PLMA CONSUMER RESEARCH REPORT

The Growing Popularity of International Grocery Products in the US

Based on an Exclusive Survey of American Shoppers by Surveylab for the Private Label Manufacturers Association

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OVERVIEW

Americans love international food products, according to a new survey conducted for PLMA by Surveylab, a global leader in customized online research. It revealed that shoppers are highly aware of the availability of international food products in their favorite supermarkets and food stores, can readily identify dozens of them on the shelves and can easily associate the products with specific countries and national and regional cuisines.

The 2020 survey also documents that consumers have strong opinions about the product qualities and features that appeal to them, and that they demonstrate a strong willingness to buy international food products for the first time. Younger generations who participated in the survey – millennials and Gen Z – were shown to be even bigger fans of international food products than the group as a whole.

Participants were also asked a series of similar questions about their awareness of and attitudes towards international non-food products, such as health and beauty offerings like perfume, cosmetics, hair care, kitchenware, and household products, among others available in a wide variety of their favorite stores. International non-food products also received high marks across the board from consumers.

PLMA's study involved some 800 women and men from throughout the US who identified themselves as the principal grocery shopper in their household.

INSIDE

HIGHLIGHTS: INTERNATIONAL FOOD PRODUCTS

- **Consumer awareness of international food products is high.**

  More than eight out of ten consumers in the study said they are aware of international food products that are sold in their favorite supermarket or food store. The figure is slightly higher among millennials in the study, at 87%. Only 4% of all respondents reported that their stores do not offer international food products.

- **A majority of American shoppers say they can identify the country of origin of all the food products in their supermarket.**

  More than half said they are aware of the country where all of their supermarket's food products are grown, produced or manufactured. An even higher percentage of millennials and Gen Z, both at 73%, say they are aware of the food products' origins. Overall, only 18% said they are not at all aware of the products' origins.

In the supermarket, how aware are you of the country where products are grown, produced or manufactured? *(Food items such as dairy, meat, frozen foods)*

Extremely aware	29.7%
Moderately aware	26%
Somewhat aware	26.3%
Not at all aware	18%
Total Respondents	**801**

To the best of your knowledge, does your favorite supermarket or food store offer international food products?

Yes	82.2%
No	3.9%
Don't know	13.9%
Total Respondents	**798**

International food items are familiar in the US across many categories.

Among international food products that consumers have seen offered at a supermarket or food store, the most often cited were cheese (seen by 58%), olive oil (53%), coffee and tea (49%); noodles, pasta, rice, and grains, (45%); candies, chocolates and sweets (44%); wine, beer, and spirits (44%); butter, yogurt, and cultured dairy products (42%); condiments and seasonings (41%); cookies, pastries, and desserts (37%); fresh fruits and vegetables (37%); fish and seafood (35%); crackers, chips, and snacks (34%); sauces (33%); dips, spreads, hummus, and nut butters (32%); deli, cured meats, and sausages (30%), breads and other bakery goods (30%); and canned fruits and vegetables (30%).

Which of the following international food products have you seen offered at any supermarket or food store?

Breads, other bakery goods	29.9%
Breakfast cereal, granola, muesli, oatmeal, etc.	26.8%
Butter, yogurt, cultured dairy products	41.6%
Candies, chocolate & other sweets	44.1%
Canned fruit & vegetables	29.9%
Cheese	58.3%
Coffee & teas	48.6%
Condiments, seasonings	41.3%
Cookie, pastries, desserts	37.2%
Crackers, chips & snacks	33.6%
Deli, cured meats, sausages	30.4%
Dips, spreads, hummus, nut butters, etc.	31.7%
Fish, seafood	34.6%
Fresh fruits & vegetables	37.4%
Frozen food items,	29.8%
Jams, jellies & preserves	28.2%
Liquid flavorings	21.8%
Milk (non-refrigerated)	13.7%
Non-alcoholic beverages	22.5%

Which of the following international food products have you seen offered at any supermarket or food store? *(Continued)*

Noodles, pasta, rice, grains	44.9%
Olive oil	53.3%
Pickles, olives	26.7%
Prepared foods	17.4%
Salty & savory snacks	22%
Sauces	32.7%
Spring & mineral waters, seltzers	22.5%
Vinegars, dressings	25.1%
Wine, beer & spirits	44.4%
Other foods	5.1%
Total Respondents	**786**

- **Respondents associate international food products with specific countries.**

When it comes to international food products consumers have seen at a supermarket or food store, the countries they most frequently associate the products with are Mexico (65%), Italy (55%), China (50%), France (41%), Japan (41%), Germany (33%), Canada (30%), India (29%), Thailand (24%), Greece (24%), Korea (23%), Great Britain (20%), Ireland, Scotland, Wales (18%), Australia (18%), Belgium (17%), Switzerland (14%), Israel (13%), and Poland (12%).

