



Asia Pacific

The OMMMM of MMMMM

All about the K-raze

Issue 18 | November 2022



Discover the flavours and dishes of *Korea* that are influencing menus and trending in Asia Pacific.

Learn how to leverage on time as an ingredient in cooking and the stories behind the food we eat in the 22nd edition of



Rise of the Korean Wave...

Korean Wave; also known as “Hallyu” 한류 refers to this meteoric rise of popular culture from South Korea that has taken the world by storm in the past few decades. Its influence first began in the mid 1990s to the mid 2000s where South Korean dramas (K-drama) started to gain traction and popular in China and Japan markets.

In this issue, we will dive into the influence of Korean wave and its popularity among consumers. From the comfort of our homes to new launches on the menu and off the shelves, discover the range of Korean flavours that are trending in the food space.

Buckle up and get into the K-razz as we take you on a journey to Korea through The OMMMMM of MMMMM!



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McCormick® Flavour Forecast® 22nd Edition

- Time as a Luxury Ingredient
- Food Stories



I. The Foodture

Hello Hallyu

Discover the evolution of *Korean culture* and its influence on Asia Pacific

How much has the *Korean wave* impacted us?



Top Global Cuisines & Korea's Standing



Taste of Korea & Its Specialty by Region



The Hallyu Sentiment & Status Index



Consumers' Intention to Use Korean Food Products



Localising Korean Cuisine



FOODTURE: THE EVOLUTION OF K-WAVE

Top Global Cuisines Based on Instagram



#1 Japanese
No. of tags – 18.035 mil



#6 Mexican
No. of tags – 7.903 mil



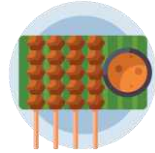
#2 Italian
No. of tags – 17.927 mil



#7 Chinese
No. of tags – 7.487 mil



#3 Indian
No. of tags – 11.339 mil



#8 Indonesian
No. of tags – 4.178 mil



#4 Korean
No. of tags – 8.704 mil



#9 Vietnamese
No. of tags – 3.181 mil



#5 Thai
No. of tags – 8.13 mil



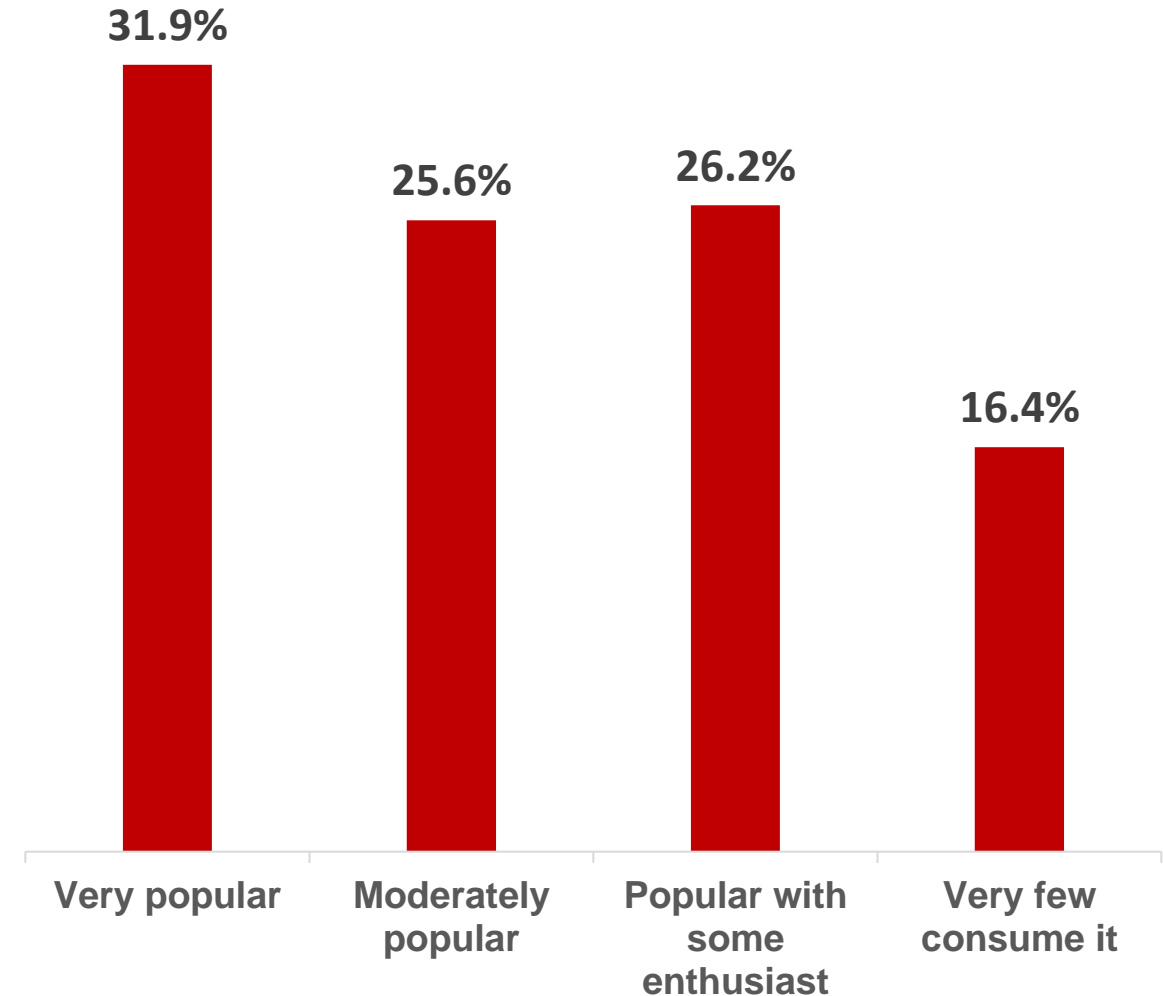
#10 Filipino
No. of tags – 1.94 mil



More than **80%** of consumers globally find Korean cuisine popular in their country*

*Based on 8500 respondents between 15 – 59 y/o

Popularity of South Korean cuisine worldwide in 2021



Source: Chef's Pencil(2022), Korea Times (2021), Statista (2021)

FOODTURE: THE EVOLUTION OF K-WAVE

Taste of Korea & Its Specialty By Region



Incheon: Jajangmyeon

thick black sauce known as *chunjang* made from *sweet bean paste*.



Jeonju: Bibimbap

Bibimbap is a rice bowl flavoured with a chili pepper paste known as *gochujang*.



Boseong: Green Tea

Products from ice cream to noodles are flavoured with *green tea*.



Jeju: Heuk dwaeji

Heuk dwaeji also known as Black Pork is barbecued and dipped in *meljeot* (salted anchovies) or *jeotgal* (salted seafood with Korean fish sauce).



The search for “**Bulgogi**” on Google has increased by **50%** over the past 5 years*

*2017 - 2022

Seoul: Bulgogi

Bulgogi known as “*grilled meat*” is a dish of barbecued strips of beef or pork, similar to Japanese yakiniku.



Sokcho: Dakgangjeong

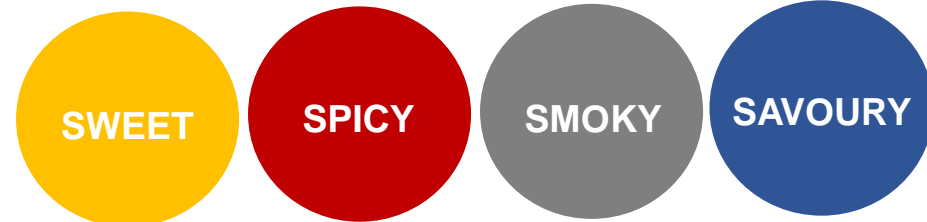
Korean fried chicken cut into bite-size pieces. It is deep-fried and braised in a spicy sauce. Sauces/toppings range from *soy, garlic, cheese* to *sweet or spicy sauces*.



Busan: Dwaengi Gukbap

A pork soup served with rice and green onions. Its primary ingredients are pork and *miso*, flavoured with *soy and sesame oil*.

