

KANTAR

Finding the future series

FOOD



What's in store on our culinary adventure?

1.

Introduction
& Framework

2.

Consumer
needs

3.

Understanding
the consumer

4.

The sustainability
takeaway

5.

Market
rundowns



Click to navigate



Before we get into the main course

Customize this future of foods report for your market(s) and your category. **For more information or questions, please contact:**

Leverage the most meaningful search and social data to better understand trends everywhere, anywhere, with speed and at scale. Unlock the power of big data amplified by tech to shape the brands of tomorrow through Kantar's Dx Analytics.



Cynthia Vega
Global Product Lead
Kantar

cynthia.vega@kantar.com



Sagar Ramsinghani
Global Commercial
Kantar

sagar.ramsinghani@kantar.com



Serene Wilson
Global Insight
Kantar

serene.wilson@kantar.com



Ashraya Chakraborty
Global Product Marketing
Kantar

ashraya.chakraborty@kantar.com



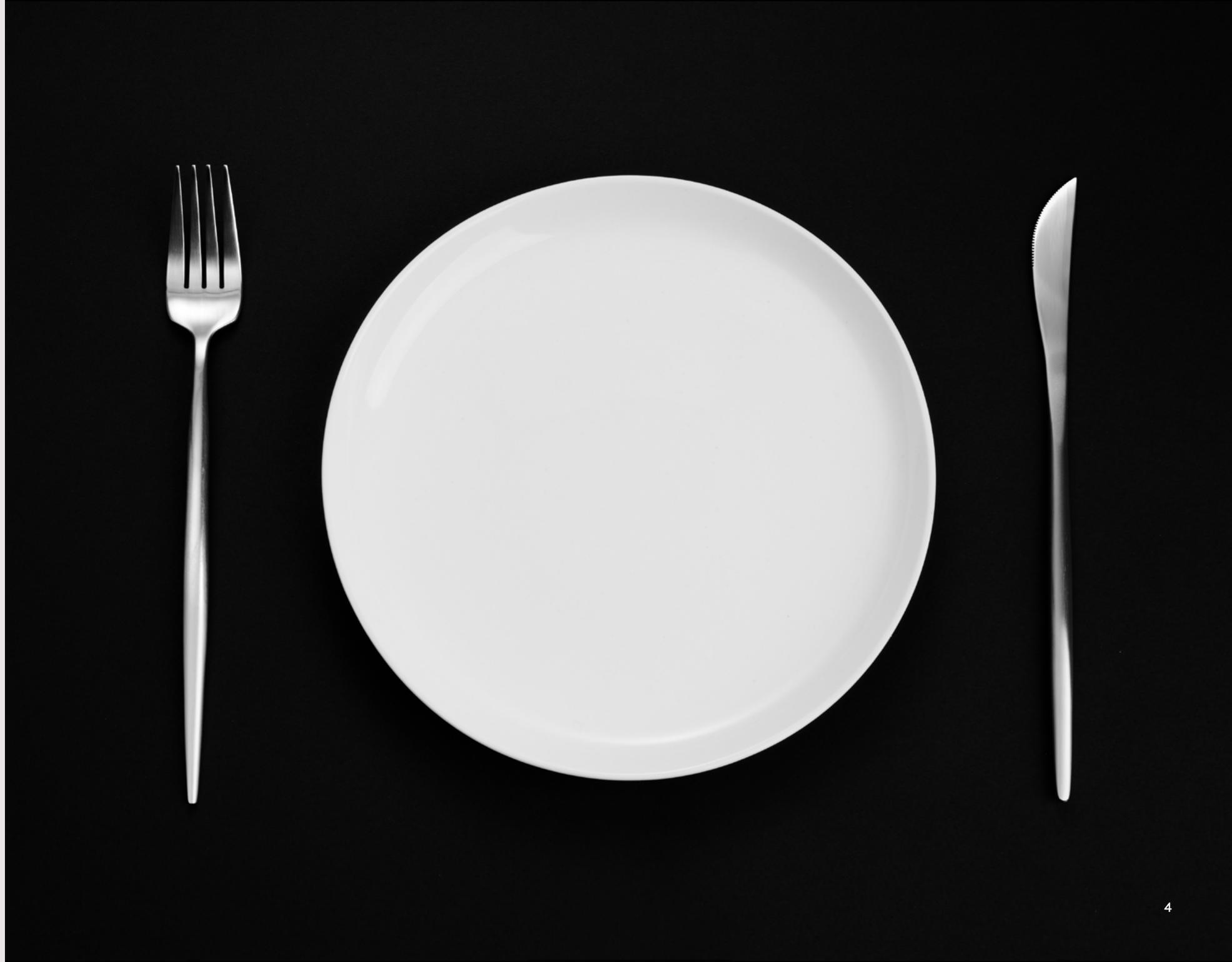
Intr

Welcome to the fourth edition of Kantar's *Finding the future series*, **your guide to the latest trends driving consumer behavior globally.**

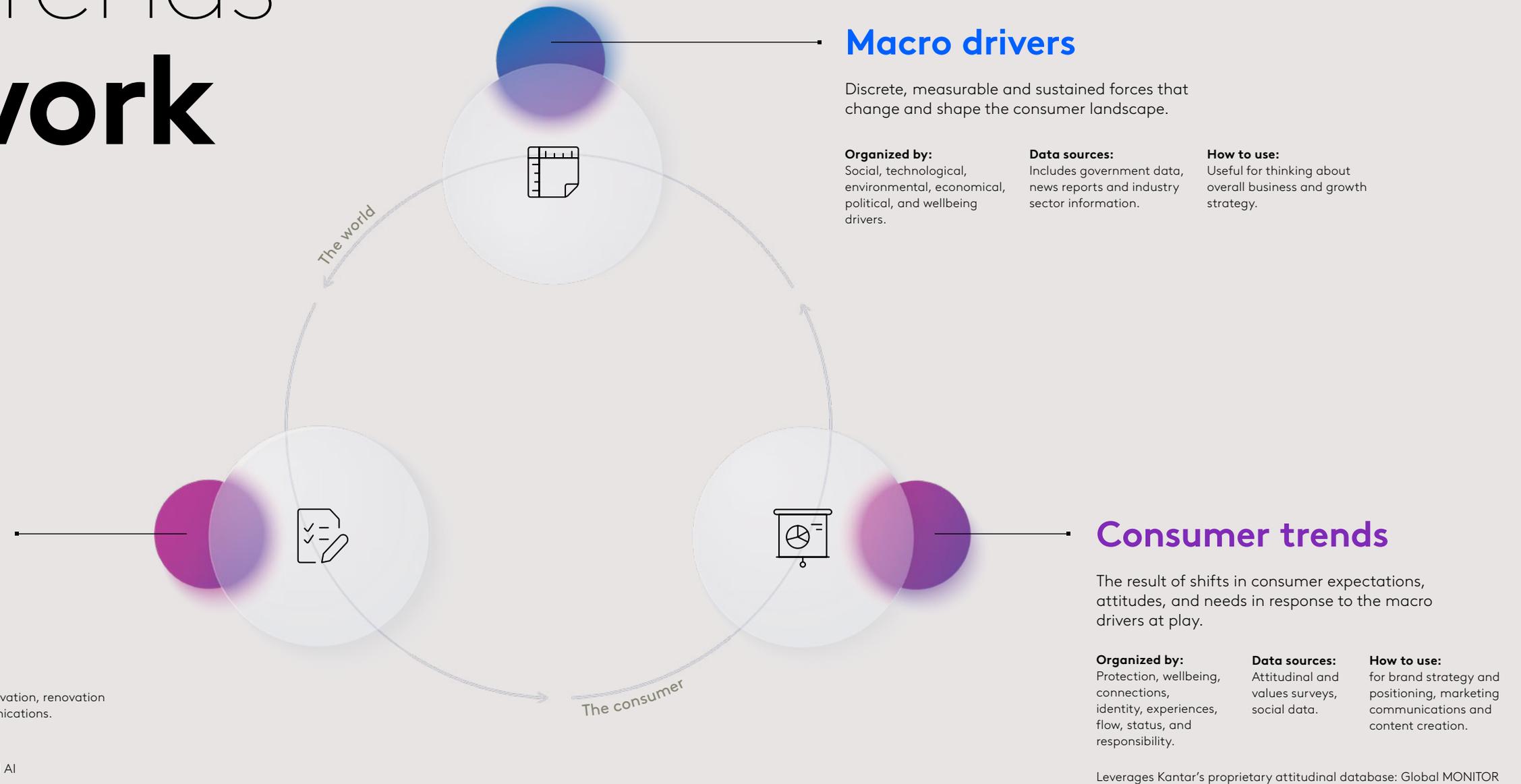
Powered by Kantar's Dx Analytics proprietary toolkit, we apply AI and analytics on digital data (search and social) to identify emerging trends at speed and scale.

By layering human insight and Kantar's trends framework, we identify growth opportunities for brands across markets, languages, and categories in real time.

In this issue, we showcase emerging trends linked to food and beverages enabling brands to map and identify future innovation, growth and activation opportunities.



Kantar trends framework



Macro drivers

Discrete, measurable and sustained forces that change and shape the consumer landscape.

Organized by:

Social, technological, environmental, economical, political, and wellbeing drivers.

Data sources:

Includes government data, news reports and industry sector information.

How to use:

Useful for thinking about overall business and growth strategy.

Category/Product expressions

Leading-edge manifestations of energy in any market. Includes types of products, benefits and ingredients.

Organized by:

New products, services, subcultures, messaging campaigns, etc.

Data sources:

Social and search, panel and industry data.

How to use:

Product innovation, renovation and communications.

Leverages Kantar's Dx Analytics proprietary tool powered by big data and AI

Consumer trends

The result of shifts in consumer expectations, attitudes, and needs in response to the macro drivers at play.

Organized by:

Protection, wellbeing, connections, identity, experiences, flow, status, and responsibility.

Data sources:

Attitudinal and values surveys, social data.

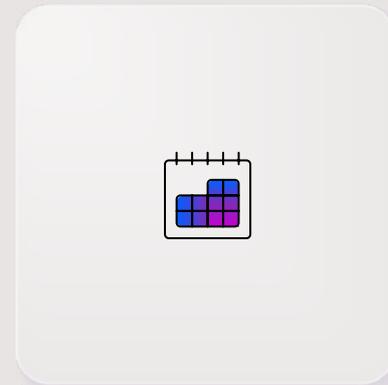
How to use:

for brand strategy and positioning, marketing communications and content creation.

Leverages Kantar's proprietary attitudinal database: Global MONITOR

How we did it?

We looked at over **36bn+ Google searches** linked to **180+ topics** spanning **9k+ trends globally** over a span of five years to uncover emerging trends.



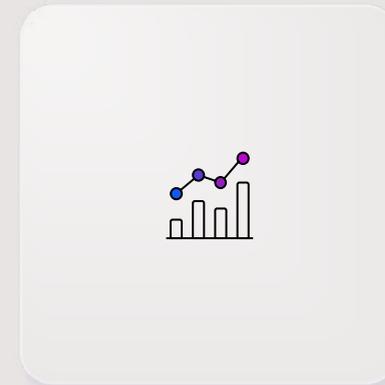
2018-2023

Time period



2023

Predicted data



36 billion+

Data points

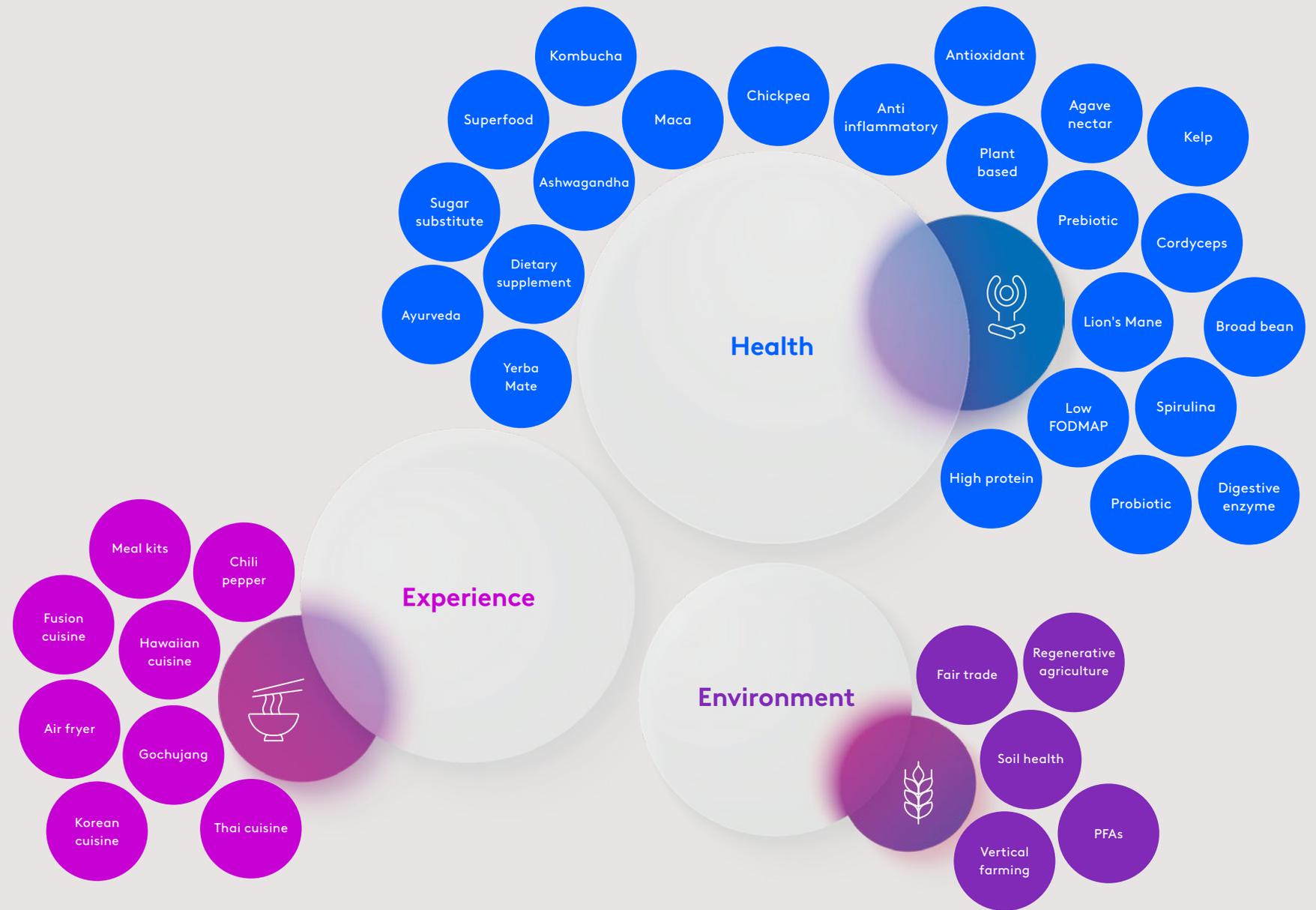


9,130

Number of search trends evaluated

The **three** key pillars driving the narrative on trends

What do consumer want?
How does the evolving context of search translate to trends?



Manifesting into **ten** trends

1.



Cognitive reloaded

2.



Plant-based bolsters, the **protein narrative**

3.



Gut **health** is life

4.



The great **sugar** debate

5.



Precision **nutrition**

6.



Sea plants are the **new superfoods**

7.



Ancestral ingredients pivot from Asia

8.



Swicy, the new flavour profile

9.



Rethinking home cooking steams ahead

10.



Sustainability gets granular

The background is black with several walnuts and almonds scattered across it. The walnuts are mostly in the top and bottom corners, while the almonds are more centrally located. The text is white and positioned on the left side of the image.

Cognitive reloaded

The pursuit of cognitive
health intensifies.

1

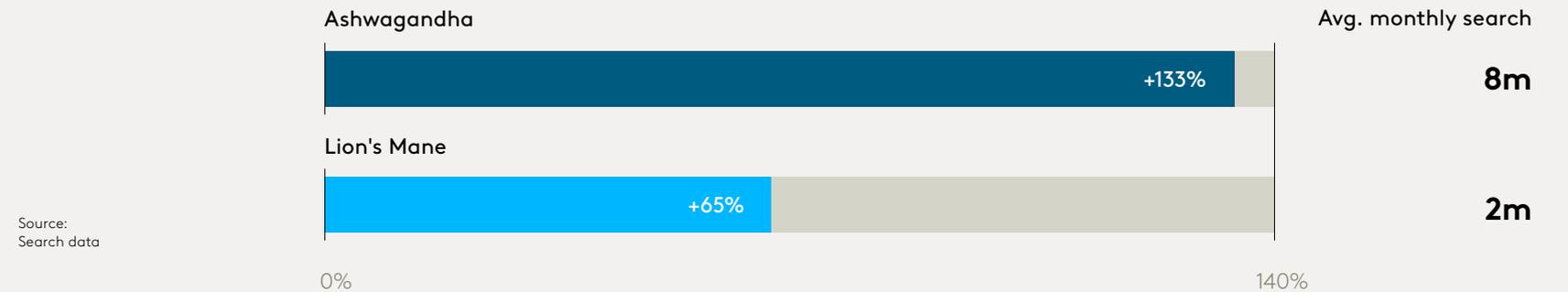
Trend definition

Cognitive function, emerges as a key area of focus as **consumers dedicate themselves** wholly into their **health, wellbeing,** and **longevity.** While stress management is at the heart, a movement to brain function support is observed.

