



GLOBAL FOOD & BEVERAGE REPORT

2020

APPROACH SUMMARY



EXPLORE

Gather global F&B data from a variety of worldwide resources

Data aggregation and multi-stage analysis, identifying global micro trends

Identify wider cultural & social factors which affect trends and TUCO

DEFINE

Identification of overarching macro F&B opportunity areas in context of wider global cultural & social factors

EXPRESS

Report completion: identifying global F&B trends, how they sit within the context of wider cultural/social factors with supporting trend manifestations

GLOBAL SCOPE

tfp has 15 years' experience as an authority on food and beverage trends, and our research and analysis team is made up of industry experts – ranging from development and marketing to chefs and hospitality.

For this report, we undertook bespoke extensive deep dive research, specifically:

- News aggregation
- Menu collection and analysis across key channels: QSR, street food, casual, high end, retail
- Review of chefs, online social media influencers and general social media chatter

All of the above across global regions: UK, Europe, North America (NAM), Latin America (LATAM), Middle East, Asia and Australasia.

We reviewed and analysed this research to identify trends to form a bespoke trends framework for TUCO.



WHAT'S NEW SINCE LAST YEAR?



2019

Anti-Inflammatory | Vegan Dude Food | Sea Vegetables | Veggie Drinks | Infused Waters | Coffee & Tea Blends | Food Whimsy | Branded | Goth Food

Trends that have stagnated or waned since last year

Immunity | Safe & Sanitary | Clean Vegan | Artisan Deli | Different 'Meats' | Haute Veggie | Liquid Layers | Hard Soft Drinks | Flavoured Spirits | Cocktails in Casa | Take Out Window | Tropical Tastes | Fancy Bar Food | Spanish Ingredients | Authentic Italian | South East Asian

New trends this year

2020

MILLENNIALS



Photo: The Creative Exchange on Unsplash

Well into adulthood, Millennials are delaying the big milestones, such as parenthood and house ownership. They're not afraid to splash out on the little luxuries though, particularly food. They continue to live up to their foodie status in 2020. They're driven to try new dishes spotted on social media or in restaurants. However, Millennials are generally more cautious and anxious about life after lockdown than younger consumers.

GEN Z

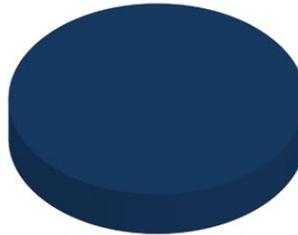


Photo: Matheus Ferrero on Unsplash

These socially responsible young adults put gender equality, diversity and LGBT equality high on their agendas. They spend a lot of time communicating with like minded individuals online, favouring TikTok or Snapchat over Facebook. 'Generation Sensible' are drinking, smoking and spending less than those before them. That said, they spend a lot of their (and their parents') money on fast food and take out.

SOCIAL & CULTURAL TRENDS

These trends work at an overarching cultural level and drive the Food & Beverage Trends.



1 GLOBAL DRIVER

Securing the Future



5 MACRO CULTURAL TRENDS

Readdress & Reconnect
 Optimising the Self
 Don't Stop the Gratification
 Cultural Creativity
 The Pleasure Principle

SECURING THE FUTURE



This is the time, the tipping point, where we all get to decide the part we want to play, or not, in our futures; as the central theme of 'Revolution' of last year morphs into the corresponding actions or non-actions felt from the political, social, environmental and economic changes going on around us.

Many of our trends this year are the responses to belief that change and a new order is needed (or a determination to hold onto what we have become used to). This belief rises and falls throughout history, punctuated by phases of stability, peace and calm. This so-called "millenarianism", documented by Norman Cohn, is an outbreak of the belief that the current sociopolitical system needs to be broken, then re-invented, because it is ineffective, corrupt and in some senses evil. We now have our heroes emerging to help save us from ourselves...

READDRESS & RECONNECT



Climate breakdown, economic misery and political turmoil has prompted us to reflect and question “Where did it all go wrong?”, “Have we gone too far?”.

We now crave to reconnect with our planet, and the good old days before the industrial revolution, artificial chemicals and modern technology.

There is an increasing sense of urgency that we need to take action, and we are starting to see this from both individuals and communities, as well as food producers and food suppliers.

Ethical heroes such as Greta Thunberg, Alexandria Ocasio-Cortez and Bernie Sanders inspire us. And hacks, pragmatic food ideas and going back to ancient methods are becoming ever more relevant to the mainstream.

OPTIMISING THE SELF



Our obsession with never-ending growth and progression includes ourselves and our bodies. We believe, with enough effort, anything is possible and we continually strive to better ourselves. This is not culturally new and harks back to the times of shamans and witch doctors.

We believe there is a fix for every ailment and problem - we just need to discover what it is. We are increasingly relying on technology and coming to the conclusion that “there must be an app for that”. And we are picking apart our sleep patterns in the quest to improve our well-being and optimise our performance.

As well as this, we are asking what food can do for us and how it can better benefit our holistic health, and make us happier, healthier, look better and live longer.

DON'T STOP THE GRATIFICATION



As Richard Dawkins' landmark 1975 book *The Selfish Gene* argues, we are innately selfish and thus seek constant gratification – and food is very much a part of this.

Food has always provided enjoyment and, unlike previous decades where we feared processed foods, we are now prepared to use modern developments in technology to engineer our food and push the boundaries on this as much as possible. This is possibly because the emerging generation don't have the memories of discovering that processed foods were bad for us. Anything that can justify a more expensive and exclusive product has appeal, as well as any food that can evoke the ultimate in sci-fi and mythic fantasy.

As well as this, we are becoming increasingly intolerant of the tedious and the mundane, we want life and particularly our consumption of food, to be easy and hassle free.

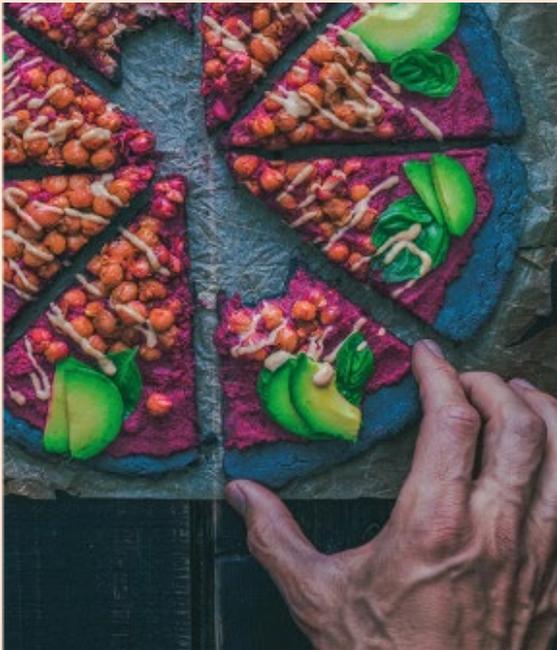
CULTURAL CREATIVITY



As we are amidst a climate crisis, economic misery and political turbulence, we crave to reach out to the world to cherish our humanity, embrace our inter-connectiveness, accept our differences and celebrate “otherness”.

It is through such openness to the other, that the wellspring of creativity lies, and in the world of food this has had a number of manifestations. Our minds seek the new and gain satisfaction from the stimulation of discovery.

THE PLEASURE PRINCIPLE



In such a turbulent world, we seek to escape from the drama and the everyday mundane through pleasure. Food has been, and continues to be, a great source of pleasure.

