ORIENTAL FOOD REPORT
# CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreword</td>
<td>pg 5</td>
</tr>
<tr>
<td><strong>Look East</strong> – The Evolution and Expansion of Oriental Food</td>
<td>pg 6</td>
</tr>
<tr>
<td>1. A Market of Scale</td>
<td>pg 8</td>
</tr>
<tr>
<td>2. The Central Role of the Restaurant</td>
<td>pg 12</td>
</tr>
<tr>
<td>3. A Flavour Hit</td>
<td>pg 16</td>
</tr>
<tr>
<td>4. A Voyage of Discovery – Beyond ‘Chinese’</td>
<td>pg 22</td>
</tr>
<tr>
<td>5. Japan – The Rising Star</td>
<td>pg 24</td>
</tr>
<tr>
<td>6. The Role of the Capital</td>
<td>pg 26</td>
</tr>
<tr>
<td>7. The Significance of Travel</td>
<td>pg 28</td>
</tr>
<tr>
<td>8. Social Eating</td>
<td>pg 32</td>
</tr>
<tr>
<td>9. Can’t Cook/Won’t Cook?</td>
<td>pg 33</td>
</tr>
<tr>
<td>10. The Missed Market: Pubs</td>
<td>pg 34</td>
</tr>
<tr>
<td>To Sum Up</td>
<td>pg 38</td>
</tr>
<tr>
<td>Foodie Favourites</td>
<td>pg 39</td>
</tr>
</tbody>
</table>
When I arrived in the UK from Hong Kong in 1959, it would have been difficult to imagine how Oriental food would grow to such elevated levels of popularity more than half a century later.

In those very early days, I worked as a waiter at a restaurant in Hull, where on very limited ingredients we were able to offer approximately 80 Chinese dishes on the menu. At the time, the most popular choices were sweet and sour pork and spare ribs which, of course, remain firm favourites with British consumers today.

My partners and I opened our first restaurants in Clacton-on-Sea and Ipswich in the early 60s with the support of a business loan from my bank manager, who at the time quizzed me about how long Chinese food would last given that other foreign themed restaurants tended to go out of fashion. I told him it was here to stay, because unlike the more formal French and English restaurants at the time, the Chinese were prepared to cater for families and young children, as the dishes were ideal for sharing.

We found it increasingly difficult to obtain the quality and variety of ingredients needed, so I eventually decided to sell my shares to my partners and move into the food import business, supplying restaurants and takeaways.

“After 10 years of running restaurants I knew what was required and opened a small shop in Birmingham selling Chinese ingredients to the trade.”

From humble beginnings, I worked with my brothers Sammy and Lee to make Wing Yip one of the UK’s leading suppliers of Oriental food.

Today, through our four superstores in Birmingham, Manchester, Cricklewood and Croydon, along with our online store, Wing Yip supplies more than 4,500 Oriental products to the trade and has a growing consumer customer base. Having started out with an exclusively Chinese product range, we now encompass all Far Eastern cuisine – the advantages that plentiful sunshine and good soil bring to these countries have enabled us to supply our current wide variety of produce.

The upsurge in long-haul travel to exotic Far Eastern destinations has undoubtedly helped drive growth in the Oriental food sector, just as the migration of people from the former British colonies of Hong Kong, Malaysia and Singapore fuelled the market in the early years.

Whilst we know that Chinese food has led the growth, we have commissioned this report in order to understand how the market is evolving as consumer tastes become ever more adventurous.

By talking to more than 3,000 people across the UK, as well as a number of leading industry operators, we have compiled what we believe is the most definitive report on trends within this ever-changing sector. Why people like Oriental food, where and how often they choose to eat it, emerging cuisines, and the opening of a number of exciting new restaurant concepts are just some of the topics covered.

Like the food, the report presents a cocktail of flavours, with lots of variations on a central theme. So whether you work in, or write about, the food and restaurant industry, I hope you enjoy the read.

Wing Yip OBE, Chairman
Chinese restaurants have been in the UK for more than 100 years. It’s our oldest international cuisine, and has paved the way for the increasingly enthusiastic adoption of foods from other Far Eastern nations by the British consumer.

In 2015, market analysts, Mintel described a “growing interest in Oriental cuisine” underpinned by “...Chinese cuisine’s ability to endure in the UK market, despite the plethora of cuisines that are now available to Brits in supermarkets and restaurants”, adding that “Chinese remains popular with a majority.”

But the Oriental food market is rarely researched in detail. For that reason Wing Yip has commissioned this extensive piece of bespoke consumer research, conducted by Populus and augmented by 19 expert interviews with key players in this market, and with authoritative observers of it.

This combined approach brings fresh, new evidence-based insights to this dynamic, diverse and developing market; insights that we have organised around 10 key themes.
“Chinese remains popular with a majority”

Mintel, Market Analysts
There is no shortage of estimates of the value of the eating out market, and they vary widely. But there is no doubting that the potential market for Oriental food is huge – not least because almost everyone eats out nowadays. Our research shows that 95% of British adults eat out at restaurants, and over 90% do so at pubs – what was once a luxury has become an almost universal pastime.

Eating out – how often do people do it?

Over 1 in 3 adults eat at a restaurant at least monthly. Very few people never eat at a restaurant.

Source: online survey, sample 3051 adults, Populus data solutions, November 2015

24% of respondents eat at restaurants and pubs at least monthly

Naturally, many out of home diners eat out relatively infrequently, but almost one-in-four adults eat out at restaurants and pubs at least monthly – that equates to a market of around 12 million people in the UK aged 18-80.

