

# **Beyond the Noodle:**

Navigating Culinary & Consumer Trends for the Future

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# What We Do ...

We help food industry partners navigate trends by revealing patterns leading to products that connect with customers

# Methodology

Military Intelligence & Chaos Analytics

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#### \*Other Forecasters

#### \*Culinary Tides, Inc.

**New Product Launches** 

**Product Sales** 

Consumer Surveys

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Behavioral Research

Competitor Intelligence

**Technologies** 

Clinical Health Research

Government Regs

Courier Industries

Economic Research

# **New Product Launches**

**Product Sales** 

Consumer Surveys



# Consumer Drivers





# **Consumers Drivers**

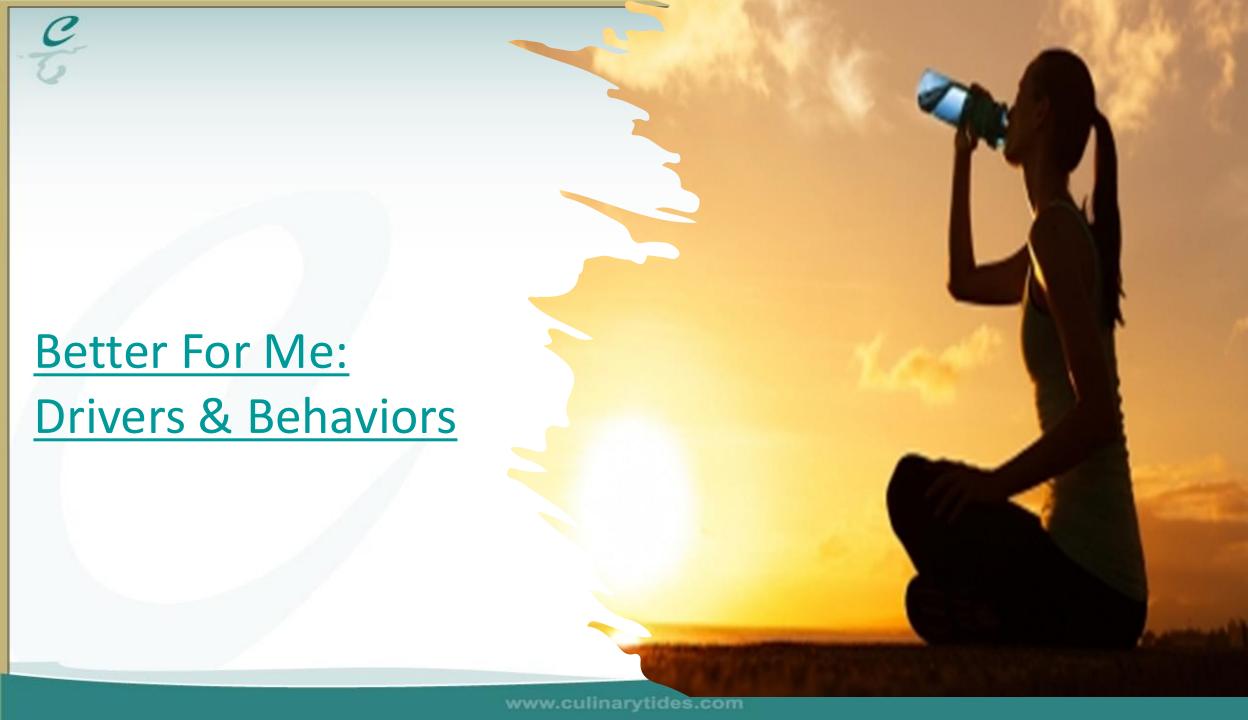




## More Drivers... Motivational

Disconnect To Connect Escapism & Permissible Indulgence Authenticity & Cultural Connection Don't Delay Rewards Hunt For Uniqueness. Psychological Nostalgia Newstalgia Minimalist Messaging Wellness & Personal Growth Personalization & Luxe Self-Expression





#### THEME: Easy Everyday Health; Achievable Goals

#### Significance

- Consumers' everyday health goals focus on a holistic approach, blending nutrition, lifestyle, ethics, and personal preferences for balanced well-being.
- Consumers are drawn to brands that share relatable stories, values, and transparent origin stories, fostering trust and loyalty in their food choices.
- Consumers look for convenient, nutritionally balanced options that fit seamlessly into their hectic schedules, promoting overall well-being without sacrificing convenience.