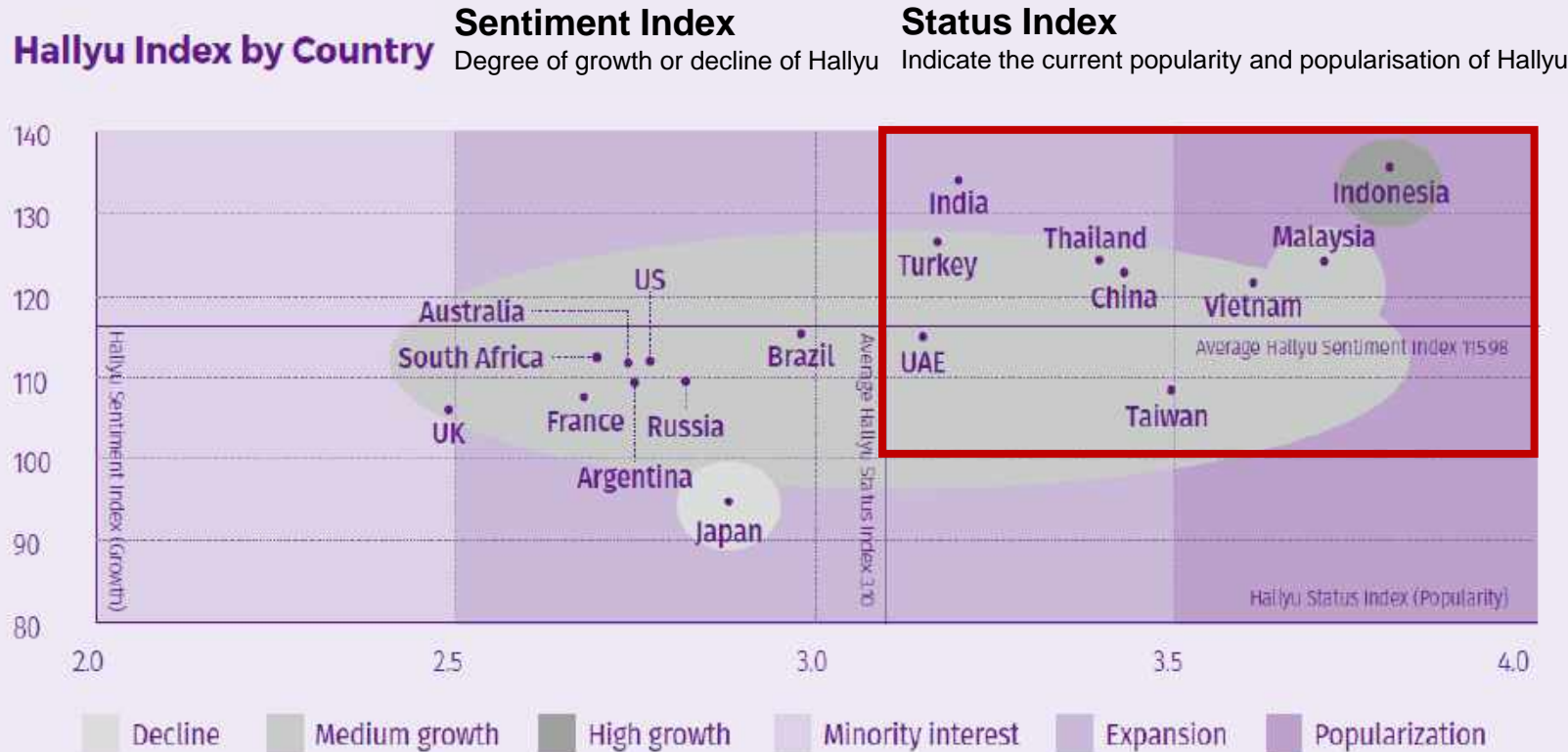
KEY FLAVOURS



Source: Books and Bao, Seoul Space, Visit Korea, Google Trends

Hallyu Sentiment – A Korean Culture Index

The Hallyu Index is an indicator of the extent which Korean culture has been **accepted** by local consumers abroad, as well as its tendency to **grow or decline**.



High Growth (Sentiment), Highly Popular (Status)



Mid Growth (Sentiment), Highly Popular (Status)



High Growth (Sentiment), Expansion (Status)



Mid Growth (Sentiment), Expansion (Status)