Similarly, takeaways and food delivery services are also very widely used. 89% of adults say they buy food from them, and over half of adults say they do so at least monthly. That is higher than the comparable figures for pubs, or for restaurants.
If we home in on the young adult market, those aged 18 to 34, the proportion buying from takeaways or having food delivered rises to 70%. It is these young adults, particularly those in the more upscale social grades, who are most likely to be monthly users of all three channels we measured (restaurants, pubs and takeaway/delivery). They are the most enthusiastic buyers of food from outside the home, and their age profile and life experience creates significant potential for future market growth, as they take their formative food habits with them as they grow older.

But there is plenty of scope for Oriental restaurants to take market share from other sectors. 40% of Oriental food consumers are eating it at restaurants less frequently than every couple of months – and that is a big market opportunity for the sector to address.

In terms of Oriental food consumption, the news there is equally positive. Around 90% of British adults say they have eaten Chinese food, and a similar proportion say they like eating it nowadays, either at home or in a restaurant – its audience is vast.

### How many people have tried various Oriental cuisines?

Almost everyone has eaten Chinese food; it is enjoyed universally. The popularity of Thai food is clear, but there is plenty of potential in other cuisines.

<table>
<thead>
<tr>
<th>Cuisine</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chinese</td>
<td>94%</td>
</tr>
<tr>
<td>Thai</td>
<td>56%</td>
</tr>
<tr>
<td>Japanese (e.g. sushi)</td>
<td>35%</td>
</tr>
<tr>
<td>Vietnamese</td>
<td>16%</td>
</tr>
<tr>
<td>Malaysian</td>
<td>15%</td>
</tr>
<tr>
<td>Indonesian</td>
<td>14%</td>
</tr>
<tr>
<td>Korean</td>
<td>10%</td>
</tr>
<tr>
<td>None of these</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: online survey, sample 3051 adults, Populus data solutions, November 2015

30% of adults have eaten at least one Vietnamese, Malaysian, Indonesian or Korean meal

75% of those are in social grades ABC1, compared to 54% of the total sample
How many people like eating Oriental cuisines nowadays?

Again, Chinese food is nearly universally liked.

Thinking specifically about Oriental food, which of the following cuisines do you like eating either at home or at a restaurant?

<table>
<thead>
<tr>
<th>Cuisine</th>
<th>% of those who say they have tried the cuisine</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chinese</td>
<td>87%</td>
</tr>
<tr>
<td>Thai</td>
<td>39%</td>
</tr>
<tr>
<td>Japanese (e.g. sushi)</td>
<td>20%</td>
</tr>
<tr>
<td>Vietnamese</td>
<td>7%</td>
</tr>
<tr>
<td>Malaysian</td>
<td>8%</td>
</tr>
<tr>
<td>Indonesian</td>
<td>7%</td>
</tr>
<tr>
<td>Korean</td>
<td>7%</td>
</tr>
<tr>
<td>None of these</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: online survey, sample 3051 adults, Populus data solutions, November 2015
Based on all who have tried any Oriental (2897)

Higher percentages for the non-Chinese cuisines are found among social grade ABC1, 25-44 year olds and people in London

Chinese cuisine is a huge player in the Oriental food market, with around 90% of British adults eating it either at home or in a restaurant.

This sense of market scale and opportunity is endorsed by Jon Lake, development director of Fine Food Capital who says:

“I think there is continued strong interest in the Asian food market from consumers, operators and investors alike. Opportunities do exist to penetrate the market further – the proliferation of street food concepts has yet to manifest itself in terms of brands of true scale, but that is probably just a matter of time.”

From an operator’s perspective, Head Chef at Bone Daddies, Tom Moxon, views the Oriental foodservice market “as going from strength to strength, and not slowly either. The customer base is in place, ready and willing, so the only real limiter on the growth of brands and the market as a whole is the speed at which they can find, train and nurture their teams.”

The consumers are there in great numbers. But how are they being reached?
"I think there is continued strong interest in the Asian food market from consumers, operators and investors alike"
A recurring theme from our expert contributors is the accessibility of Oriental food, in terms of number of outlets and value for money. Data from CGA Peach suggests there are well over 4,000 Chinese, Thai and Japanese restaurants in the UK, around 16% of all the country’s restaurants, and they are growing in number. The total number of Chinese, Thai and Japanese restaurants has largely kept pace with the rapid overall rate of restaurant openings in the last five years, both growing at around 20% in that time.

**The Central Role of the Restaurant**

As Kanada Kazuhiro, founder of Kanada-Ya ramen restaurant, puts it, “the UK has proven that it’s open to trying new dishes and cuisines – the vast amount of Oriental restaurants in the country really does speak for itself.”

On the value issue, Kazuhiro also notes that, “you don’t have to pay a huge amount for great food in Oriental cuisine, which makes it accessible for everyone” – and our research confirms that for most Oriental cuisines, the restaurant is the most likely place where people will be eating them.

For example, more than 70% of those who eat Thai food do so at restaurants, compared to only 30% who buy it from a takeaway or have it delivered, and 55% who cook it from scratch at home, or buy ready meals.

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**Oriental restaurant numbers are growing steadily**

648 NET added Chinese/Thai/Japanese restaurants in that period (+18%). Strongest growth is in the Japanese market.

<table>
<thead>
<tr>
<th></th>
<th>2015 count</th>
<th>% change since 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chinese</td>
<td>2730</td>
<td>+12%</td>
</tr>
<tr>
<td>Japanese</td>
<td>551</td>
<td>+67%</td>
</tr>
<tr>
<td>Thai</td>
<td>1061</td>
<td>+16%</td>
</tr>
</tbody>
</table>

These three markets account for around one in six of all restaurants.
How and where do people eat Oriental cuisines?