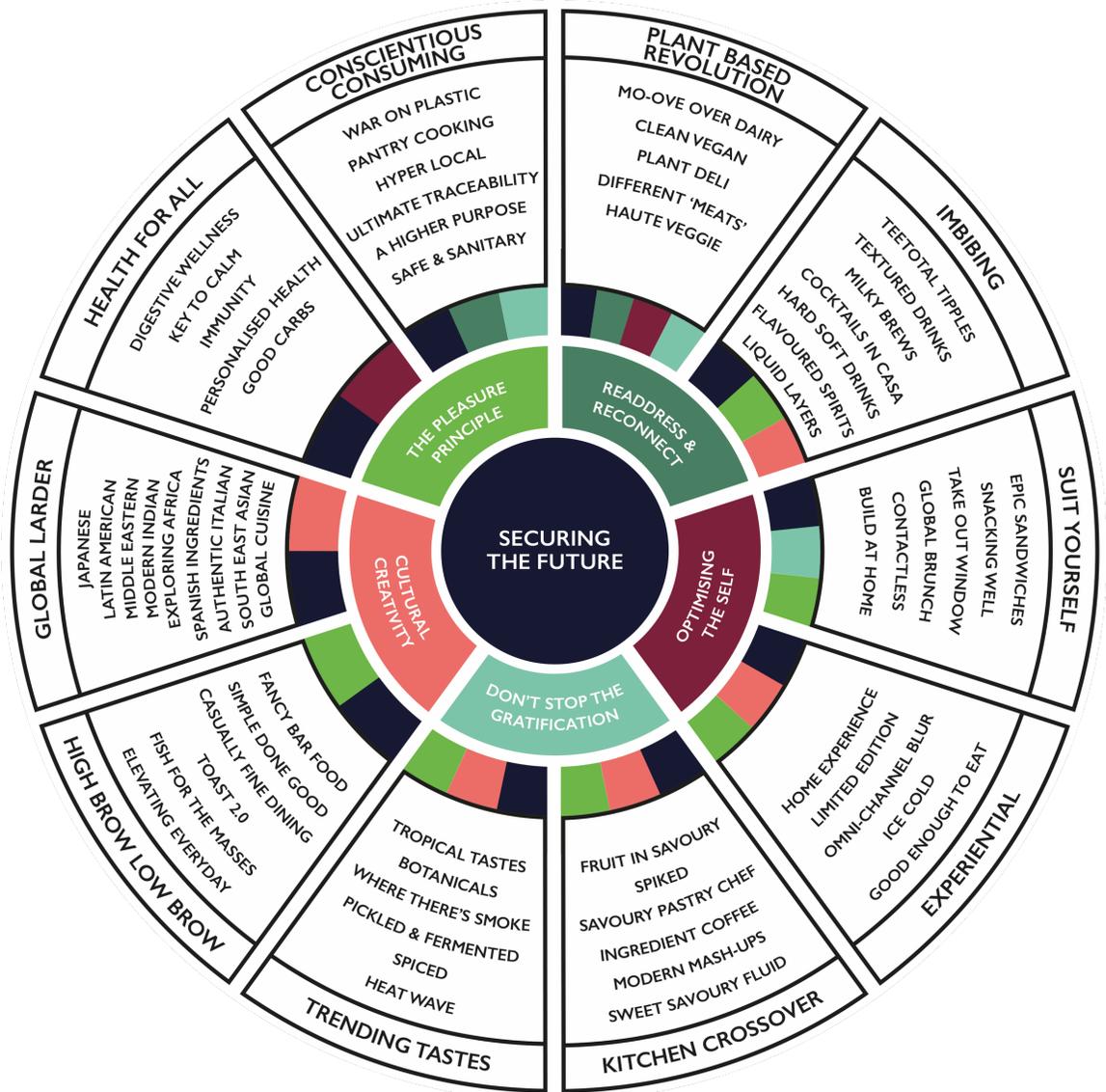
Food flavour is moving in exciting directions. Always influential in human behaviour, its secrets are being laid bare ever more through science and experimentation.

Turning the idea of foodstuffs that might otherwise be linked with low quality (or even disgust) on its head – from the valuing of aging and fats to something as traditionally unthinkable as mould. Add to this the more sophisticated use of floral flavours and more refined ways to achieve sweetness, flavour is now scaling new heights of exquisiteness.

MACRO CULTURAL TRENDS MAP



TUCO FOOD & BEVERAGE TREND MAP



MEGA TREND SUMMARY



HEALTH FOR ALL

CONSCIENTIOUS
CONSUMING

PLANT-BASED
REVOLUTION

IMBIBING

SUIT YOURSELF

EXPERIENTIAL

KITCHEN CROSSOVER

TRENDING TASTES

HIGH BROW LOW BROW

GLOBAL LARDER

HEALTH FOR ALL

Less likely to smoke than previous generations, and with flatlining obesity and a concern for mental health¹, Gen Z understand the importance of looking after after body and mind. This year we have seen awareness of digestive wellness go up further. Consumers continue to reduce ‘bad carbs’, which can cause blood sugar spikes, this year with more pulses. In 2020, we’ve focused in on anxiety and calm, as well as immunity, a trend that has particularly come to light in the fight against COVID-19.

GENERATION RELEVANCE:

- 92% of 16-24 year olds think eating healthily is important and 71% are concerned about their digestive health²
- 94% of 13-to-34-year-olds agree that taking care of mental health is just as important as taking care of physical health³
- And half of young consumers report feeling anxious about COVID-19⁴

DIGESTIVE WELLNESS | GOOD CARBS | KEY TO CALM | IMMUNITY

PERSONALISED HEALTH

¹ Pew Research Centre, UK, 2019

² Global Data, global, 2019

³ YPulse, US, 2017

⁴ YPulse, US, 2019

HEALTH FOR ALL

2019 TRENDS STILL PRESENT

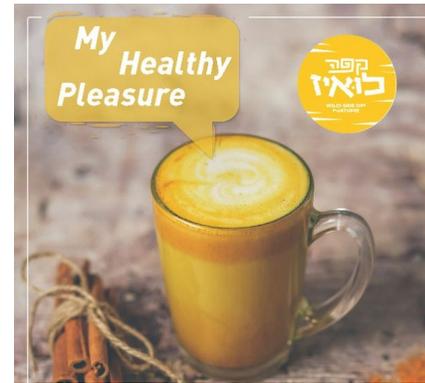
Those trends which are still manifesting but have either exhibited little growth/evolution this year, or have tipped into the mainstream/ubiquity



IN PRAISE OF PROTEIN

Protein continues to be the favoured macronutrient due to its ability to satiate without fattening. This trend has tipped into the mainstream, with big brands fortifying with plant protein.

'Plant Protein' cereal, Kellogg's, UK



ANTI-INFLAMMATORY

Turmeric, chia, acai and goji – all these 'it' ingredients are still appearing but buzz has slightly waned. This could be due to both a lack of a true consumer understanding of the benefits, as well as any hard proof.

Turmeric latte – Café Louise, Israel



CLEAN ENERGY

There continues to be an interest in 'natural' energy drinks in contrast to the likes of Red Bull. However, the same ingredients are featuring this year, including guarana, mate and ginseng.