Decline (Sentiment), Minority Interest (Status)



FOODTURE: THE EVOLUTION OF K-WAVE

Consumers' Intention to Use Korean Food Products

The intention to use Korean products and services in the future was **highest in the Middle East**, followed by **Asia Pacific** and **Africa**.

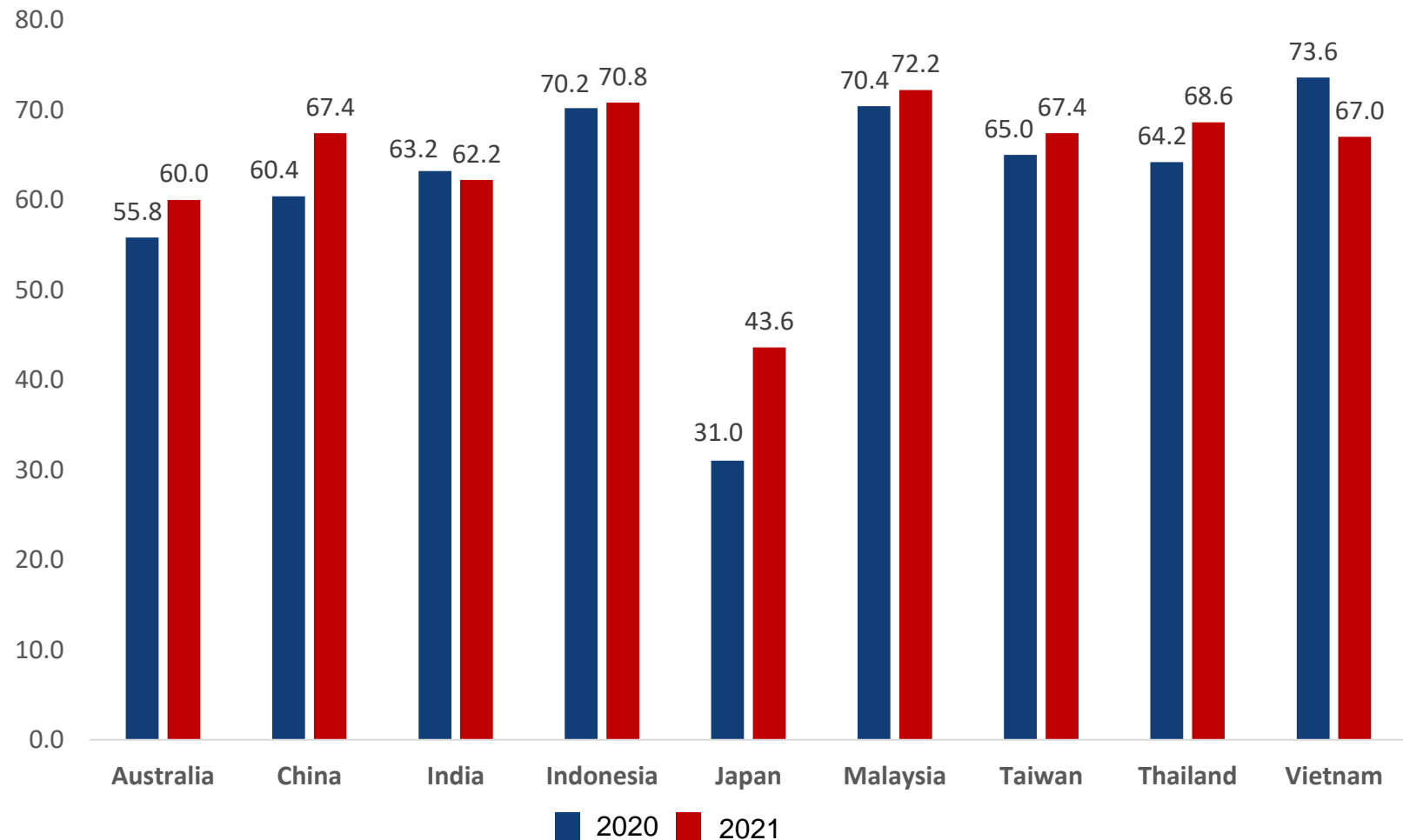
In Asia Pacific, the intention to purchase **Korean food products (64.5%)** in the future is the highest, followed by Korean cosmetics (55.3%) and clothing (54.6%).