The role of the restaurant is critical to all. Only one in three users are currently cooking Chinese /Thai at home. Supermarkets are playing a bigger role for Japanese/sushi.

Chinese
- Takeaways/delivery: 75%
- Restaurants: 52%
- Supermarket ready meals: 37%
- Cook from scratch at home: 37%

Thai
- Takeaways/delivery: 30%
- Restaurants: 72%
- Supermarket ready meals: 27%
- Cook from scratch at home: 38%

Japanese (e.g sushi)
- Takeaways/delivery: 18%
- Restaurants: 68%
- Supermarket ready meals: 44%
- Cook from scratch at home: 17%

Malaysian
- Takeaways/delivery: 22%
- Restaurants: 69%
- Supermarket ready meals: 20%
- Cook from scratch at home: 34%

Indonesian
- Takeaways/delivery: 21%
- Restaurants: 69%
- Supermarket ready meals: 19%
- Cook from scratch at home: 34%

Vietnamese
- Takeaways/delivery: 19%
- Restaurants: 80%
- Supermarket ready meals: 13%
- Cook from scratch at home: 24%

Korean
- Takeaways/delivery: 18%
- Restaurants: 80%
- Supermarket ready meals: 18%
- Cook from scratch at home: 23%

Source: online survey, sample 3051 adults, Populus data solutions, November 2015
For Vietnamese food, the role of the restaurant is even more dominant, used by 80% of those who like eating the food nowadays, compared to only around 1-in-5 who use takeaway or delivery, and just 30% who cook from scratch or buy ready meals.

Japanese/sushi has been more successfully developed in a ready-meal format by the grocery market. Here, although 68% of those who like eating the cuisine do so at restaurants, and only 18% use takeaway or delivery, 44% say they buy ready meals (or often in the case of sushi, ready to eat), the highest figure of any of the Oriental foods, including Chinese.

Chinese food still reflects the traditional strength of the Chinese takeaway, used by three quarters of all Chinese food eaters, compared to 52% who use restaurants. It is the only Oriental cuisine where restaurants are not the most commonly used channel.

Restaurants dominate Oriental food, but despite all the excitement and innovation at the leading edge of the market, we must not forget that the British consumer is still highly attached to the Chinese takeaway.
A FLAVOUR HIT

Oriental food’s popularity is all about the flavour – that’s the view of the experts established and emerging.

“"It seems we can’t get enough of Oriental flavours”

Elizabeth Carter, Consultant
Editor of the Good Food Guide

“"I love the fresh, light, powerful flavours, exciting textures and great balance of Oriental food”

Paul Dickinson,
Fuller’s Head of Food

“"Fresh tastes, both in terms of spiciness and non-mainstream dishes, excite me about Oriental food”

Peter Harden,
Harden’s Guides

“"It’s healthy, delicious and accessible”

Ken Hom, legendary chef and authority on the region’s food

“"It’s the endless variety of dishes and flavours that sets Oriental food apart from other dishes in the world“

Punky Patra-Yanan
Rosa’s Thai Cafe

What’s more, consumers clearly agree: when Wing Yip asked people for the reasons they like the various Oriental cuisines, the flavour factor is overwhelmingly dominant – it was mentioned by 85% of Chinese food consumers, 85% of Malaysian food users, and by 90% of those who eat Thai food.
Why do people like the various Oriental cuisines?

It is overwhelmingly flavour-driven, but Japanese/sushi has a freshness and healthy advantage. For all its established familiarity, Chinese has as much novelty as other cuisines.

<table>
<thead>
<tr>
<th>Chinese</th>
<th>Thai</th>
<th>Japanese (e.g. sushi)</th>
<th>Malaysian</th>
<th>Indonesian</th>
<th>Vietnamese</th>
<th>Korean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flavours</td>
<td>85%</td>
<td>90%</td>
<td>76%</td>
<td>88%</td>
<td>85%</td>
<td>80%</td>
</tr>
<tr>
<td>Healthy</td>
<td>18%</td>
<td>28%</td>
<td>60%</td>
<td>24%</td>
<td>35%</td>
<td>28%</td>
</tr>
<tr>
<td>Freshness</td>
<td>21%</td>
<td>34%</td>
<td>52%</td>
<td>30%</td>
<td>39%</td>
<td>30%</td>
</tr>
<tr>
<td>Novelty/something different</td>
<td>35%</td>
<td>33%</td>
<td>39%</td>
<td>36%</td>
<td>39%</td>
<td>42%</td>
</tr>
</tbody>
</table>

Source: online survey, sample 3051 adults, Populus data solutions, November 2015
That is at the general level, but we also asked consumers to name their favourite Oriental meal, and to give reasons why. Here too, ‘flavours’ is the most commonly occurring word, followed by ‘taste’ and ‘tasty’.

The specific dishes named by consumers as their favourites understandably include some established menu staples – the five most mentioned were Sweet & Sour Chicken, Thai Green Curry, Chicken Chow Mein, Sushi and Crispy Duck – but that top five also reveals the strength of the wider Oriental food market, and specifically the impact sushi has made on the UK consumer.

It is the combination of the flavours, not just spiciness, which gives Oriental food its consumer appeal. This is moving to a new level as contemporary operators develop more imaginative, varied and authentic concepts.

As James Liang, MD of Chinese takeaway and delivery brand Hotcha, puts it: “I think Thai and Vietnamese cuisines are very exciting to consumers at present, with their street food style and exotic flavours.”

Paul Hopper, founder of Hop Vietnamese in London, talks of the “contrasting and complementary flavours” in Oriental food, which has become “so exciting and varied, it’s never boring. Oriental food is so much more accessible now, and the British are embracing the excitement with open arms.”