Vitamin fortified energy – Aquarius, Spain

HEALTH FOR ALL KEY TO CALM



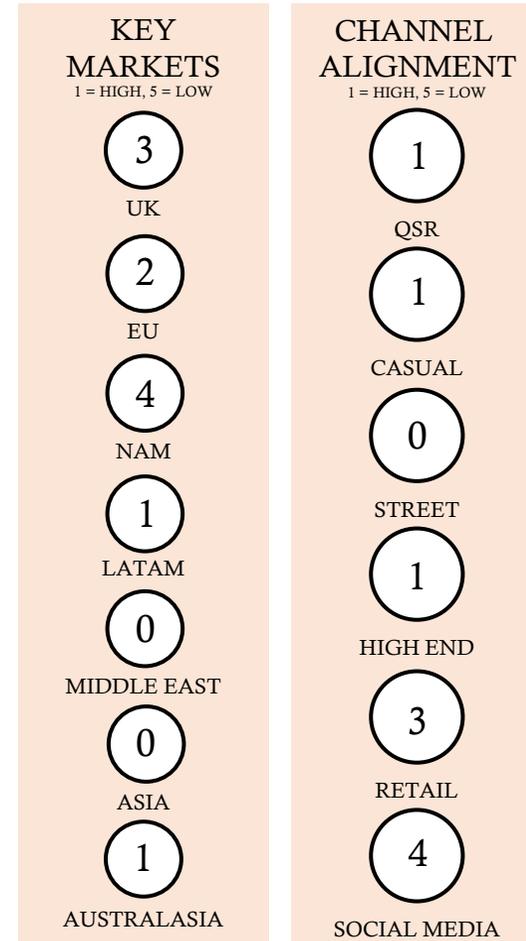
Mental health is a big concern for Gen Z, growing year on year. This trend has therefore evolved from the beauty encompassing ‘Holistic Health’ trend from last year. Stress calming elixirs and food to help quiet anxiety and aid sleep are increasingly manifesting. CBD is a key ingredient, as well as valerian and magnesium.

RELEVANCE FOR TUCO MEMBERS:

- Acknowledge and target products that promote calm and focus at key times of the year when anxiety could be high e.g. exam times

MANIFESTATIONS:

- Beauty & brain function still present from last year’s trend, but with no evolution
- Focus on mood balancing and stress relieving benefits of CBD – less gimmicky use
- CBD in juices, lattes, coffee, tea & food
- CBD shots & capsules to add to drinks
- Magnesium in drinks & ice cream for sleep
- Valerian in confectionery for calm



LIFE EXPECTANCY: 7-10 years

HEALTH FOR ALL KEY TO CALM



CBD infused Americano & latte cold brew with oat milk
Calm Drinks, UK



Ice cream claims to help you sleep with mineral blend including magnesium
Nightfood, US



Watermelon, CBD, mint & basil infused herbal tea for inner peace
Mood33, US



Stress relieving gum with valerian root, chamomile & gamma-aminobutyric
Bubble Calm, US

HEALTH FOR ALL IMMUNITY



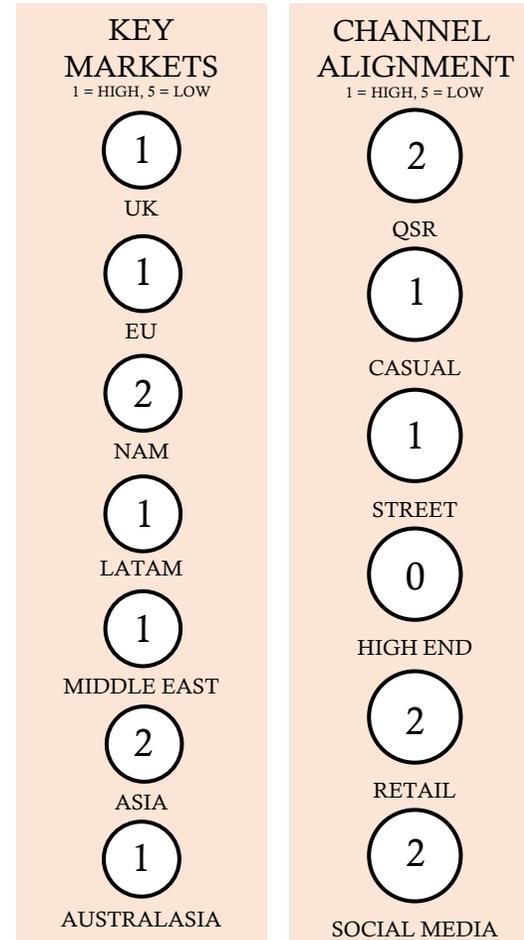
Online influencers, brands and foodservice all offer solutions to help ‘boost’ immunity in light of the new global health threat. As well as vitamin C, vitamin D is highlighted, particularly in sun-starved regions. Despite the hype, experts advise there’s no magic bullet – a balanced diet, plus sleep, supports normal immune function.

MANIFESTATIONS:

- Primary focus on Vit C but also Vit D
- Menu item launches in response to COVID-19 prompted interest in immunity
- Key ingredients: ginger, lemongrass, turmeric, zinc, elderberry, holy basil (Ayurvedic)
- Backlash against misinformation: no magic ingredients ‘boost’ immune system
- Juice shots, chewing gum, supplements

RELEVANCE FOR TUCO MEMBERS:

- Help consumers to support normal immune function with communication of healthy diets and nutrient rich ingredients
- Target specific times of year
- Be wary of making over-claims around specific ‘superfoods’



LIFE EXPECTANCY: 1-3 years

HEALTH FOR ALL IMMUNITY



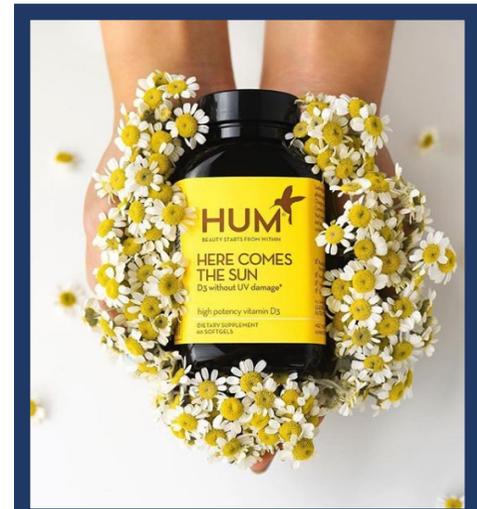
‘Immune boosting’ herb drink with biancaea sappan, cloves, bay leaf, ginger & lemongrass
Fore Coffee, Indonesia



‘Immunity’ chewing gum with zinc, elderberry, reishi & ashwagandha
Mighty Gum, US



Lemon flavoured drink with innovation that claims to lock in more vitamin C in the bottle
Carabao, Thailand



Goop recommends “D3 without the UV damage” for supporting the immune system & respiratory tract
HUM, US

CONSCIENTIOUS CONSUMING

More than most other years, 2020 has really demonstrated how young consumers expect brands to align with their values, speak up and act. Most recently, 69% of Millennials and Gen Z said they thought brands should participate in the #BlackLivesMatter movement¹. Corporate social responsibility and ‘giving back’ are no longer a bonus but an important part of choosing a brand or restaurant, hence more companies evidencing their B Corp certification, environmental credentials and food philanthropy through the pandemic.

