

# WHAT'S ON THE MENU IN 2018 GLOBAL FOOD & BEVERAGE TRENDS

Prepared by the Daniel J. Edelman Global Food and Beverage Sector  
March 2018

# ACKNOWLEDGEMENTS

Thank you to everyone who contributed to this year’s 2018 Food and Beverage Trends. This project takes months of researching, curating, synthesizing and defining a clear POV. In addition to thanking those listed below for their help in bringing a “glocal” approach to this report, we owe our design team – Ryan Faszczka and Karen Tian - a tremendous amount of gratitude for helping to bring the trends to life via beautiful design work and strong visuals. Our special thanks to Isabelle Furth for bringing her fresh eyes into a review.



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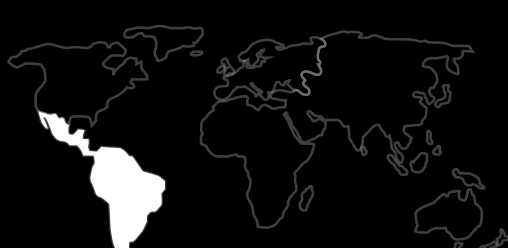
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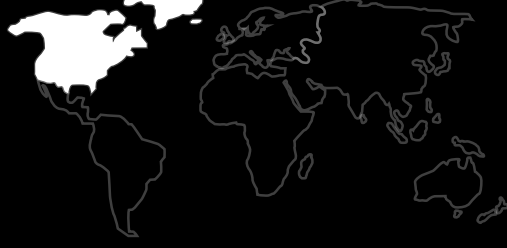
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Finally, special thanks to our friends at Mintel Analytics.

