



60%

are interested in **UMAMI**
profiles



65%

want it garlic-forward



Spicy + Garlic-forward

Spicy and garlic-forward flavors lead interest, with creamy/rich, ginger, sweet, and savory/umami also performing strongly. Overall, consumers appear open to layered, bold flavor profiles rather than relying on one dominant flavor characteristic.



66%

are interested
in spicy



**We bring
progress
to life**

- Familiar Asian cuisines provide the strongest foundation. Chinese, Japanese, Korean, and Thai lead cuisine interest, while Korean BBQ/Bulgogi emerges as the strongest specific future flavor.
- Bold flavor and authenticity matter. Consumers are particularly drawn to spicy, garlic-forward, ginger, rich, and umami flavors, while authentic flavor is the single most important consideration when choosing an Asian-inspired frozen meal.
- Innovation works best when paired with familiarity. Strong performance for Korean Beef, Ginger Chicken Rice, and Asian-inspired Mac & Cheese suggests consumers are comfortable exploring new flavors when presented through recognizable proteins and meal formats.
- Thai represents a particularly strong development territory. Thai Red Curry Chicken and Thai Basil Noodles are among the highest-performing concepts in their respective categories.
- There is opportunity across both entrees and sides. Purchase intent is consistently high across the concepts tested, supporting a broader Asian-inspired frozen food platform rather than relying on one specific product format.