GENERATION RELEVANCE:

- 79% of 13-to-36-year-olds say buying products from brands that have social good components makes them feel better about spending money²
- 69% 16-24 year olds think compostable or biodegradable packaging is important³
- Between March and April 2020 Pinterest saw a 191% increase in searches for the term ‘leftovers’⁴

WAR ON PLASTIC | A HIGHER PURPOSE | PANTRY COOKING | HYPER LOCAL
ULTIMATE TRACEABILITY | SAFE & SANITARY

¹ YPulse, US, 2020

² YPulse, US, 2019

³ Global Data, global, 2019

⁴ Pinterest, 2020

CONSCIENTIOUS CONSUMING

A HIGHER PURPOSE



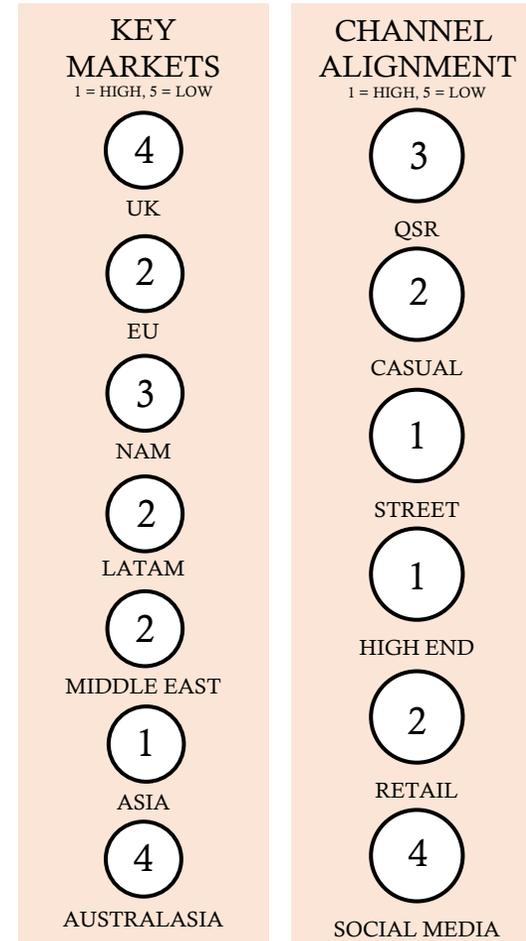
The last few years have shown a gradual shift in consumer attitudes – values are no longer a ‘nice to have’ but a real consideration for deciding on a product or service. The state of emergency this year has resulted in a real outpouring of goodwill, particularly towards key workers on the pandemic front line.

MANIFESTATIONS:

- B Corp certified: balance business & profit
- Black Lives Matter: young consumers urge companies to support the movement
- Proceeds donated to bushfire cause in Aus
- Foodservice send food to key workers
- Discounts/free foodservice for NHS staff
- Retailers send care packages to vulnerable
- Vouchers for restaurants when able to reopen

RELEVANCE FOR TUCO MEMBERS:

- There are lots of different avenues and causes to support at this point in history
- Involve students in choosing charitable causes and garner suggestions from them for what sort of action to take



LIFE EXPECTANCY: 1-3 years

CONSCIENTIOUS CONSUMING A HIGHER PURPOSE



**During 24 hour lockdown,
fast food chain delivered
10,000 free meals a day to
those in need
Al Baik, KSA**



**Black Label Rescue Tea Tree
honey proceeds go to
communities affected by
bushfires
Meluka, Australia**



**Donated 1,000 hot cross buns
over Easter weekend to 12
NHS Hospitals & shelters
across London
Dominique Ansel, UK**



**Food delivery truck going
directly to hospitals to give
free meals to healthcare
workers
The Habit, US**

CONSCIENTIOUS CONSUMING PANTRY COOKING



Particularly relevant for students, tin can cooking was emerging as a trend before but it's really come into its own with quarantine. In uncertain times, it's no surprise consumers stock up on budget-friendly, long-lasting items. Influencers offering recipes that don't need a bespoke trip to the shop win on easy points too.

RELEVANCE FOR TUCO MEMBERS:

- Inspire consumers to elevate their cooking in limited facilities and with pantry essentials with e.g. videos, recipe cards

MANIFESTATIONS:

- Popularity of tinned fish – sardines & tuna
- The tuna pasta bake gets a revamp
- Pulses & beans used in more online recipes
- Influencers suggest uses for leftovers and “store cupboard essentials”
- Yeast shortage sparks more beer & soda bread home baking
- Even easier ‘no drain’ tuna or quinoa

KEY MARKETS 1 = HIGH, 5 = LOW

3

UK

2

EU

3

NAM

1

LATAM

1

MIDDLE EAST

1

ASIA

3

AUSTRALASIA

CHANNEL ALIGNMENT 1 = HIGH, 5 = LOW

0

QSR

1

CASUAL

0

STREET

0

HIGH END

3

RETAIL

4

SOCIAL MEDIA

LIFE EXPECTANCY: 4-6 years

CONSCIENTIOUS CONSUMING PANTRY COOKING



Matzo ball soup that suggests using egg replacer in response to egg shortage during lockdown passover
Haaretz.com, Israel



Drained, canned & ready to serve quinoa
Napolina, UK



Gluten free pasta, chickpeas & vegetables, "leans heavily on pantry staples"
@wellandfull



"Pantry Pasta" made from canned tuna & red lentil pasta
Lee Holmes, Australia

CONSCIENTIOUS CONSUMING SAFE & SANITARY



As lockdown starts to lift globally, restaurants are beginning to open their doors - but not as we know them. Foodservice is employing drastic changes to meet government regulations and limit the spread of the virus – from obsessive cleaning regimes to limiting diner numbers. Operators are having some fun with it though...

RELEVANCE FOR TUCO MEMBERS:

- Explore and support routes to encourage socialising at a safe distance
- Consider novel or fun ways to adhere to safety and social distancing

MANIFESTATIONS:

- 'Fill-in' diners and recorded chatter make restaurants feel less empty with diner limits: use of mannequins, plush toys & cut outs
- Sanitation booths & tables on entry
- Table isolation through screens, mini green houses, bumper tables or pool noodles
- Vending machines added to retail & foodservice outlets

KEY MARKETS 1 = HIGH, 5 = LOW

4

UK

4

EU

4

NAM

4

LATAM

4

MIDDLE EAST

4

ASIA

4

AUSTRALASIA

CHANNEL ALIGNMENT 1 = HIGH, 5 = LOW

3

QSR

3

CASUAL

1

STREET

3

HIGH END

4

RETAIL

4

SOCIAL MEDIA

LIFE EXPECTANCY: 1-3 years

CONSCIENTIOUS CONSUMING SAFE & SANITARY



Pandas placed in seats in restaurant to ensure diners keep social distance from one another
Maison Saigon, Thailand



Sanitiser Sommelier offers range of options on restaurant entry
The Gantry, Australia



Greenhouses installed to keep diners separate
Mediamatic, Netherlands



Sanitiser booth sprays disinfectant mist at pub entrance
Kichiri Shinjuku, Japan

PLANT-BASED REVOLUTION

Casual and retail channels have historically led in plant-based trends. But, as vegan eating matures, dishes and products are taking a more sophisticated turn. In meat and dairy alternatives, this manifests as artisan and deli techniques and cues, such as ageing and curing. However, there is also a backlash against 'fake' meat with a move towards 'clean' plant-based dishes and products with natural ingredients shown off in all their glory.