#### Poster Childre

- Seasonal & local
- Sensible indulgences
- Food tribes
- Recognizable ingredients, whole ingredients
- Relatable & emotional brand stories, origin stories
- Functional
- Conveniently nutritious

- Ingredion: 78% will pay more for clean label, natural claims, 29% looking for products w/ no artificial ingredients
- Food & Beverage Insider: 62% are looking for pasta with added health benefits, such as higher protein, fiber, or functional ingredients



#### **Pasta Allies**



- Why: Adds fiber, texture, & slow-digesting carbohydrates
  - Why: Adds a global twist or exciting flavor element, enhancing appeal of pasta products

- Why: Elevates pasta with creamy textures & rich flavors, while providing protein, calcium
- Why: Enhances dishes with vitamins, minerals, while aligning with global & plant-forward trends
- Why: Infuses products with bold flavors while adding healthful antioxidants





# What's Causing Bolder Flavors to Turn Up in Food?



#### Inflation Behaviors: Pre-Covid

#### Reaction

- Fear ↑
- Emotional shutdown ↑
- Panic ↑
- Motivation ↓

#### **Action**

- Risk-taking ↓
- Exploration / Experimentation ↓
- Travel ↓
- Comfort food ↑

#### **-----**

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#### Inflation Behaviors (Now): Post-Covid

#### **Reaction**

- Fear set point ↑: less reactive
- Cautious, No emotional shutdown
- Stress 1, Not panic
- Motivation unaffected

#### **Action**

- Risk-taking tempered, but remains strong
- Exploration / Experimentation remains strong
- Travel h: Global flavors ↑
- Extremes on palate ↑: citrus, chilies, heat, spice ↑



# **How Bold Flavors Come to Life**



Mintel: 45% of U.S. consumers say they actively seek out spicy or bold-flavored pasta dishes.

# **Drivers: Tone/Voice**

- Adventure & Excitement Through Taste
- Healthy
- <u>Heritage</u>: taste & experience history
- Lux: affordable indulgences
- Newstalgia: nostalgia with a modern twist
- Nostalgia: food tied to a time and place in history
- Pickled, Fermented
- Rewarding: rich flavors, indulgent texture
- Sour: dressings, sauces, and condiments
- <u>Sweet Fusions</u>: swalty, swicy, swokey
- Textural: foams, jellies, flaky, crunchy
- Thrilling Comfort: comfort flavors with spice & heat
- <u>Unexpected</u>: Create contrast and intrigue
- Visually Engaging: bold colors, textures
- Wake Up Senses: pickled, blistered, aged, smoked
- Wild Not Mild: complex heat

# **Affinity Scale: Food Preparations**

#### **Insights:**

- High-heat techniques like roasting, smoking, and caramelization enhance natural flavors, creating depth and complexity that elevate home and restaurant dining experiences.
- Unexpected textures and flavor combinations, from gelatinous to flaky and umami to sweet-bitter pairings, push boundaries, making food preparation an adventurous experience.

Bold & Spicy Flavors

Unexpected Flavor Charred & Smoked Sized Products

Combinations

Wake Up Senses

Charcuterie Boards

Snack Versions Of FullSized Products

Unique Textures

Stuffed Meals For Two + Flavors Are Wildly Inventive

Alcohol Infused

Dumplings & Portability, Hand-held Pocket Foods

Roasted & Caramelized



### Beyond The Noodle: Emerging Pasta Formats & Shapes

Newer Shapes in Spotlight: Radiatori, Cascatelli Legume-Based: Chickpea, Lentil, Black Bean Pasta Shapes **Bronze Cut High-Protein**: Infused with Pea or Whey Irregular & Hand Cut: Trofie, Mafaldine, Pici Pasta Formats **Hybrid Fresh-Dried** Low-Carb & Keto: Made from Konjac, Zucchini, or Cauliflower **Upcycled & Functional**: Using byproducts like spent grain or fortified with fiber, probiotics, or added micronutrients

<u>Mintel</u>: 35% of U.S. consumers report eating alternative pasta at least 1x month, up from 26% in 2020 <u>Whole Foods</u>: Plant-based pasta innovations grew by 29% in the last two years, with chickpea, lentil, and vegetable-infused pastas leading the way.