Across Asia Pacific, the intention to use **Korean food products is ranked #1** among all 9 surveyed countries except India, where the category is ranked 6th.

ASIA PACIFIC

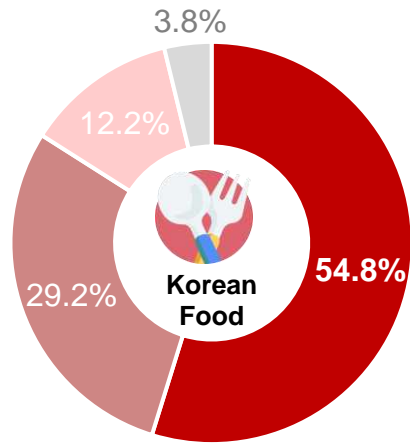
Intention to use Korean food products in the future (%)



Source: KOFICE Global Hallyu Trends (2021)

Localising Korean Cuisine

Across 10 different categories (beauty, entertainment, fashion etc) **Korean food is ranked #1 (54.8%)** for its mass popularity among Asia Pacific consumers. The top 3 factors driving its popularity are **taste (38.7%)**, **experience of Korea culture (15.8%)** and the usage of **healthy ingredients (9.4%)**.



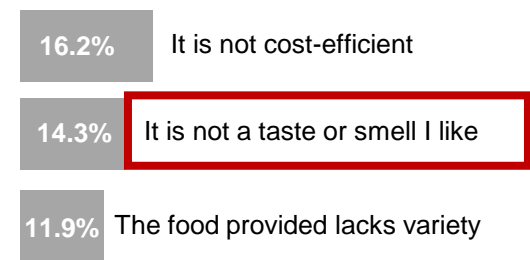
- Mass Popularity
- Average Popularity
- Little Popularity
- Rarely Use

While “Taste” is the main reason for Korean food favourability, it is also a factor inhibiting favourability. Hence, it is key is to **adapt Korean flavours** to suit the palates of locals consumers.

Factors driving Popularity



Factors hindering Popularity



Localise with Flavour



Warung Marenta Cireng Gochujang Indonesia

Traditional fried Cireng snack coated with Korean Gochujang sauce.

Localise with Language



Wang Korea, Korean BBQ Sauce Sweden

“Korean B.B.Q. Sauce” call out on packaging (simplified naming for Korean term ‘Bulgogi’).

Localise with Packaging



Mahsuri Korean Style Garlic Flavoured Sauce Malaysia

Korean Garlic Sauce with localised language “Sos Berperisa Bawang Putih” and Halal logo on packaging.