GENERATION RELEVANCE:

- 9% Gen Z report never eating meat - higher than for other generations. Chicken is avoided by 5% of Gen Z, 2% of young Millennials and 4% of other generations¹
- 68% 16-24 year olds find the term 'plant-based' appealing – 65% for dairy alternatives²
- 72% 16-24 year olds think grains and pulses have a positive effect on health and 72% think pea protein does³

MO-OVE OVER DAIRY | DIFFERENT MEATS | PLANT DELI | HAUTE VEGAN | CLEAN VEGAN

¹ NatCen Social Research, UK, 2019

² Global Data, global,, 2019

³ Global Data, global, 2019

PLANT-BASED REVOLUTION

PLANT DELI



For those consumers who need a little help making the jump from animal-based to vegan, we're seeing increasingly refined lookalike products. This year we're zooming in on artisan deli. From cured 'ham' to faux gras, brands and foodservice show that going plant-based doesn't mean you have to miss out on the finer things.

MANIFESTATIONS:

- Curing & smoking plant-based meats
- Porchetta, capicola, pastrami, bacon, corned beef
- Use of seitan, beans, vegetables, coconut to emulate deli meats
- Vegetable based terrine or pâté: root vegetables, mushrooms, truffle, nuts, lentils
- Specific sausages: chorizo, beer bratwurst

RELEVANCE FOR TUCO MEMBERS:

- Cured and crafted meat alternatives for added flavour to dishes
- Elevated plant-based deli 'meats' in the food-to-go fixtures e.g. deli counter

KEY MARKETS

1 = HIGH, 5 = LOW

2

UK

1

EU

2

NAM

1

LATAM

1

MIDDLE EAST

1

ASIA

2

AUSTRALASIA

CHANNEL ALIGNMENT

1 = HIGH, 5 = LOW

1

QSR

1

CASUAL

1

STREET

1

HIGH END

2

RETAIL

2

SOCIAL MEDIA

LIFE EXPECTANCY: 4-6 years

PLANT-BASED REVOLUTION

PLANT DELI



Boar free bacon made from yellow peas
Sunfed, Australia



Plant-based corned beef sandwiches, made from beetroot, chickpeas & tomatoes
Unreal Deli, US



Vegochorizo made from soy protein & a little chilli
Anamma, Norway



Faux Gras made with mushrooms, beetroot, lentils, walnuts, garlic, thyme, rosemary, sage & soy sauce
Alex Gauthier - Bosh!, UK

PLANT-BASED REVOLUTION

CLEAN VEGAN



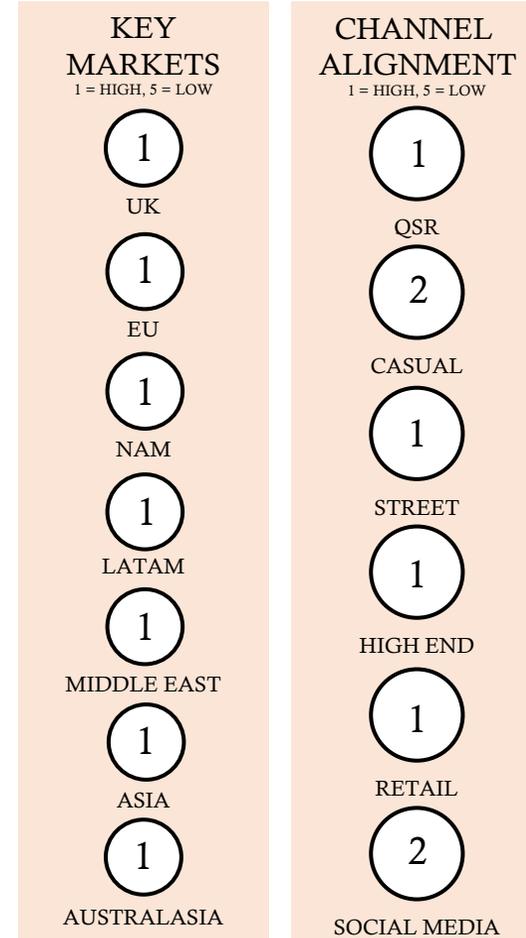
Plant-based burgers are all very well for carnivores who want to reduce meat consumption but feel they're missing out. However, the long list of baffling ingredients is forcing many to rethink the health credibility of ultra realistic meat substitutes. There's an emerging movement towards 'clean' and whole.

MANIFESTATIONS:

- Vegan doesn't always mean healthy
- 'Clean label': shorter lists of familiar, natural or whole food ingredients
- Labelling ranking food by degree of processing
- In foodservice, dishes featuring plants as plants, not 'pretending' to be meat

RELEVANCE FOR TUCO MEMBERS:

- Review ingredient lists of vegan products and investigate reducing or removing unnecessary and unrecognisable items
- Simplify vegetable-centric dishes and allow the produce to be the hero



LIFE EXPECTANCY: 7-10 years

PLANT-BASED REVOLUTION CLEAN VEGAN



'Clean label' ice cream made from Perfect Day milk (made through microbial fermentation)
Smitten, US



Aromatic, herb roasted broccoli
Flax & Kale, Spain



Avocado with fennel, heritage tomatoes & spring onions on rye sourdough
#cleanvegan
@antipodeskitchen



Hummus, beetroot & sourdough
Black Cab Coffee, UK

IMBIBING

While Gen Z drink comparatively less than previous generations, recent world events have put all consumers into two camps: those that drink more and those that drink less during lockdown. Appealing to both sides, sodas and spirits are carrying similar sophisticated floral and fruity flavours. Visual appeal and texture continue to play their roles, through colour layering and the dalgona craze (#whippedcoffee has over two billion TikTok views). Cocktails are being enjoyed at home in innovative ways.

GENERATION RELEVANCE:

- 44% of 16-24 year olds are actively trying to reduce their alcohol consumption and 38% consume it in moderation¹
- 36% of 21-39-year-olds say they've been drinking more often because of Coronavirus²
- 55% of 18-24 year olds like to see unusual or new and trendy flavours in hot and soft drinks and 58% in alcoholic drinks³

MILKY BREWS | TEETOTAL TIPPLES | FLAVOURED SPIRITS | HARD SOFT DRINKS
TEXTURED DRINKS | LIQUID LAYERS | COCKTAILS IN CASA

¹ Global Data, global, 2019

² YPulse, US, 2020

³ Global Data, global, 2019

IMBIBING

TEXTURED DRINKS



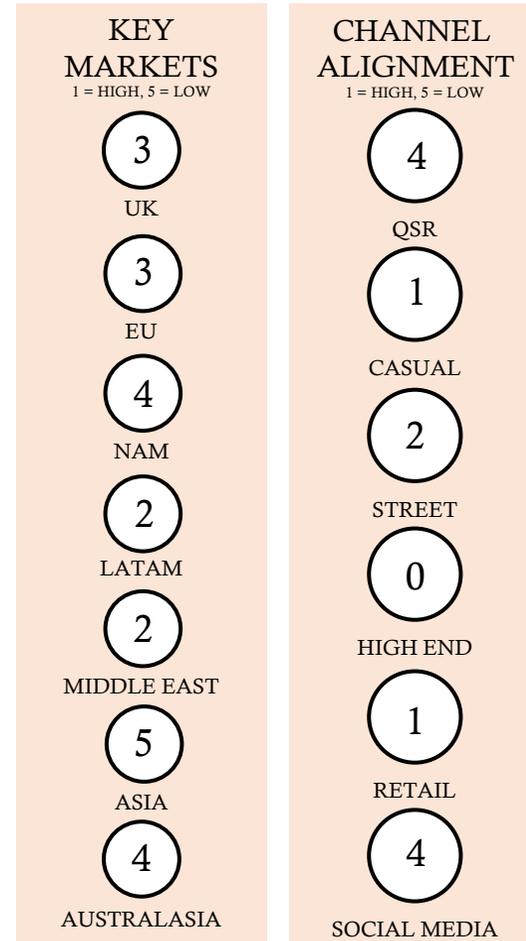
Appealing to the senses beyond flavour, there's continued innovation with textural play in drinks. Novelty plays a big role. The cheese tea, jelly and boba of last year are still strong, but it's whipped, or 'dalgona' drinks that have stolen the show, especially in lockdown. Boba has crossed over to food, with some interesting results...