**01 TRIBAL  
EATING**

**02 INNOVATE OR  
EVAPORATE**

**03 ENDANGERED  
FOODS**

**04 GOING  
BEYOND  
TASTE**

**05 FOLLOW  
YOUR  
GUT**

**06 PLANT  
BASED  
PALETTES**

**07 HEALTHY  
C(M)OCKTAILS**

**08 DEMAND  
FOR DATA**

**09 WHOLE  
FOOD  
FEASTING**

**10 FUNCTIONAL  
MUSHROOMS**

**11 MALLS TO  
HALLS**

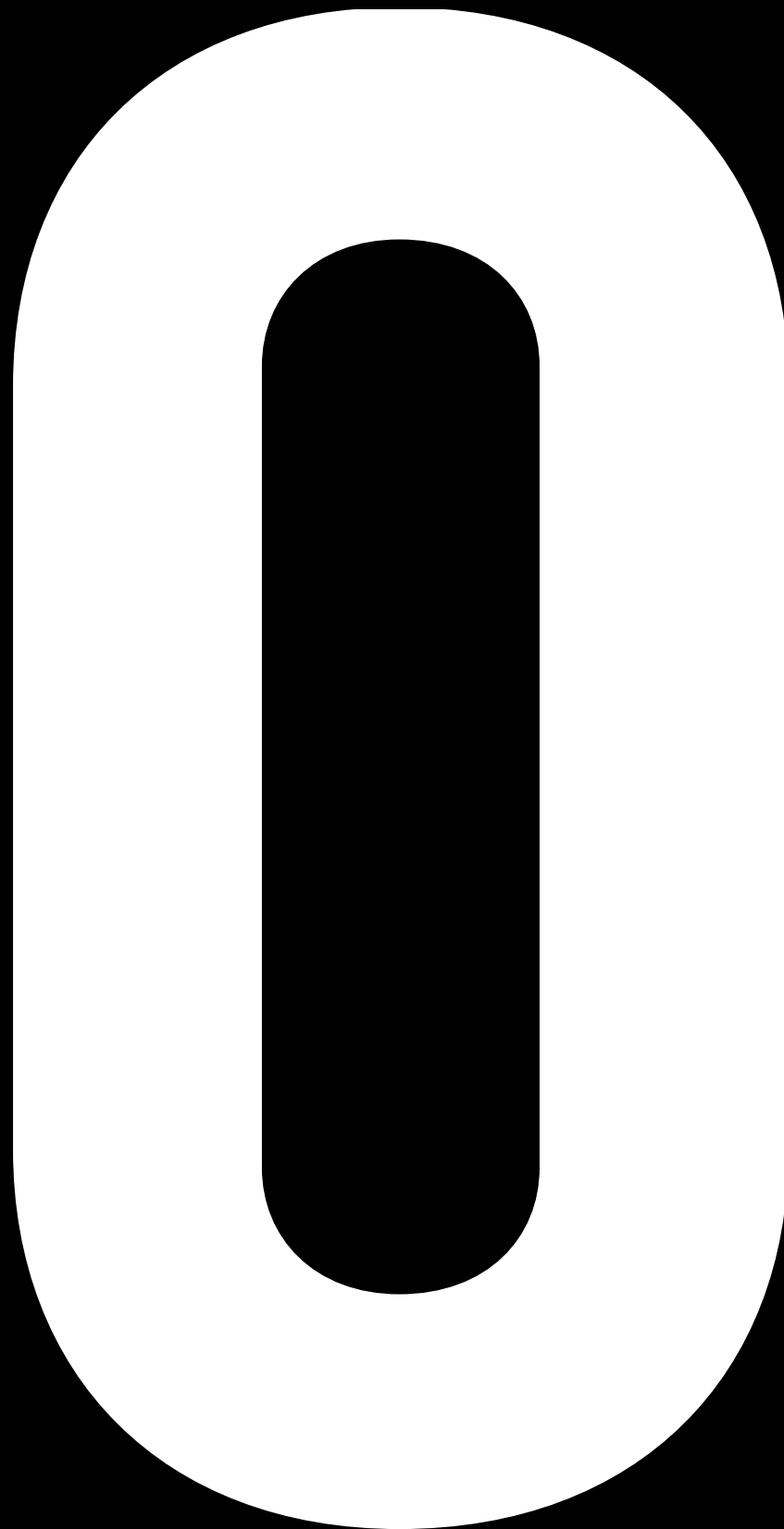
**12 GOING  
SOLO**

**13 FLOWER  
POWER**

**14 PURPOSEFUL  
PACKAGING**

**15 TRACEABILITY  
TRANSPARENCY  
& TRUST**





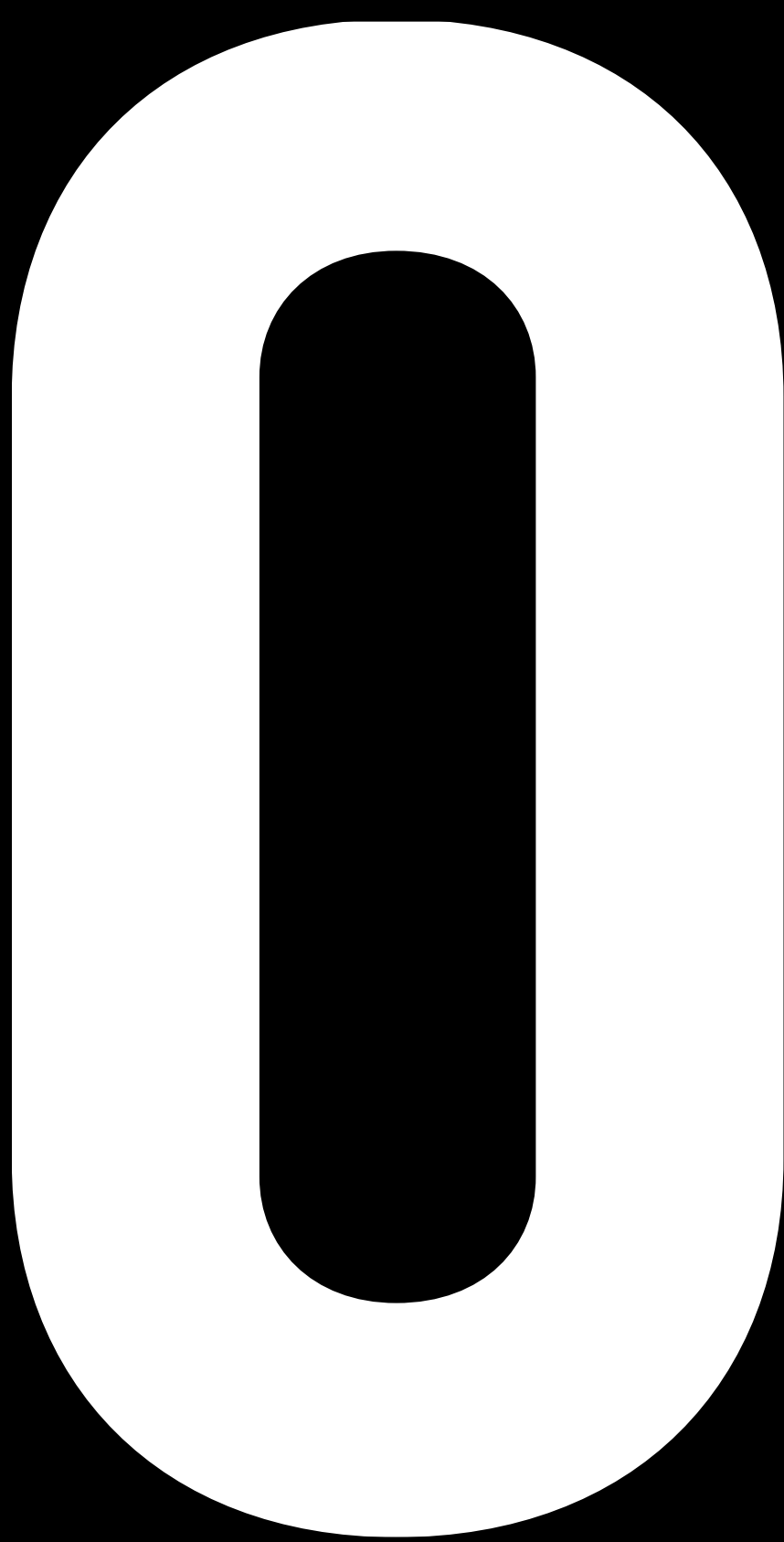
# TRIBAL EATING

Clean eating. Flexitarian. Gluten-free. Lacto-vegetarian. Lacto ovo-vegetarian. Low carb. Paleo. Pescatarian. Vegan. Vegetarian. Our diets increasingly define not only what we eat, but how we think about – and define – our community and our world. As our diets have developed into lifestyles, they provide a lens into our peer groups, our values, and even our politics.

And in our fast-paced, ever-changing mobile and digital environment, our diets have become a way of connecting us with our broader communities. Students of ancient history or anthropology know that tribes provide instinctual comfort and pride, based on common descent, culture, language and ideology. Now we can add diet to that list of commonalities.

So instead of saying “You are what you eat”, we may want to proclaim “We are who we eat with”.  
*What to Consider:*  
For communicators and marketers, think about how our tribes, and the values and behaviors they champion, reflect micro-segments that can be targeted and tapped into for engagement.





