

Market Intelligence Report:

Mexican

HELPING FOODSERVICE EXECUTIVES STAY SMART ABOUT MEXICAN CUISINE & CONCEPTS

NEW



Technomic's exclusive report covers the latest Mexican marketplace dynamics with in-depth insights and analysis to help readers:

- ▶ **UNDERSTAND** consumer attitudes
- ▶ **EVALUATE** menu trends
- ▶ **EXPLORE** hot concepts
- ▶ **DEVELOP** new products
- ▶ **ENHANCE** results

TECHNOMIC

Food Industry. Facts. Insights. Consulting.

Introducing the **Market Intelligence Report: Mexican** a comprehensive assessment identifying trends and opportunities.

CAPITALIZE ON THE OPPORTUNITIES IN MEXICAN CUISINE AND CONCEPTS TO DRIVE MENU INNOVATION AND CUSTOMER TRAFFIC...

Mexican cuisine continues to be a consumer favorite. Almost eight out of 10 adults like to try **Mexican flavors**, and a large majority wants them to be **authentic**. Restaurants are responding with new entrées, appetizers and beverages including Tex-Mex classics and more authentic **regional** Mexican preparations. The number of Mexican concepts is **growing in both limited service and full service**, and chains large and small are seeing annual sales and unit counts rise. As a segment, Mexican is experiencing higher growth rates than the industry overall.

Market Intelligence Report: Mexican digs deep into Technomic's **exclusive consumer, menu and industry data** to uncover insights and opportunities in the Mexican market. The report includes data from Technomic's MenuMonitor online trend-tracking resource, which analyzes the menus of the top chains, emerging concepts and leading independent restaurants. It also features consumer data culled from Technomic's Consumer Trend Reports. Rounding out the data are operator examples, including the **new products** and **hot concepts driving innovation**.

IN-DEPTH COVERAGE AND ANALYSIS

Market Intelligence Report: Mexican provides operators and suppliers with powerful insights to help:

- ▶ **Attract the 78% of consumers who say they would try dishes featuring Mexican flavors**, and appeal to the majority of those consumers with a preference for authentic fare.
- ▶ **Understand demographic differences among consumers who like Mexican food and flavors to varying degrees** to reach your target customer or market to new customers.
- ▶ **Explore the possibilities of fish tacos**, which are growing in popularity, whether they're grilled or fried, served on dishware or handed out a drive-thru window.
- ▶ **Drive beverage sales** with favorites such as margaritas, imported beer and sangria, which continue to increase their presence on restaurant menus. Non-alcoholic drinks like horchata and Mexican bottled soda provide an opportunity to please consumers who are looking for a more authentic experience.
- ▶ **Grow the morning daypart**. More consumers are discovering breakfast burritos, and innovative menu developers are rolling out new Mexican breakfast options.
- ▶ **Tap the latest food trends that Mexican dishes suit** such as small plates, gourmet food trucks, layers of flavors, fresh preparation and comfort food.

VALUABLE REPORT DELIVERABLES

- ▶ **Executive Summary** of insights, implications and opportunities for operators and manufacturers.
- ▶ **Real-life examples** of new products and restaurant promotions.
- ▶ **Company profiles** of established and emerging Mexican concepts.

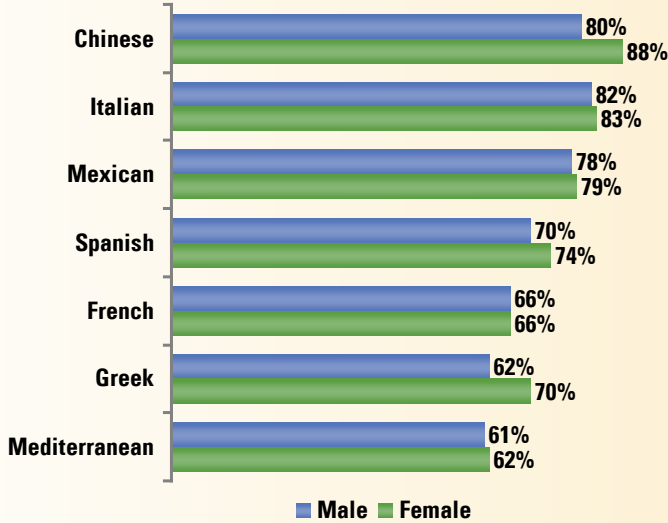


**To order your copy of *Market Intelligence Report: Mexican*
or for additional information, please contact
Patrick Noone at 312-506-3852.**

Look inside the report!