RELEVANCE FOR TUCO MEMBERS:

- Flexible limited editions in coffee outlets to respond to social media crazes
- Substantial drinks that satiate and quench thirst

MANIFESTATIONS:

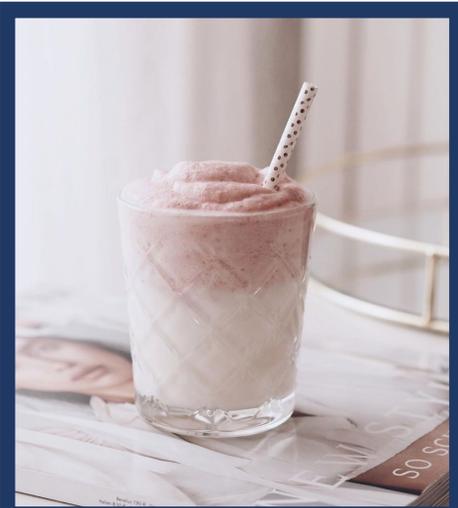
- Dalgona (whipped) coffee trend on Instagram & subsequent strawberry, matcha or ube whip
- Yoghurt drinks with purple rice or cereal
- Canned boba drinks
- Boba in food: on pizza, with ice cream, in ramen, with crab, on waffles
- Cheese tea & jelly in drinks continue from last year



LIFE EXPECTANCY: 4-6 years

IMBIBING

TEXTURED DRINKS



**Whipped 'dalgona'
strawberry drink**
@nadineschlegl



**Various dalgona lattes inc.
coconut flavour and one
featuring jelly**
NAO, Vietnam



**Yoghurt drink with purple
rice inclusions**
Koomi, Australia



Boba pizza
Domino's, Japan

IMBIBING

LIQUID LAYERS



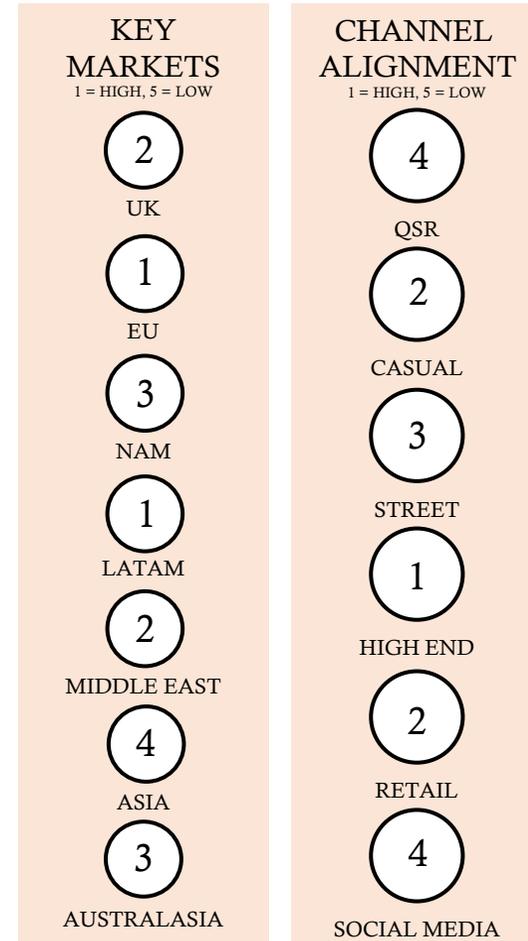
The latte offers a canvas for a rainbow of colour but fruit teas and sodas are also wearing their flavours in layers. Favourite colours include pink, yellow, blue and green, particularly from mildly flavoured, but dazzlingly hued, butterfly pea or matcha. Ingredients provide natural colour, and often a perceived functional benefit too.

RELEVANCE FOR TUCO MEMBERS:

- Consider the visual appeal of beverages especially in limited edition menus
- Explore uses of edible colour in beverage development

MANIFESTATIONS:

- Dirty matcha: coffee, milk & matcha
- Layered lattes with various colours & flavours
- Colourful layered juices & teas
- Textural contrast within layers: jelly, yoghurt, cream
- Particularly in Asia
- Bottled as well as in clear cups



LIFE EXPECTANCY: 1-3 years

IMBIBING

LIQUID LAYERS



Dirty matcha with espresso
Atulea, US



**Lavender lemonade -
sweetened with organic
honey and butterfly pea tea**
Pink Matter, US



Coffee and rose latte
Jolt, UK



**Blend of ice, apple cider
vinegar, grape & butterfly
pea tea**
The Alley, Singapore

IMBIBING

COCKTAILS IN CASA



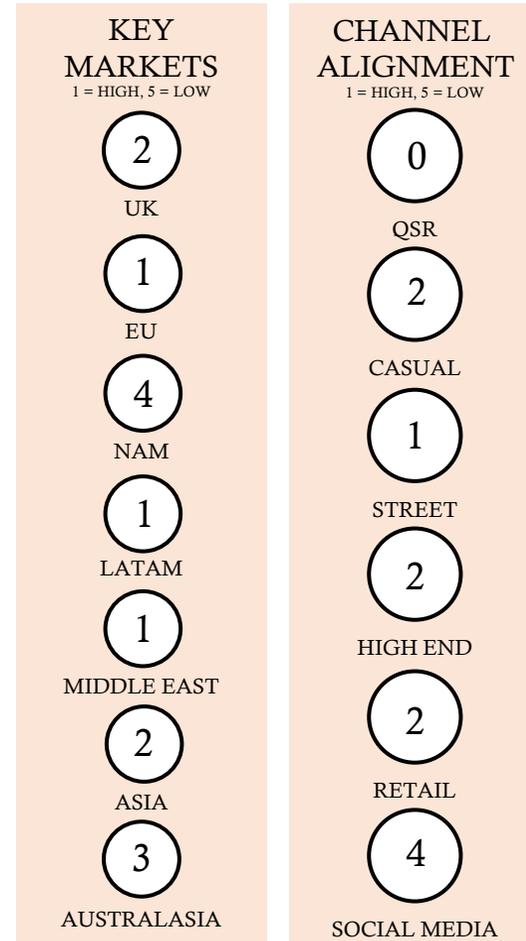
In 2018 we wrote about premix drinks. While this trend settled in 2019, it's really come into its own this year within the wider context of cocktails at home. As bars and restaurants fight to stay afloat in lockdown, they're delivering premade cocktails, kits for making them yourself and online tutorials for how.