Under pressure to meet the needs of new consumers who don't just want to eat food, but want to experience it, use it to discover new cultures, and let it define who they are and what they value, brands and the companies who make them have faced a choice in recent years: disrupt or be disrupted? Rather than be pushed

to the side of the industry's plate by countless start-ups, many have turned up the heat on innovation, incubation and investment. The result will be continued sell-off of older lines; more incubation and aggregation, healthier and more sustainable product lines and a whole host of new products and services from iconic players.

# INNOVATE OR EVAPORATE

*What to Consider:*  
Expect even more disruption in the year ahead. Look for legacy food and beverage companies to continue to innovate, invest, and imitate the communications and marketing approaches of their disrupting peers.



# U

# B



## ENDANGERED FOODS

As our climate becomes more volatile and less predictable, our food system stressed. Droughts, typhoons, wildfires and inordinate temperature changes are putting some of our regional and global staples at risk of disappearing from our tables. Typhoons and heatwaves, and a decline in the number of dairy farmers led to butter shortages in Japan, mudslides impacted last summer's mushroom

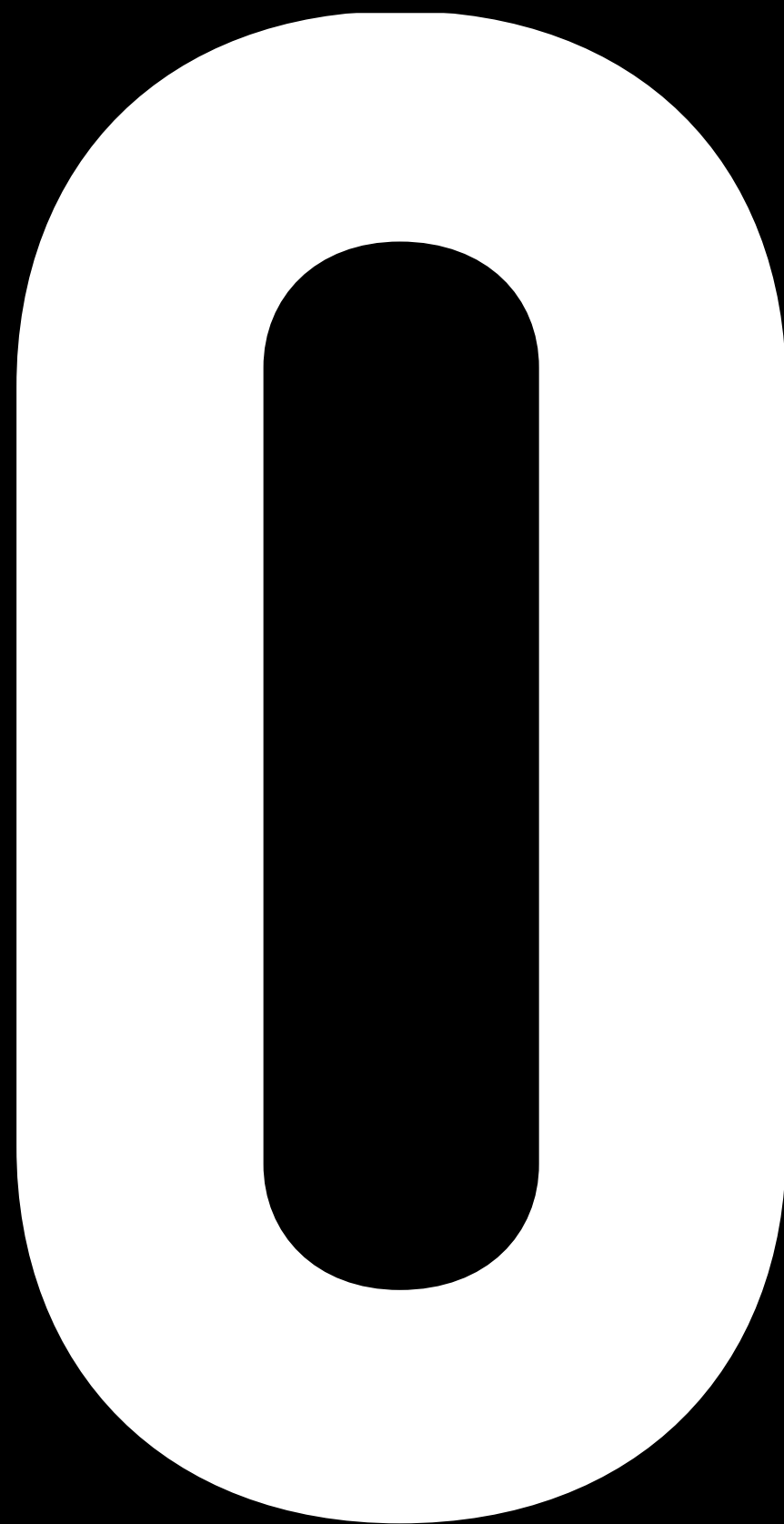
crops in China, and hurricanes threatened the Florida citrus market. Staples like avocados, cocoa, coffee, tropical fish and lobster, maple syrup, beans, cherries and wine are all on the endangered list. With 60% of the world's diet coming from corn, wheat and rice, scientists are raising alarm. They predict that a one-degree Celsius temperature rise will slow the growth rate of corn