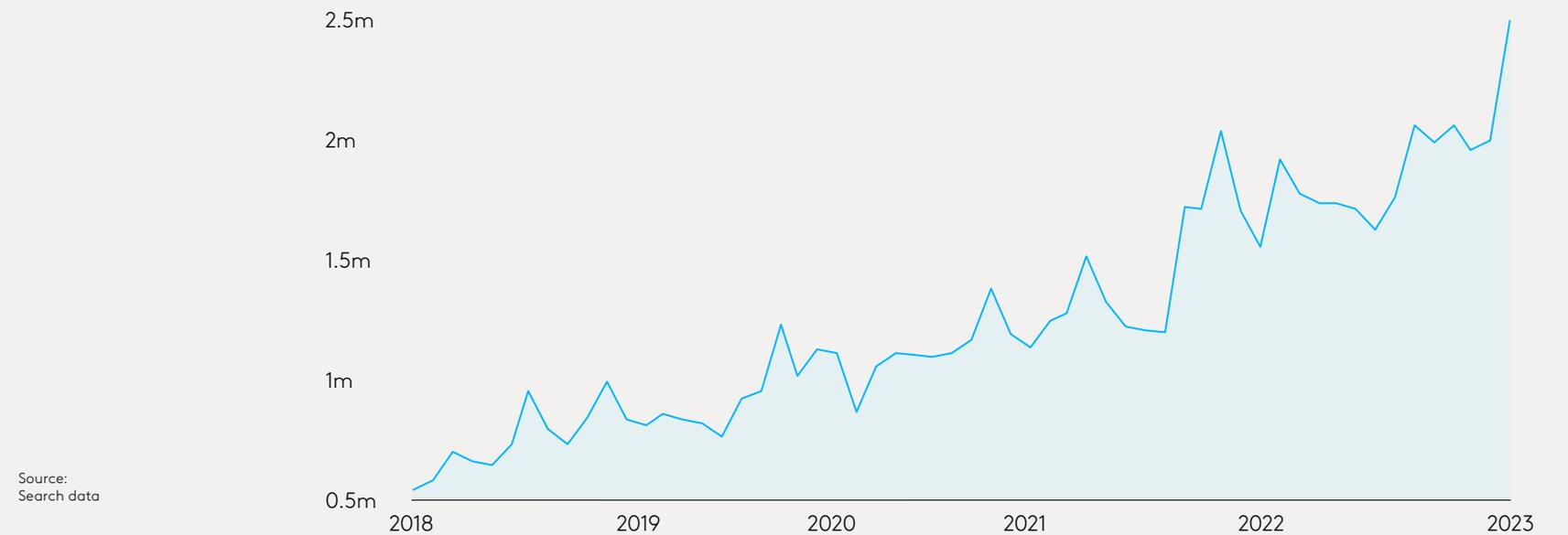
11m+

Average global monthly searches

INTEREST IN HERBS & MUSHROOMS DRIVING THE TREND RANKED BY GROWTH



INTEREST IN LION'S MANE



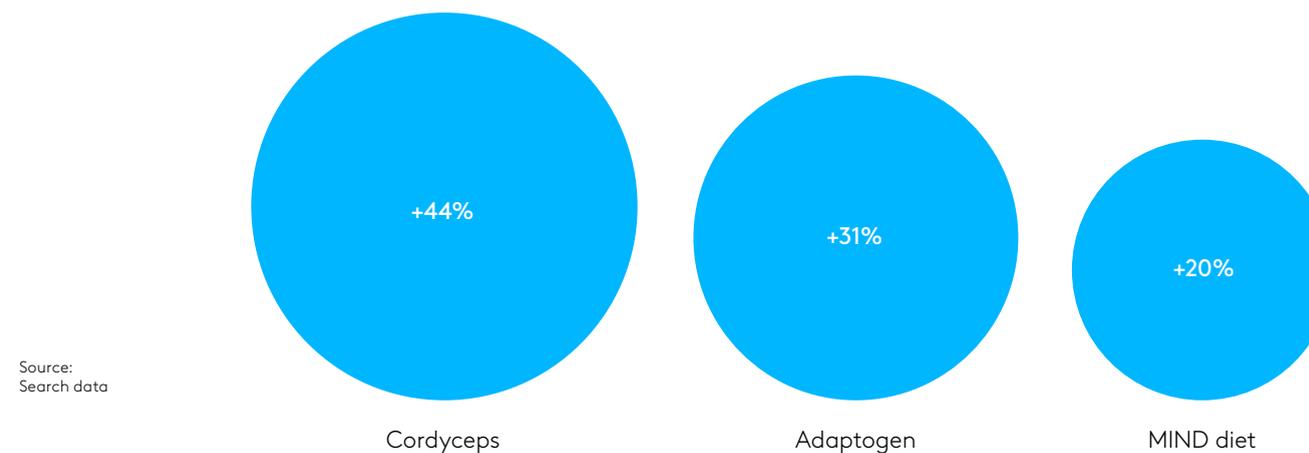
Consumer need

Consumers are clear about what they want in their drive to sustain cognitive acuity and energy. Many narrow in on specific cognitive functions like memory, focus and mental endurance. The market goes beyond seniors, encompassing gamers, young / middle aged adults and children. Interest rises for products and ingredients linked to cognitive health.

Activation opportunities

Ashwagandha continues its meteoric rise along with Lion's Mane, where interest spans across supplements, teas, recipes. Cordyceps disrupts in the supplement and coffee space while interest in adaptogens also grows rapidly. A niche cohort of consumers actively seek ways to embed the MIND diet into their lives pointing potentially to the next space to watch.

DISRUPTIVE INGREDIENTS & TOPICS RANKED BY GROWTH



"Low energy Monday. Skipping a weight training workout today and opting for low-impact body weight movements and loading up on vegetables paired with healthy fats. Treating myself to a mid-afternoon pick-me-up via adaptogen hot cocoa. Work with your body, not against it."

Social expressions

Core consumer needs linked to this trend.



Manage stress



Optimize mental performance



Brain function support





Plant-based
bolsters,
the **protein**
narrative

Diversification continues.

2

Trend definition

Protein is a mainstream macro ingredient consistently lauded thanks to its health credentials. Given how embedded it is, consumers are beginning to **diversify and experiment with multiple plant-based protein sources**.

29m+

Average global monthly searches

INTEREST IN DIETS DRIVING THE TREND RANKED BY GROWTH



Source: Search data

"If soy protein powder works well, I'll easily go vegetarian or vegan when I run out of meat in my freezer. The main reason is weight loss, but I've also seen opinions that a plant-based diet is a key to a healthy life."

Social expressions



Consumer need

A rising cohort is taking on a flexitarian approach specific to its protein needs by blending different alternatives. While health remains foremost, product experience is as important. Furthermore, the link to sustainability values cannot be ignored as the movement to plant-based gains momentum.

Activation opportunities

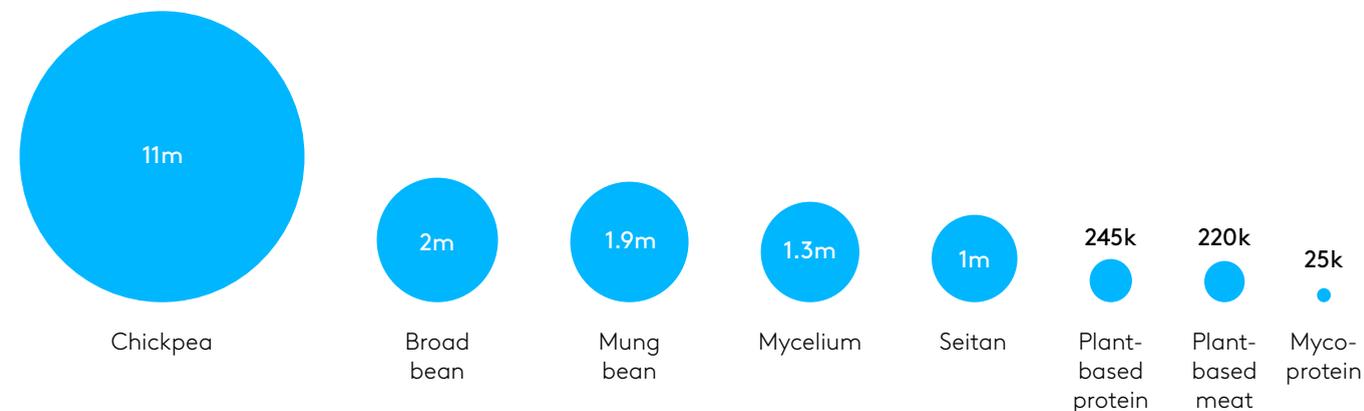
Chickpea leads the pack followed by broad / fava and mung. Queries around seitan are anchored to its nutritional quotient. While plant-based protein is in the space of shakes, powders and brands.

Plant-based meat searches revolve around details / breakdown of ingredients and whether they are healthy. Consumers are seeking assurance. Brands such as Beyond Meat, Impossible Burger appear.

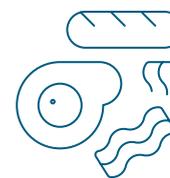
Interestingly, a small proportion of consumers are following developments in the alternative protein space through Mycoprotein.

DISRUPTIVE INGREDIENTS & TOPICS RANKED BY VOLUME

Source: Search data



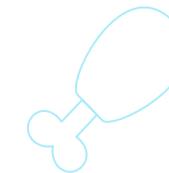
Core consumer needs linked to this trend.



Protein macros



Diversity in plant based



Diversity in animal based

A preview of brands that are already **innovating** to address this trend



Forest Feast is not only vegan, gluten-free, and non-dairy, but it also boasts 30% less sugar than regular milk chocolate ¹.



MyBACON, a MyForest Foods product, is a delicious alternative to traditional bacon, made from farm-grown mycelium and completely meatless ².



The Plant Based Seafood Co. offers a mind-blowing experience with its plant-based scallops, Mind Blown, a shelf-stable alternative seafood product that promises to tantalize your taste buds ³.



Indulge guilt-free with Issei Mochi Gummies, which are free from gelatin and low in sugar, gluten-free, soy-free, and non-GMO ⁴.



Gut **health**
is life

The emergence of new enablers.

3

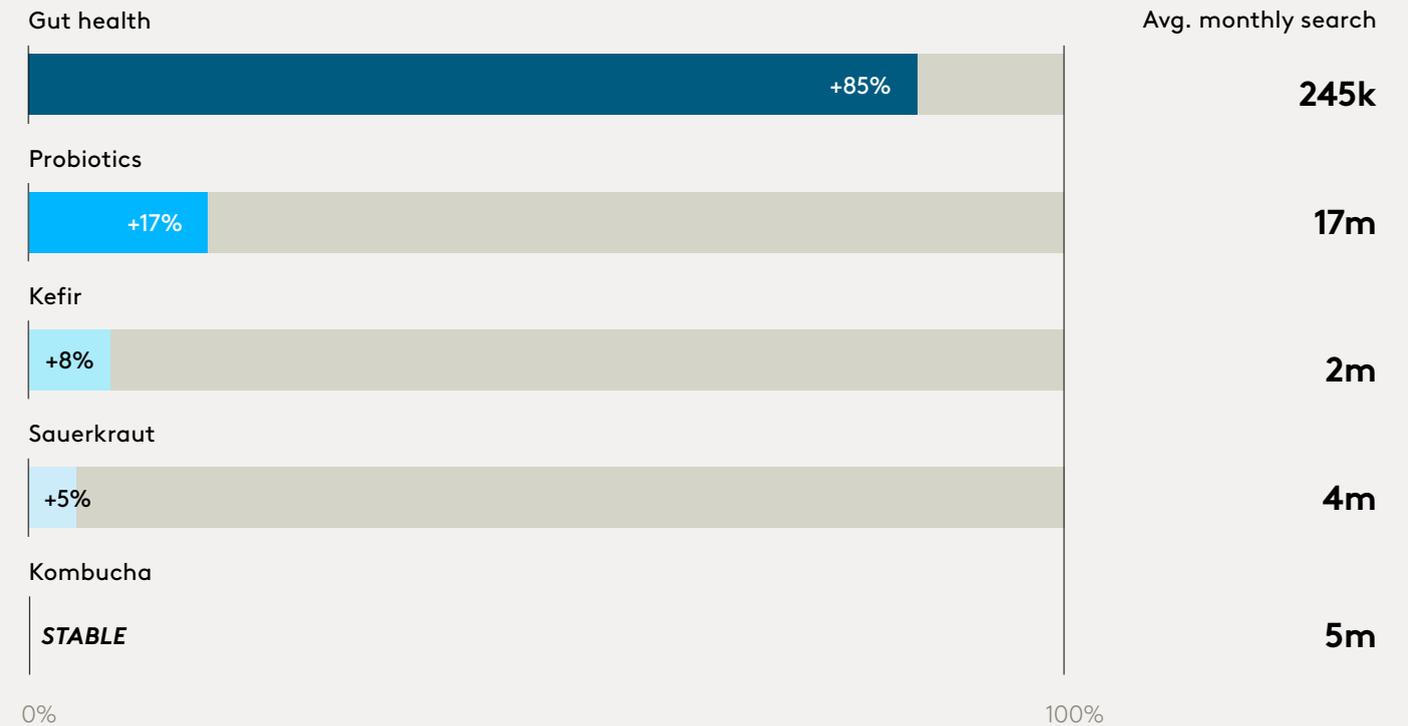
Trend definition

Gut health is here to stay and grows from strength to strength. **Consumer understanding of the gut in the context of health and wellbeing sharpens.** An appetite for digestive health products continues in its upward trajectory.

40m+

Average global monthly searches

INTEREST IN TOPICS & INGREDIENTS DRIVING THE TREND RANKED BY GROWTH



Source: Search data

"Working on my gut health and on the path to eating better and with intent. Getting rid of the problems I have with my gut health, such as bloating, and constipation."

Social expressions

Consumer need

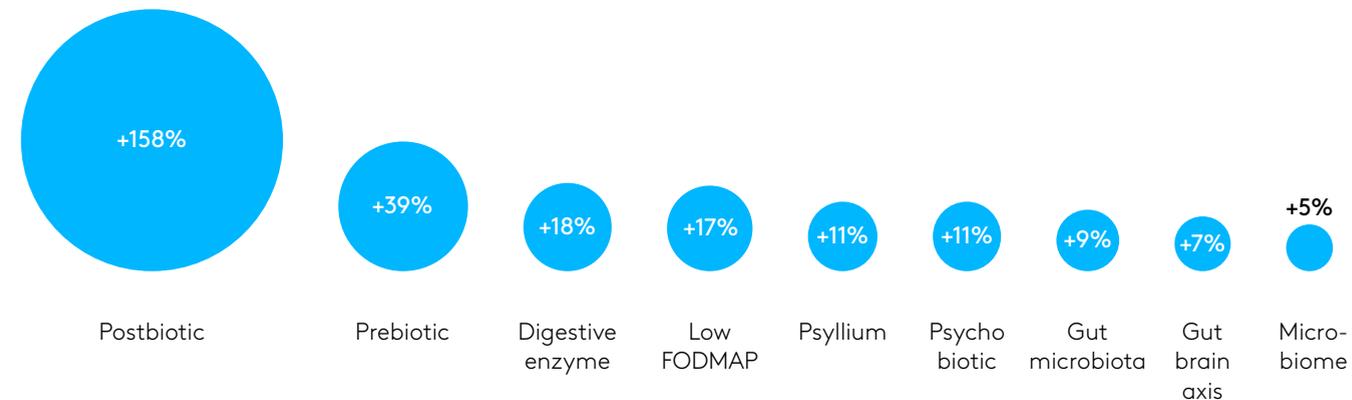
Prioritization of gut health as the connection between gut, health, cognition and more deepens. While functionality is at the forefront, evident through supplement-linked searches, the desire for fun through experience and discovery is clear based on brand searches across categories (such as flavored drinks, chocolate, sparkling).

Activation opportunities

While kombucha, kefir and sauerkraut show no signs of slowing down, search behavior around enzymes and psyllium shed some light on the specificity of needs. Given the increasing access to personal data through home tests, this trend shows no sign of slowing down.

DISRUPTIVE INGREDIENTS & TOPICS RANKED BY GROWTH

Source: Search data



Core consumer needs linked to this trend.



Efficacious; something that delivers



Targeted; addresses a specific need



Experiential; discovery of new things

A preview of brands that are already **innovating** to address this trend



Olipop Ginger Lemon Sparkling Tonic is full of plant fiber and prebiotics to support your digestive and gut health ⁵.



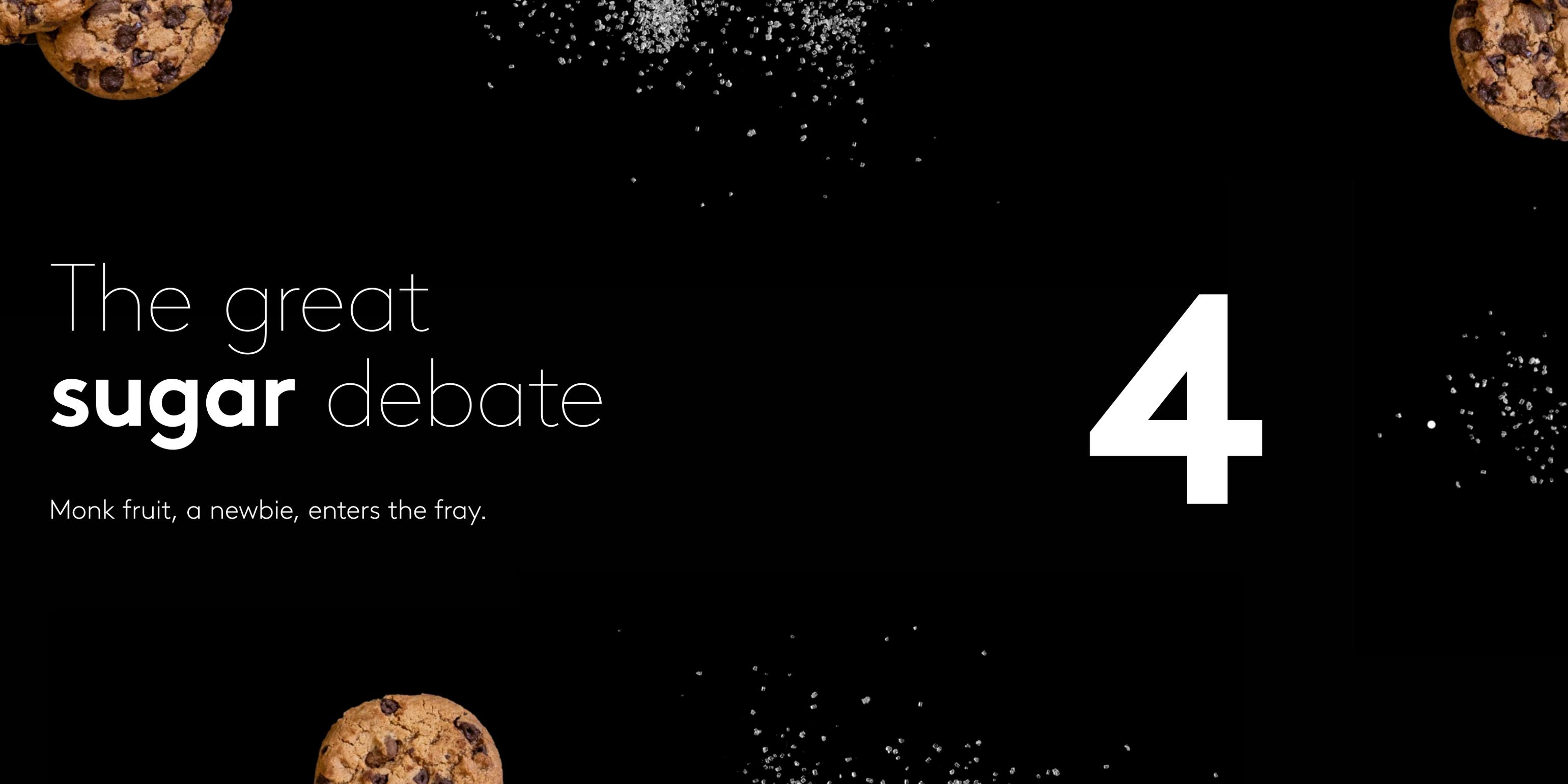
Lil' Goodness launched India's first prebiotic cocoa powder, which contains zero added sugar and is made from natural prebiotic fibres and 100% antioxidant-rich real cocoa. This healthy treat promotes gut and heart health ⁶.



Fermenti offers a unique twist on traditional cookies by crafting them from fermented fruits and nuts, resulting in a delicious and healthier snack option ⁷.



Ffirst Living Soda is a functional beverage with all-natural ingredients packed with beneficial probiotics and prebiotics. Plus, it contains zero added sugar ⁸.