A similar point is made by Ed Farrell, co-founder of street food operator The Duck Truck, who says: “Operators in the Oriental market are really challenging flavours and mixing things up, getting you thinking about combinations that you wouldn’t think should go together.”

Oriental food delivers a flavour hit, and it’s clearly a hit with consumers.
“I think Thai and Vietnamese cuisines are very exciting to consumers at present, with their street food style and exotic flavours”
**SHOPPERS BROADEN THEIR HORIZONS WITH WING YIP**

Growth in the Oriental food sector is reflected in the diverse range of sauces and ingredients sold via Wing Yip supermarkets and its online store.

The range of products, once all or predominantly Chinese, has expanded enormously since the company started trading almost 50 years ago. The most startling difference is how shoppers are now buying authentic food from right across the Far East.

<table>
<thead>
<tr>
<th>JAPANESE</th>
<th>KOREAN</th>
<th>MALAYSIAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sushi rice</td>
<td>Kimchi</td>
<td>Laksa pasta</td>
</tr>
<tr>
<td>Ramen</td>
<td>Gochujang or hot pepper paste</td>
<td>Rendang curry paste</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>VIETNAMESE</th>
<th>THAI</th>
<th>TAIWANESE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pho</td>
<td>Green &amp; red curry paste</td>
<td>Tapioca pearls – used to make bubble tea</td>
</tr>
<tr>
<td></td>
<td>Rice noodles</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>INDONESIAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ketjap manis</td>
</tr>
</tbody>
</table>

Sweet and sour and black bean sauces may well remain firm favourites with British consumers, but here is a flavour of some of the other products Wing Yip sees gaining huge traction.

These days, shopping trolleys are also far more likely to include coconut-based products, including oil, milk and water, aloe vera drinks, and jackfruit, with its amazing ability to create vegan ‘pulled pork’.
A VOYAGE OF DISCOVERY
Beyond ‘Chinese’

Chinese food remains the dominant force in this market. 87% of adults who have tried any Oriental food like eating Chinese food. The closest competitor, at 39%, is Thai food, and beyond that, currently only Japanese/sushi gets into double figures – although as we will see, this cuisine is on the rise.

It is also too simplistic to talk of ‘Chinese’ as a single market. Andrew Wong, chef/owner of the A.Wong restaurant in London notes that, “regional Chinese food is on the up. China has 14 national borders, the food varies massively from one province to the other – it’s this diversity within the one China that excites me most.”

But the diverse discoveries to be made beyond China mean “you can never stop discovering” according to Scott Hallsworth, founder of Kurobuta restaurants, who identified a “genuine thirst from consumers for new and exciting foods.”

China is the primary gateway for consumers to the other cuisines, but we could say it is still only half open – because currently only half the people who eat any kind of Oriental food eat any of the non-Chinese cuisines. Our research shows these more adventurous consumers are more likely to be found in London, to be aged 25 to 44, and to be in the ABC1 social grades.

Put another way, half of all Oriental food consumers have yet to discover the other nations’ foods – and that amounts to at least 20 million adults. It is a massive latent market, and that is further demonstrated by our research, which shows that currently only one-in-five people eat more than two different Oriental cuisines.

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How many different Oriental cuisines do people eat?

Only a minority (one in five) eat more than two.

![](chart.png)

Percentage of people according to number of different Oriental cuisines they enjoy eating

Source: online survey, sample 3051 adults, Populus data solutions, November 2015
Base: All who have tried any Oriental cuisine
Thai food is the second most commonly eaten Oriental food, and it is liked by the great majority of those who eat the emerging cuisines, such as Vietnamese and Malaysian. In fact, early in 2015, Malaysian food was described by Mintel as a “rising star”, as well as being identified by Ken Hom as being at an “exciting” stage – probably where Thai was 10 years ago.

In the Thai market “special mention should go to the branded Thai operators who really have challenged customer perceptions and brought a fresh approach to Thai food in a number of ways” according to Fine Food Capital’s Jon Lake, citing brands such as Thaikun, Busaba, Giggling Squid, Koh Thai and Rosa’s – “all quality brands bringing something different to the consumer.”

Whilst there is no denying the buzz around Korean and Vietnamese food, particularly in London, currently these cuisines are consumed by only 5% and 7% of Oriental food users. However, there were signs of Korean food beginning to emerge in supermarkets and on mainstream pub menus in 2015.

Greater consumer access is likely to bring greater consumer uptake, and increasing restaurant numbers will do much to drive this trend.
Perhaps the best example of access driving demand is Japanese food. But arguably it is work in progress. In the view of Peter Harden, from Harden’s Guides, “Japanese food is exciting consumers the most at present as there is much to discover and the market is still fairly unsaturated.” Lots of towns still lack a Japanese restaurant.

Currently, one-in-five adults now say they like eating Japanese food. That makes it the nation’s third most popular Oriental cuisine – and as we noted earlier, sushi features in our top five of consumers’ favourite dishes.

To dispel any stereotypes, the UK’s conversion to sushi is not female-driven. There are as many men eating Japanese food nowadays as there are women. Neither is it solely the preserve of the young: more than half of Japanese food consumers are aged 35 and over, and well over a third of them are aged 45 and over.

It is also notable that four-out-of-five people who eat Japanese nowadays are living outside London. Sushi may not have gone fully mainstream yet, but it has moved way beyond a niche.