MANIFESTATIONS:

- Big spirit brands & independent bars do online cocktail masterclasses
- Delivery of DIY cocktail kits
- Premixed cocktails delivered by foodservice in fun, often 'make-do' packaging
- Premix cocktail subscription service
- Classic favourites as well as new entries
- Canned cocktails

RELEVANCE FOR TUCO MEMBERS:

- Party, picnic and celebration kits and bundles of alcohol with mixers and garnishes
- Stock premixed, to-go cocktails in novel packaging to create an experience



LIFE EXPECTANCY: 1-3 years

IMBIBING

COCKTAILS IN CASA



Alcoholic capris inc. lychee or pineapple flavour
Mokyo, US



Online mixology class from Lynette Marrero & Ryan Chetiyawardana
MasterClass, global



Quarantini premix made with olive gin & lemon leaf vodka
Scout, UK



Old Fashioned & Gimlet kits
Session Bar, US

SUIT YOURSELF

56% of 16-24 year olds and 65% of 25-34 year olds are interested in and actively buy products that help them save time and effort¹. The need for convenience continues to push developments in foodservice and retail. Ongoing innovations in handheld formats, snacks and brunch appeal to shifting behaviours – no longer governed by set meal times, food needs to fit in with the consumer’s life. But a lot of the tech developments made in recent years in the name of convenience have proved essential during lockdown restrictions, which have also necessitated new innovations.

GENERATION RELEVANCE:

- 89% of 13-37-year-olds say technology makes their lives easier, and 71% agree that scientific advancement is always a good thing²
- Gen Z have a desire to stand out and place greater value on personalised, bespoke or limited-edition items compared to other generations³
- 46% of Millennials and 41% of Gen Z feel cautious about lockdown restrictions being lifted⁴

SNACKING WELL | EPIC SANDWICHES | CONTACTLESS | BUILD AT HOME | GLOBAL BRUNCH
TAKE OUT WINDOW

¹ Global Data, global, 2019

² YPulse, US, 2020

³ OC&C Strategy, global, 2019

⁴ YPulse, US, 2020

SUIT YOURSELF

TAKE OUT WINDOW



A new trend this year, take out windows have become an easy solution for enabling foodservice outlets to keep serving diners during temporary restaurant closures. Not limited to coffee, enterprising outlets offer everything from curb side cocktails to ramen. Drive thru has come into its own for foodservice and retail alike.

RELEVANCE FOR TUCO MEMBERS:

- Smaller establishments for extended opening hours and specialised or slimmed down menus
- Opportunity for more versatile offerings onsite

MANIFESTATIONS:

- Take out windows for coffee, cocktails, pizza, ramen, sushi, salads & sandwiches
- Smaller, independent operators do takeout
- More gourmet offerings – not just fast food
- Chain foodservice operators launch drive thru for even more contact avoidance
- Drive through grocery & fresh produce pick up in Asia

KEY MARKETS 1 = HIGH, 5 = LOW

3

UK

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EU

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NAM

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LATAM

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MIDDLE EAST

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ASIA

4

AUSTRALASIA

CHANNEL ALIGNMENT 1 = HIGH, 5 = LOW

4

QSR

3

CASUAL

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STREET

1

HIGH END

2

RETAIL

2

SOCIAL MEDIA

LIFE EXPECTANCY: 1-3 years

SUIT YOURSELF

TAKE OUT WINDOW



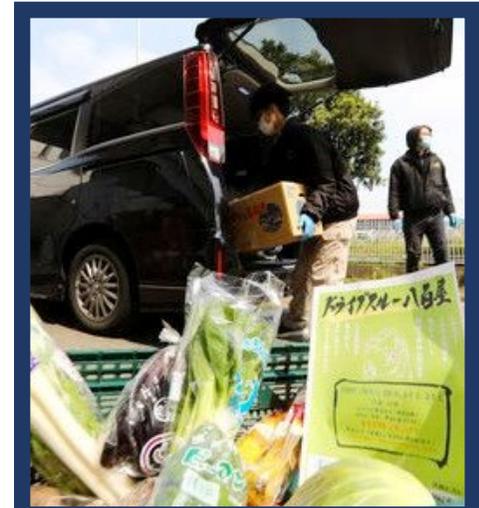
Drive thru introduced to keep customers well supplied during social distancing
Brooklyn Boy Bagels,
Australia



Curbside cocktails prepared at cart outside restaurant
Da Toscano, US



Gourmet takeout window serving e.g. fried chicken sandos & salads
The Dutch Door, US



Vegetable wholesaler starts makeshift drive thru store amid pandemic
Food Supply, Japan

SUIT YOURSELF

EPIC SANDWICHES



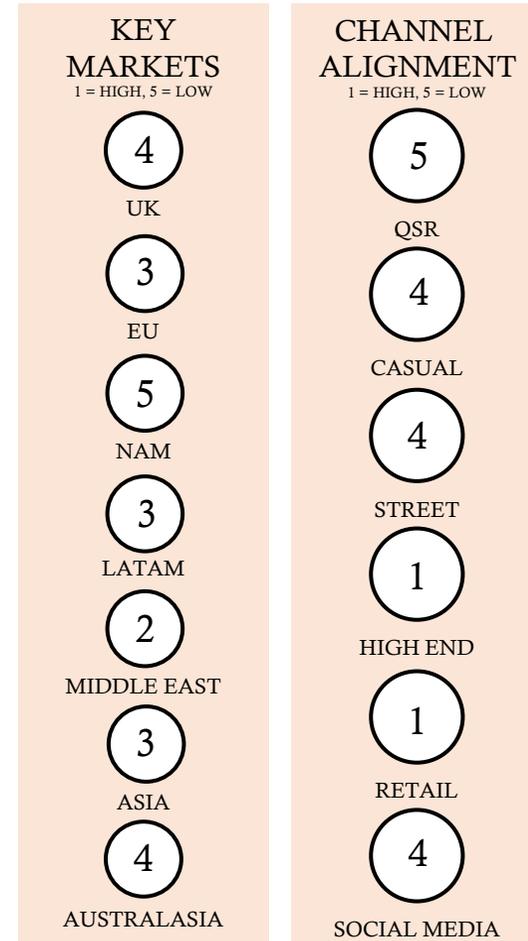
Last year we looked at the rise of handheld formats driven by the popularity of street food. In 2020 we're zooming in on sandwiches in particular. But these are not just any sammies – think bread overflowing with a variety of fillings hailing from different cuisines and brandished on social media for food envy.

MANIFESTATIONS:

- Thick toast bread – doorstep
- Fully loaded or double bread/filling
- Overstuffed with insides visible from outside
- Colour & variety with fresh, pickled & cooked ingredients
- Twists on banh mi e.g. mortadella
- Japanese sandos & Hokkaido milk bread
- Toasted & croque madame

RELEVANCE FOR TUCO MEMBERS:

- Elevate sandwich offerings with alternative carriers and build-your-own deli counter choices
- Explore sandwiches as an offer at breakfast, evening meals and late night munching
- Take global influences for flavour combinations and sandwich style



LIFE EXPECTANCY: 4-6 years

SUIT YOURSELF

EPIC SANDWICHES



Vegan friendly toasted sandwich
Combi, Australia



Mortadella banh mi & chicken liver mousse
Snack Bar, UK



Ham & cheese toastie in Hokkaido style bread
Hanso, Spain



Double smoked ham, double cheese, ale, honey mustard, béchamel & fried egg on toasted 5 grain sourdough
Social Brew, Australia