The great **sugar** debate

Monk fruit, a newbie, enters the fray.

4

Trend definition

Sugar continues to be on the radar **as many try to reduce their intake without sacrificing sweetness or taste**. The quest to find something that is 'better for me' while satisfying the sweet tooth continues.

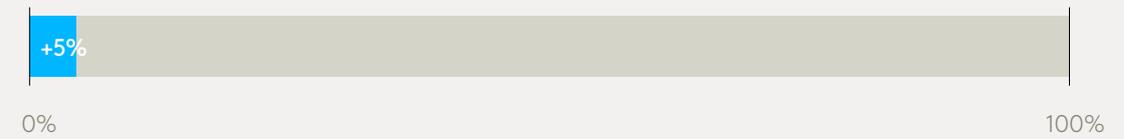
16m+

Average global monthly searches

INTEREST IN TOPIC DRIVING THE TREND RANKED BY GROWTH

Source:
Search data

Sugar substitute



Avg. monthly search

12m

"I'm addicted to keto friendly chocolate. Made of dark cocoa chocolate and sweetened with plant-based sweeteners, like monk fruit. Made with no artificial sweetener or refined sugar!"

Social expressions

Consumer need

In their journey to be healthier, many consider alternatives and want to understand the health credentials behind sucralose, erythritol, stevia and agave nectar. However, the tension between taste / indulgence and being healthy still exists.

Activation opportunities

Psciose (allulose) and monk fruit disrupt sugar substitute-related searches; there is a genuine interest to know more about them, their origin, and their impact on health. At a brand level, Lakanto is salient for Monk fruit. An uplift in queries linked to the negative side effects of artificial sweeteners is observed.

Demand for sugar-free variants remains and spans across the spectrum, chocolates, candies, desserts, sweets, cough drops, snacks, wine, liquor, RTD coffee, creamers, baked goods, and more.

Core consumer needs linked to this trend.



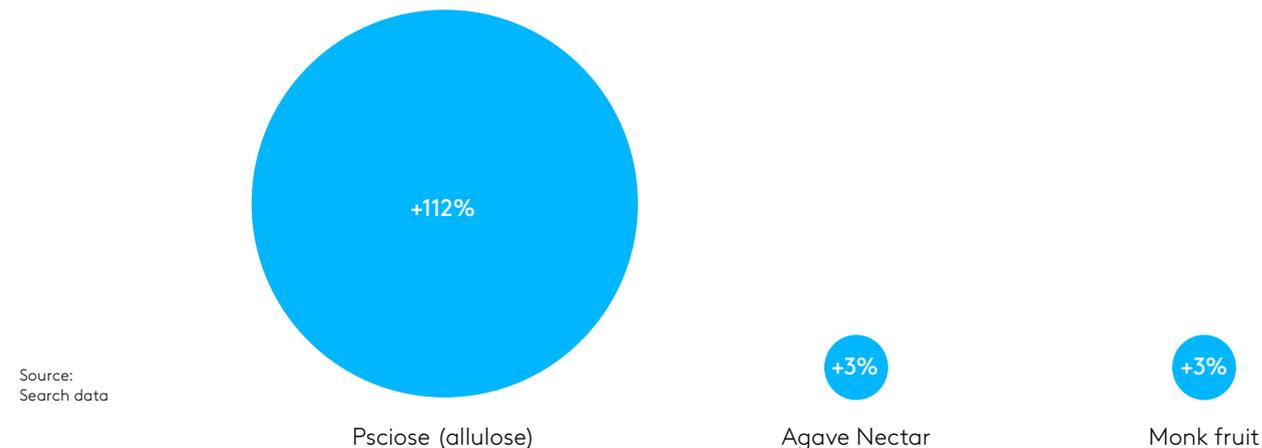
Health credentials, better for me



Taste, same as sugar

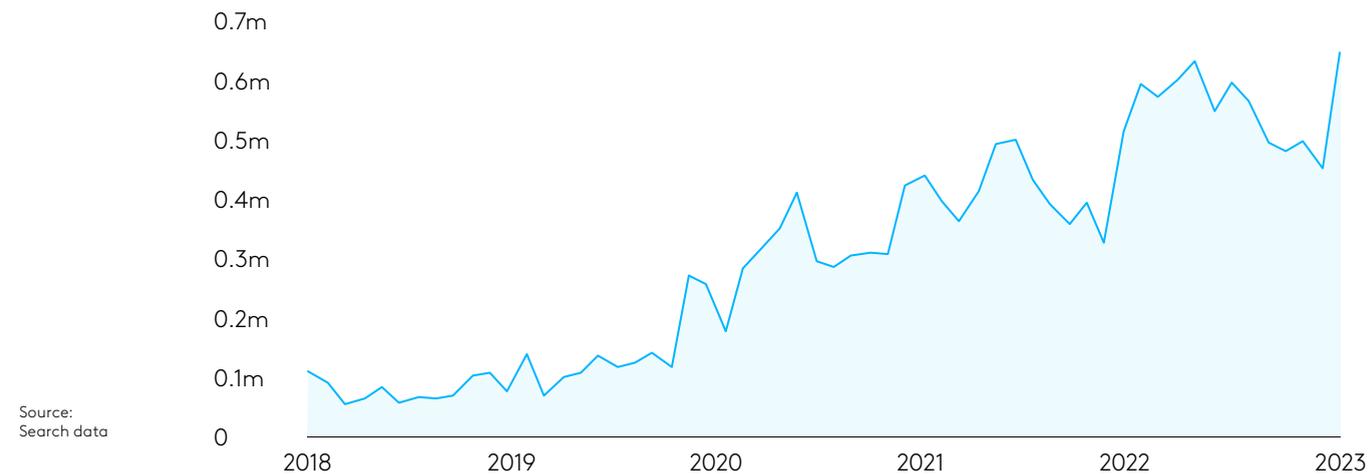


DISRUPTIVE INGREDIENTS & TOPICS RANKED BY GROWTH



Source: Search data

INTEREST IN PSCIOSE / ALLULOSE

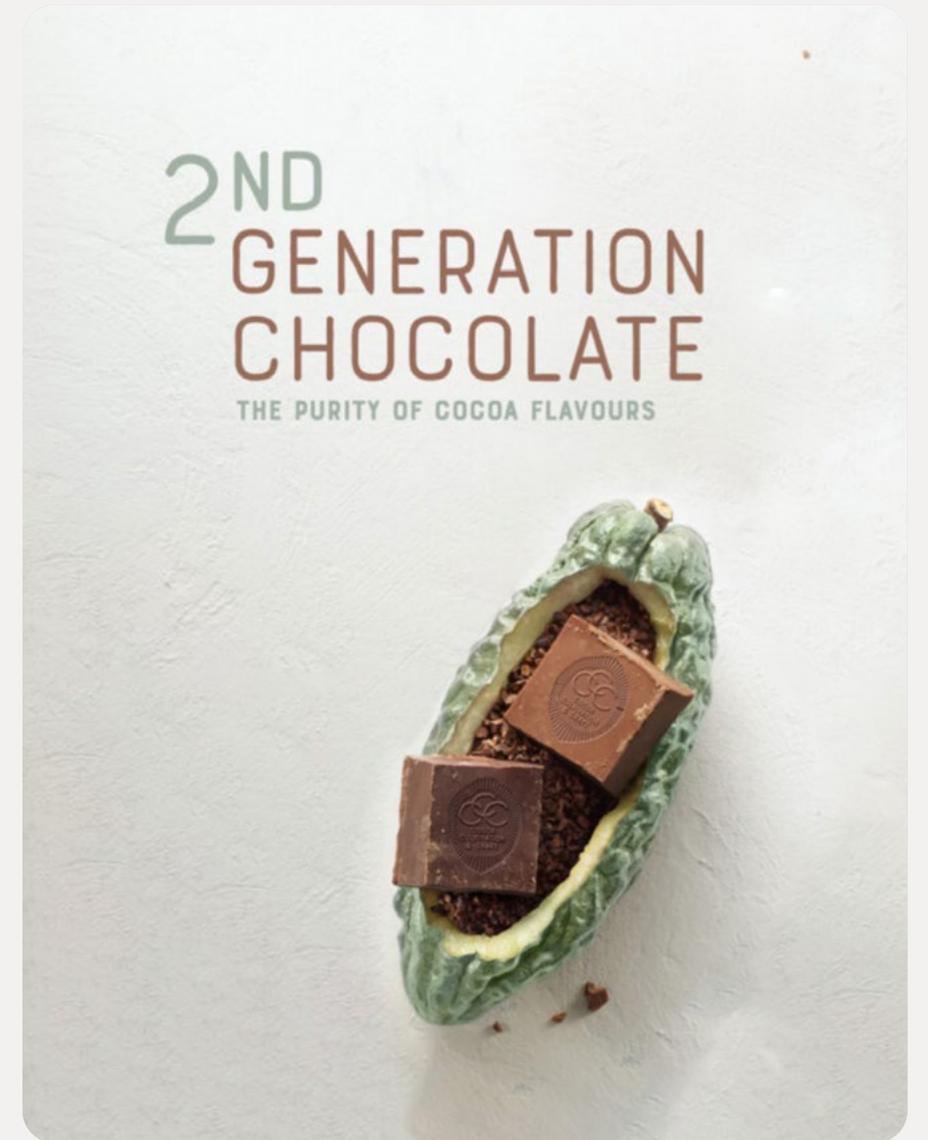


Source: Search data

A preview of brands that are already **innovating** to address this trend



Jnck Bakery launches a game-changer in baked goods, with 90% less sugar, 50% less saturated fat, three times more protein, and five times more fibre ⁹.



Barry Callebaut's Second Generation Chocolate has revolutionized chocolate-making by prioritizing cocoa and adding sugar last. The result is chocolate that contains 50% less sugar than the most commonly consumed chocolate worldwide ¹⁰.



Precision **nutrition**

Talking to new needs that matter. Nouveau mushroom variants emerge.

5

Trend definition

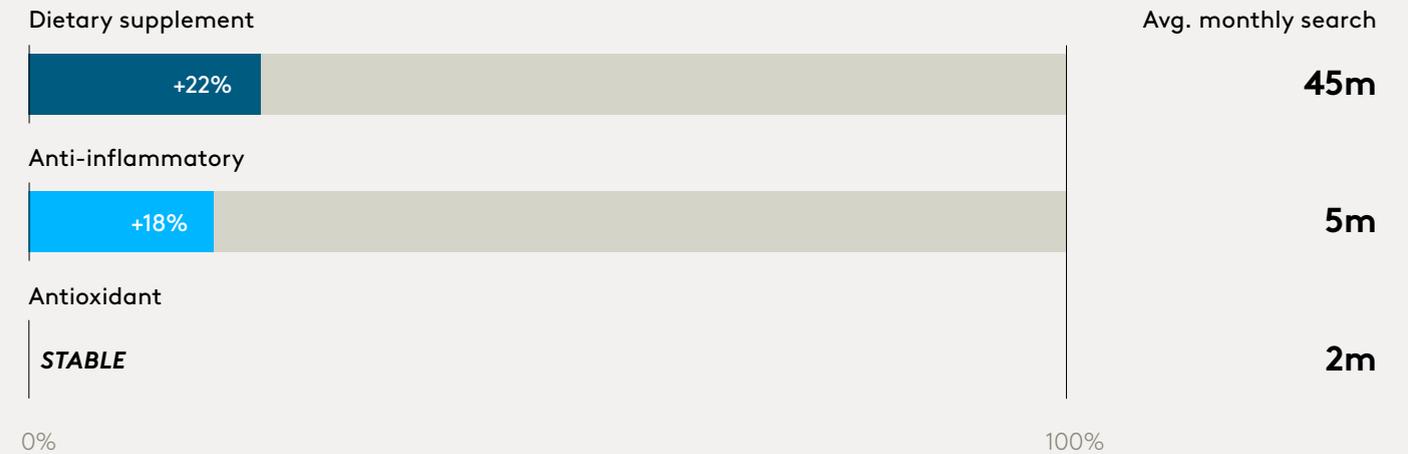
Consumers are becoming exceedingly purposeful. As the shift to *prevention is better than cure* moves mainstream, **food is at the heart, and precision is top of the mind.**

61m+

Average global monthly searches

INTEREST IN TOPICS DRIVING THE TREND RANKED BY GROWTH

Source:
Search data



"I took a photo of myself this morning, and I think I am looking better than I have in a long time!!!! I've been trying to eat a lot of anti-inflammatory foods."

Social expressions

Consumer need

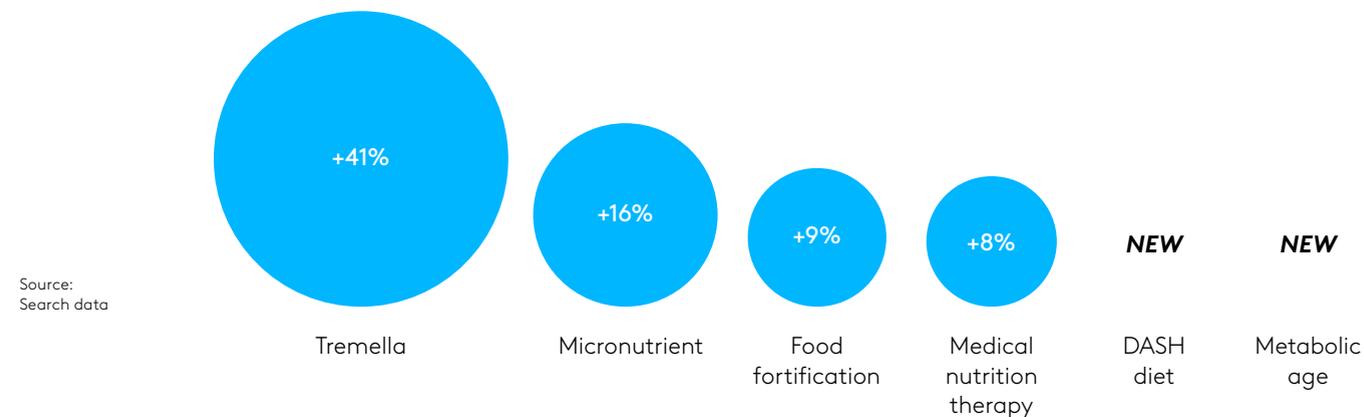
Armed with easily accessible personal data, there is an expectation for choices to deliver on specific need.

Activation opportunities

While anti-inflammatories and antioxidants continue to find a following, the need to go deeper is represented by searches around micronutrient testing. Consumers want supplements that are aligned with their specific needs. Searches for nutritionists through niche also appear, aligned with addressing personalized needs.

Tremella mushroom disrupts, with many looking for its credentials in the food space. This is possibly a positive spillover effect of the waves it has made with its rejuvenating properties in skincare.

DISRUPTIVE INGREDIENTS & TOPICS RANKED BY GROWTH



Core consumer need linked to this trend.



Targeted, personal and for me

The background is a solid black color. It features several pieces of seaweed and sea plants. In the top center, there is a piece of brownish-green seaweed with large, rounded, overlapping leaves. In the bottom center, there is a piece of seaweed with many small, pointed, leaf-like structures. On the left and right edges, there are partial views of other seaweed pieces. The text is white and positioned on the left side of the image.

Sea plants
are the **new**
superfoods

Marine vegetables create waves.

6

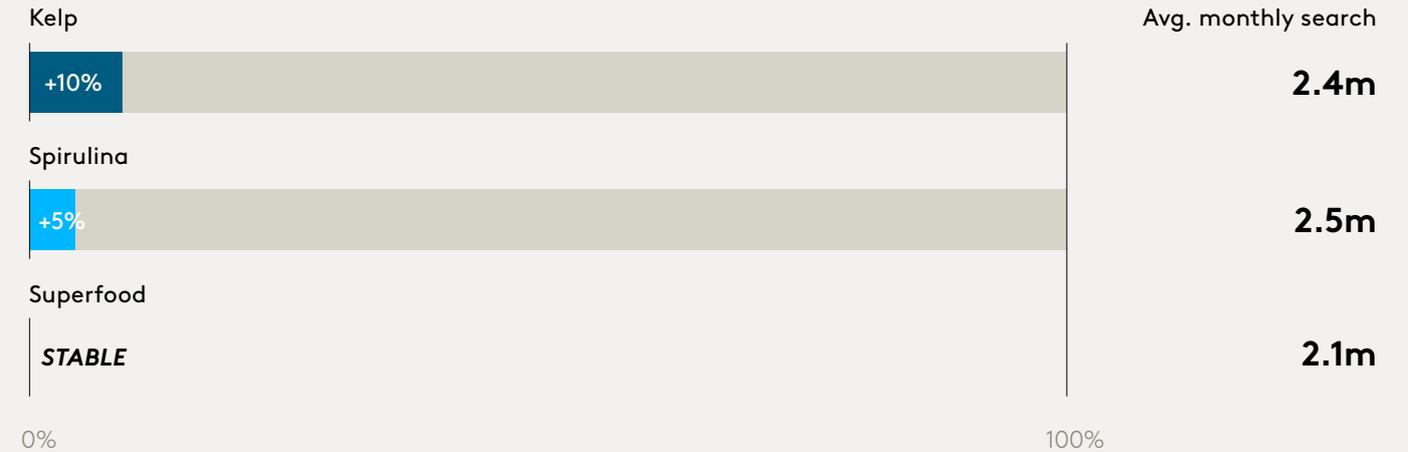
Trend definition

The rising trend of eating seaweed and algae continues. As awareness of the nutrient-dense credentials establishes itself, **consumers are willing to expand their repertoire and experiment** with new varieties.

7.5m+

Average global monthly searches

INTEREST IN TOPICS DRIVING THE TREND RANKED BY GROWTH



Source: Search data

"Given the toxic air polluting us from all angles,...currently upping my intake of these liver-supporting / cleansing powerhouses dandelion root (tea), turmeric (on food), spirulina (in a daily smoothie). #helpyourliverfilter"

Social expressions

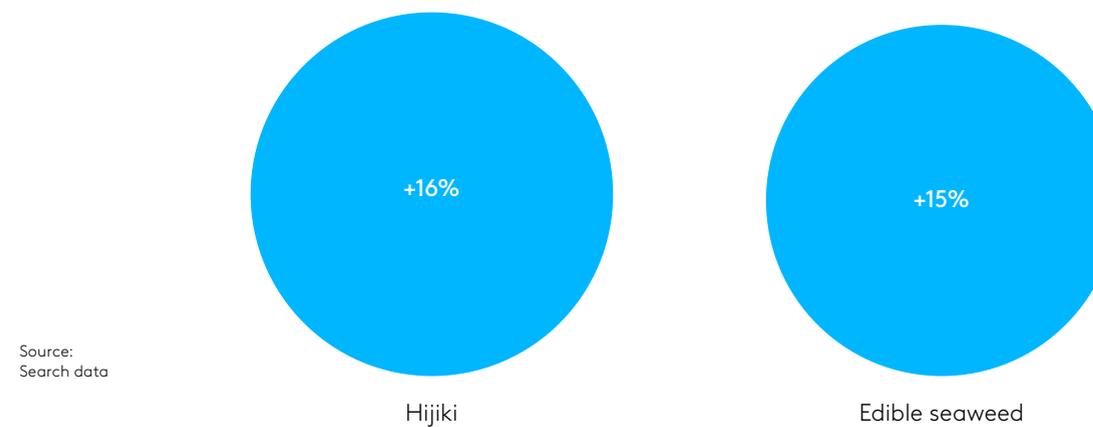
Consumer need

A superfood that is nutritionally dense and can be consumed in a variety of ways in food (recipes) or on the go (drinks).