Analysis of Horizons’ Menurama data commissioned for this report shows how significant the rise of Japanese food in general (and sushi in particular) has become. Across the 115 multiple and branded chains, pub groups and branded hotels covered in Horizons’ dataset, Japan now accounts for 81% of main courses listed. Just two years ago it accounted for 65%. And this expanded share of presence on menus has largely been at the expense of Chinese and Thai dishes.
Specifically, Horizons says sushi is now – by some distance – the most commonly listed ‘pan-Asian’ dish on the country’s branded and multiple-operator menus. It now accounts for one in four of all the pan-Asian menu listings, up from 14% two years ago, since when the absolute number of sushi listings picked up by Horizons has more than doubled.

The numbers prove it. The growth in the Oriental restaurant sector we noted earlier is being driven most strongly by Japanese restaurants, which have increased by 67% in the last five years according to CGA Peach, now standing at more than 550.

Chains are a significant factor here. “Credit is due to the likes of Itsu and Wasabi who have played a huge part in making Japanese food more accessible to Londoners – they have managed to make the cuisine an everyday choice” – according to Paul Hopper, founder of the Hop Vietnamese ‘street eats’ operation.

There can be no doubt that the British food consumer is fast learning, and learning to love, Japanese.

The 10 most commonly used pan-Asian dishes

Sushi has rapidly become the most commonly found dish. The top 10 account for 56% of pan-Asian main course listings.

<table>
<thead>
<tr>
<th>Number of listings 2015</th>
<th>% of total pan-Asian Main listings 2015</th>
<th>% of total pan-Asian Main listings 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Sushi</td>
<td>60</td>
<td>24%</td>
</tr>
<tr>
<td>2. Chicken (Curry)</td>
<td>32</td>
<td>13%</td>
</tr>
<tr>
<td>3. Soup &amp; Noodles*</td>
<td>16</td>
<td>6%</td>
</tr>
<tr>
<td>4. Chicken (Noodles)</td>
<td>9</td>
<td>4%</td>
</tr>
<tr>
<td>5. Platter</td>
<td>8</td>
<td>3%</td>
</tr>
<tr>
<td>6. Vegetable (Noodles)</td>
<td>4</td>
<td>2%</td>
</tr>
<tr>
<td>7. Prawn (Noodles)</td>
<td>4</td>
<td>2%</td>
</tr>
<tr>
<td>8. Salmon (Salad)</td>
<td>3</td>
<td>1%</td>
</tr>
<tr>
<td>9. Chicken &amp; Rice</td>
<td>3</td>
<td>1%</td>
</tr>
<tr>
<td>10. Chicken (Salad)</td>
<td>2</td>
<td>1%</td>
</tr>
</tbody>
</table>

*Japanese only

Source: Horizons
THE ROLE OF THE CAPITAL

London is of course the multi-cultural hub and focal point of the vibrant UK restaurant market. It is where “Brits are spoilt for exceptional versions of all cuisines, blended or singular, and Oriental is definitely at the heart of this,” – according to Kanada Kazuhiro of Kanada-Ya ramen restaurant.

For Tom Moxon, head chef at Bone Daddies, “London provides a dense customer base of well-travelled consumers, actively seeking out these newer, more exotic foods – and where London leads, the UK’s other large cities are never too far behind.”

Oriental foods are “very much a rising star on the restaurant scene, given the number of Oriental restaurants that have opened in London recently” according to Elizabeth Carter, consultant editor of the Good Food Guide, who also talks of the beneficial “trickle-down effect” from new high-end destination Chinese and Japanese restaurants in the capital.

London accounted for around 13% of people in our online survey, but its importance to emerging cuisines in general is very clear, particularly so in the case of Oriental food. For example, our research shows that around one-in-three of those who like to eat Korean food are found in London, along with one-in-four of the Vietnamese food consumers, and one-in-five who eat Malaysian food.

The importance of London

For the less familiar cuisines, the London market is disproportionately significant.

<table>
<thead>
<tr>
<th>Cuisine</th>
<th>Proportion of those who like eating each cuisine, who live in London</th>
</tr>
</thead>
<tbody>
<tr>
<td>Korean</td>
<td>32%</td>
</tr>
<tr>
<td>Vietnamese</td>
<td>26%</td>
</tr>
<tr>
<td>Japanese (sushi)</td>
<td>21%</td>
</tr>
<tr>
<td>Malaysian</td>
<td>20%</td>
</tr>
<tr>
<td>Indonesian</td>
<td>18%</td>
</tr>
<tr>
<td>Thai</td>
<td>17%</td>
</tr>
<tr>
<td>Any Oriental</td>
<td>13%</td>
</tr>
<tr>
<td>Chinese</td>
<td>12%</td>
</tr>
</tbody>
</table>

Source: online survey, sample 3051 adults, Populus data solutions, November 2015
By contrast, for Chinese food, with its near-universal take-up, only 12% of its consumers are found in the capital.

Part of this London-loading effect is due to the demographic profile of the capital, with its disproportionate number of young professional adults, with their more adventurous and eclectic tastes.

But this population trend is not just about London. It is a development that has also emerged strongly in the major provincial cities, where young single people are moving in large numbers. Published reports show the populations of city centres in the country’s large cities doubled between 2001 and 2011, led by those young adults.

This creates opportunity for expansion for the more innovative Oriental cuisines and formats in the provinces.
THE SIGNIFICANCE OF TRAVEL

In early 2015, the Office for National Statistics published a long-term analysis of travel trends, showing marked growth in the number of UK residents visiting Asia comparing 2003 to 2013: visits increased 53% over that 10-year period, despite the dampening effect of the economic downturn. The region enjoyed the fastest growth in spending from UK visitors of any of the world’s regional destinations.

This is set against a wider context of robust growth in international tourism. The World Travel & Tourism Council’s published data showed 5% growth in the Asia-Pacific region in 2014, just ahead of the global average, but within that, the rising star was again Japan, where tourist arrivals increased 29% in the year, ahead of even the recently opened-up market of Myanmar.