II. Eatsighting

It's About To Get #Kimchified

Trending Korean flavours observed in *Asia Pacific*

Fingerprints of *Korea* across Asia Pacific



Trending K-food Search
Among Consumers



Korean Flavours At Our Homes



Korean Flavours From The Screen



Korean Flavours On The Menu



Korean Flavours Off The Shelves

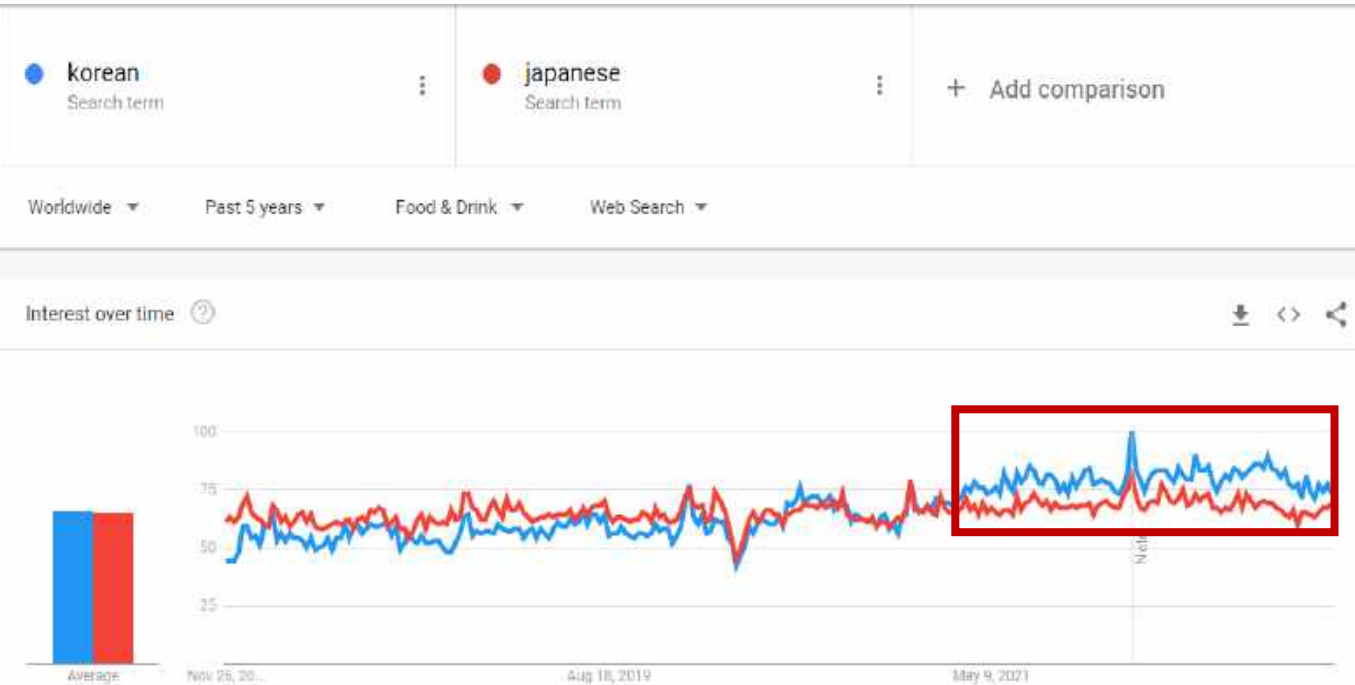


EATSIGHTING: EMERGING KOREAN FLAVOURS

Trending K-food Search Among Consumers



“Korean corn dog” has been the top searched query, with most consumers searching for “Korean corn dog near me”.



While Japanese cuisine has been popular throughout the years, the search interest for Korean cuisine has surpassed it by Q1 2022. In fact, the top 5 countries that have search interest in Korean food & drinks are in the Asia Pacific Region.

Search Interest of Korean Food & Drinks by Countries

Korean Food Queries with High Search Results

#1 Singapore



#2 Malaysia



#3 Philippines



#4 Australia



#5 New Zealand



Korean Corn Dog



Korean Ramen



Korean BBQ



Tteokbokki



Korean Fried Chicken



EATSIGHTING: EMERGING KOREAN FLAVOURS

Korean Flavours At Our Homes

#koreanfood

 11.8B views

 9.4M posts

 419K posts

 161K videos

Top Korean Food Content on TikTok (no. of views)

While some Korean dishes such as **#kimchi** and **#bibimbap** might be familiar to most consumers, others such as **#dakgangjeon (Korean Fried Chicken)** or **#bulgogi (Korean BBQ Beef)** might not. Thus, it is key to utilise names of Korean dishes and products that are locally relevant to consumers in each market.

#kimchi 2.3B views **#bibimbap** 383.6M views



#mandu 312.9M views **#kimbap** 262.3M views




korean fried chicken vs **dak gang jeong**
 1.7B views 18.9M views
korean beef recipe vs **bulgogi recipe**
 209.4M views 128.9M views



In 2020, **Korean Garlic Cream Cheese Bread** has taken the internet by storm, with **100% increase in search interest***, with the extent of bakeries jumping onto the trend.

*May – July 2020

Bakery



korean cream cheese garlic bread recipe
15.6M views



#koreancreamcheesegarlicbread
5.9K people are posting about this



#koreancreamcheesegarlicbread
17,711 posts

Drink



watermelon soju
11.7B views



#watermelonsoju
2.2K people are posting about this



#watermelonsoju
11,164 posts

Street Food



Korean Corn Dog
552.8M views



#KOREANCORNDOG
7.5K people are posting about this



#koreancorndog
38,704 posts

EATSIGHTING: EMERGING KOREAN FLAVOURS

Korean Flavours From The Screen

Consumers are not only exposed to Korean food through social media platforms but also from content they watch via TV shows and movies. Over the years, Korean content and entertainment industry play a huge role in influencing consumers' appetite for Korean food.

