

# Hot, Hot, Hot: Spices and Seasonings

**THE HEAT IS** on for spices and seasonings that transport consumers to other lands as well as challenging their tolerance for fiery flavorings.

Growing demand for convenience foods such as ready-to-eat meals, soups, and frozen products is overlapping with a surge in desire for global cuisine and hot seasonings, pumping up sales forecasts for both spices and spice blends. The worldwide spices and seasonings market is projected to hit \$34.7 billion by 2030, a compound annual growth rate (CAGR) of 5.7% from 2022–2030, according to Polaris Market Research. The company predicts that ginger will continue to head up the category, with paprika, pepper, oregano, mint, sesame, and turmeric also

seeing high market demand.

The \$20.2 billion global blended spices market is expected to grow at a 5.4% CAGR from 2022–2030, reports Grand View Research, led by the dominant Indian garam masala segment and fast-growing sales of berbere, a hot Ethiopian spice mixture.

“Transportive regional seasonings like Tajin, adobo, aji amarillo [yellow chile pepper], sumac, amba [mango pickle], baharat, and Sichuan peppercorn are a delicious way for consumers to travel through their taste buds,” says Jennifer Zhou, senior director of product marketing, North America at ADM.

Clean label and functionality demands are also helping to boost spice and seasoning

profiles, as consumers seek out recognizable and nonchemical-sounding ingredients along with products that they perceive as having health benefits. “Seasoning ingredients that can provide potential functionality and diverse flavor such as black garlic, ginger, turmeric, cardamom, or cayenne will be largely in play in 2023,” says Joseph Gwisdalla, market research specialist at Kalsec.

Heat is the common denominator among many trending seasoning profiles, says Kevan Vetter, senior director culinary and executive chef at McCormick. “Heat is now everywhere, from grocery store shelves to upscale dining establishments, and eating spicy for fun, delight, and dares is now a social pastime,” he says. ft

## Spices Throughout History



### 4000 BCE:

Northern European hunter-gatherers season their roasted fish and meat with garlic mustard seeds.

### 2700 BCE:

Chinese emperor Shen Nung writes *Pen Ts'ao Ching (The Classic Herbal)* and includes the spice cassia, similar to cinnamon.

### 800 BCE:

Indigenous Indian spices, such as cardamom and turmeric, are cultivated in the gardens of Babylon.



**1180:** King Henry II of England founds the Guild of Pepperers for wholesale merchants, including spice trade management.

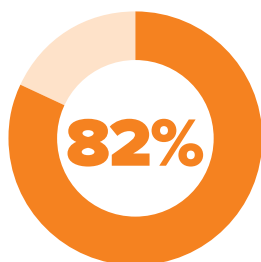


**1773:** American colonists replace traditional teas with spices and herbs after the Boston Tea Party.

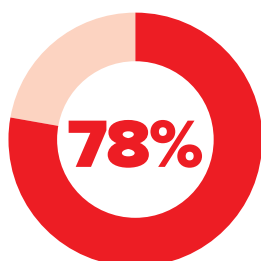
**1907:** The American Spice Trade Association is founded in New York City.

Sources: American Spice Trade Association, McCormick Science Institute, PLOS One, U.S. Department of Agriculture

# Global Ready-Meal Seasoning Preferences



Spicy



Tandoori



Curry

Source: ADM/FMCG Gurus, Flavor, Colors & Textures Report, 2021

**1982:** The U.S. space shuttle program incorporates spices into astronaut food.



**2012:** U.S. per capita spice consumption hits 3.4 pounds, almost tripling since 1966, according to the U.S. Department of Agriculture.



## Spices and Seasonings Glossary

**Berberé**—Hot Ethiopian mixture of red chile peppers, fenugreek, ginger, and other spices

**Nashville hot chicken**—Spicy U.S. Southern paste or sauce with cayenne pepper

**Chili crisp**—Chinese spicy infused oil with bits of peppers and other aromatics

**Salsa macha**—Mexican oil-based seasoning made with seeds and/or nuts, chiles, and garlic

**Chimichurri**—South American sauce made with finely chopped parsley, garlic, oregano, and vinegar

**Sambal**—Indonesian chile paste or sauce incorporating a variety of chile peppers

**Chinese five spice**—Powdered mixture of sweet, bitter, sour, salty, and savory spices, commonly including star anise, cloves, cinnamon, Sichuan pepper, and fennel

**Seasoning**—Substance(s) that add flavor to food, such as spices, herbs, salt, pepper, either alone or in combination

**Ganjang**—Korean soy sauce made from fermented soybeans and brine

**Shichimi togarashi**—Japanese mixture of seven spices, usually including coarsely ground red chile pepper; also called Japanese seven spice