by 7%. According to an Intergovernmental Panel on of between 10 and 25% by 2050.

### *What to Consider:*

As endangered foods hit the consumer radar through increased discussion and pricing, expect increased debate around how technology can help drive solutions and ensure the food supply we need to feed our growing population.





## GOING BEYOND TASTE

The palette of food colors is changing; the more the novel, the better. Why? We're all looking for something to frame and share on social media. Exotic, intense and beautiful. Bright pops of color are a must on every plate coming out of restaurant's kitchen – and every post, pin, snap or story that accompanies them. It's all about surprising and delighting.

The next attraction on this parade of sensations is texture, pleasing not exclusively the eyes, but also the palate. As VR becomes a reality, brands and chefs around the globe play with a mix of sensations to attract curiosity and provide consumers with interactive — and documentation-worthy — experiences.

*What to Consider:*  
Visual and textural satisfaction are more important than ever to the consumer experience, so we need to be factored into marketing efforts. In addition, flavor and ingredients companies must help stakeholders understand the value and benefits of their work to meet customer and consumer demand.



# O



## FOLLOW YOUR GUT

Gut health is no longer something we're shying away from. In fact, we're openly talking about our stomachs and how we can make them feel better. We are also more aware of the role that the microbiome plays in our overall health, with some considering the gut to be the second brain, given its ability to control hormones and promote various aspects of physical, emotional and mental health.