Dalgona Candy

The New York Times



Why Is Everyone Talking About Dalgona Candy?

Interest in the South Korean treat has spiked since the debut of the Netflix drama "Squid Game."

#Dalgonacandy has over **46.5B views** while the #dalgona challenge has over **3.4B views on Tiktok** today (Nov 2022).



The **viewership of K dramas** on Netflix in **India** reported a YoY **370% jump** in 2020 and the **import of Korean Noodles** also witnessed a **volume growth of 162%** in the same year.

Gimbap

Post Magazine / Food & Drink



Netflix K-drama Extraordinary Attorney Woo has boosted kimbap sales worldwide, but what is this Korean food, and where did it come from?

The Google search results for "Gimbap" and "Kimnap" has **increased by 50%** in 3 months after the release of Extraordinary Attorney Woo.



Ramdon

Lifestyle / Food & Drink



Those ram-don noodles from Parasite: a cheap noodle treat popular with students and not usually found on restaurant menus

Following the release of Oscar winning show Parasite, searches for "ramdon recipe" on Google increased by **more than 400% globally**.



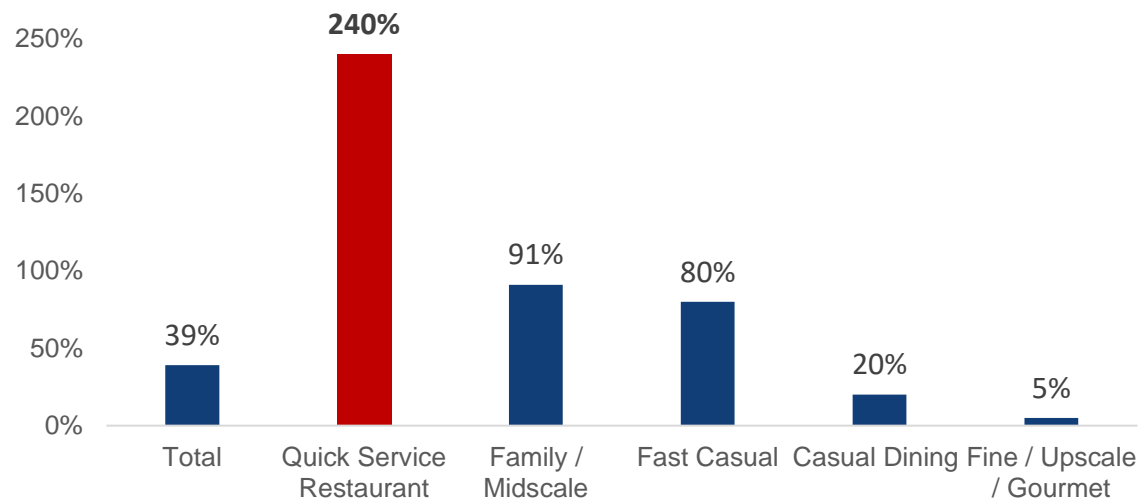
EATSIGHTING: EMERGING KOREAN FLAVOURS

Korean Flavours On The Menu

Korean food offers more than just a Kimchi dish. From casual fast-food chains to fine-dining restaurants, fusion of Korean and local flavours are spotted on various menus. Fusion flavour is an opportunity for food businesses to add flare to consumers' familiar favourites.

UNITED STATES

Fusion menu item growth by restaurant segment
(% change Q3 2018-Q3 2021)



Within the QSR segment in U.S, fusion grew in **sandwiches, wraps and bowls.**



East Meets West



Crunchy Itaewon Pizza, The Pizza Company Thailand

The pizza highlights premium bacon with giant pineapple chunks squared on a new and unique "corndog crust".

Fusion of Asia

Nasi Lemak Tokochi, MyeongDong Topokki (MDT) Malaysia

In conjunction with Merdeka (Malaysia's National Day), MDT launched an exclusive fusion set of Korean rice cake (topokki) with Nasi lemak ingredients such as chili sambal and ikan bilis (anchovies).

Korean - Mexicana



Kimchi and Tacos, Vatos Urban Tacos Singapore

Started by Korean-Americans who gathered inspiration from American street food and combined iconic flavours of Korean and Mexican together.