This has run in parallel with a reported trend for culinary tourism, with research in the USA indicating the rising influence of learning and enjoying dining experiences in overseas travel.

This is endorsed by The Good Food Guide’s Elizabeth Carter, who is “delighted and astonished at how knowledgeable Good Food Guide readers are on Oriental food – and it’s all down to the gap year, especially mid-life/retirement gap years – and just the popularity of travelling to the Far East these days. These people are experiencing authentic dishes on holiday, then looking for that exciting flavour hit when they come home.”

Authentic Pub Company director Simon Bailey adds, “through exotic holiday destinations and TV shows, people are experimenting more with Korean, Vietnamese and Thai food – it will continue to increase in popularity.”

Yet this is arguably more of a potential growth story for Oriental food, because despite the much talked about rise of long haul travel, 80% of British adults interviewed in our report say they are yet to travel to any of the seven nations we focus on in our report. Thailand is the most visited country, but only 10% of adults have been there. It is followed by Malaysia, visited by 7% of adults; and China, 6%. Vietnam, often highlighted as a ‘cool’ destination for the long-haul traveller, has been visited by only 3%, in line with Japan at 4%.

Foreign travel

Despite the growth of long haul travel, very few people have visited these nations and yet, a relatively large number would like to, China and Japan in particular.

Which of these countries have you travelled to on holiday or would you like to visit?
Base: All respondents

<table>
<thead>
<tr>
<th>Country</th>
<th>Would like to visit</th>
<th>Have holidayed</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>40%</td>
<td>6%</td>
</tr>
<tr>
<td>Thailand</td>
<td>36%</td>
<td>10%</td>
</tr>
<tr>
<td>Japan</td>
<td>27%</td>
<td>47%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>23%</td>
<td>3%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>26%</td>
<td>3%</td>
</tr>
<tr>
<td>Korea</td>
<td>19%</td>
<td>1%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>23%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: online survey, sample 3051 adults, Populus data solutions, November 2015
However, significant numbers of people expressed an interest in visiting all the countries in question – particularly Japan: 47% of adults say they would like to visit, more than for any of the nations in our survey, with China second on this Oriental wishlist, at 40%.

Among the people who have visited these nations, the country’s food was typically said to be at least quite important by more than half of those who travelled. For visitors to Japan, 27% said it was a very important factor in their decision to visit.

The importance of food for foreign travellers

It has some importance for typically over half of those who have holidayed there. Japan is more influenced by food than other countries.

<table>
<thead>
<tr>
<th>Country</th>
<th>Very important</th>
<th>Quite important</th>
<th>Not important</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>23%</td>
<td>33%</td>
<td>45%</td>
</tr>
<tr>
<td>Thailand</td>
<td>21%</td>
<td>36%</td>
<td>43%</td>
</tr>
<tr>
<td>Japan</td>
<td>27%</td>
<td>31%</td>
<td>42%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>15%</td>
<td>39%</td>
<td>45%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>14%</td>
<td>33%</td>
<td>53%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>18%</td>
<td>35%</td>
<td>46%</td>
</tr>
</tbody>
</table>

And people who have travelled to the Orient are far more likely to eat the relevant cuisine nowadays. More than 70% of those who have visited Thailand are consumers of its food, compared to 39% of those who eat any Oriental food. In the case of Japan, the contrast is even more marked. 55% of visitors eat the food nowadays, compared to only one-in-five of the wider population.
But it is too limiting to think of this issue purely in terms of international travel. As Lisa Meyer of Yum Bun notes, “visiting markets and street food hubs is becoming more of a social pastime – interacting with traders and seeing different cuisines and fresher ideas being produced right in front of people is inspiring..they bring quality produce, flair and flavour to street side cooking which is affordable and fun” – and clearly that can increasingly be experienced in Britain’s major cities.

For the other Asian cuisines, the positive influence of travel on consumption is clear.

<table>
<thead>
<tr>
<th>Country</th>
<th>All Oriental food eaters</th>
<th>Those who have holidayed there</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>87%</td>
<td>85%</td>
</tr>
<tr>
<td>Thailand</td>
<td>39%</td>
<td>71%</td>
</tr>
<tr>
<td>Japan</td>
<td>20%</td>
<td>55%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>8%</td>
<td>39%</td>
</tr>
</tbody>
</table>

% who like to eat the cuisine nowadays

As consumer affluence increases, so will long haul travel – which can only benefit the growth of Oriental cuisine.

Source: online survey, sample 3051 adults, Populus data solutions, November 2015
Sub-sample 2707 people have tried any Oriental food
**SOCIAL EATING**

Social eating – it is a recurring theme picked up by many of our interviewed Oriental food experts, whether in terms of the dishes themselves, the nature of the experience, or social media sharing potential.

There is something inherent in Oriental cuisine that aligns with the wider consumer trend for informal sharing food. As Lisa Meyer, founder of London street food operator Yum Bun, puts it: “the tendency to share plates in Asian cuisine is also gaining popularity as a style of eating in general.”

And that is a trend inextricably linked to the rise of street food, which in big cities generally, and London in particular, has brought new impetus to the Oriental food market.

“Street food is definitely having its day at the moment, and it’s great to see some of the street food vendors making the leap from stall/van to bricks and mortar. BAO are a fine example”, according to Hop founder Paul Hopper.

Street food is also inextricably linked to social media.

> “Food and social media go hand in hand in today’s culinary world... customers can learn about food they have never heard of before at the click of a button, or on their phone via applications such as Instagram. Photos speak louder than words, especially food photos!”