Regarding the international food products you have seen at any supermarket or food store, what countries or regions would you say they represent?

Afghanistan	2.4%
Australia	18%
Austria	6.3%
Belgium	16.7%
Canada	29.9%
China	49.7%
Japan	40.6%
Korea	22.5%
Eastern Europe countries	8.4%
Ethiopian, Sudanese, Sub-Saharan regions	7.2%

Regarding the international food products you have seen at any supermarket or food store, what countries or regions would you say they represent? *(Continued)*

France	40.9%
Germany	32.9%
Great Britain	20.2%
Greece	23.9%
Ireland, Scotland, Wales	18%
India	28.5%
Iran	5.4%
Israel	13.5%
Italy	55%
Lebanon	7.2%
Malaysia	6.2%
Mexico	64.8%
The Netherlands	5.3%
North Africa & Egypt	3.9%
Pakistan	5.4%
Poland	12.2%
Portugal	11.1%
Russia	10.4%
Scandinavia	8.1%
South America	23.1%
Switzerland	14.4%
Thailand	24.4%
Turkey, Caucasus region	5.4%
Other countries	4.5%
Total Respondents	**778**

- **Product assortment is seen as growing.**

  Nearly half in the study said that compared to five years ago there are now more international food products available in their favorite supermarket or food store. One in four said there is the same number available in their store.

- **American consumers want more international food products in their stores.**

  More than one-third would like to see their favorite supermarket or food store offer more international food products. The percentage who want more of them is higher in younger groups in the study: Gen Z (56%) and millennials (50%).

Would you like to see your favorite supermarket or food store offer more international food products?

Yes	34.8%
Maybe	34.7%
No	16.2%
Don't know	14.2%
Total Respondents	**795**

- **Many say international food products are priced higher than their domestic counterparts.**

  Four in ten said international food products are generally priced higher than similar domestic food products in their favorite supermarket or food store. One in four said international food products are priced about the same; one in five said the pricing varies.

- **Most US consumers are willing to try international food products.**

  A majority said they are willing to buy an international food product for the first time when they are shopping in their favorite supermarket or food store. Another third said they are somewhat willing to buy a product for the first time. Three of four millennials and two-thirds of Gen Z respondents in the study are willing to buy them for the first time. Only 8% overall said they are not willing.

- **The products are purchased often.**

  More than a quarter always or frequently purchase an international food product when they do their regular grocery shopping at their favorite supermarket or food store. Half of millennials and a third of Gen Z respondents buy international food products at that rate when they shop. Among all in the study, 43% said they buy at least one or two international food items when they shop, while another 22% said they buy three or more food items each time they shop.

- **One-third in America buy international food products online.**

Three in ten of all consumers in the study said they purchase an international food product of any kind frequently or occasionally online. Among younger generations in the study the degree of online purchase of an international food product increases sharply: to 53% of Gen Z respondents and 51% of millennials. At the other extreme, only 14% of pre-baby boomers and 16% of baby boomers buy them at that rate. Overall, 46% have never purchased an international food product online, and another 18% rarely have. In response to a separate question, 40% of all in the study (and 61% of the millennials) said they ordered food online from a restaurant or supermarket in the previous six months.

- **International food products are purchased often in other channels.**

Besides their favorite supermarket or food store, consumers also buy international food products at other types of stores, including mass merchandisers (cited by 38%), specialty food stores (30%), club stores (28%), low price stores (21%), neighborhood ethnic stores (20%), dollar stores (15%), local specialty food stores, such as deli, bodega (14%), and farmer's market (12%).

- **US retailers' store brands are well-recognized.**

When they shop for international food products, six in ten consumers in the study said they are aware of the retailer store brand that the products carry. Younger groups demonstrate an even greater awareness of the retailer's store brand: millennials (74% are aware) and Gen Z (67%). In a related question, half replied that when they shop for international food products, they are aware of "any brand" that they carry. Millennials were more brand conscious: Two-thirds of them said they were aware of any brand.

When you shop for international food products, how aware are you of any retailer's store brand they carry?

Very aware	23.3%
Somewhat aware	35.8%
Not very aware	21.3%
I don't think about brands	10.9%
Don't know	8.6%
Total Respondents	**798**

- **Many US consumers are buying more international products.**

Compared to five years ago, one-third said they are now buying more international food products when they do their regular grocery shopping. Again, among younger generations, the number who are now buying more international food items versus five years ago runs higher: millennials (at 46%), Gen Z (43%). Half of all in the study said they are buying the same number.