# Sauce Matters: Global & Regional **Flavors Transforming Pasta**

- Kimchi Cream Sauce (spicy, fermented depth)
- Mole-Infused Marinara (chocolate, chiles, tomatoes)

- Tikka Masala Cream Sauce (spiced, creamy tomato base)
- Miso Butter Pasta (umami-rich alternative to Alfredo)
- Harissa Tomato Sauce (spicy, smoky depth)

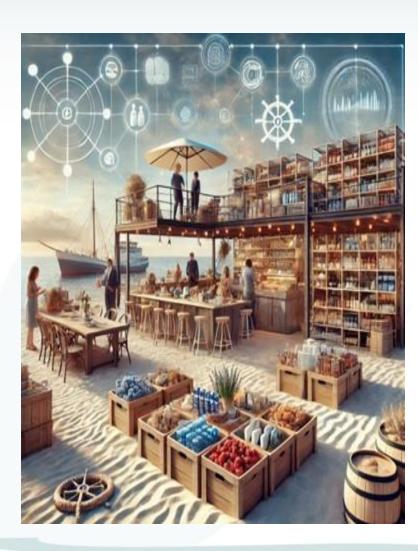
**Technomic**: 62% of consumers say they want bold, international flavors in comfort foods.

**Datassential**: 35% of U.S. restaurants have introduced at least one global-fusion pasta dish in the past two years.

Mintel: Spicy, umami, and fermented flavors are among the fastest-growing flavor profiles in pasta sauces.



# **Navigating Spending Patterns**



#### Beverage

Food

Food Service & Retail

Consumer

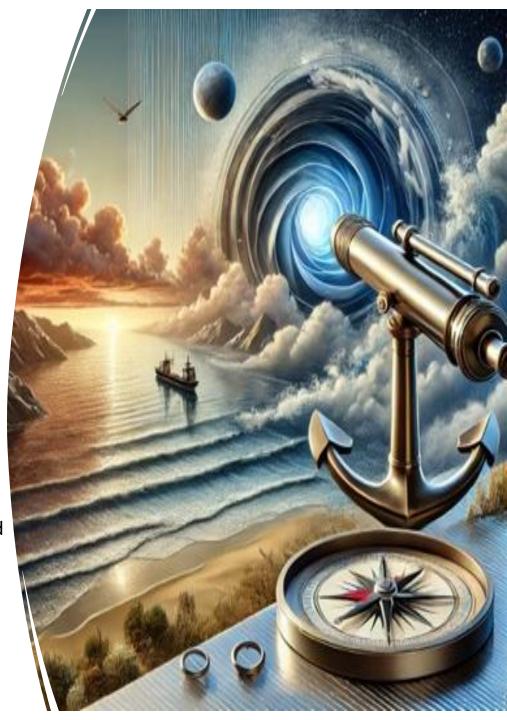
#### **Q1 Forecast**

- Overall alcohol consumption ↑, RTD, Beer ↑
- Functional alcohol & non-alcohol ↓
- Breakfast away from home slows
- Snacking ↑ (Inflation, Stress)
- Vegetarians 1, Plant forward 1
- Plant based meat/dairy sales & volume ↓
- Flavor exploration ↑
- Food service traffic ↓, spending ↓
- C-store & Grocery foodservice ↑, traffic ↑
- Retail ↑, private label ↑, cook at home ↑
- Health spending ↓
- Sustainability spending ↓
- Stock piling ↑
- Travel 1

# **Final Thoughts**

- Consumers values authenticity, convenience, and a sense of adventure in their food choices
- Elevated experiences make up the backbone of many trends: does not always mean higher cost
- Cross tying, or layering trends, within a concept lengthens its lifecycle

- Know the birth and lifecycle of a trend prior to deciding to recommend it so you can foretell how to navigate it
- Neither love nor hate a trend emotions will fog the trend's true pattern and you may be blindsided when it shifts
- Spend more time researching a trend's personality and trajectory than worrying about what your competitors are doing – after all, they may be idiots



# Thank You!



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