That is the view of Rosa’s Thai Cafe’s Punky Patra-Yanan, and it touches on a key theme in contemporary eating out – the newsworthiness, or social sharing value, of the food you eat, something Oriental food is very well placed to exploit. It is a point reinforced by Kanada Kazuhiro, founder of Kanada-Ya ramen restaurant, who notes that “we find a lot of customer inspiration is taken from Instagram.”

Modern social food, in modern social environments, for the social media generation – it puts Oriental food at the intersection of three critical contemporary social trends.
CAN’T COOK, WON’T COOK?

A key issue for the longer term development of the market is the consumers’ ability (or their perceived ability) to cook these cuisines from scratch at home.

Consumers may take their inspiration from restaurants – and increasingly in big cities from street food – but our research shows that only 37% of those who like to eat Chinese food are cooking it from scratch at home.

Alternatively, 40% of all the people who like eating Chinese food say they do not buy ready meals or cook it from scratch. They therefore depend on out-of-home options, whether restaurants, takeaway or home delivery.

This is a huge potential market of consumers, equating to one third of the whole adult population – around 16 million people aged 18-80 – who like Chinese food, but are not cooking it at home.

In our research, the most mentioned reason given by these people is a lack of confidence: “I don’t cook it at home because I’m not sufficiently confident in my cooking skills” was mentioned by half the people asked (and by more among those aged under 35). Only one-in-three said they preferred to buy Oriental food from a specialist supermarket.

What stops people from cooking from scratch at home?

Mostly, it is a lack of confidence, therefore, an opportunity to educate. Only a minority are generally averse to cooking from scratch.

- I don’t cook at home because I am not sufficiently confident in my cooking skills: 50%
- I believe it’s best to buy Oriental food from a specialist restaurant: 33%
- I am happy with the quality of Oriental ready meals from a supermarket: 23%
- I rarely cook anything from scratch: 20%
- I don’t cook at home because I can’t get the right ingredients: 16%

If you never cook Oriental food from scratch at home, which of these statements do you agree with? Base: All respondents who have never cooked Oriental food from scratch at home (786)

This issue of confidence and credentials seemingly affects Oriental food not only for consumers themselves, but for the grocery sector, and in particular – as we turn to next – for Britain’s pubs.
Over the last couple of decades, pub food has been one of the most dynamic segments of the out-of-home food market, as the great majority of pubs moved away from being wet-led. Most estimates suggest food now accounts for around one third of pub industry turnover, and for some of the largest managed pub groups, it can take more than 50% of sales. And yet when we ask consumers where, and how often, they eat their Oriental food, well over half of them say they never eat it in a pub. Only 7% say they eat it in a pub at least monthly.

**THE MISSED MARKET: PUBS**

Even among regular pub food diners (those who eat there at least monthly) who also like eating Oriental food, almost 40% say they **never** eat it at a pub.

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**Eating Oriental food – how often do people do it?**

Pubs rarely feature.

In each of the following circumstances, roughly how often do you tend to eat any kind of Oriental food? All respondents who like eating Oriental food nowadays (2707).

- **Restaurant**: 3% Weekly, 15% Once or twice a month, 30% Every couple of months, 40% Less often, 12% Never
- **Pub**: 2% Weekly, 5% Once or twice a month, 9% Every couple of months, 28% Less often, 56% Never
- **Takeaway or delivered**: 9% Weekly, 29% Once or twice a month, 30% Every couple of months, 20% Less often, 12% Never
- **Shop ready meal**: 6% Weekly, 20% Once or twice a month, 21% Every couple of months, 28% Less often, 25% Never
- **Cooked from scratch at home**: 12% Weekly, 23% Once or twice a month, 15% Every couple of months, 21% Less often, 29% Never
There is a big gap here, and when we ask people why they do not choose to eat Oriental at a pub, the most common response is “I generally think pubs don’t do Oriental food as well as other types of food” – cited by 57% of those who say they have never eaten the cuisine at a pub. 52% agree they “would generally prefer to eat Oriental food at a restaurant.”

What stops people from choosing Oriental food at a pub?

Evidence of a lack of trust – for most it is not about preferring other foods. Restaurants have a distinct advantage.

- I generally think pubs don’t do Oriental food as well as other types of food: 57%
- I generally would prefer to eat Oriental food at a restaurant: 52%
- I prefer other cuisines to Oriental food and would choose them in a pub instead: 22%

Older consumers are more likely to prefer other cuisines in a pub. Younger consumers and AB social grades are more likely to doubt pubs’ ability.

It is a clear sign of a perceived credibility gap for the pub sector, and it is more prevalent among younger adults and those in the higher social grades.

Probe further for reasons why people doubt pubs’ credentials in this area, and it’s clear that it is a combination of three things:

- the lack of a serious offer on the menu
- a presumption that the product would lack authenticity and/or quality
- a preference for specialist skills in the kitchen

Looking in more detail at the issue of menus and dish availability, we examined quantitative data provided by Horizons FS Limited, from their ‘Menurama’ analysis, based on a dataset of menus drawn from UK’s top 115 multiple and branded chains, pub groups, and branded hotels.

Of the 254 ‘pan-Asian’ dishes listed across this menu database, only 23 dishes appear on pub menus. This figure has fluctuated over the last three years, but there is no consistent pattern of growth in pubs. Furthermore, Horizons says that pan-Asian dishes account for only 1% of menu items in the pub sector, compared to 5% in restaurants and 4% in the market overall.
The number of pan-Asian dishes on menus has grown 9% in the last three years

Driven by strong growth in the QSR channel, whereas hotels are going against the growth trend.**

Number of pan-Asian* main course menu listings

<table>
<thead>
<tr>
<th>Year</th>
<th>Pub</th>
<th>Hotel</th>
<th>Quick service</th>
<th>Restaurant</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>194</td>
<td>39</td>
<td>22</td>
<td>84</td>
</tr>
<tr>
<td>2014</td>
<td>235</td>
<td>71</td>
<td>15</td>
<td>116</td>
</tr>
<tr>
<td>2015</td>
<td>254</td>
<td>77</td>
<td>23</td>
<td>148</td>
</tr>
</tbody>
</table>

**Growth in QSR is driven by emerging chains Abokado and Wasabi.

*Indian dishes excluded

Pan-Asian main course dishes’ share of total menu items is broadly stable

Despite an increased presence in the QSR channel, pubs overlook the cuisine.