- **Taste is paramount for shoppers.**

The features of an international food product that consumers find appealing when they are considering its purchase include taste (69%), quality (48%), authenticity (36%), exotic flavor (33%), uniqueness (28%), packaging (19%), size or amount (19%), unusual ingredients (16%), and performance (12%).

Which of the following features of an international food product do you find appealing when you consider purchasing it?

Taste	68.7%
Quality	48.4%
Authenticity	35.6%
Exotic flavor	32.6%
Uniqueness	27.5%
Size or amount	19.4%
Packaging	19.2%
Unusual ingredients	16.4%
Performance	12%
Innovation	9%
Other	4.2%
Total Respondents	**792**

- **Recommendations of others are top buying influencers.**

  The leading influences that encourage a consumer to buy a particular international food product for the first time include the recommendation of family or friend (39%), the desire to try something new (37%), value for the money (35%), they tasted it at an ethnic or international restaurant (25%), they sampled it in the store (25%), they bought and enjoyed other products from the brand (25%), they saw it on a TV food show (24%), trust in the supermarket or food store (24%), country of origin of the product (24%), and trust in the supermarket or food store that is selling the product (24%). Among all influences specified, the respondent's ethnic heritage was lowest (13%).

- **Flavor and quality encourage consumers to repurchase.**

  The top reasons that encouraged consumers to repurchase a particular international food product were flavor (54%), quality (42%), overall satisfaction (41%), value for the money (37%), ingredients (26%), and authenticity (24%).

- **US consumers express some concerns.**

  Among the concerns they have before they buy an international food product, respondents cited price (39%), quality (34%), overall product safety (30%), ingredients (25%), pesticides or environmental impact (25%), inspection (23%), regulation (19%), perishability (18%) and availability (16%). Twelve percent said they have no concerns.

HIGHLIGHTS: INTERNATIONAL NON-FOOD PRODUCTS

Half of US shoppers surveyed are aware of international non-food products.

Forty-nine and nine-tenths percent of the consumers in the study said they are aware of international non-food products that are sold in their favorite supermarket, drug store, mass merchandiser, club store, department store, specialty health and beauty store; or home décor or home improvement store, among others. In younger groups the awareness level was higher: 58% of millennials and 70% of Gen Z respondents said they are aware of the products.

Nearly half say they know the origin of non-food products.

When they shop in a supermarket, 47% said they are aware of the country where the all of the store's non-food products – personal items, kitchenware, housewares – are produced or manufactured. Two-thirds of millennials said they are aware of the non-food products' countries of origin. Overall, only one quarter said they are not at all aware of the products' origins.

In the supermarket, how aware are you of the country where products are grown, produced or manufactured? *(e.g., personal products, kitchenware, housewares)*

Extremely aware	18.6%
Moderately aware	28.1%
Somewhat aware	28.1%
Not at all aware	25.2%
Total Respondents	**801**

Consumers identify the international non-food products in the store.

Among the international non-food products that respondents reported their stores offer, the most often cited were: kitchenware, such as cookware and bakeware, utensils (31%), consumer electronics and technology devices (31%), beauty and personal care products, such as soaps, skin care (31%), perfume, cologne (29%), housewares and small household appliances (27%), hair care (25%), health and wellness remedies (24%), cosmetics (23%); eyewear, sunglasses (20%), furniture (20%), and men's grooming products (15%).

Which of the following international non-food products have you seen offered at any supermarket or food store?

Perfume, cologne	29%
Cosmetics	23.4%
Hair care	25.2%
Beauty & personal care products, soaps, skin care	30.9%
Men's grooming products	15.1%
Health & wellness remedies	24.1%
Fitness products	12.7%
Apparel	35%
Eyewear, such as sunglasses	20.4%
Kitchenware, such as cooking & bakeware, utensils	31.3%
Housewares & small household appliances	27.3%
Consumer electronics & technology devices	30.5%
Furniture	20.3%
Other	10.7%
Total Respondents	**735**

- **More international non-food products are available now.**

  One-third of respondents said there are now more international non-food products available in their favorite store compared to five years ago. Another third said there is the same number of products.

- **Consumers want more of them.**

  One in four would you like to see their favorite store offer more international non-food products. Four in ten millennials and Gen Z respondents in the study want to see more of the products in their store.

Would you like to see your favorite supermarket or food store offer more international non-food products?