Activation opportunities

While spirulina and kelp as ingredients are central in the supplement space, searches that disrupt are mainly in the space of salads and side dishes as they increasingly incorporate them into their diets. The market is evolving rapidly with innovations catering to this rising need.

DISRUPTIVE INGREDIENTS RANKED BY GROWTH



Source:
Search data

Core consumer needs linked to this trend.



Nutritionally dense,
loaded



Multifunctional; address
multiple need

The background features a dark, almost black, surface. Scattered around the edges are several fresh, vibrant green tea leaves and two dark, textured tea balls. The tea balls have a craggy, porous appearance, typical of compressed tea. The overall aesthetic is clean and natural, emphasizing the botanical origins of the ingredients.

Ancestral ingredients

pivot from Asia

New herbs, fruits and botanicals.

7

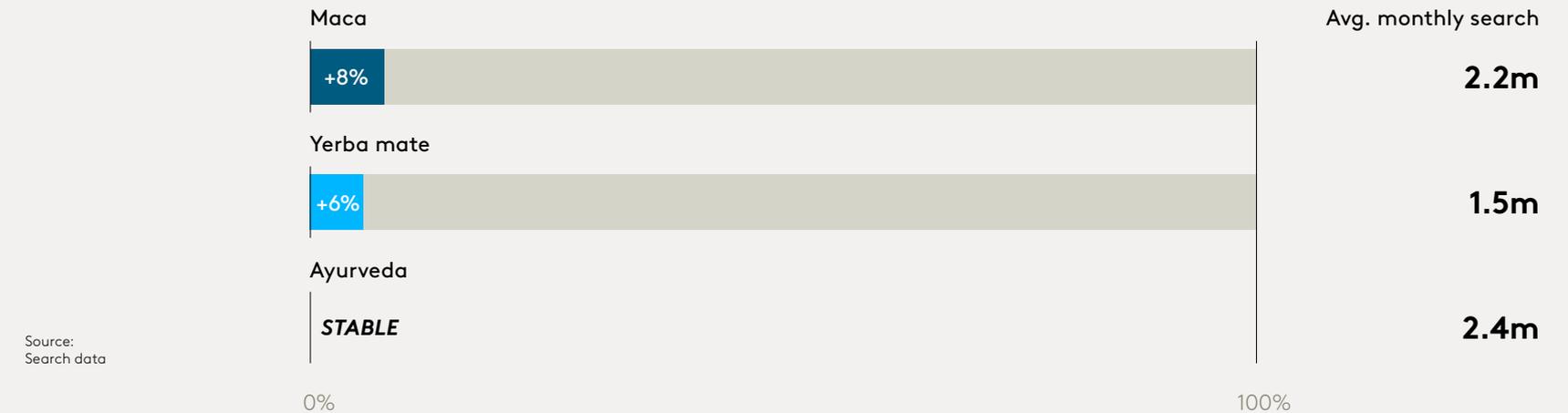
Trend definition

As consumers longingly seek balance amid a turbulent world, **the search for ancient ingredients** with proven value over the years grows significantly.

6.5m+

Average global monthly searches

INTEREST IN INGREDIENTS DRIVING THE TREND RANKED BY GROWTH



"I like rooibos and gunpowder mixed with roasted yerba, mate. Also, earthy and spicy kinds of flavors, so ginger, ginseng, and other roots now and again. Chamomile and calendula flowers are something I bulk up on as well. Food = medicine IMO."

Social expressions

Consumer need

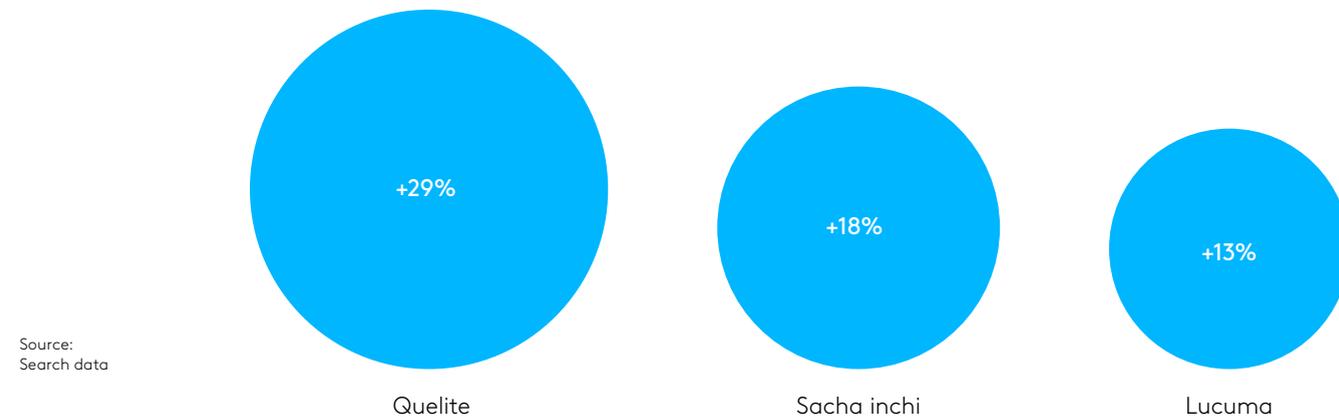
Ancient ingredients that have been prescribed through Ayurveda teachings have grown in popularity. Consumers are increasingly leaning towards natural ingredients that prevent, protect and fight. These ingredients have survived generations and have been a source of vitality and wellness.

Activation opportunities

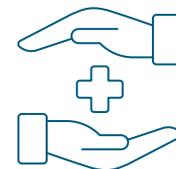
Maca root search revolves around benefits linked to fertility, dealing with menopause, and improving sexual function. An ingrained ingredient in South America, it has started to pick momentum in India. Yerba mate appears across categories ranging from tea, coffee, energy drinks, and personal care.

Disruptive ingredients like quelite see a resurgence thanks to their medicinal properties. Sacha inchi finds a following across formats, including oils, seeds and powder, but once again driven by its highly-nutritious properties.

DISRUPTIVE INGREDIENTS RANKED BY GROWTH



Core consumer needs linked to this trend.



Holistic, preventative properties



Therapeutic



Swicy, the new flavour profile

Hitting the sweet, savoury and spicy spot.

8

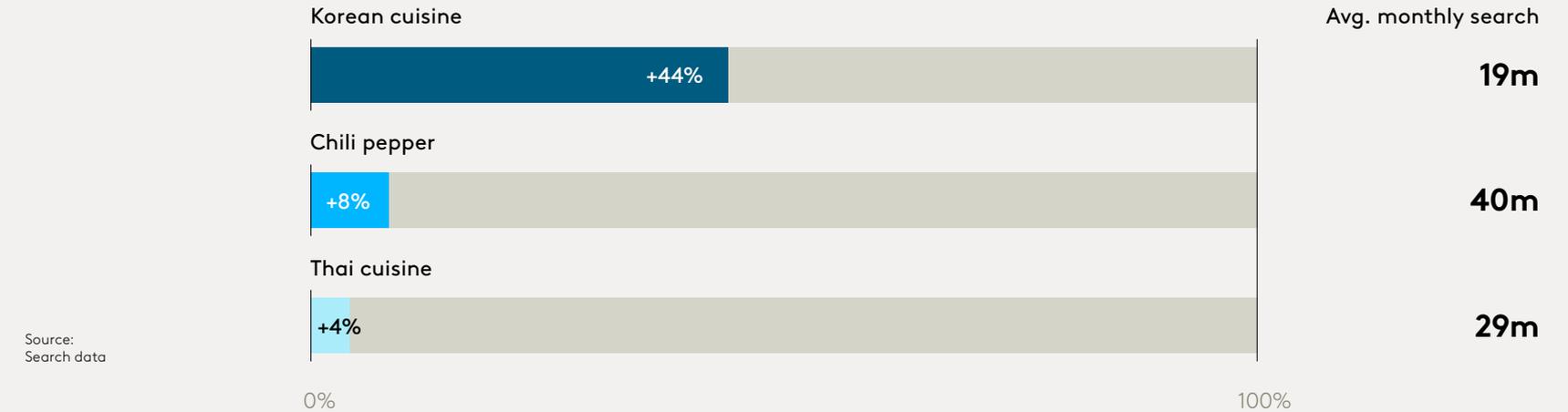
Trend definition

Affinity for spicy food continues as consumers increasingly appreciate the **depth and balance of heat and flavour**. The refinement of the palette for these flavour profiles is evident and is set to grow.

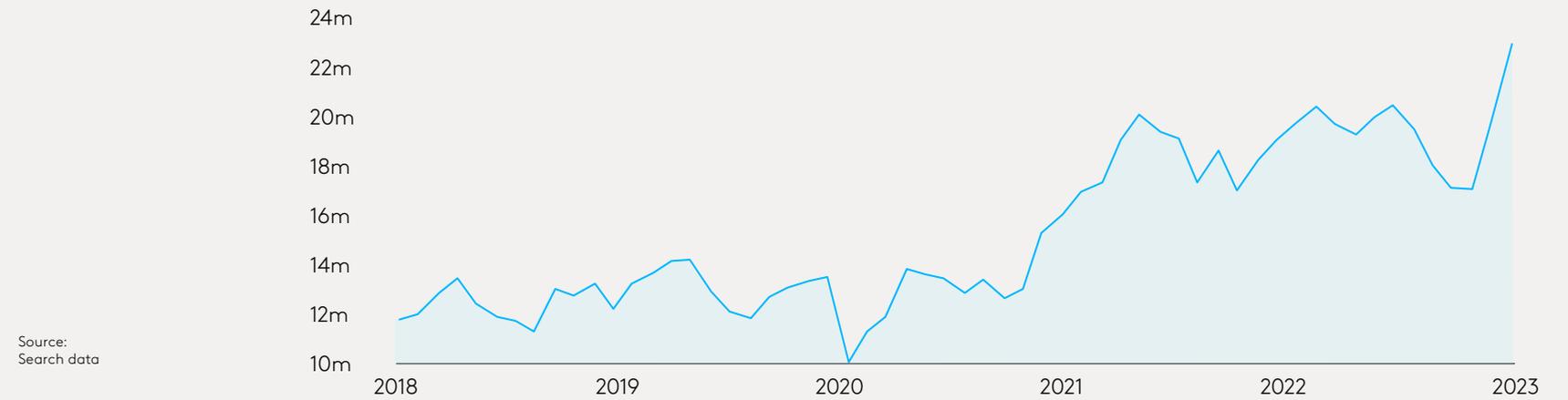
10m+

Average global monthly searches

INTEREST IN CUISINES & INGREDIENTS DRIVING THE TREND RANKED BY GROWTH



INTEREST IN KOREAN CUISINE



Consumer need

Seeking excitement through a combination of flavors built from an existing repertoire through fusions that create new flavour profiles.



Activation opportunities

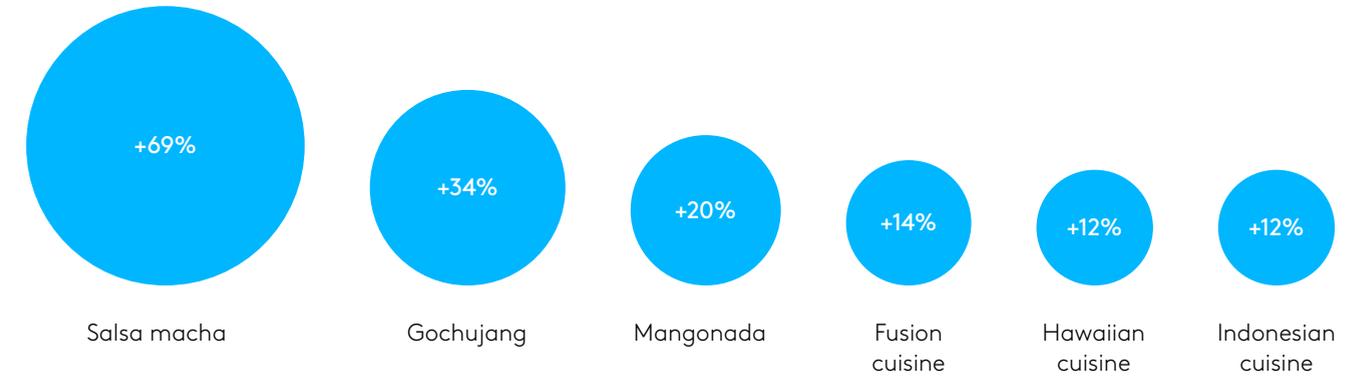
Interest in Thai and Korean foods continues to soar, picking up significantly in India as the trend percolates from the US and the UK. Comparatively, the US appears to be going towards niche cuisines in their consumer search for excitement. Hawaiian, Indonesian, and Nigerian food disrupts.

Mexican mangonada and salsa macha show a significant uptick in interest with the common theme being the combination of sweet, savoury, and spicy.

Fusion foods also find a following. Associated queries showcase emerging hybrids born from the collision of various food cultures and the need to hyper localize them. Look for the mochinut (mochi + donut) and Korean corn dog.

DISRUPTIVE CUISINES, CONDIMENTS & DRINKS RANKED BY GROWTH

Source: Search data



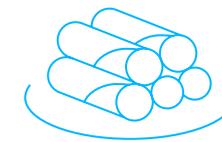
"Air Fryer Salmon Bites are sweet, and spicy salmon cooked to perfection. A gochujang glaze gives this salmon recipe an Asian flavoring that is irresistibly delicious! #grumpyshoneybunch"

Social expressions

Core consumer needs linked to this trend.



flavour pairing, heat, savoury, and sweet



Experiential, exotic, and new





Rethinking home cooking steams ahead

Increasing reliance on digital
smarts to elevate.

9

Trend definition

The trend around sophisticated meals within the home continues. **The appetite for healthy indulgences** anchored to cooking techniques and methods shows no signs of declining.

101m+

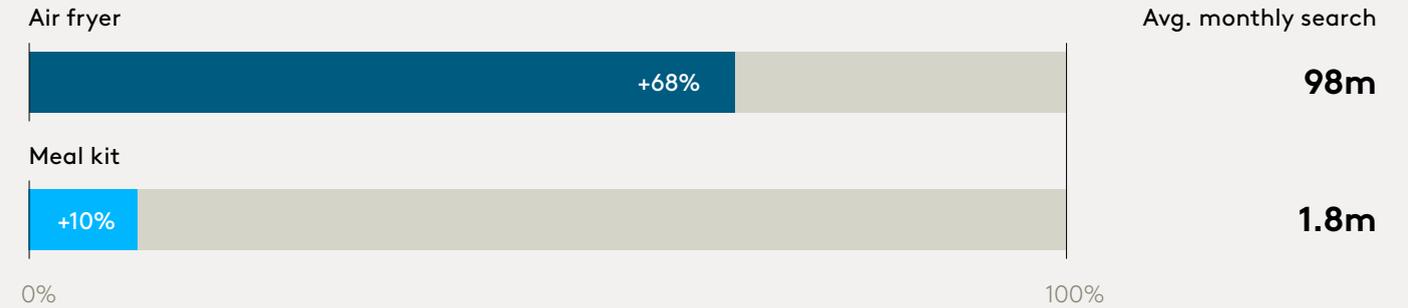
Average global monthly searches

Consumer needs: Experience



INTEREST IN TOPICS DRIVING THE TREND RANKED BY GROWTH

Source: Search data



"I have an instant pot and an "air fryer" because it makes batch cooking on weekends super easy. I also take umbrage with ye old "water sauté" which is just steaming."

Social expressions



Consumer need

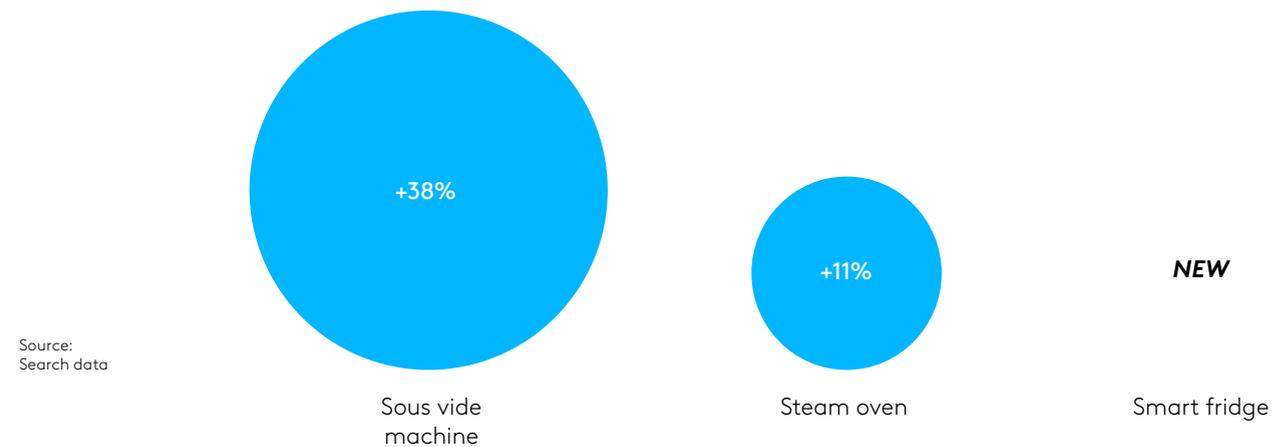
Looking for help to showcase their 'chef-manship' through sophisticated appliances or meal kits to take them to the finish line.

Activation opportunities

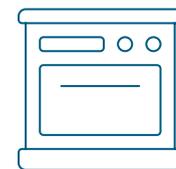
Interest in air fryers shows no signs of abating; steam as an added functionality is trending and sought-after.

Meal kits pivot to address new needs: affordable meal kits (Dinnerly), ready-to-eat (factor), programmed for perfection (Tovola)—essentially enabling meals that are cooked to perfection through smart functionality.

DISRUPTIVE APPLIANCES RANKED BY GROWTH



Core consumer needs linked to this trend.



Enabling indulgence in a healthy way



Exotic, experiential experiences in home



Sustainability gets granular

About looking after self while
also making an impact.



10

Trend definition

The sustainability agenda moves from generic to specific. **Focus shifts to granular topics that will have long-term impact.** Consumers are beginning to look at the big picture.