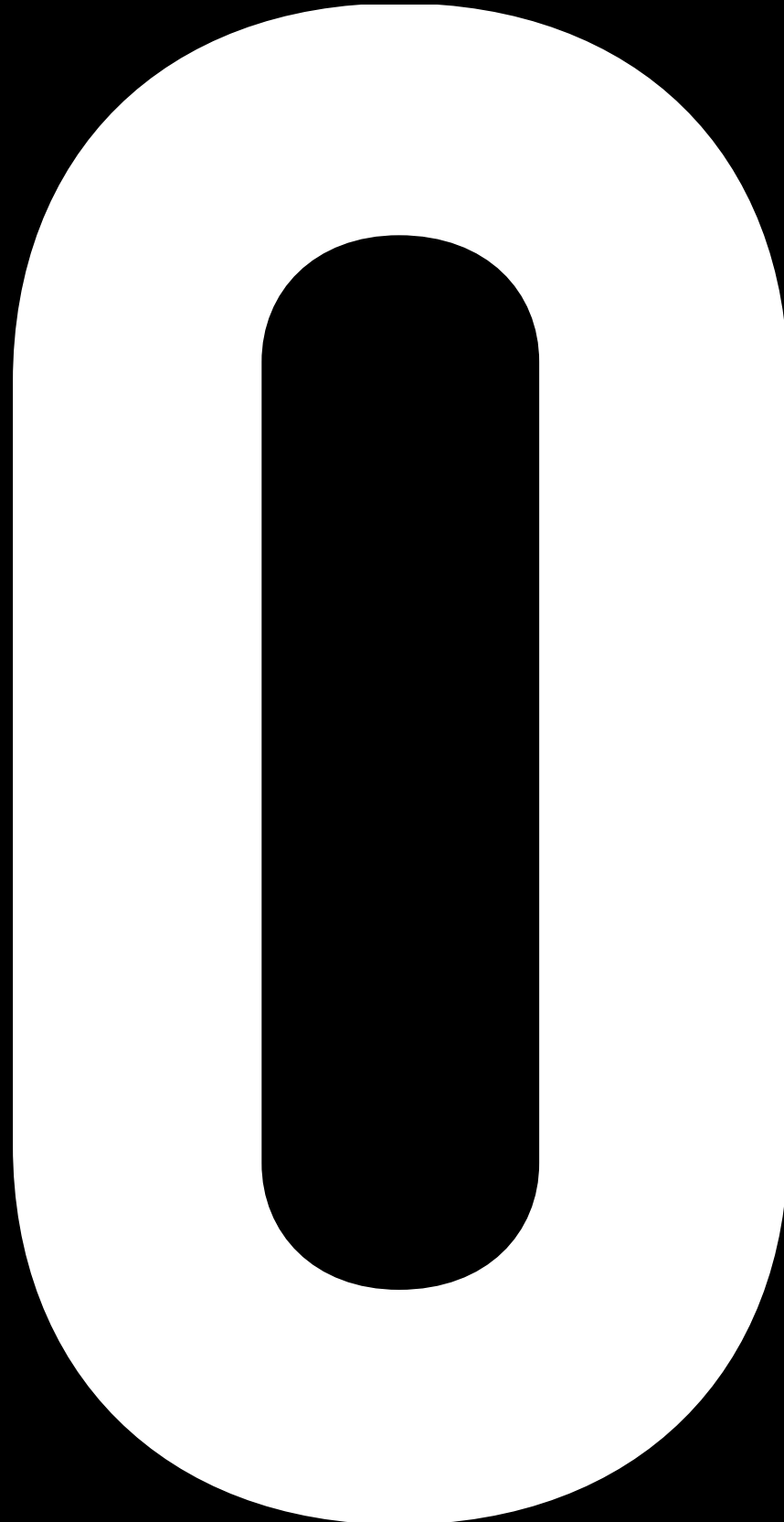
With science showing the link between gut health and everything from obesity to diabetes, allergies, cancer, eczema and asthma, it's no wonder that the promotion of good bacteria in the gut is taking center stage. Both probiotics and fermentation products continue to build stature in the maintenance and promotion of health. From yogurt to Kombucha, kimchi shots,

and pickle and sauerkraut juices, there's increasing demand for these anti-inflammatory, health-benefiting foods and drinks.

*What to Consider:*

As our appetite grows around food as medicine, look for more innovation, more investment and possibly more regulatory discussion.