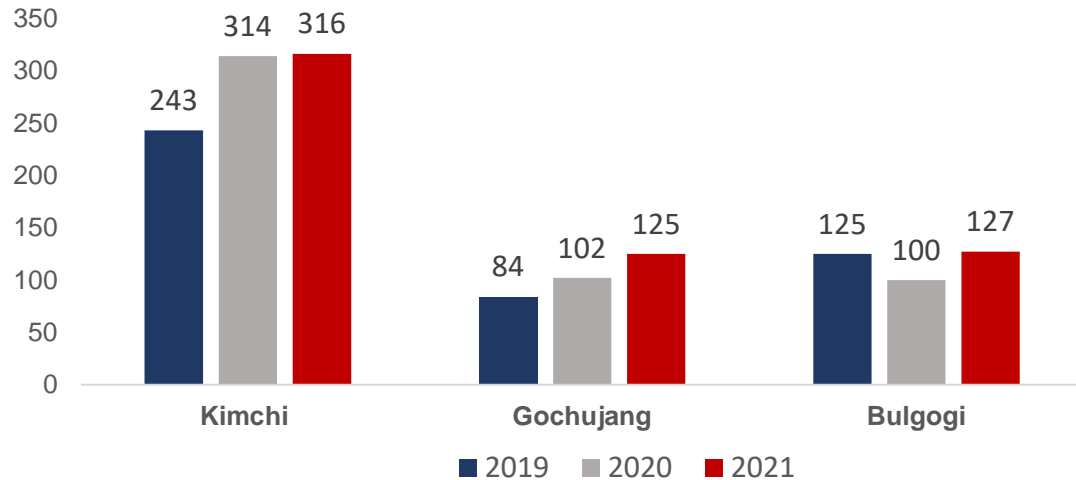
EATSIGHTING: EMERGING KOREAN FLAVOURS

Korean Flavours Off The Shelves

From Ramyeon (Instant Noodles) to Mandu (Dumplings), Korean food products have been penetrating into grocery stores. Be it imported or locally produced, new FMCG launches with iconic Korean flavours have increased over the past 3 years.

ASIA PACIFIC

Number of new product launches with Korean flavours (2019 – 2021)



Following the Oscars Awards to the movie “Parasite”, exports of Nongshim’s Chapagetti instant noodles jumped 120% year-on-year in February 2020.



Kimchi

Kimchi; an iconic banchan (side dish) from Korea has become a globalised flavour that is seen across various food categories today.



**Bu Dui Guo Feng
Wei Guo Wu Di Liao
McCormick
China**

Korean Army Stew
Flavoured Hotpot Stock
in squeeze pack format.



**Jajangmyeon Kimchi
Crispy Seaweed
Tao Kae Noi
Thailand**

Combination of two
Korean dishes Jajangmyeon
and Kimchi into its newest
crispy seaweed.



**Black Pork Belly
with Kimchi
Yata x Lee Fa Yuen
Hong Kong**

Tangy spicy pork belly made
with a secret Korean Chef's
recipe and marinated with
fruits and vegetables.



III. Flavouracle

McCormick® Flavour Forecast® 22nd Edition:

Time as a Luxury Ingredient , Food Stories

Leveraging on time as a cooking aid and highlighting the power of women and their stories in the food industry

UNSUNG INFLUENCES

showcases the *nuance, complexity,* and *passion* that goes into a perfect bite...



the investment, savouring and saving of time through cooking

TIME AS A LUXURY INGREDIENT

PLUS SWEET

a shift in sweetness from the spotlight to supporting role



celebrating the power of woman in food and flavour



FOOD STORIES



*22ND FLAVOUR
FORECAST THEME*

TIME AS A LUXURY INGREDIENT





22ND EDITION

TIME AS A LUXURY INGREDIENT



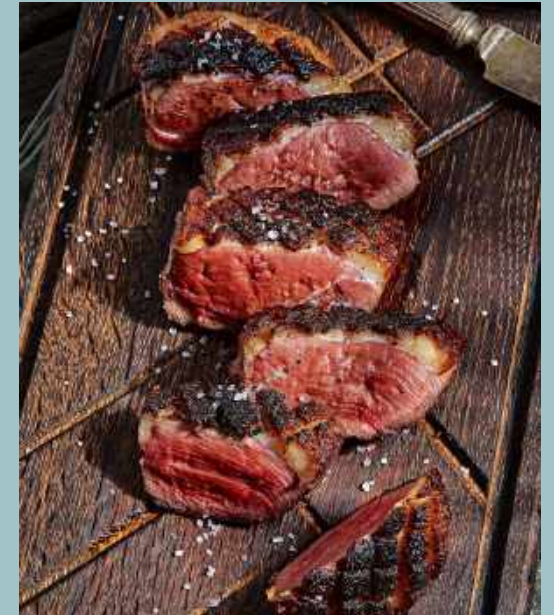
Saving Time

Finding techniques and ingredients that offer *convenience and efficiency*, while maintaining flavour.



Peserving a Point in Time

Playfully *preserving flavour* to deepen and shift flavours resulting in new taste experiences.



Slowing Down Time

Deep, rich, layered, and complex flavours that are only achieved with *time and attention*.



22ND EDITION

TIME AS A LUXURY INGREDIENT - RECIPES

Korean “Twice Smash” Burger



Smashing technique for deeper flavour and quicker cooking

Mango Kimchi



2-3 days fermentation to preserve and deepen flavour

Dry-Aged Duck Breast



Dry-aging for several days increases the depth of flavour and creates a firmer texture



22ND EDITION

TIME AS A LUXURY INGREDIENT – ON THE MENU



SMASHBURGER, UK

Served with **smashed burger patty** to seal in the flavours and caramelize the burger. Comes in 3 flavours Classic Oklahoma, Mushroom Blue and Hot & Smoky



4FINGERS, MALAYSIA

Kimslaw (Kimchi + Coleslaw) made from scratch with in-house seasoning and fermentation.