5m+

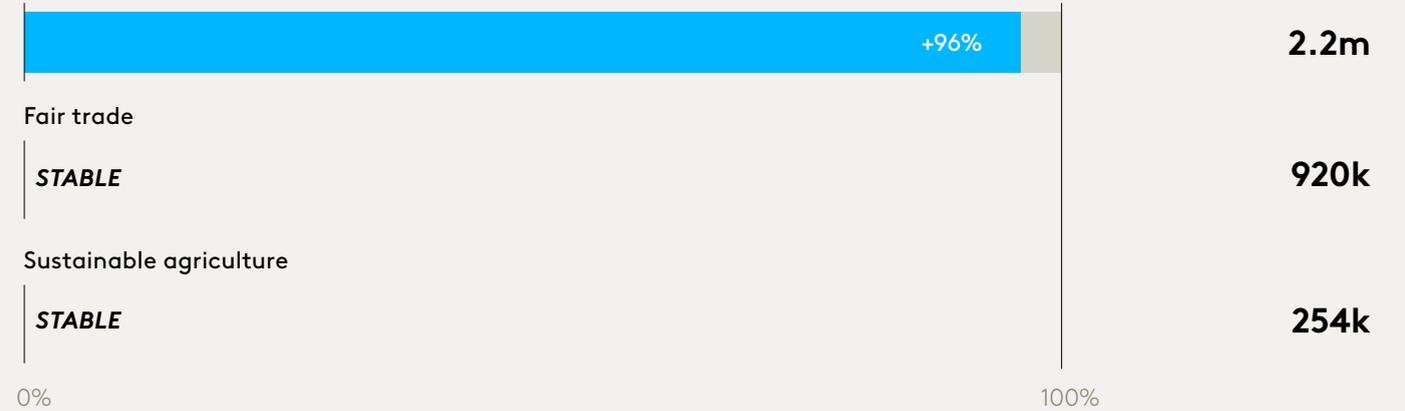
Average global monthly searches



INTEREST IN TOPICS DRIVING THE TREND RANKED BY GROWTH

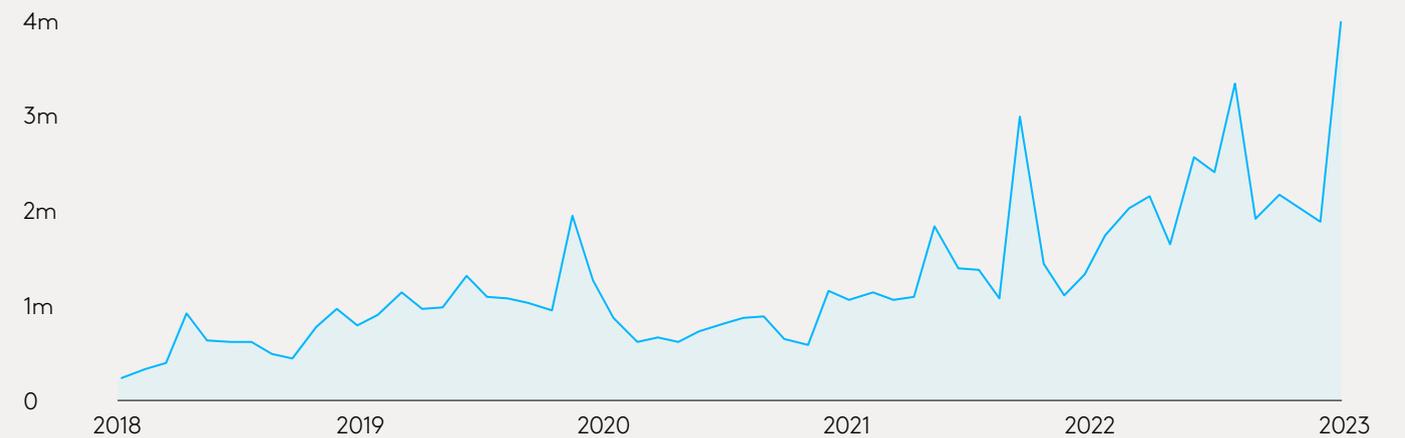
PFA's (Perfluoroalkyl & Polyfluoroalkyl Substances)

Avg. monthly search



Source: Search data

INTEREST IN PFA'S



Source: Search data

Consumer need

As the growing consciousness around sustainability gains momentum consumers are paying more attention. Transparency goes beyond the label.

Activation opportunities

There is a genuine interest in knowing about sustainable agricultural methods and the need to protect through regenerative practices. Soil health comes up as a priority area and points to a consumer who is looking at it from a long-term perspective. Many are actively trying to reduce or manage their food waste, some through composting at home.

The recent lawsuit against 'Simply' orange juices and the toxic level of PFA's invigorates searches around the ingredient. But judging from the trajectory of concerns, it is not new news. Consumers are vested, aware, and willing to hold brands accountable.

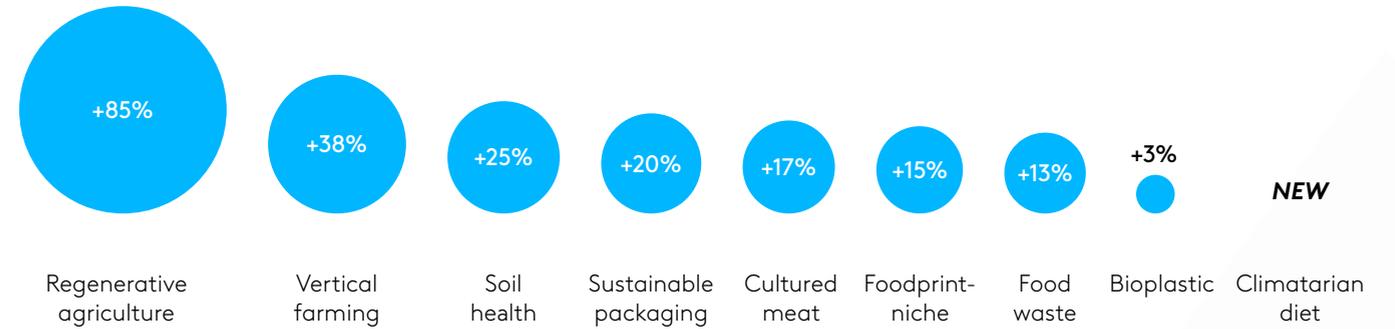
"I support fair trade, which would raise the prices of goods. Before we can adopt fair trade policies, businesses must be forced to raise wages to mitigate the struggle to afford higher-priced fair-trade goods."

Social expressions



INTEREST IN INGREDIENTS DISRUPTING THE TREND BY GROWTH

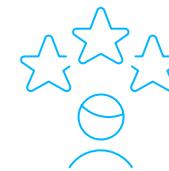
Source: Search data



Core consumer needs linked to this trend.



Protect, self first then the environment



Support, to make an impact



A preview of brands that are already **innovating** to address this trend



Kissd has launched a new line of sustainable flavoured waters, which are locally sourced and shipped in bulk, made from 88% plant-based packaging derived from wood pulp and sugarcane waste ¹¹.



RIND® Snacks are functional and sustainable whole-fruit snacks that encourage consumers to 'Keep it Real & Eat the Peel' ¹².



Brolones containers are made from 100% recycled ocean-bound plastic ¹³.

So, what's next?

1.

The momentum for food as medicine will not subside as the narrative on health consciousness blossoms. New need states (brain function, joint health) will emerge or evolve over and beyond beauty, immunity care, weight management and digestive health.

2.

Balancing act between science and ingredients will continue. It's imperative to leverage ingredients that resonate with consumer health beliefs while showcasing demonstratable health benefits.

3.

Blurring of boundaries between categories will accelerate as ingredients race across. Convergences between supplements and adjacent industries are currently rampant. Supplements will continue to bleed into multiple categories.

4.

AI and tech will continue to disrupt beyond lab meat or the infusion of digital smarts into home appliances. Armed with personal data consumers are going to move from a transaction-based relation to a longitudinal-data-driven one.

5.

Specificity and personalization will go to the next level, as consumers look for specific benefits from specific products for specific moments of consumption linked to specific needs.

6.

Transparency is essential as consumer focus will be on "naturalness." They strive to tick multiple boxes aligned with their health and wellness goals.

7.

Consumers want healthy but without compromising on taste or ingredients. It's about satisfying cravings by mimicking feel good foods through healthy, plant-based ingredients or a through the creation of new recipes that continually engage.

Understanding the **consumer**

Uncovering the consumer behind the gut health trend



Javier Buron
CEO & Co-founder
Audiense

While this report alludes to multiple trends impacting the future of foods and the ways to activate against it—it is important to take a step back and consider a holistic view of the consumer.

We need to see them through a lens that considers their dynamic nature while being rooted in their diverse interests, habits, values and affinities. **To win, brands need to think beyond the category behaviours of consumers** and assess what really drives them as people.

Using big data, we gain further insight into consumers behind specific trends, need states or segmentations traditionally done through surveys. We can unearth their demographics, socioeconomics, influencer brands, media affinity, online habits and even the personality of any given group of consumers.

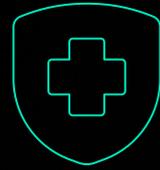
For this report, we wanted to understand who is behind the gut health trend. From a consumer segmentation perspective, there are other interests that bind these people together. While gut health is the common denominator, the spectrum on which these consumers sit is very diverse. A one-size-fits-all approach would not work given the inherent traits unique to each subset. This information can help find new routes to market and ways to connect seamlessly with the audience. To this end, we were able to uncover four distinct segments of consumers behind the gut health trend along with their digital personas and footprints. This enables brands to efficiently engage and or target them.





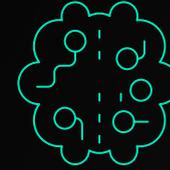
Pop culture advocates

- Skews **young females** from cities such as Miami, Seattle, Houston, and Los Angeles.
- Identify as **social content creators** who love music and are health and fitness enthusiasts.
- Uses **TikTok** as their go-to social app.
- Branding that fits them best: adventurous, imaginative, evolutionary, with a social purpose and a good story. Be **non-conforming** yet **intellectually stimulating**.



Gut health advocates

- They are **males and females** from the 18-24 age cohort.
- Consumers of health brands such as GoodBelly Probiotics, KeVita, Microbiome Plus+, Bärbuscha Kombucha, Navitas Organics, Beyond Meat, and Sweetgreen.
- Uniquely interested in **food and drink, science, health, and fitness**.
- How to influence them: communicate **instrumental benefits**. Focus on rewards and **feel-good outcomes**.



Tech advocates

- They are **mostly men**.
- Consumers of tech and news brands: TechCrunch, Mashable, The Verge, Techmeme, WIRED, OM, The Economist, and The New York Times.
- Personality: analytical, particular, and sentimental.
- Influence: encourage them to think and come to **conclusions themselves**. Provide **evidence** supported by **credible authorities**.



Change advocates

- Skews married females, 25-34 age cohort.
- Align themselves with keywords such as **author, mom, opinions, Black Lives Matter, equality, politics, and resist**.
- Personality: **Authority-challenging**; they prefer to challenge authority and traditional values to help bring about positive changes.
- Branding that fits them best: present the brand as sensible, reliable, and dutiful—a persistent hero in an everyday context.

The **sustainability** takeaway

Sustainable food practices can benefit the planet



Karine Trinquetel
Global Offer Lead, Sustainability Practice
Kantar

The pressures on natural ecosystems and climate render our food systems increasingly vulnerable.

To ensure the world can feed a population of nearly 8.6bn in 2030, we need solutions for climate-resilient food systems for a healthier planet and people. So, what will we be eating in the future? Algae, lab-grown meat, plant-based foods, edible insect burgers and protein bars are predicted to be on the global menu. But how does that fit with what people are currently looking for?

People show an appetite for different diets. Five trends out of ten in this report support the shift toward more sustainable diets by favouring more diversity in food. They underline the importance of the nutritional value of the food we eat while pivoting to alternative sources of protein and interrogating agricultural methods.

How can brands leverage these trends? There are three key opportunities to help consumers make better choices.

1. Sustainable innovation

Over 80% of all product-related environmental impacts can be influenced during the design phase, making sustainability a key pillar of innovation and a critical enabler of change. These trends show that now is a good time for brands to evolve their portfolios to provide consumers with more sustainable choices. Global brands are making a bigger play here, as we see in Hershey's recent launch of plant-based sweets.

2. Design and execute for success

The Value-Action Gap can get in the way of new product success. Consider what might enable or get in the way of the adoption of your innovation as you design it. These are the fuels and frictions of behaviour change. With this knowledge, you can intervene effectively to overcome behaviours such as habit, loss aversion, and social and cultural norms. For example, when launching its new plant-based burger in Australia, Burger King brilliantly challenged its customers to go meat-free with its latest campaign. They made plant-based options standard and meat the exception.

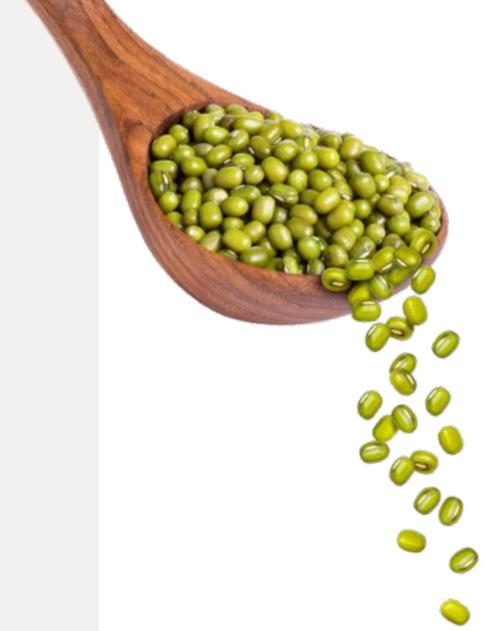
3. Engaging communication

This report shows that the way to get to a more sustainable food system and diet isn't necessarily by talking directly or only about sustainability. Brands need to connect with consumer interests and attitudes to strike the right tone at the right time. Health is a critical driver. The best way to talk about regenerative farming may be to stress how it improves the nutritional value of crops, enabling people to live healthy lives.



Market rundowns

Global trends meet the distinct Chinese market



While consumer trends in China synchronize with many global food directions, the Chinese market has many of its own distinct Oriental cultural factors.

For instance, health is not “health”, it is called “the remedy of life”. In recent years, the Oriental ethos has been displayed in the Chinese food industry, especially among beverages where innovations are both timely and less costly. Here are a few popular Oriental phenomena detected among beverages.

Grain-based drinks have become a huge opportunity and are mostly developed in freshly-made drinks. Even years ago, there were freshly-made beverage stores offering drinks with barley to enrich texture. Now it has become popular and is a common ingredient in many ready to drink products. **Mung beans are a growing trend.** Mung bean soup used to be a traditional dessert in China and now has been adopted in freshly-made and RTD market.

Barley

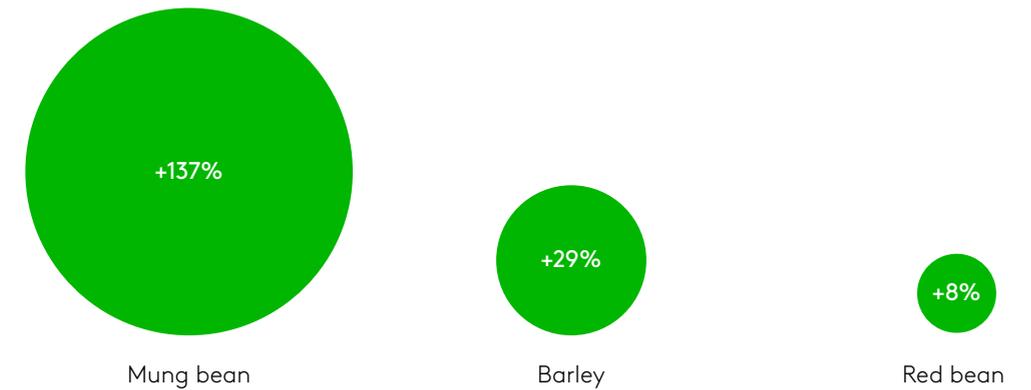
Barley grains have become a set ingredient in some yogurt products.

Mung bean

A bottle of mung bean milkshake is all you need on a scorching hot summer day.

DISRUPTIVE BEANS & GRAINS BY GROWTH

Source: YOY, social data



Rachel Liu
Director, Dx Analytics, China
Kantar



Dalena Guo
Manager, Dx Analytics, China
Kantar

Beauty-related recipes have been adopted in many beverages. With anti-aging becoming a trending need, the new concept of “remedy with food while caring for face” has become popular. People are adopting herbal teas and beverages for their beauty properties. Among these concepts is “five black ingredients”, with the belief that black ingredients nourish kidneys. These ingredients are said to be anti-aging and also refine hair quality. Tea bags with this recipe are now on the market as an innovative product. Another popular concept is “Morning with Vitamin C and Evening with Vitamin A”. Vitamin C is said to brighten skin color while Vitamin A is for removing wrinkles.

The seasonal imprint in beverages is no longer exclusive to fruits, but also integrates floral elements. While seasonal fruits focus on their refreshing nature, seasonal floral fragrances integrate smell and taste at the sensory level. These create a sense of ritual and unique flavour memories specific to the season. Cherry blossom in among the most popular in spring, jasmine in summer and osmanthus in autumn.

Marketers should follow global trends as the starting point in the Chinese market. But, to fully succeed, they need to also adopt and integrate Chinese culture and the special Oriental aesthetic.

Seasonal floral-focused freshly-made drinks

1. Cherry Blossoms

Starbucks–Sakura Blooming Latte and Cherry White Peach Latte: Inspired by traditional Chinese seasonal occasions, a variety of innovative spring-ful drinks were launched one after another, tagging “Cherry Blossoms.”

2. Jasmine

The Empress–Jasmine Oolong Milk Tea: Jasmine comes from Hengxian County, the hometown of jasmine in China. It says only the double-petaled jasmine picked on sunny days was used on this drink to stimulate its fragrance fully.

3. Osmanthus

GuMing–osmanthus oolong, osmanthus wine, and osmanthus longan coconut: The exclusive taste of autumn and winter must be a strong and sweet osmanthus fragrance. To retain this rich aroma of osmanthus flowers, the silky osmanthus fragrance is integrated into the new product.

Ready to drink beverages with floral notes

1. Mengniu Chunzhen

Cherry Blossom Green Plum Yogurt: Commercial: “Spring Plum is coming with Cherry Blossoms towards you. Bring the freshness of spring, pack it, and send it to you. Savour the taste of this spring.”

2. BeiHaiMuChang

White Grape Flowing Jasmine Yogurt: Commercial: “Fresh jasmine fragrance with milk. Selected Guangxi double-petaled jasmine for fresh floral fragrance, jasmine aftertaste.”

3. Junlebao

Osmanthus Fermented Rice Yogurt: Commercial: “Autumn limited. Autumn is around the corner, and the golden Osmanthus is fragrant. It is a sweet taste unique to autumn.”