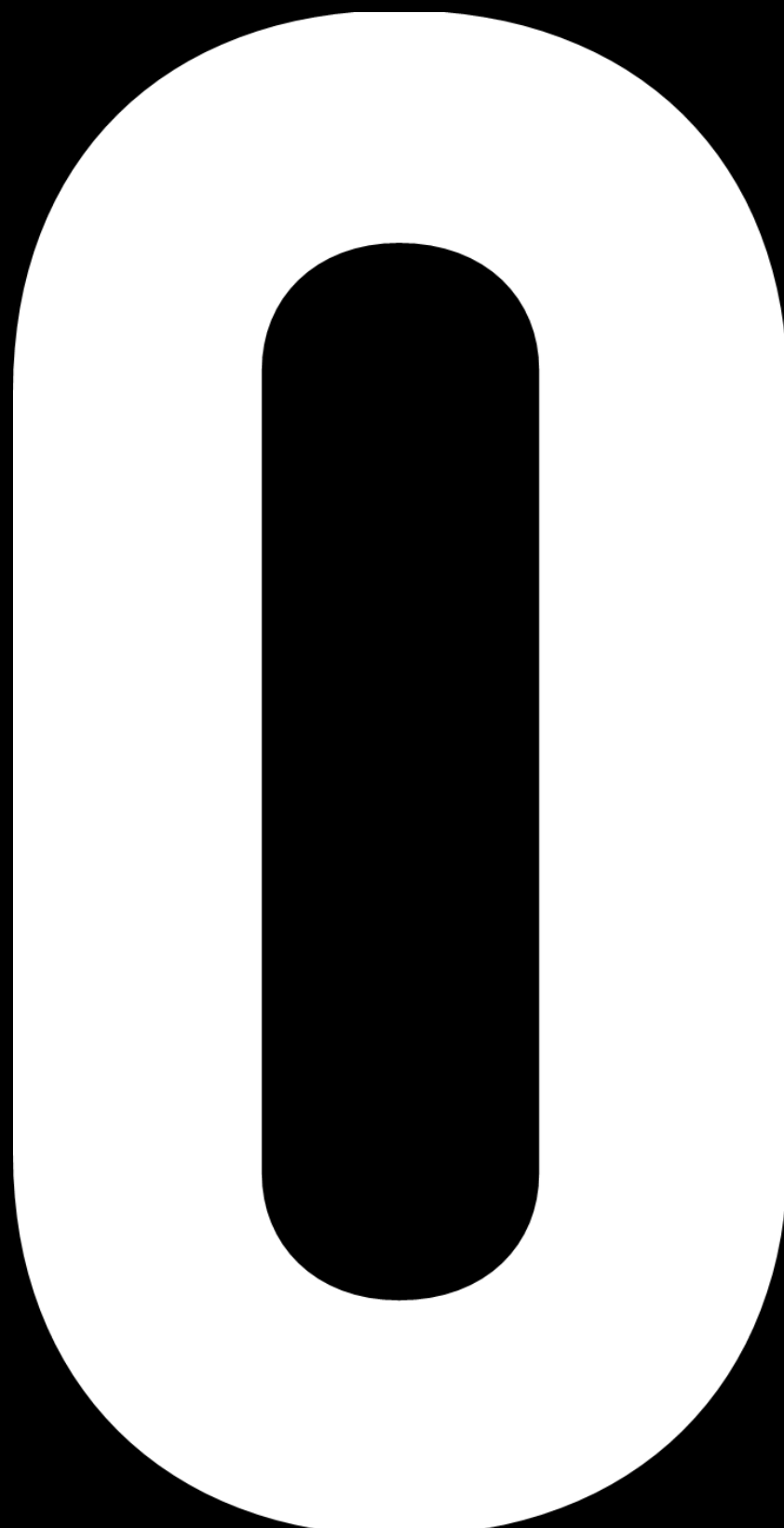


The road to plant-based food and drinks seems to have no U-turn. Whether because of health, the environment or both, we are demanding more plant-centric products. And the industry is responding. A wider range of ‘veggie’- and plant-based FMCG/CPG options are everywhere. Foods like mock schnitzel Milanese, faux fish, and plant-based protein bowls are finding their way into

the mainstream. And longtime favorites like pizza now come with cauliflower crusts, scrambled eggs are made with mung beans and hamburger meat is “grown” in a lab or blended with plant proteins. Look for more CPG/FMCG product plant-based offerings in everything from entrees to drinks, snacks and desserts. Also, watch the shift in both food service and restaurant offerings.

*What to Consider:*  
Should companies start making commitments to start using less animal-based ingredients or more plant-based products? Look for CPG/FMCG companies talking about plant-based products and ingredients as a value proposition from both a corporate reputation and brand promotion standpoint.





Cocktail culture is following food culture and shifting to drinks that are healthier and more sustainable. Mixologists are stepping up and meeting the demands of younger consumers who are more health conscious – but no less sociable – and want to enjoy lower alcoholic beverages made from organic or gluten-free ingredients. It’s not just alcohol content that’s changing. Sugar has already

been decreased in foods, but now it’s time to do the same to drinks. So the focus is on adding flavor instead of sweeteners or alcohol. Drinks lists routinely offer lower alcohol organic wines, gluten free beers and low- or no-sugar cocktails based on healthy ingredients. In some regions where cannabis is legal, vaping and edibles are becoming the preferred

alternatives. In other cultures, this is due to religious beliefs.

*What to Consider:*

Expect the thirst for low- and no-alcohol drinks to grow. Look for more innovation in this space from both the non-alcoholic beverage and distilled spirits companies. In the culinary space, look for more pairings between foods and lower-alcohol drinks.



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# 8



## DEMAND FOR DATA

There's no doubt that the greatest disruption is happening in the retail and grocery space, which is finally fully embracing technology. E-commerce has officially transformed the way we shop and the way grocers think of the role they play in the vast food and beverage landscape. Now, grocers can capture new data like never before – and they can use that data to help companies understand