HUBER'S BUTCHERY, SINGAPORE

100% pure Australian chilled beef, **dry aged for 21 days** served with sun-dried tomato aioli and buns.

Source: Smashburger UK, The Halal Food Blog, Burpple SG



22ND FLAVOUR
FORECAST THEME

FOOD STORIES



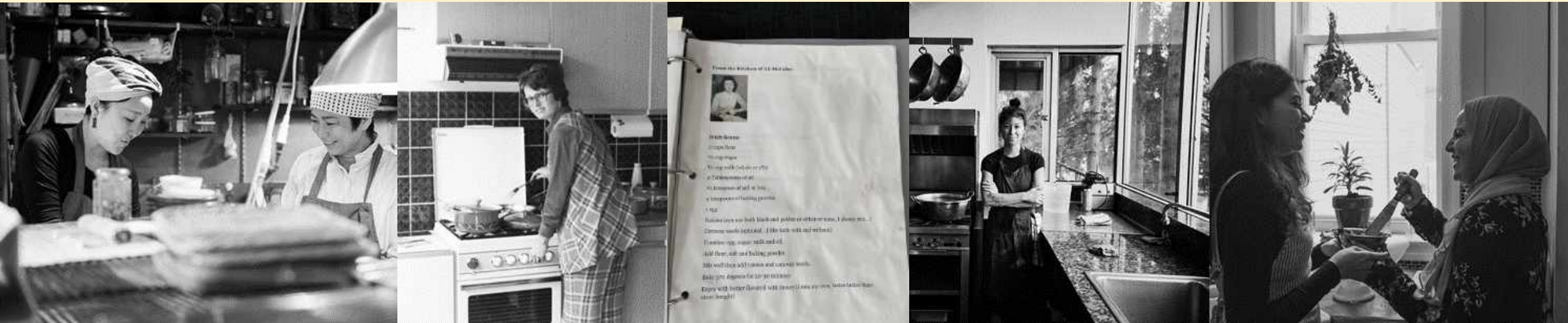


22ND EDITION

FOOD STORY: THE POWER OF WOMEN IN FOOD & FLAVOUR

During discovery, we witnessed an overarching theme behind the rising global flavour profiles we were tracking: the individuals passionately bringing them to life are women with inspiring stories.

From professional chefs and restaurant operators to the grandmothers passing down recipes to keep generational techniques alive, this year's food story recognizes the power of women in food and flavour in a contemporary way.





22ND EDITION

FOOD STORIES

Iman's Story



Highlighting a chef whose goal is to introduce consumers to Egyptian cuisine, thereby cultural curiosity, by crafting deeply **personal and connective dishes**.

Monica's Story



Highlighting a restaurant owner and operator who celebrates regional Indian flavours through **small plates** in a romantic and contemporary setting.



22ND EDITION

FOOD STORIES - RECIPES



PIONEERING FLAVOUR

Bringing Egyptian culture and flavour to the suburban consumer in an approachable, plant-based format.

Iman Moussa is the owner and operator of **Koshary Corner**, a **vegan fast-casual concept with a focus on Egypt's national dish: the Koshary bowl**. Koshary Corner was founded with a progressive vision to spread compassion for the planet through plant-based cuisine and better the world one Koshary bowl at a time.

Iman shows her unwavering commitment to this mission through Koshary Corner's partnerships with local food charities and employment of immigrant and refugee women.



Iman's Red Lentil Soup

Featuring cumin, coriander, and black pepper

PIONEERING FLAVOUR

Reshaping the boundaries of Indian cuisine

Owner Monica Saxena wanted aRoqa to be a restaurant and cocktail bar where anniversaries and birthdays to everyday happy hours feel special in its festive atmosphere with a chic ambiance. **aRoqa fuses authentic Indian flavours with fanciful presentations** to have discerning New York and Global clientele thrill both their palates and their eyes.



Monica's Marigold & Smoke Cocktail

Featuring black peppercorns



22ND EDITION

FOOD STORIES

PIONEERING FLAVOUR

#Kimchify everything - leveraging on Kimchi which gives umami taste while also imparting the sour, palate-cleansing effect of pickles or vinegar that keeps people wanting more.

Chef Esther Choi's food was inspired by her grandmother, who grew Korean herbs at home and blended them in American food.

She opened her own restaurant at the age of 28 in 2014 and is the owner and chef of Mōkbar which has 3 outlets today. To pay tribute to her grandmother, Mōkbar's most famous dish, dumplings, are named '*Halmoni Dumplings*'.

Halmoni means grandmother in Korean.

Esther's Halmoni's Dumpling

Available in Kalbi (Beef), Halmoni (Pork) or Japchae (Vegan)



Source: NJ (2022), SK Pop (2022), Mokbar



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