INTEREST IN INGREDIENTS BY GROWTH

Source: YOY-Social data

+268%

Five black ingredients

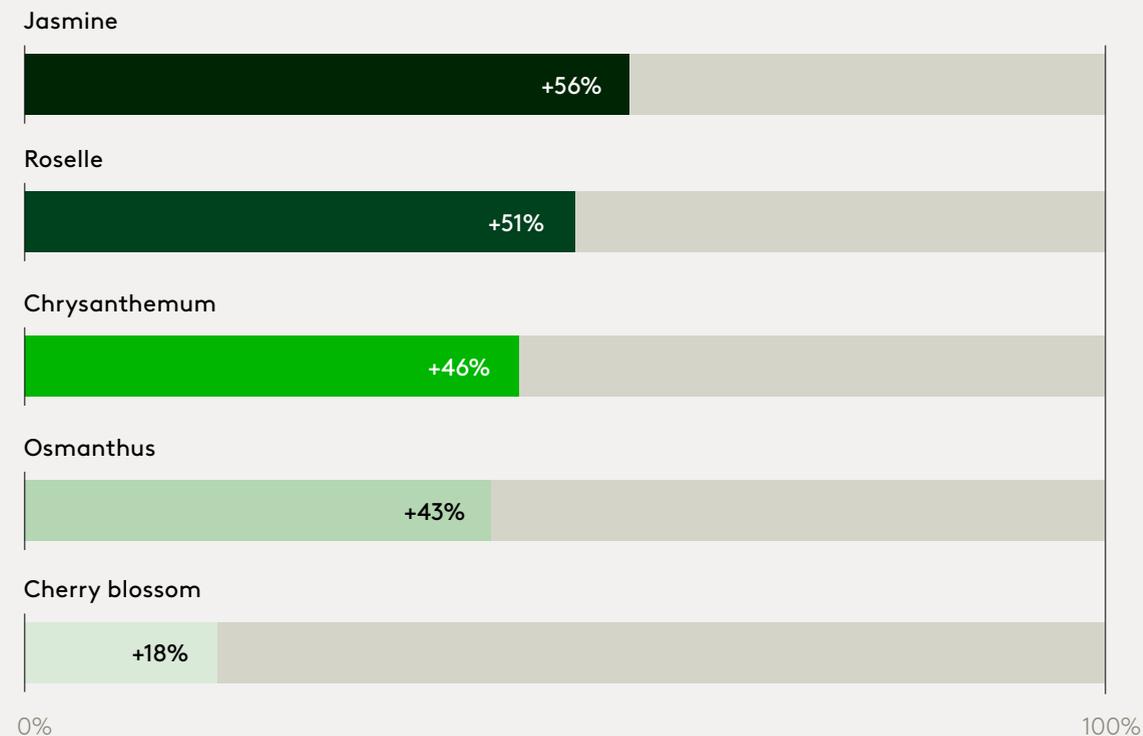
Black rice, black sesame, mulberry, black beans, and black goji berry.

+83%

Morning with Vitamin C & Evening with Vitamin A

Morning: black goji berry, grape, pomelo peel, date, and oolong tea. **Evening:** Mulberry, Rose, Plum, and Black tea.

FLORAL FLAVORS DISRUPTING DAIRY RANKED BY GROWTH



Source: YOY-Social data

India: aligning tradition and innovation in gut health



Indian food trends are rooted in tradition.

The pandemic drove people to improve their overall immunity and wellbeing with a back-to-tradition approach. Daily diets became increasingly inspired by Ayurveda. The Ayurvedic principle focuses on how digestive health is imperative in the regulation of physical and mental well-being. Accordingly, the Indian consumer started to focus on gut health as a foundational building block of holistic well-being. It soon became all about keeping both mind and body in alignment.

While culinary traditions already emphasized the importance of gut-friendly foods (look at how a thali from any part of the country has curd as a part of the platter), interest in traditional fermented Indian foods like palaya soru/congee (day old rice porridge) and kanji (a fermented drink made with black carrots and beetroot) have become significant, especially among urban populations.

Indians also began actively looking at the importance of probiotics in their diet. This is a global trend that seems to see no signs of abating.

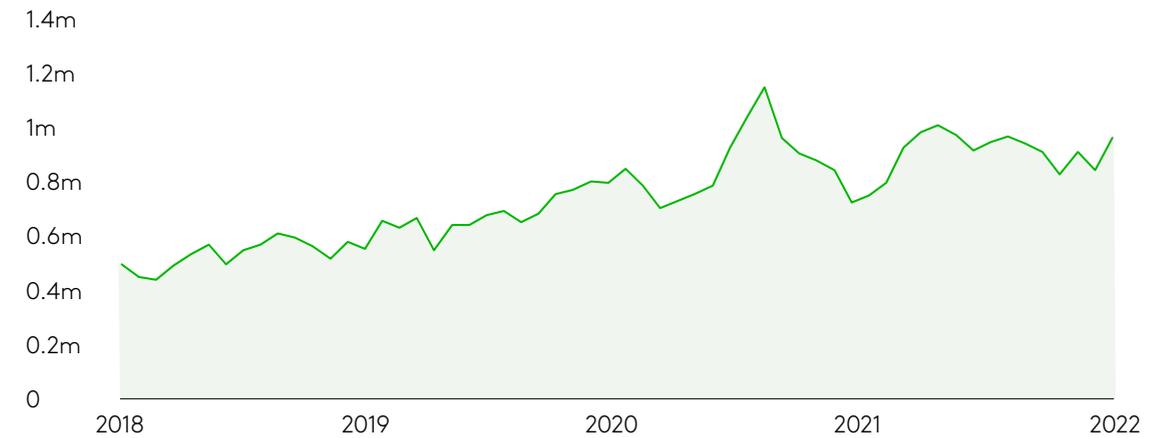


Mary George Parayil
Senior Director, Analytics, India
Kantar



Stephen Samuel
Head of Analytics, India
Kantar

INTEREST IN PROBIOTIC (NUMBER OF SEARCHES)



Source:
Search data, March

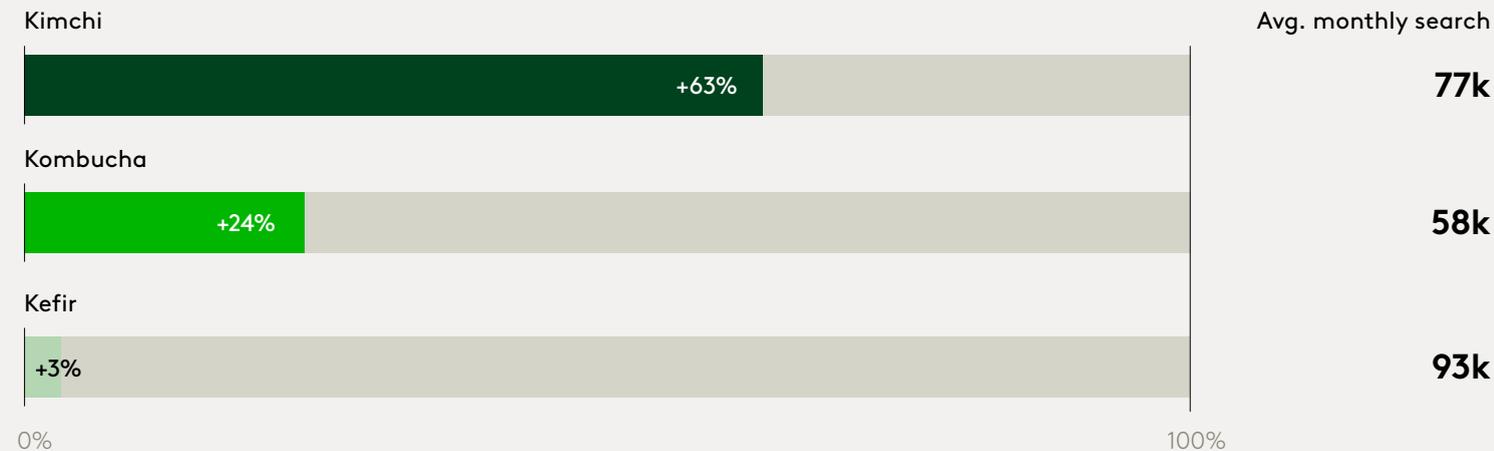
Indians are diversifying their diets. More modern areas of India are on a journey of exploration, and are willing to experiment with flavors, and textures. Dietary trends are now being informed and driven by post-pandemic experiences through travel and social media. While the mainstay of gut-friendly foods in India have typically been curd-based, fermented foods derived from local ingredients have also been a core part of the Indian diet. From the idli (steamed rice cakes made from fermented batter) and dosa (crepes made from fermented batter) of southern India to the selroti (ethnic fermented rice food) of the northeast, probiotic foods have their place in every Indian's plate.

However, consumers are no longer limited to options from the subcontinent. Kefir, kombucha and kimchi are now making their presence felt. Metropolitan areas have seen a surge in kombucha breweries, with products also finding space on supermarket shelves and e-commerce platforms.

Gut health is a big focus of interest. While there has been consistent increased focus on probiotics and the consumption of probiotic-rich foods, it's interesting to note how consumers are more aware of the necessity to ensure that gut fauna has the optimal conditions to flourish. There has been slow but sustained growth in consumer interest and awareness of prebiotics (food for gut bacteria). This has typically been a niche area in the pharma/nutraceutical domain but over the past couple of years firms from the food category also ventured into prebiotics. Prebiotic chocolate has generated recent buzz and there is opportunity for product innovation in this space. As always, India's vibrant startup ecosystem has not been far behind with a proliferation of firms in the gut health space, ranging those that specialize in prebiotic chocolate to breweries focusing on just kombucha or kimchi.

The pandemic led to awareness about mental health. With increasing scientific evidence pointing to the gut /brain connection as fundamental to mental wellbeing, the focus of the Indian consumer on gut health will likely continue.

INTEREST IN INGREDIENTS RANKED BY GROWTH



Source: Search data

INTEREST IN PREBIOTIC (NUMBER OF SEARCHES)



Source: Search data



Indonesia: departing from tradition to playful exploration



Nelson Loaiza
Head of Media, Analytics & Digital, Indonesia
Kantar

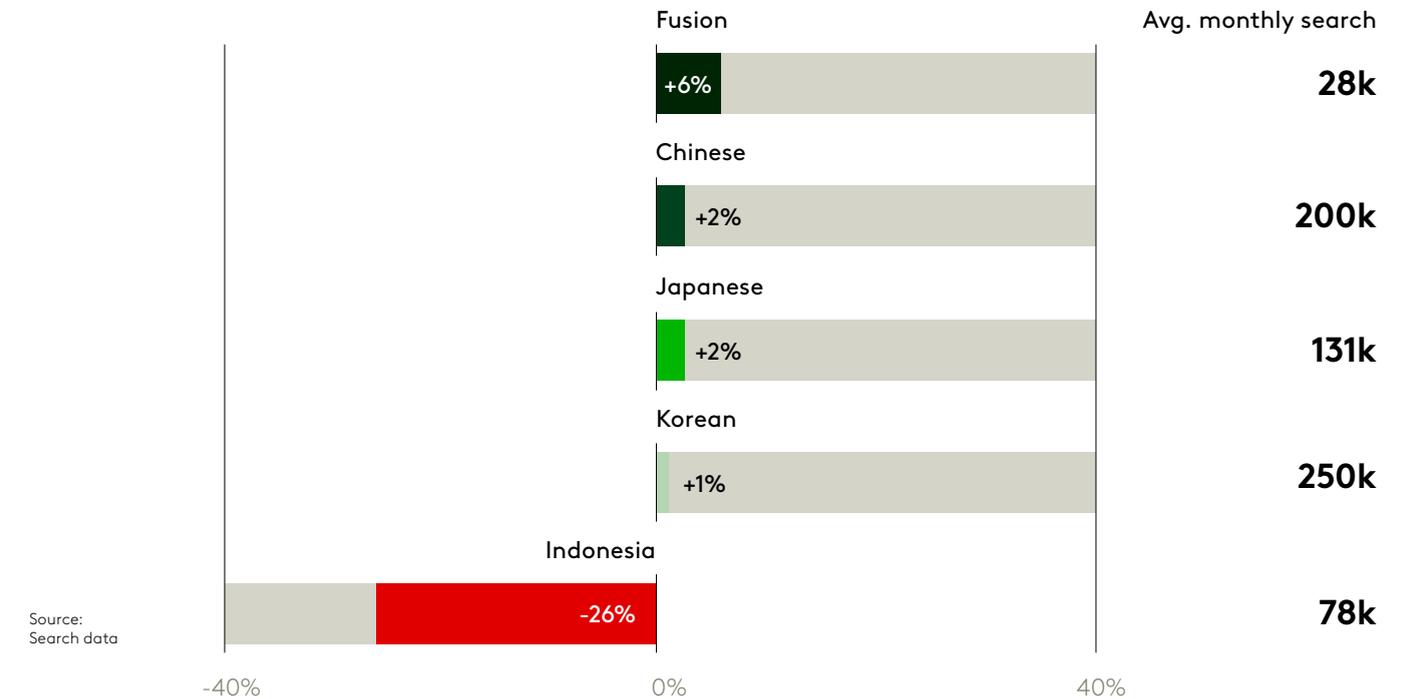
Market rundowns: Indonesia

Food is one of the most important cultural and characteristic traits of any community and this is especially true for Indonesians.

It's an important facet of their identity and an enabler of social connection in a highly affiliative society. Traditional Indonesian food remains popular within the country and is a source of great pride. Still, the landscape is beginning to evolve as connectivity accelerates and cross-cultural interactions increase.

Indonesian foods are moving beyond tradition. **Interest in Indonesian cuisine shows a decline with many opting for Chinese, Korean and Japanese cuisines.** Fusion cuisines are in the disruptive space and point to a consumer looking for excitement and a rejuvenation of the known with a new twist. Indonesians have a desire to experiment and experience within a somewhat familiar flavour profile.

INTEREST IN CUISINES RANKED BY GROWTH



Consumers are seeking an indulgent balance. Snacking is a staple and ingrained behaviour within Indonesia. It typically includes high-carb meals (such as martabak manis, roti bakar), heavily sweetened drinks (such as kopi susu and boba milk tea) and a lot of sambal (spicy foods/sauces). This indulgence comes at a cost, primarily in the form of health problems associated with high acidity and diabetes. Indonesia ranks #5 in the world for highest diabetes rate.

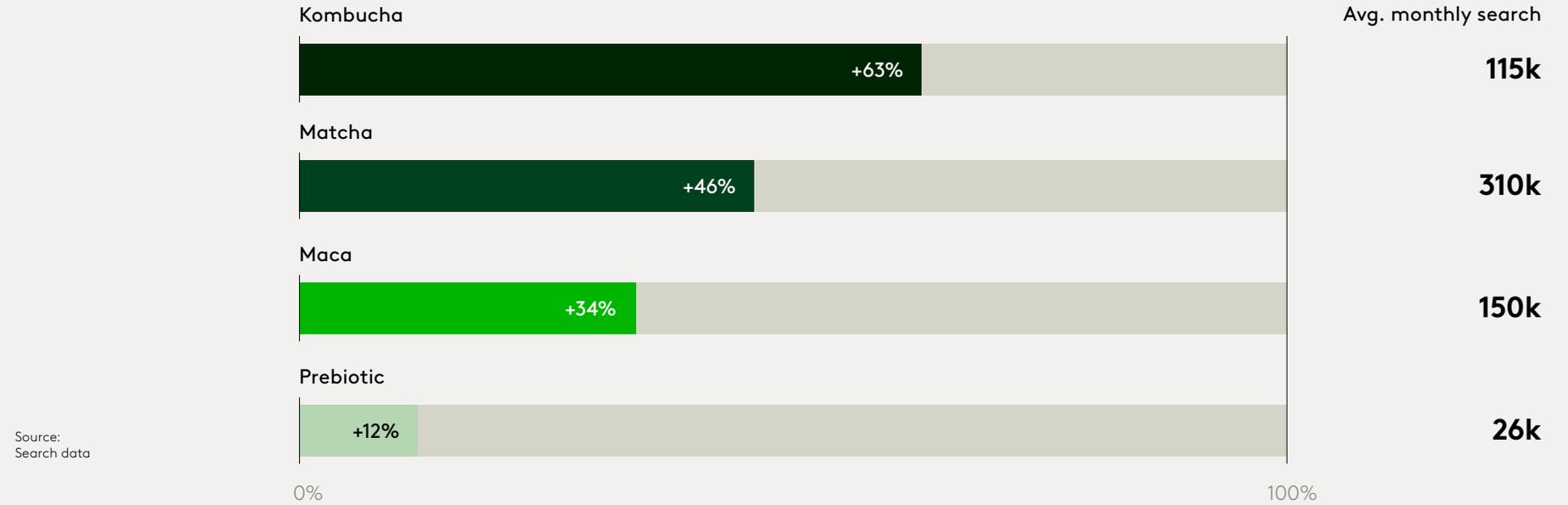
While we do not expect to see a drastic change in these behaviours, it's interesting to note that the Indonesians are beginning to embed healthier choices in their endeavour to mitigate or recover from the consequences of excessive snacking. In line with global trends, gut health is an increasing area of interest.

Indonesians face up to conscious consumption. With a population of just over 270m and a sizable landmass, Indonesia faces numerous difficulties. They are one of the largest producers and exporters of agricultural products like rice, cocoa, and palm oil. Mass food production is necessary not only to feed the country's expanding population but also to meet global demand. This requires the clearing of forests and peatlands, extensive distribution efforts across islands and nations, and the industrialization of traditional agriculture. As the government implements programs and initiatives to address these concerns, public interest in topics like food waste, sustainable agriculture, and bioplastics grows. This representing a significant shift in consumer consciousness.

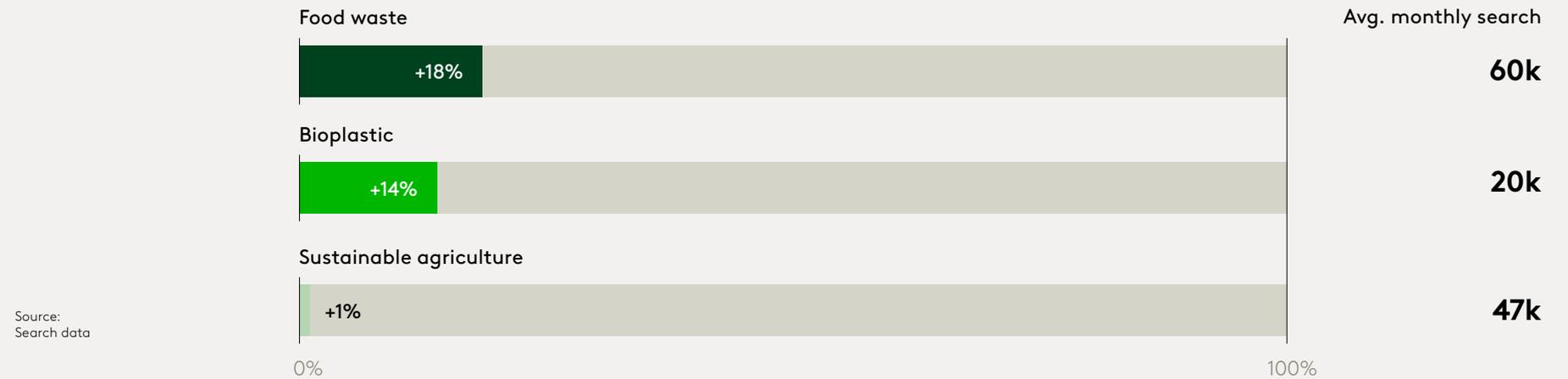
All things considered, even though Indonesians are unlikely to significantly alter their fundamental eating patterns, search data points to an expansion of their culinary repertoire with many embedding healthy ingredients balancing their guilty pleasures. They are showing interest in sustainability practices that would have an impact. These trends inform strategies companies can implement to disrupt the market and drive meaningful difference while creating brand value.



