



Industry Trends & Insights

Wizard of Lightbulb Moments

For the last year we have been immersed in the familiar ... in comfort food and beverage. Now the switch has been flipped and we are heading back towards experimentation. Consumers have been under a cloud of fear between the Recession and COVID-19. Fear and lack of confidence drives comfort and the familiar to gain the spotlight. With the Recession resolving and COVID-19 having gone through a temporary calm (Delta threatens that, but that is for another newsletter), confidence is making its way back. Confidence, and the waning of fear, causes a reversal of flavor trends. With confidence comes an uptick of extremes in one's life – for food and beverage that means we turn towards extremes on the pallet and seek new experiential drivers. Among the poster children for consumer confidence are citrus, hot chilies, dry cooking methods - we like to set things on fire when we are feeling confident. Say goodbye to steaming, braising, and slow cooking and hello to grilling, broiling, and frying.

For beverage a return of calm means alcohol use will decrease but cocktails will become more extreme – smoke, nitro, bitters, tiki, shrubs – you get the picture. Lemonades are a better place to be than iced tea, mocktails return, and seltzers will glide effortlessly between alcohol and non-alcohol.

Desserts will move from grandma to global, dairy will also go global, and snacks will tilt back towards healthy and away from indulgent. Another confident behavior to watch for is foraging – you would think this behavior would rise during a Recession, but you have to be wicked smart or dead crazy to forage. It is a brave behavior.

If you think of this move toward more extreme flavors as a blender turned on high – then Inflation slows that blender down. It doesn't reverse it. Consumers have been reacting to Inflation but not to the newer Delta strain of COVID-19 ... until now. Delta will also slow the blender.

What is the perfect spot to be for the next 6 months?? Look to hybrids, mashups, and stuffed foods. These offer just the right combination of familiar with an edge. Fusion is farther off and don't bank on insects for a while. Stay safe everyone.

Indulgent Flavors Shake-Up Breakfast Offerings

According to Innova Market Insights, the need for indulgence is no longer limited to snacking and after-dinner treats. As a result, the market researcher sees a rise in indulgent breakfast foods and flavors. Innova Market Insights latest report – entitled *Flavors by Occasion* – reveals that the likes of cakes and cookies prove popular indulgent flavors at breakfast. Overall, consumers tend to eat healthier products for the first meals of the day, outlines Parra, including cereal, juices, yogurt, fruit. Moreover, brown flavors, cake, cookies and pie concepts are most evident in cereals, he observes. Cake, cookie and pie flavors increased by a 9 percent CAGR over 2016-2020, while brown flavors (such as chocolate, caramel and peanut butter) increased by 6 percent. Sweet choices Milk chocolate is currently the leading flavor in cereal products, including breakfast cereals and cereal and energy bars. However, it is flavors inspired by the bakery category, which see some of the strongest growth. Cookie flavors increased by 30 percent CAGR and brownie by 26 percent over 2016-2020. Furthermore, chocolate remains the top snack of the COVID-19 pandemic, with nearly 90 percent of US consumers purchasing some form of chocolate candy within the last three months.



Sources: Innova

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KEY INSIGHTS

Cake, cookie, pie flavors increased by a 9% CAGR 2016-2020



Ancho, Thai chili pepper, Toban Djan, Bulgogi trending



5 types of Mexican and Latin American cuisine, grew 15.6%



32% of consumers prefer new, spicy and bold flavors in snacks



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Barbecue: The Perfect Canvas

The top dishes with barbecue mentions are barbecue chicken pizza, barbecue chicken sandwich, barbecue chicken, pork ribs, then chicken wings apps, in that order. The fastest-growing preparations paired with barbecue mentions are fire-roasted (+50.0 percent year over year), rotisserie (+26.5 percent year over year) and raw (+18.5 percent year over year), according to Technomic. Of the five barbecue dishes with the greatest purchase intent scores, “preparation descriptors are a common theme, with phrases including ‘roasted to fall-off-the-bone tenderness,’ ‘hand-crafted,’ ‘serve it hot off the grill,’ searing in the flavor,’ ‘slow braised’ and ‘premium, thinly sliced tender and juicy’ all in descriptors of the top five”. The top global ingredients paired with barbecue are jalapeno, cilantro, teriyaki sauce, chipotle and Parmesan. Mentions of ancho, for example, are up 10.5 percent year over year with barbecue, and mentions of Thai chili pepper are up 10.2 percent. Barbecue curry, North African flavor infusions in barbecue sauce, toban djan (fermented Chinese chili bean paste) in barbecue dishes and Korean barbecue (bulgogi), are also trending.



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HOT, HOT, HOT!

Hot Hot Hot!!: Like most categories, sales growth in Mexican foods shifted from foodservice to retail during the year following the pandemic, and like most categories, it caught fire. The overall “Handheld Entrées” category, which includes five types of Mexican and Latin American cuisine, grew 15.6% to \$1.6 billion in sales for the 52 weeks ended Feb. 27, according to multi-outlet data from Nielsen. Within that category, sales of burritos rose 10.6% to \$715.8 million, tamales were up 16.4% to \$148.1 million, tacos skyrocketed 31.0% to \$126.0 million, quesadillas increased 14.1% to \$48.1 million, and empanadas gained 13.0% to \$30.0 million, Nielsen found. The National Pork Board has noticed growth and popularity in Mexican foods and ethnic cuisine in general, says Tara Dugan, director, consumer, and marketplace insights. “The landscape of the country is really changing. The younger generations are more multicultural than ever,” she says. “That, of course, is influencing a lot of the trends we’re seeing.” IRI data from calendar year 2020, provided by the National Pork Board, shows that the supermarket ethnic aisle overall grew about 24%-year over-year, while Mexican food sales were up 23% and Mexican sauce sales rose 22%, respectively. Nearly one-third of respondents (32%) to a March 2021 survey by the pollster CivicScience (conducted in partnership with the National Pork Board) named Mexican as their favorite type of cuisine, and 20% said they eat it at least four times a month, Dugan notes.



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Snacks Are Essential as Consumers Prepare to Break Out This Summer

Frito-Lay’s latest US Snack Index found that 80% of consumers have made plans for Memorial Day, including many activities outdoors like attending a barbecue, spending time at the park, visiting the beach, traveling, or playing sports. In 2020, 82% planned to stay at home alone for the holiday. Additionally, 50% of vaccinated adults said they plan to spend time with people outside of their household for Memorial Day. The Snack Index found that 84% of consumers cited summer snacks as a staple of the season and 80% said snacks are essential to moments they enjoy. More people are getting snacks in-person at the grocery store (a 14-point increase from 2020) and 35% are picking up snacks at convenience stores. Online snack sales are up 73% year-over-year. The most important thing to consumers is convenience or having tried-and-true favorites for 89% when choosing a snack. Chips are the top snack to stock up on for nearly all summer activities and two-in-three consumers say they prefer to stick with the classic, traditional flavors this summer. Americans are getting more adventurous in 2021, with consumers preferring new, spicy and bold flavors (25% in 2020 vs. 32% in 2021) and higher among millennials and Gen Zers (45%).



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Sources: Technomic, PowerReviews, FLNA

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Operators Get Creative as Spicy Items Grow In Popularity

Operators get creative as spicy items grow in popularity: Creative chile-laden food & drink continue to expand on menus. The trend toward hot and spicy has been heating up for some time now, with consumers eating — and seeking out wherever they go — more hot and spicy food and drink. New research from Kalsec, a global producer of spice and herb flavor extracts, indicates that more than 50% of consumers say that they choose spicy options when dining out or eating at home, double the number from just two years ago.

Sources: Kalsec

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