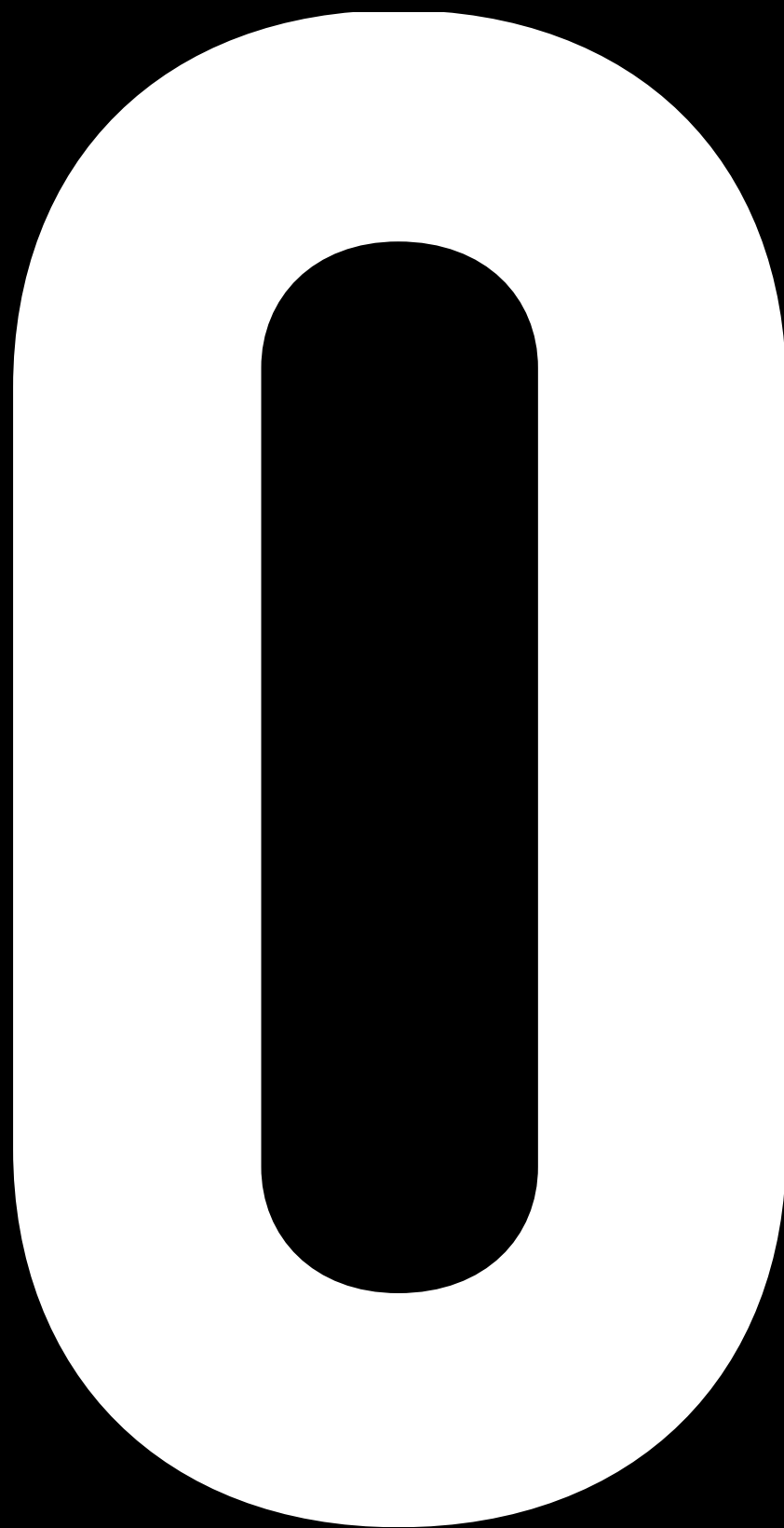
consumers interact with products that sit on their shelves or e-commerce platforms. Food retailers are combining consumer insights on purchases and other online activities to target consumers based on their habits and preferences both in-store and online. So instead of thinking about grocery stores and food markets as places to buy food, perhaps we should be thinking of them as

data companies that happen to sell foods and beverages.

*What to Consider:*

According to Edelman Digital's 2018 Trends 'devising the best possible end-user experience is a must.' So to retain customers, grocers must underscore relevance, efficiency and affordability. Without it, customers will take their loyalty elsewhere.





# WHOLE FOOD FEASTING

Think of foods – be it a piece of produce or an animal. The possibilities they offer, in terms of flavors, textures and combinations are endless. In a world with increased interest in sustainability, root-to-stem and nose-to-tail cooking is a natural shift for consumers to make, driving culinary experimentation in kitchens everywhere. With one eye on sustainability

and another on culinary creativity, this trend means not only using all parts of a fruit, vegetable, pig, cow or fish, but also combining leftovers to create tasty meals that both reduce waste and introduce us to new foods and ingredients we may not have been familiar with in the past. So, be it an unfamiliar cut of meat or the roots or leaves of a vegetable, it's something

we're all enjoying in new ways.

*What to Consider:*

This evolution of farm-to-table allows new experiences for culinary exploration while contributing to sustainability. Trend leaders have an opportunity to steer the conversation with mainstream consumers and the push to use “the whole food” and therefore reducing waste.





# FUNCTIONAL MUSHROOMS

Functional mushrooms have mostly been used in dietary supplements, but now their nutritive (and non-hallucinogenic) properties are said to show up in ingredient lists everywhere. With their umami-rich flavor, Reishi, Chaga, Cordyceps and Hedgehogs are being put to use in bottled drinks, coffees, smoothies and infusions, enriching our tastebuds in surprising ways.

Not only is the mushroom push about flavor; it's also about health. If you're looking for a wellness booster, Maitake is said to help regulate blood sugar levels, while Chaga neutralizes the acidity in the stomach. Mushrooms' rich flavors also lend themselves to broths, and their creamier brethren work well with cocoa, chocolate and coffee flavors.