Yes	34.8%
Maybe	34.7%
No	16.2%
Don't know	4.2%
Total Respondents	**795**

- **Only one in four say prices of international non-food products are higher than domestic counterparts.**

  International non-food products are priced more, when compared to similar domestic non-food products in their favorite store, according to 26% of the respondents. One-third said international non-food products are priced about the same.

- **Half of US respondents describe themselves as willing first-time buyers of the products.**

  Nearly half are willing to buy an international non-food product for the first time when they are shopping in their favorite store. Another 39% said they are somewhat willing to do so. Fully 60% of millennials in the study expressed a willingness to buy international non-food products for the first time.

How would you describe your willingness to buy an international non-food product for the first time when you are shopping in your favorite store?

I am...

Very willing	16.9%
Willing	28.4%
Somewhat willing	38.5%
Not willing	8.9%
Don't know	17.9%
Total Respondents	**795**

- **International non-food products are often bought online.**

  Four in ten always/frequently purchase an international non-food product of any kind online. Six of ten millennials and half of Gen Z respondents in the study purchase the products online at that rate, compared to pre-baby boomers (22%) and baby boomers (28%).

- **American consumers are buying more international non-food products now.**

Compared to five years ago, 22% in the study (and 31% of millennials) are now buying more international non-food products when they are shopping at their favorite store. Half say they are buying the same number.

- **Non-food international products are purchased in many types of US stores.**

As for the types of stores in which consumers have purchased international non-food products, the leading channels cited are mass merchandisers (42%), online sites, such as Amazon (34%), supermarkets (27%), club stores (24%), department stores (22%), dollar stores (21%), housewares stores (20%), and home improvement stores (19%).

- **Half of US consumers are aware of the retailer's store brands.**

When they shop for international non-food products, half of respondents said they are aware of the retailer's store brands. Two-thirds of millennials are aware of them. To a similar question, 46% in the study replied they are aware of any brand the retailer carries when they shop for international non-food products. millennials, once again, were more brand conscious: 60% of them said they were aware of any brand.

- **Quality tops product features that appeal to American shoppers.**

The features of an international non-food product that consumers find appealing when they consider purchasing it are led by quality (56%), authenticity (32%), uniqueness (31%), and performance (30%).

Which of the following features of an international non-food product do you find appealing when you consider purchasing it?

Quality	56.1%
Authenticity	31.6%
Uniqueness	30.9%
Performance	30.3%
Size or amount	22.8%
Packaging	17.6%
Innovation	16%
Unusual ingredients	13.6%
Other	7.5%
Total Respondents	**789**

- **Personal recommendations from others are top influencers in buying a product for the first time.**

  Among influences that encourage a consumer to buy a particular international non-food product for the first time, the list was led by a recommendation from family or friend (52%), value for money (48%), saw item on TV (28%), want to try a new item (25%), trust in the store (22%), and trust in the brand (22%).

- **Quality is the chief factor in repurchase of international non-products.**

  When it comes to what reasons encourage a shopper to repurchase a particular international non-food product, top factors were: quality (48%), value for money (42%), overall satisfaction (39%), performance (30%), and trust in the brand (23%).

- **Some concerns regarding international non-food products were expressed.**

  Respondents expressed a limited number of concerns before buying an international non-food product, such as quality (42%), price (38%), and product safety (37%). One in ten (12%) have no concerns.

DEMOGRAPHICS AND INSIGHTS INTO SURVEY RESPONDENTS

Among the 800 respondents in the PLMA study, 54% are female and 45% are male. As the principal grocery shopper in their household, 38% expect to spend $100 or more each time they visit a supermarket. As well, 57% are married, 32% are single; 9% are divorced or separated.

In terms of education, 52% hold a four-year college degree or beyond and another 26% have some college, while 21% have a high school diploma or equivalent; 34% report an annual income of $50,000 to $99,000, while another 29% earn $100,00 or more.

Some 18% of those in the study have a parent who emigrated to the US, and for 17% at least two languages were spoken in their home while they were growing up. As well, 87% drive their own car for daily activities, 3% use public transportation, and 3% walk.As for their primary sources of news and information, 68% watch TV, 49% go online, 32% read a printed newspaper, 28% listen to the radio, 26% use apps, 23% depend on social media, 20% rely on word of mouth from family, friends, and colleagues, and 14% read a printed magazine.

In the prior six months, 51% said they made a recipe that they saw online, 34% read a book on an electronic device, 40% flew on a plane and 6% moved from another city or country. Among other recent experiences and activities they reported: 42% took a car journey longer than four hours, 36% visited a public library, 35% took a vacation with more than five days off work, 27% attended a live sports event, 19% did volunteer work, and 17% visited an emergency room in a hospital.

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