Hotels

<table>
<thead>
<tr>
<th>Year</th>
<th>Restaurants</th>
<th>Pubs</th>
<th>Quick Serve</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>8%</td>
<td>1%</td>
<td>14%</td>
</tr>
<tr>
<td>2014</td>
<td>10%</td>
<td>1%</td>
<td>18%</td>
</tr>
<tr>
<td>2015</td>
<td>10%</td>
<td>1%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Restaurants

<table>
<thead>
<tr>
<th>Year</th>
<th>Restaurants</th>
<th>Pubs</th>
<th>Quick Serve</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>4%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>2014</td>
<td>5%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>2015</td>
<td>5%</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Total Market

<table>
<thead>
<tr>
<th>Year</th>
<th>Restaurants</th>
<th>Pubs</th>
<th>Quick Serve</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>3%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>2014</td>
<td>4%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>2015</td>
<td>4%</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>
Meanwhile, in the quick serve channel, the emergence of chains such as Wasabi and Abokado is driving significant growth in the numbers of pan-Asian menu items. These (and other similar) chains’ influence has driven pan-Asian to account for close to 20% of menu items in the channel.

It is a symptom of the move to ‘good food fast’ and also a reflection of the growth in ‘on the go’ eating, two trends that the pub food sector is perhaps not best placed to exploit.

“Asian food is great for sharing with friends, and there should be an opportunity for some operators in the pub and bar space” according to Fine Food Capital’s Jon Lake. Yet there are clearly some attitudinal barriers to overcome, and those exist perhaps in the trade as much as with the consumer. It is the view of Neil Rankin, owner of The Smokehouse, that “so far pubs and bar operators haven’t put enough effort into making Oriental food work. It has legs, but they need to get the right chefs on board.”

Similarly, Paul Dickinson, Head of Food at Fuller’s, emphasises the “need to have someone with the training and skills” to do Oriental food well.

Those are barriers that we suspect no longer apply for Indian food in a pub, and which therefore should not be insurmountable.

Whitbread Food & Beverage Director Ron Lento agrees:

“I think Oriental food has growth potential in pubs. We have had a couple of Malaysian inspired dishes on our table menu, which have been popular. I think it will just take some time to get into people’s vernacular.”

Simon Bailey, director of the Authentic Pub Company, whose sites include four Dragon restaurants offering Thai food, commented: “Thai food is exciting because it gives us a real point of difference. The flavours and ingredients are fresh, exciting and really complement our sharing food culture and it also goes really well with a pint of beer!

Oriental food hasn’t evolved as much as Indian because it’s all about the expertise in the kitchen and the Government has made it very difficult to access foreign cooking talent. There are a lot of Indian pubs due to the skills that exist in the UK.”

The consumers are waiting out there in large numbers, and their tastes are developing. It’s now up to pubs to move with the trend.
TO SUM UP

• Oriental food is consumed by the great majority of the British public. It aligns with contemporary trends in terms of flavours, social eating, street food and social media.

• Restaurants drive the market and they are expanding, particularly Japanese/sushi restaurants, led by the emerging branded groups.

• There is massive scope for consumers to be drawn to discover the Oriental cuisines beyond and within China, and this restaurant expansion will be instrumental in that process.

• Growth in long haul travel will further stimulate interest and demand, aligned to the trend for culinary tourism, at home and abroad.

• But there is clear scope to improve the perception of the Oriental food proposition in the retail and pub sectors, alongside an opportunity to help consumers become more confident in their own cooking ability.

The future’s bright for Oriental food.
Here are some examples of our contributors’ favourite Oriental desert island dishes:

“Satay chicken skewer and crispy shredded beef”

James Liang
Managing Director, Hotcha

“It has to be Pho. Hearty, nourishing, hydrating, spicy...everything you need to keep you satisfied on a desert island”

Paul Hopper
Founder, Hop Vietnamese, London

“Crispy duck wraps. Far and away, the tastiest Oriental food around”

Ed Farrell
Co-founder, The Duck Truck

“Bun Uni Domburi (Sea urchin on rice)”

Lisa Meyer
Founder, London Street Food Operator, Yum Bun

“Peking duck with its crispy skin and rich, moist, dark flesh”

Ken Hom
Chef

“Thai red curry of duck with steamed jasmine rice”

Scott Hallsworth
Founder, Kurobuta

“Thai spicy papaya salad”

Punky Patra-Yanan
Communications Manager, Rosa’s Thai Cafe

“Ramen of course. With its variations of toppings, meat cuts and noodles, you can alter your dish each time, renewing it for yourself”

Kanada Kazuhiro
Founder, Kanada-Ya, Japanese Ramen Restaurant
Wing Yip would like to thank the following contributors to the Oriental Food Report:

Simon Bailey, Authentic Pub Co
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Paul Hopper, Hop Vietnamese
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Jon Lake, Fine Food Capital
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James Liang, Hotcha
Lisa Meyer, Yum Bun
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Punky Patra-Yanan, Rosa’s Thai Cafe
Populus
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Andrew Wong, A. Wong Restaurant