Finally, mushrooms also blend well with meat to meet consumers' plant-based aspirations.  
*What to Consider:*  
Functional foods are more common on consumers' shopping lists. Brands have the opportunity to 'introduce' this next superfood by leveraging benefits that may still be unknown to many.





Long a tradition in Europe and other parts of the world, food halls have debuted, expanded and been updated across the globe, providing high-quality, cultural food experiences. Showcasing a variety of vendors, they are a destination for foodies willing to experiment while representing a 'push-back' on the e-commerce trend by humanizing the experience. Now, plans for new and bigger halls are on the rise. Eataly now has

outlets around the world in places like Sao Paulo, Monaco, Seoul, Japan and Istanbul. In addition, grocers have found new ways to use empty aisle space, and have developed their own form of food halls, or "grocerants." For up-and-coming chefs who are looking for options to survive mounting restaurant and retail pressures, food halls and 'grocerants' allow them to build their careers and reputations while consumers can try,

and take home, their culinary creations.

*What to Consider:*

When it comes to food, the experience rules. Differentiation will come from offering consumers what they can't get online – letting them see, smell and taste their foods. Food halls and "grocerants" are now the places where consumers experience foods for the first time, take that experience home, and come back for more.





# GOING SOLO

In many regions of the world, we're settling down later – or not at all. In addition, there has been a rise in the number of elderly living alone. For the food industry, this is leading to a need to adjust portion sizes and packaging – offering smaller versions of products to attract new and different types of customers who want delicious and nutritious foods, but they need it for one instead of a family of four.

Similarly, as more people move into cities, hectic urban lifestyles are leaving less time for meals. So, it's not just about the packaging that's being down-sized. Everything from kitchen appliances and even kitchens themselves are getting smaller. Expect this trend to grow with continued population shifts and increased GDP in newer markets.

*What to Consider:*  
As households populated by one person are rapidly increasing around the world, companies can use single packs as a marketing advantage. It's also a way to contribute to food waste solutions. For communicators and marketers, there is an advantage to understand the nuances of this audience segment and answer their needs.



# 13



## FLOWER POWER

Floral flavors are popping up, with chefs using edible flowers in everything from drinks to garnishes, and spice rubs to snacks. Cocktails featuring floral flavors – such as elderflower, violet, hibiscus, lavender and rose – are particularly popular. Amateur mixologists can try their hand with the trend at home, with a growing assortment of edible flowers and

floral-flavored mixers available through food retailers. So instead of admiring beautiful blooms or enjoying their fragrance, consumers will taste flowers in a whole new way: latte coffee with lavender, rose hibiscus tea, violet cakes and sparkling elderflower wines will soon be commonplace. In the coming year, look for these and others such as clove-scented dianthus, the

sweet infusion of shungiku petals and the sweet-oniony flavor of allium.

### *What to Consider:*

As the search for healthier options for drinks and foods keep increasing, floral flavorings can help make food both more pleasing to the eye and more pleasing to the taste buds.



# 14



## PURPOSEFUL PACKAGING

As consumers demand more from the brands they consume, they're certainly putting pressure on food and beverage brands. Brands have been responding by establishing connection and engagement with consumers in fun, emotional and sometimes provocative ways. Packaging has been the most interesting channel for this connection. It's been transformed in ways that engage consumers, make

them feel part of a brand "family", lift their moods, and even personalize the brand experience. For example, Nissin cup noodles collaborated with popular Japanese animation film Kimi No Na Wa, and designed packaging so that a secret message appeared on the lid as hot water was added. Further, Lay's global purpose campaign, "Pass the Smile", engaged consumers in ways that allowed them to become

part of both the brand's purpose and its packaging.

### *What to Consider*

Expect to see even more engaging ways of connecting through packaging - especially the use of mood-based and color psychology to convey products' benefits. Also, look for continued use of packaging to convey, and engage consumers in, brands' purpose platforms.



# 15



## TRACEABILITY TRANSPARENCY & TRUST

According to Edelman's 2017 Earned Brand Study, 30% of consumers worldwide say that they make belief-driven purchase decisions more than they did three years ago. In a world driven by such behavior, consumers require complete and total transparency from their food and beverage brands – and the companies that make them. So, there is no choice for brands but to evolve. Technology plays an important

role in this effort, providing what is necessary for food and beverage manufacturers to go beyond transparency, democratize traceability and build trust. This allows consumers to be not only aware of what they are eating, but also where it comes from, how it's made and how it's kept safe. Now, by simply scanning the food item's label, technology allows us to trace every aspect of the foods we consume – from field, lab or the sea, and into our pantries.

### *What to Consider:*

As consumers demand more accountability, voluntary and based-on-trust-technology is a higher form of transparency to which companies aspire. That will put more pressure on ingredient and flavor manufacturers. It will also create more discussion and understanding of blockchain's potential in building trust.



# THANK YOU