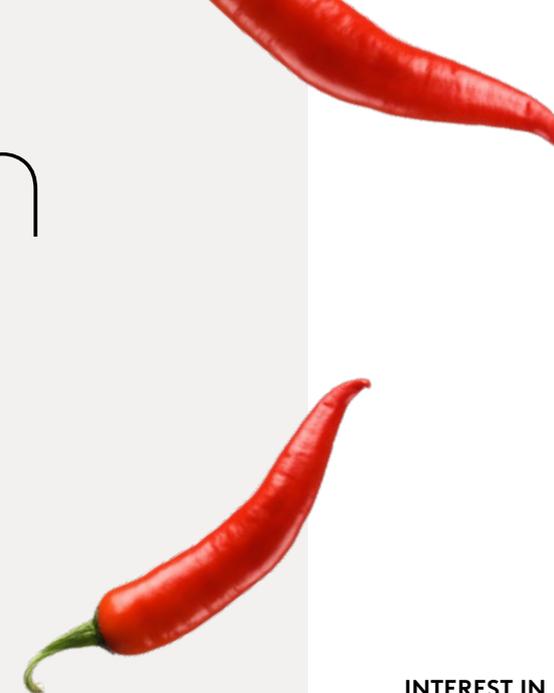
INTEREST IN INGREDIENTS RANKED BY GROWTH



INTEREST IN SUSTAINABILITY LINKED TOPICS RANKED BY GROWTH



Mexico's health craze: will bug cuisine go global?



Mexican cuisine is distinguished worldwide for its unique combination of bold flavors and ingredients, making it one of the most popular cuisines in the world.

Tacos, tamales, birria, enchiladas, guacamole and pozole are some of the many dishes that have a firm following globally.

Edible insects (chapulines) have always been a part of the food culture within Mexico and they are seeing a renaissance, possibly driven by the climate crisis, future food insecurity or simply due to their credentials as alternative sources of protein. It will be interesting to see if this travels across the globe as a food trend. Other sources of alternative proteins emerge, though in significantly lower volumes aligned with the whole flexitarian approach to eating.

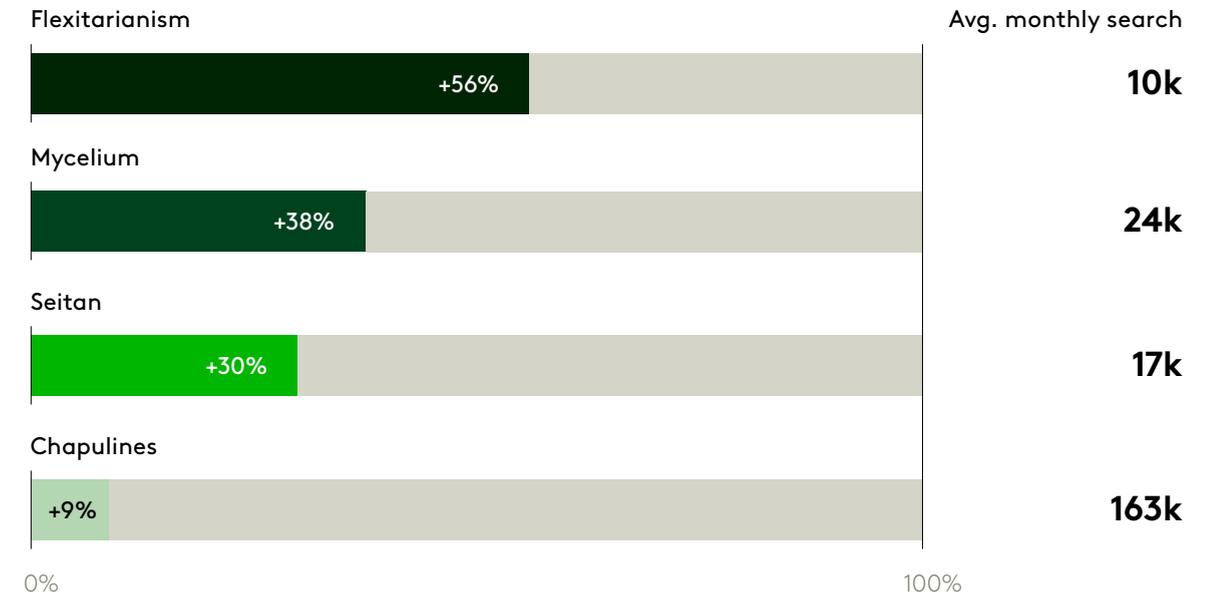


Sandra Gómez
Vice President, Analytics, Mexico
Kantar



Fernando Soto
Senior Data Scientist, Mexico
Kantar

INTEREST IN DIETS & ALTERNATIVES RANKED BY GROWTH



Source:
Search data



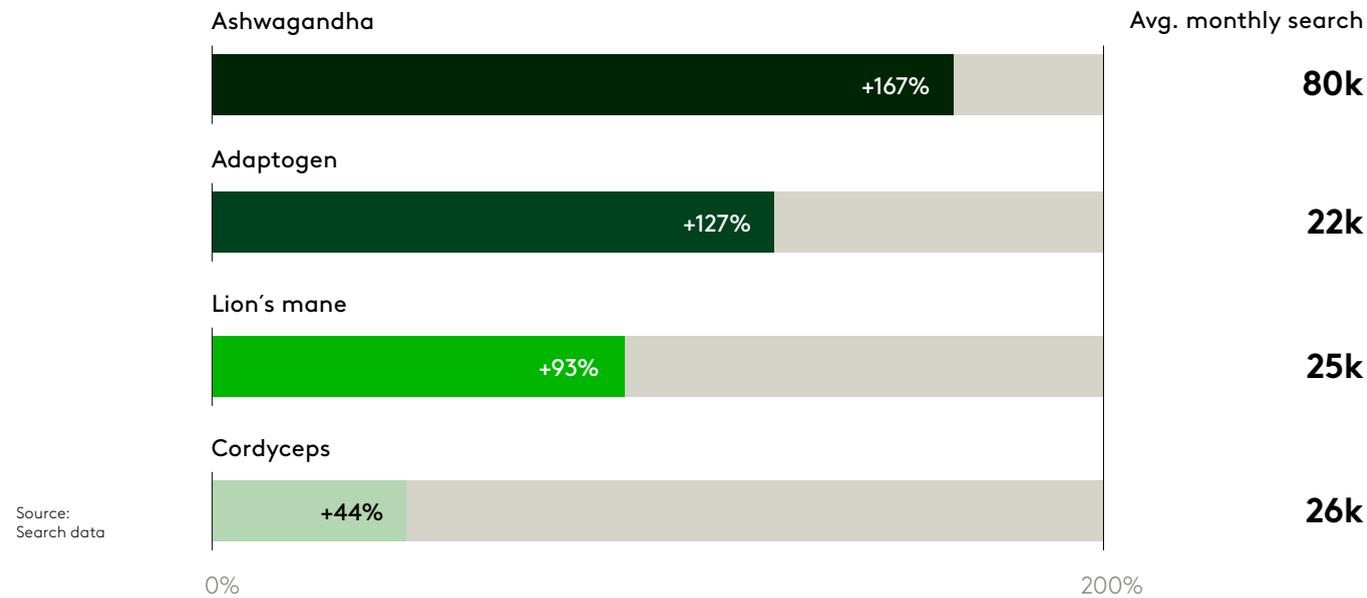
Health dominates the search narrative and cognitive support is a disruptive trend. Mexicans are captivated by the new ingredients making waves globally and want to know how they can be a part of this growing movement. Queries revolve around how to consume, the specific benefits they can expect and the utility specific to gender.

Digestive health continues to gain traction, while probiotic has a significant following. Newer topics such as digestive enzymes paint the picture of what's to come and how the market is evolving aligned with global trends.

The influence of ingredients and cuisines from across the world is evident. **Korean and Chinese food have surged, possibly driven by the deep flavor profiles the Mexican palette is familiar with.** Many are infusing additional ingredients and flavors from Mexican culture to localize foods to their needs. But flavor is not the only driving force: health priorities continue to take precedence with certain diets seeing a steady rise. The combination of multiple elements shapes the narrative for everyday life in Mexico.

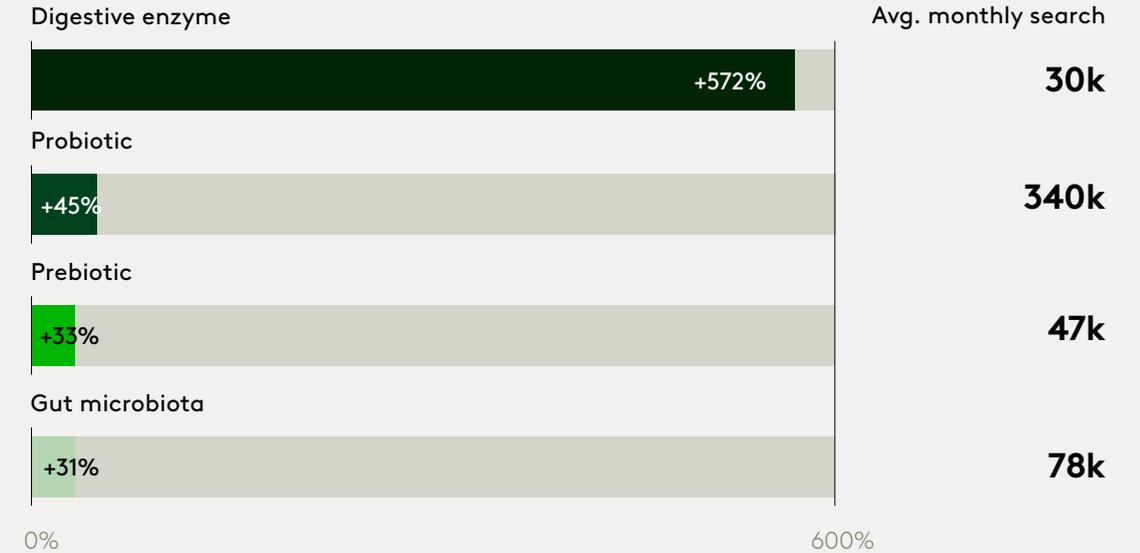
As much as Mexico is at the forefront of cuisine on the global platform, there is a willingness within the country to explore, experiment and embed new functional led ingredients from other countries. It remains to be seen is whether or not Mexico will be able to export its penchant for eating insects to other markets.

INTEREST IN TOPICS LINKED TO COGNITIVE HEALTH RANKED BY GROWTH



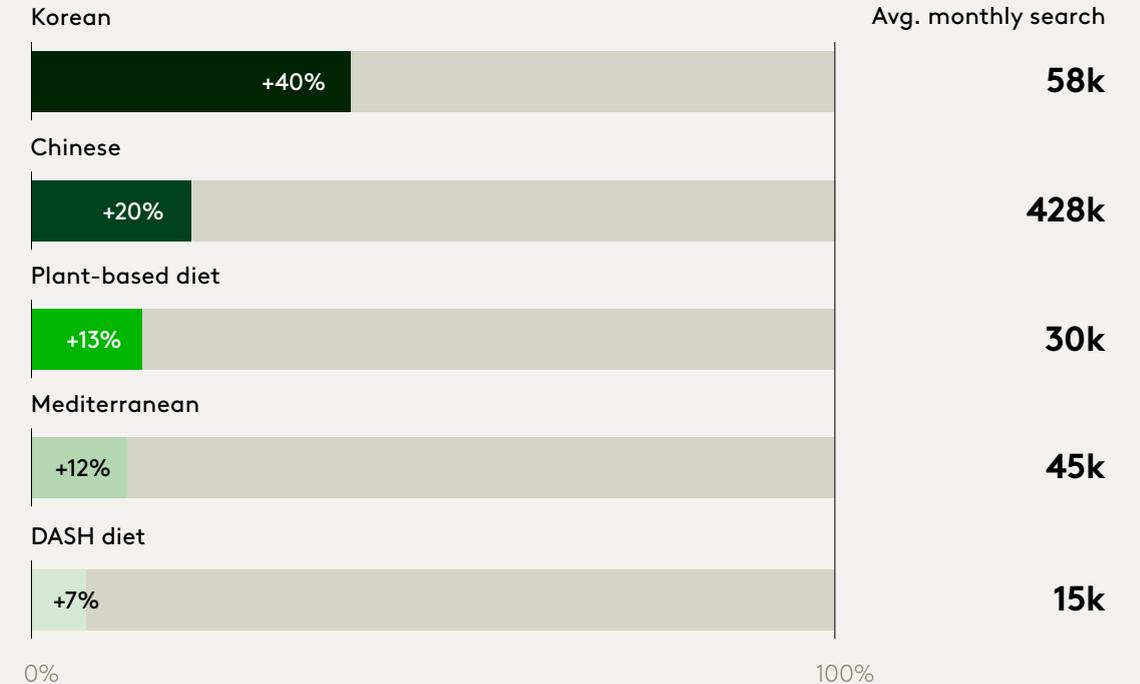
INTEREST IN TOPICS LINKED TO GUT RANKED BY GROWTH

Source: Search data



INTEREST IN CUISINES & DIETS RANKED BY GROWTH

Source: Search data



Spain: to the Mediterranean and beyond



In a post pandemic world, Spaniards fall back to their old food habits infused with certain nuances accelerated by this tumultuous time.

Health and wellbeing remain integral. However, new tensions emerge because of rise in food prices driven by the Russian invasion of Ukraine. As consumers grapple with this reality, we see four keys drivers that feed the narrative around food: health, experience, environment, and convenience.

Health and wellbeing is at the center of most trends, with consumers looking for a variety of factors aligned with their individual needs. Gut health is top of mind: searches around probiotics, gut microbiota and fermented food continue to grow. Kefir, kimchi and kombucha are the most searched terms within the fermented subset. There is a growing curiosity for CBD specific to gummies, oils and supplements. If or when legalisation changes, there is a clear and interested audience waiting in anticipation. In line with global trends, Spaniards are in pursuit of cognitive support including information on ashwagandha and lions mane. There is also a surge in interest around anti-inflammatory diets pointing to the overall mindset of the consumer.



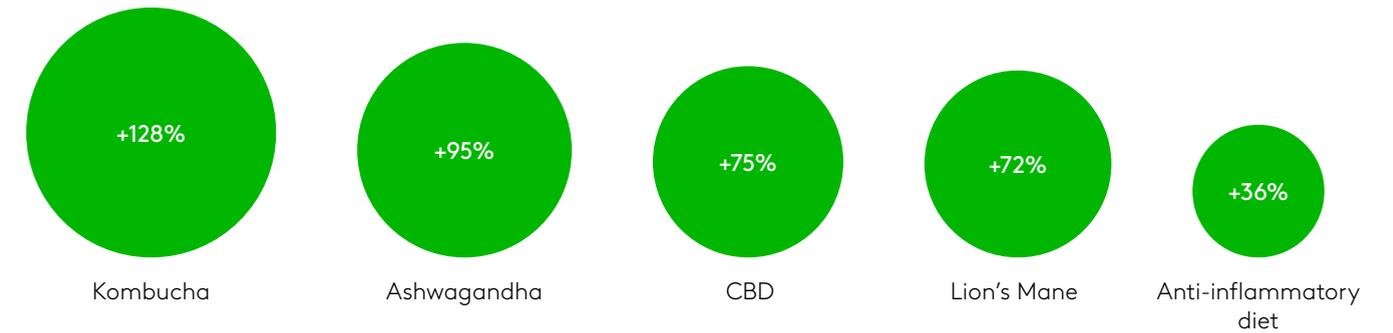
Rafa Montoya
Associate Director, Spain
Kantar



María Martínez
Head of Clients & Analytics, Spain
Kantar

INTEREST IN INGREDIENTS / DIETS RANKED BY GROWTH

Source: Search data



In the context of environment and sustainability, consumers are searching about regenerative agriculture practices and managing food waste. "Too good to go" dominates searches around food waste. Another interesting facet is the growth of the flexitarian approach to food (primarily vegetarian but still eating some meat) and the inclusion of plant-based foods. This trend that fits with health goals as well as the greater good of the planet.

Specific to cooking and convenience, demand for air fryers (+1160%) shows no signs of slowing down and many are actively embracing once-a-month-cooking (+15%) or batch cooking (+28%).

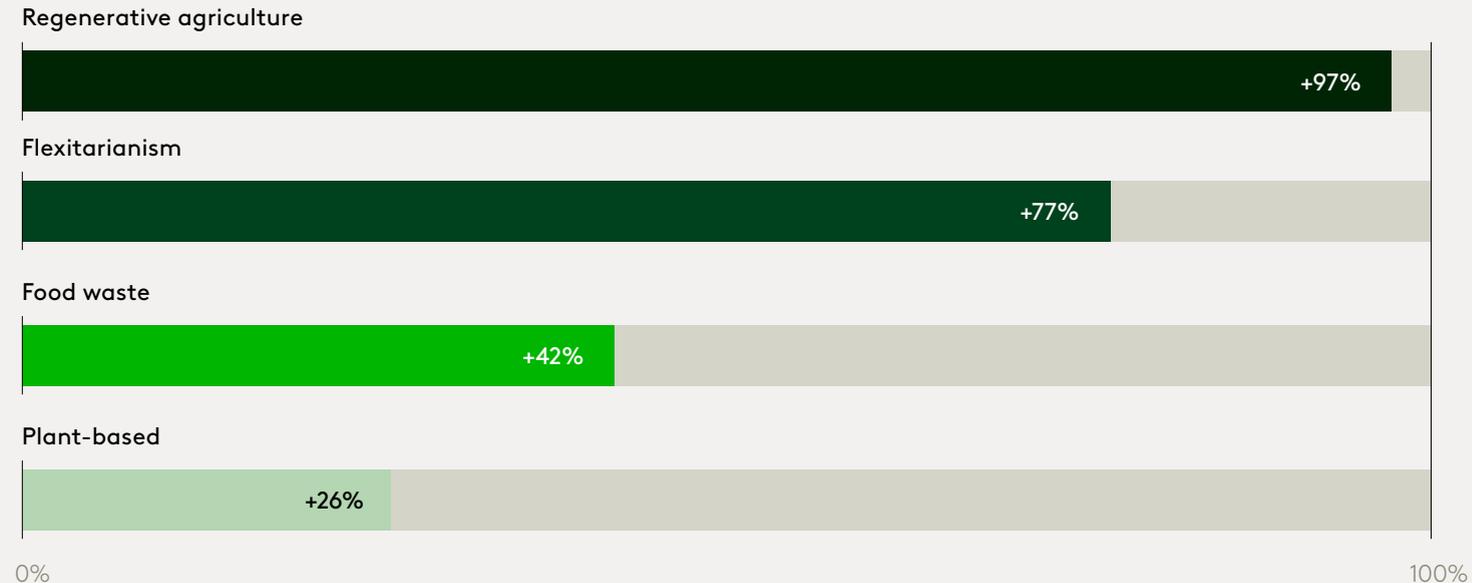
In the context of *experience and discovery*, Spain follows the global narrative on **Korean cuisine** as being a trending one in addition to a taste for Gochujang. Italian and Chinese continue to be in-demand, while everything related to Mediterranean food leads the growth ranking.