**Garam masala**—Indian blend of spices that are roasted and then ground together

**Spice**—Seed, fruit, root, bark, or stem of a plant used to flavor or color food

**Gochujang**—Korean fermented red chile paste

**Sriracha**—Asian hot sauce made from chile pepper, vinegar, garlic, sugar, and salt

**Guajillo**—Reddish-brown Mexican dried chile pepper

**Tajin**—Seasoning mix of chile peppers, salt, and lime made by the Mexican company Tajin

**Harissa**—North African paste or sauce made with roasted red peppers

**Za'atar**—Middle Eastern blend of za'atar herb, toasted sesame seeds, dried sumac, and other spice

**Herb**—Leaves of a plant used to flavor or color food

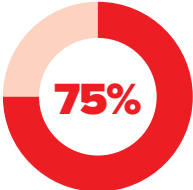


### Pick a Peck of Peppers

Peppers are seasoning superstars, with consumers increasingly seeking out specifically named peppers for heat, culinary authenticity, and fuller flavors. Preferences for ancho, jalapeño, pasilla, and serrano peppers have jumped since 2019, reports Kalsec, while Thai and Hatch chile preferences have skyrocketed.

Chile pepper-forward seasonings include oils, hot sauces, and chile pastes, says Kevan Vetter, senior director culinary and executive chef at McCormick. “Oils, which are more flexible and versatile than sauces, bring out the true flavors of peppers in multitextural heat enablers” like trending chile crisp and salsa macha, he adds.

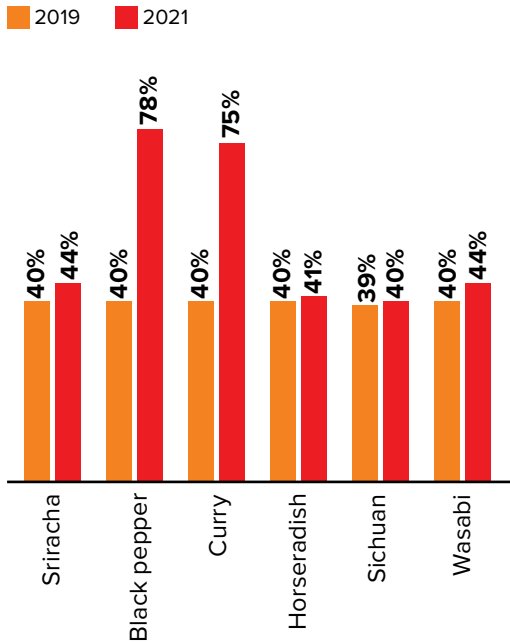
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## Percentage of global consumers who say most foods taste better with some level of heat

Source: Kalsec Hot & Spicy Survey Results, 2022

## Respondents who “tried and liked”



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Source: Kalsec Hot & Spicy Survey Results, 2022



# 89%

Percentage of global consumers who say they enjoy chile sauces

Source: ADM/FMCG Gurus Flavor, Colors & Textures Report, 2021

## Top 3 Restaurant Condiments, Sauces, Spices, and Seasonings

- 1 Sriracha variations
- 2 Ganjang (Korean soy sauce)
- 3 Guajillo chile sauce

Source: National Restaurant Association What's Hot 2023 Culinary Forecast





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Growth of Nashville hot flavor on restaurant menus during 2020

Source: Tyson Fresh Meats Foodservice/MenuTrends Infinite, 2021

## Fast-Growing Menu Seasonings Predicted Two-Year Restaurant Operator Penetration Growth

Nashville hot



Chimichurri marinade



Jerk marinade



Lemongrass marinade



Source: Trilogy Essential Ingredients/Technomic 2023 Trend Predictions Fourth Quarter



## A Dash of Salt Substitutes

- Health concerns will help drive a 7.9% compound annual growth rate in the global salt substitute market from 2022–2030, with projected sales of \$2.3 billion in 2030, reports The Brainy Insights market research firm.
- The U.S. Food and Drug Administration is seeking ongoing reduction of sodium in commercially prepared foods, beginning with voluntary guidance released last year for 163 categories with the goal of decreasing sodium consumption by 12% during a 2.5-year period.
- Dutch startup Fooditive plans to introduce LowSalt in 2023, an ingredient developed from potassium and sodium chloride that maintains the same taste as normal salt in partially reduced formulations, according to the company website.



# 81%

Percentage of consumers who are interested in trying new flavors that are inspired by global cuisines

*Source: Kerry proprietary research, October 2022*

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