HOW LIKELY WOULD YOU BE TO ORDER A MENU ITEM MADE WITH THE TYPICAL FLAVORS AND INGREDIENTS USED IN THE FOLLOWING ETHNIC CUISINES?

Top two box = probably and definitely would order

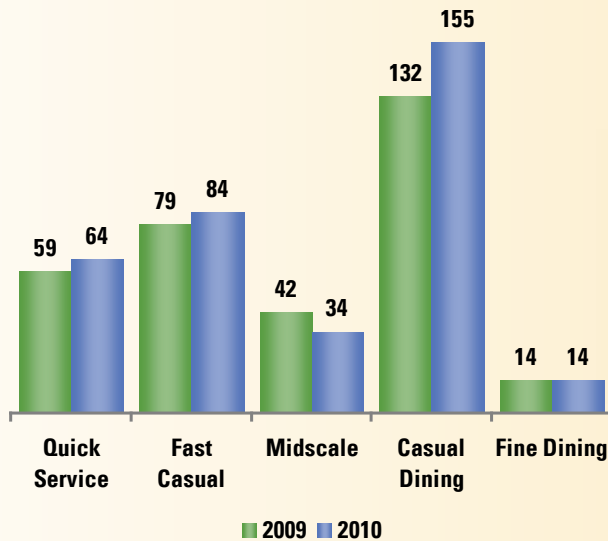


Analysis: Consumers are eager to try new dishes influenced by ethnic cuisines, including Mexican. In-depth consumer research reveals the demographic characteristics of those most likely to find Mexican flavors appealing, such as Gen X, Asian and Hispanic, and those in the Western United States.

Source: Technomic, Inc.; Flavor Consumer Trend Report 2009
 Base: Approximately 800 consumers aged 18+, base varies slightly depending on cuisine

NUMBER OF TACOS MENUED

By segment



Analysis: The number of tacos has grown on menus, and not just those of Mexican restaurants. Casual-dining concepts have seen the largest increase. Chicken and beef are still the most popular proteins, but fish and shrimp tacos are gaining acceptance; their incidence on menus rose 22.5% this year over 2009.

Base: Top 500, 116 emerging chains and 113 independent restaurants
 Source: Technomic MenuMonitor, Jan.-June 2009 and Jan.-June 2010

A SAMPLING OF ESTABLISHED AND EMERGING MEXICAN CONCEPTS PROFILED

In alpha order

Bajío Mexican Grill
 Cafe Rio Mexican Grill
 Cantina Laredo Restaurants
 Chipotle Mexican Grill

Chronic Tacos
 Chuy's
 Hacienda Colorado
 Lime Fresh Mexican Grill

Margaritas Mexican Restaurant
 Moe's Southwest Grill
 Qdoba Mexican Grill
 Rubio's Fresh Mexican Grill

Senor Frog's
 Taco Bell
 Uncle Julio's
 And more...

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SOMETHING NEW FROM TECHNOMIC

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ABOUT TECHNOMIC: Technomic, Inc. has been tracking the foodservice industry for over 40 years, providing industry intelligence, forecasts, data and training support to manufacturers, operators, distributors and others allied to the field. Our numerous publications and digital products—featuring quick-read newsletters, analytical annual reports, training handbooks, sales guides and restaurant chain profiles—help industry leaders keep a finger on the pulse of the entire foodservice terrain. Technomic delivers distinctive, premium content to its customers. To learn more about our products and services, visit us at technomic.com.