While Spain embraces trends taking place on the global stage, the closer-to-home interest in the Mediterranean diet is growing steadily (+66%) over the last two years vs. the rest of the world (+41%). The Mediterranean diet was declared an Intangible Cultural Heritage of Humanity by UNESCO in 2010 for being much more than healthy eating: it's a lifestyle that encourages social interaction, respect for the land and biodiversity along with conservation of traditional agricultural and fishing.

Given the ever-increasing importance of health; the antioxidant properties of the Mediterranean diet coupled with its ability to lower risk of chronic diseases hits the trend sweet spot on multiple levels. It satiates the appetite, provides protein and calcium, while allowing for indulgences like wine and chocolate in moderation. It also reduced greenhouse gas emissions. We believe that the principles of the Mediterranean diet will continue its upward trend and gain further prominence.

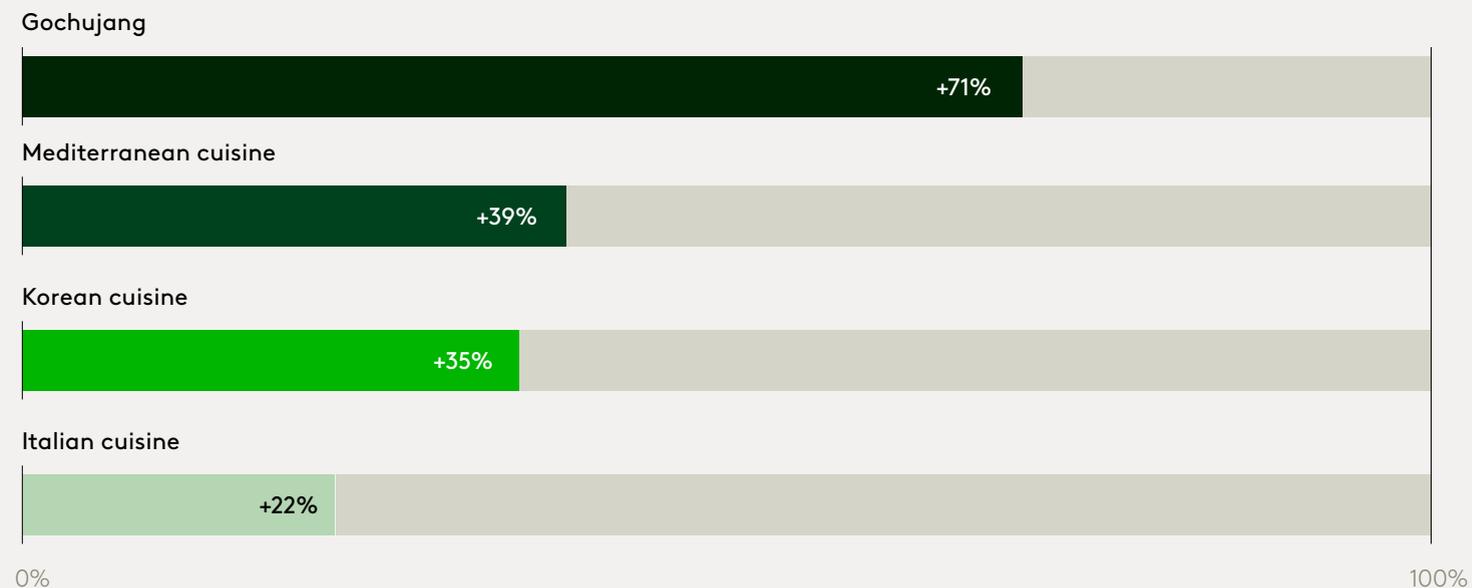
INTEREST IN TOPICS LINKED TO SUSTAINABILITY RANKED BY GROWTH

Source: Search data



INTEREST IN INGREDIENTS / CUISINES RANKED BY GROWTH

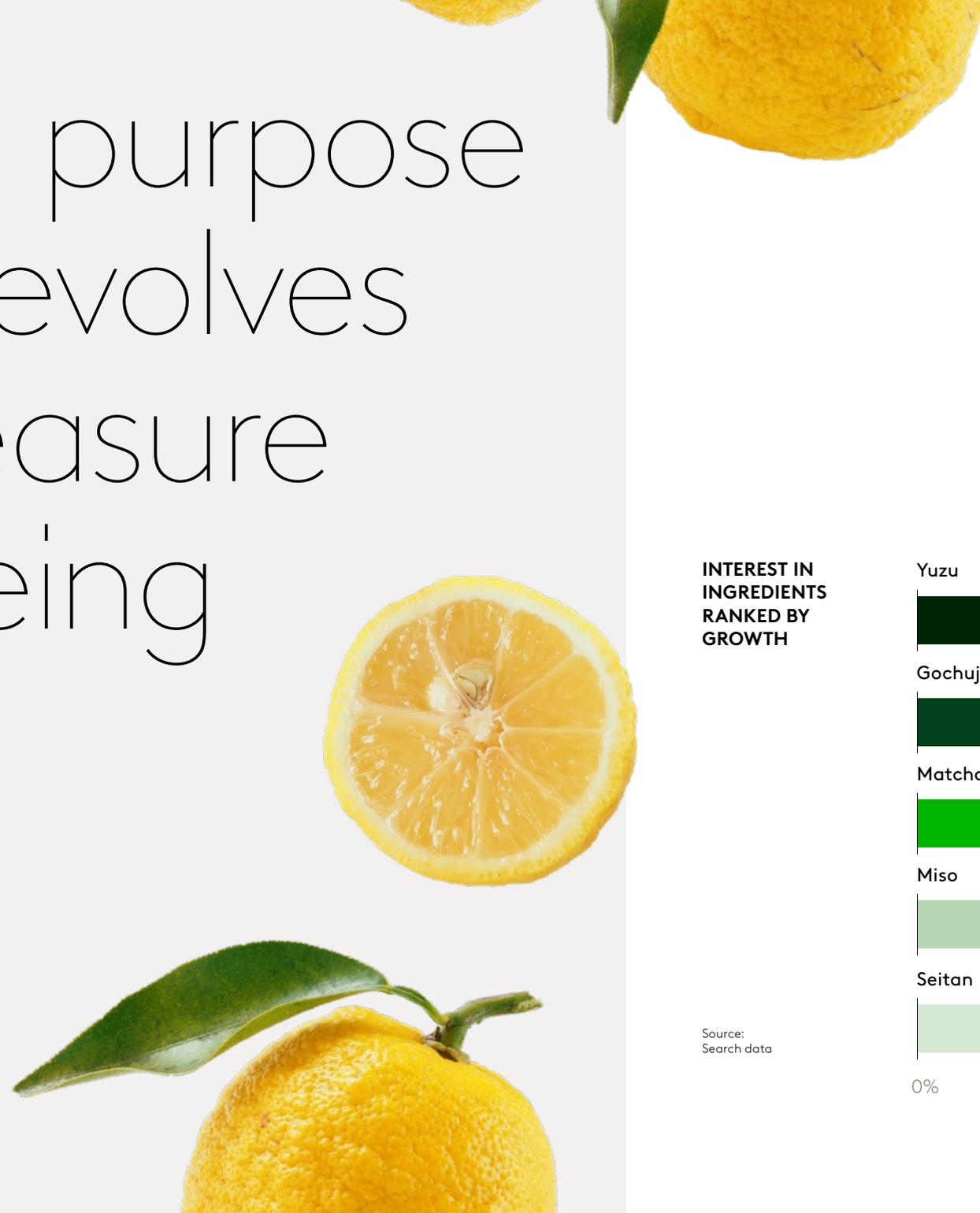
Source: Search data



Sweden: purpose of food evolves from pleasure to wellbeing



Mika Fischerstrom
Head of Analytics, Nordics
Kantar

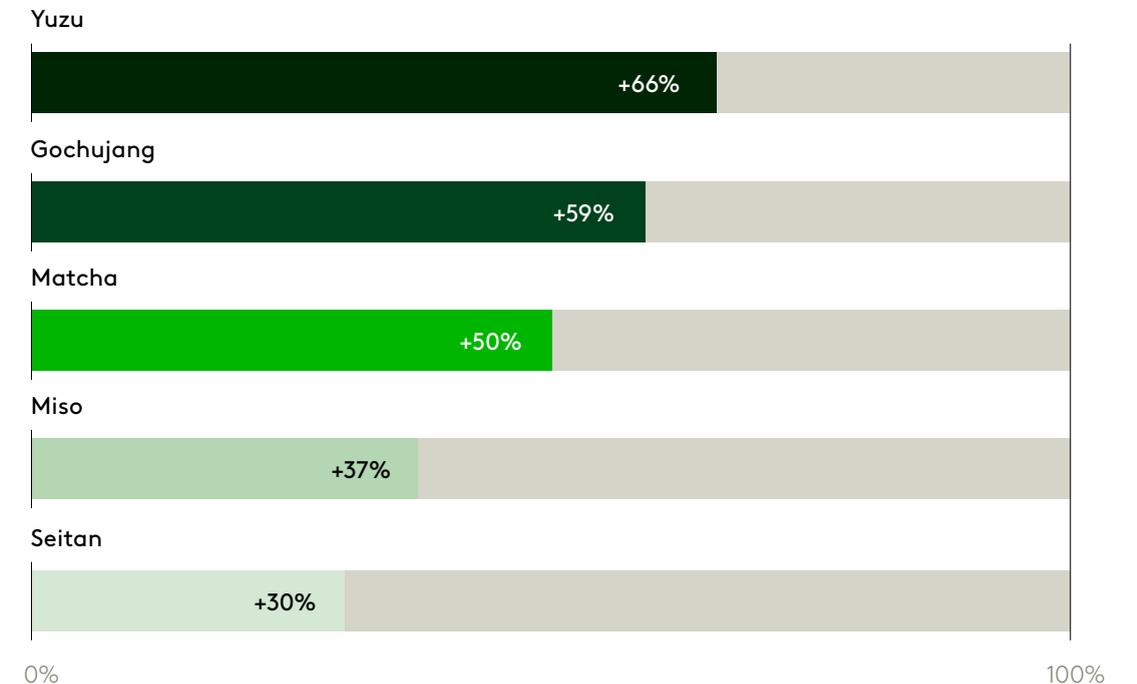


Sweden may be known for its meatballs and herring but Swedes interest and taste in food follow international trends.

Analysing search data from the country identifies growing trends and influences from the Far East intertwined with increased focus on food as part of overall wellbeing. The purpose of food has evolved from pleasure to wellbeing. The current economic environment and increased food prices are also reflected in the choices Swedes make.

Swedes' fascination with food and ingredients from the Far East is on the rise. **Interest in Korean food has exploded (growing by 26% over the past two years) while the appeal of Thai cuisine has plateaued but it remains a firm favourite.** New ingredients and flavour profiles from the Far East appear on the radar.

INTEREST IN INGREDIENTS RANKED BY GROWTH



Source: Search data

Some of these flavours and ingredient trends are migrating to other categories. Yuzu in particular has seen a range of scent releases (perfume from Acqua di Parma and Rituals) and home fragrance from H&M. Another category that seems quick to pick up on new flavour trends is the "snus": non-tobacco nicotine pouches and snuff. Yuzu flavoured snus is only one of many exotic flavours being offered in a steady stream of new flavour releases aimed at a younger target group willing and interested to try new things.

Swedes are interested in life hacks and simplifying while still hitting health goals. The phenomenon of the air fryer has swept across globe. Sweden may have been late to the party, but it emerges as a trend. While searches for air fryers have grown significantly over the past two years, an explosion in interest levels occurred between the second half of 2022 and the beginning of 2023 with over 500k monthly searches. Queries evolve from being about "what it is" and "best one to buy" to "how to use it". Recipes searched for span across chicken and pork to bread, eggs and more. There is a clear desire to use air fryers across multiple consumption occasions.

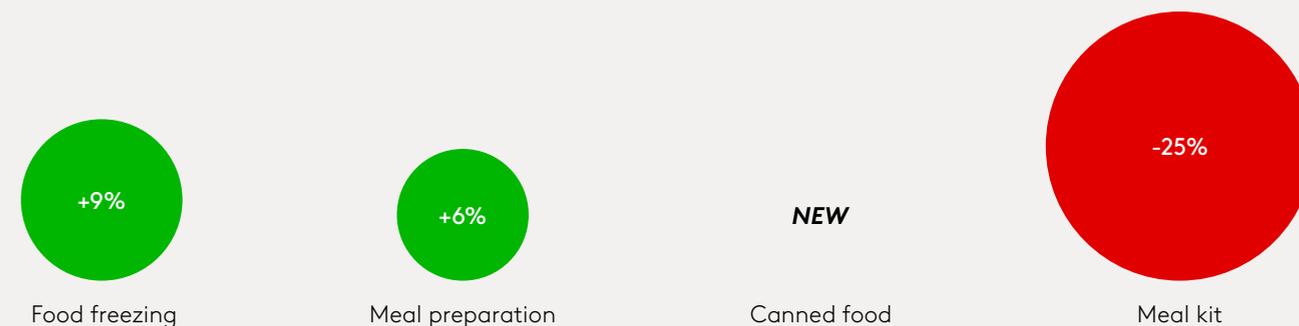
Consumers are focusing on preparation and planning as a means to economize due to inflation and rising food prices. Given that food prices have increased by more than 20% in the last year in Sweden, consumers are looking for ways to save and be more economical. Interest in meal preparation, food freezing and canned food shows growth. The flip side is declining interest in organic food, possibly due to its higher price points. Search interest in organic food has decreased by 30% over the past two years. Industry figures for sales of organic products show a decline of 6.3% last year and the decline is expected to accelerate. Meal kits, which have been around for a long time on the Swedish market, and a firm favourite with consumers, are also seeing waning interest, potentially due to increasing inflation and the need to economise.

Diets continue to capture consumer interest; they are keen to understand or uncover solutions linked to specific issues. Swedes want to understand what kind of foods can or can't be consumed in the context of their problem. Established diets like veganism, raw foodism and low carb still have strong followings but show declines. Many are looking for diets related to specific allergies in the quest to find solutions that impact overall well-being.



INTEREST IN TOPICS LINKED TO FOOD PREPARATION RANKED BY GROWTH

Source: Search data

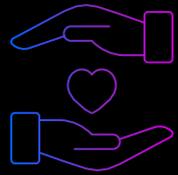


INTEREST IN DIETS / FOOD ALLERGIES RANKED BY GROWTH



Source: Search data

Accelerating brand growth through Dx Analytics



Curate your **brand strategy** by understanding how consumers talk about your category, delving deeper into who they are and their touch points of influence.



Feed into your **innovation** pipeline through an understanding of trends as they emerge at a local or global level. Across categories, markets and languages.



Enable **brand guidance** through an unprompted view of consumer interest in your brand vis a vis competition, category needs and geographies.

Sources

Trend 2

¹ Butler, Sam. "Craigavon Firm Launches an Innovative Range of Chocolate Coated Products "without the Moo."" <https://www.newsletter.co.uk/27-Jan-2023-www-newsletter.co.uk/business/craigavon-firm-launches-an-innovative-range-of-chocolate-coated-products-without-the-moo-4001492>. Accessed 30 Mar. 2023.

² Vegconomist. "MyForest Foods Triples MyBacon Availability, Grows Production and Prepares to Launch First Jerky." Vegconomist.com, 1 Feb. 2023, vegconomist.com/company-news/myforest-triples-mybacon-jerky/. Accessed 31 Mar. 2023.

³ Vegconomist. "The Plant Based Seafood Co. Unveils "First-of-Its-Kind" Mind Blown Shelf-Stable Sea Scallops." Vegconomist.com, 28 Mar. 2023, vegconomist.com/products-launches/plant-based-shelf-stable-scallops/. Accessed 31 Mar. 2023.

⁴ Vegconomist. "Issei Brings Gelatin-Free, Japanese-Inspired Mochi Gummies to Whole Foods." Vegconomist.com, 17 Dec. 2022, vegconomist.com/food-and-beverage/issei-mochi-gummies-profile. Accessed 31 Mar. 2023.

Trend 3

⁵ Sullivan, Eliza. MBG Creative, "Our 17 Favorite Probiotic Drinks to Sip for Gut Health in 2022." Mindbodygreen, 15 Jan. 2022, www.mindbodygreen.com/articles/best-probiotic-drinks. Accessed 30 Mar. 2023.

⁶ Udayavani. "Lil'Goodness Launches India's First Prebiotic Cocoa Powder." Udayavani, 7 July 2022, www.udayavani.com/english-news/lilgoodness-launches-indias-first-prebiotic-cocoa-powder. Accessed 30 Mar. 2023.

⁷ Pope, Clare. "Kent Food Business Wins Four Golds at Health Food Awards – Taste Kent Magazine." <https://www.tastekent.co.uk/2022/10/20/kent-food-business-wins-four-golds-at-health-food-awards/>. Accessed 31 Mar. 2023.

⁸ Convenience Store. "Fhirst Living Soda Functional Drinks Hit Shelves." Convenience Store, 29 Mar. 2023, www.conveniencestore.co.uk/products/fhirst-living-soda-functional-drinks-hit-shelves/677757/article. Accessed 31 Mar. 2023.

Trend 4

⁹ Thomson, Johanna. "Jnck Launches Non-HFSS Cookies." Talking Retail, 23 Mar. 2023, www.talkingretail.com/products-news/biscuits-cakes/jnck-launches-non-hfss-cookies-23-03-2023/. Accessed 30 Mar. 2023.

¹⁰ Barston, Neill. "A Bold New Vision for Barry Callebaut's Second Generation Chocolate." Confectionery Production, 2 Nov. 2022, www.confectioneryproduction.com/blog/41619/a-bold-new-vision-for-barry-callebauts-second-generation-chocolate/. Accessed 30 Mar. 2023.

Trend 10

¹¹ BURGESS, Joshua. "Kissd Launch New Line of Sustainable Flavoured Waters This Valentine's Day." EIN News, 14 Feb. 2023, www.einnews.com/pr_news/616295557/kissd-launch-new-line-of-sustainable-flavoured-waters-this-valentine-s-day. Accessed 31 Mar. 2023.

¹² Snacks, RIND. "RIND® Snacks Sweetens Portfolio with New Dark Cocoa Sea Salt Coconut Crisps." www.prnewswire.com/14-Sept-2022-www.prnewswire.com/news-releases/rind-snacks-sweetens-portfolio-with-new-dark-cocoa-sea-salt-coconut-crisps-301623323.html. Accessed 3 Apr. 2023.

¹³ Enerva, Kaycee. "Brownes Switches to Ocean-Bound Plastic for Its Dairy Packaging." Viable Earth, 22 Nov. 2022, viable.earth/plant-based-food/brownes-switches-to-ocean-bound-plastic-for-its-dairy-packaging/. Accessed 31 Mar. 2023.

KANTAR

Kantar is the world's leading marketing data and analytics company. We have a complete, unique and rounded understanding of how people think, feel and act; globally and locally in over 90 markets. By combining the deep expertise of our people, our data resources and benchmarks and our innovative analytics and technology, we help our clients **understand people** and **inspire growth**.