SUIT YOURSELF

CONTACTLESS



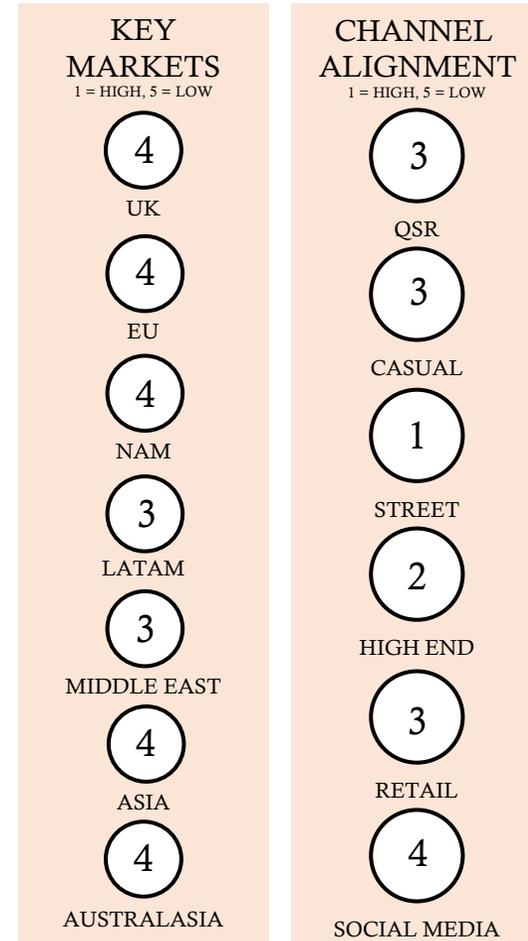
While convenience drove advances in tech forward last year, necessity has moved things even further in 2020. This trend has been renamed Contactless because it is this need to limit contact and contagion that has resulted in more automaton, self serve and delivery in new guises.

MANIFESTATIONS:

- Automated, self serve shops & hot vending
- Takeaway for all e.g. high end delivery
- Robot service & digital menus via QR code
- Contactless delivery
- Ghost kitchen delivery: many menu concepts in one kitchen
- Delivery platforms diversify delivering essentials & pharmaceuticals

RELEVANCE FOR TUCO MEMBERS:

- Hot vending and self service opportunities wherever possible
- Investigate delivery platforms on campus that do not require in-person contact or consumer effort
- Utilise technology to reduce physical contact e.g. in app ordering



LIFE EXPECTANCY: 1-3 years

SUIT YOURSELF

CONTACTLESS



Foodie's MicroMarket self service mini market in consumer workplaces
Selecta, Spain



In response to COVID, supermarket unveils new store concept made up of vending machines
Family Mart, Thailand



Delivery platform introduce 'No Contact' delivery option to minimise coronavirus contagion
Deliveroo, UK



Robot chefs cooks and drains noodles
Soba Ichi, Japan

EXPERIENTIAL

Despite (or perhaps because of) recent restrictions on in situ experiences, consumer hunger for more than fuel from their interactions with food is very strong. Instagram is awash with new visual food trends to please the eye, and weird and wonderful sweet/savoury combos in ice cream are making for a double sensorial whammy. Meanwhile, foodservice and retail are pivoting and flexing to deliver fun and engagement at home.

GENERATION RELEVANCE:

- Over a fifth of Gen Z strongly agree that they would rather spend money on experiences than products – a few percentage points higher than Millennials in the US and Germany¹
- Gen Z are most likely eat takeaway food once or twice per week when the average is once or twice a month²
- 39% of 16-24 year olds say they use social media to help them decide where to eat out³

GOOD ENOUGH TO EAT | ICE COLD | OMNI-CHANNEL BLUR | LIMITED EDITION

HOME EXPERIENCE

¹ OC&C Strategy, global, 2019

² NatCen Social Research, UK, 2019

³ Food Standards Agency, UK, 2019

EXPERIENTIAL

GOOD ENOUGH TO EAT

Last year this trend focused on the glut of gooey eggs and cheese filling Instagram feeds. While these have gone nowhere, other visual trends have also manifested. Colourful and pretty are tenets, but natural is key. Focaccia is lovingly decorated with vegetables to resemble art, as are smoothie bowls with flowers and fruit.

MANIFESTATIONS:

- Focaccia art trend: decorated with images crafted from e.g. olives & tomatoes
- Pancake boards with an array of attractively presented pancakes & ingredients
- Smoothie bowls as canvases: topped with fruit and edible flowers artfully places
- Colourful & artistic dollops, drops & smears on plates & boards

RELEVANCE FOR TUCO MEMBERS:

- Introduce topping stations or build-your-own concepts to create highly visual bowl and topped brunch and lunch offerings
- Explore the options around health bowls and sharing boards and platters
- Consider visual appeal in development

KEY MARKETS
1 = HIGH, 5 = LOW

4

UK

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EU

4

NAM

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LATAM

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MIDDLE EAST

4

ASIA

5

AUSTRALASIA

CHANNEL ALIGNMENT
1 = HIGH, 5 = LOW

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QSR

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CASUAL

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STREET

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HIGH END

2

RETAIL

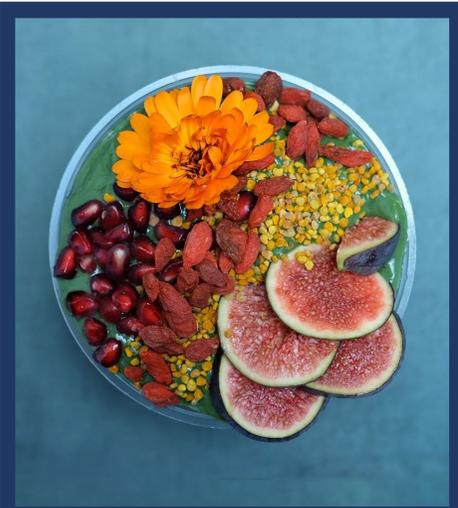
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SOCIAL MEDIA

LIFE EXPECTANCY: 7-10 years

EXPERIENTIAL

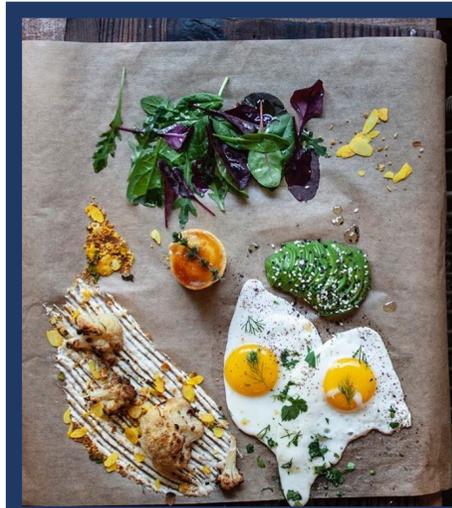
GOOD ENOUGH TO EAT



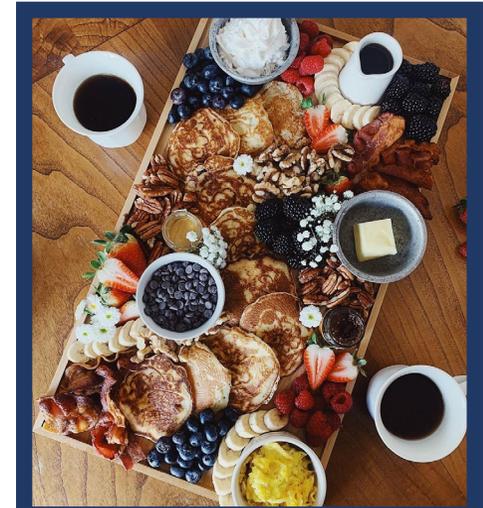
**Green smoothie bowl with
flowers, pomegranate,
pollen, fig & gojis**
Farm Girl, UK



Focaccia art
@dianemorrissey



**Roasted cauliflower, tahini,
gremolata, caramelised goat
cheese, avocado & eggs**
Roamers, Germany



Pancake board
@cheeseprettyplease

EXPERIENTIAL

OMNI-CHANNEL BLUR



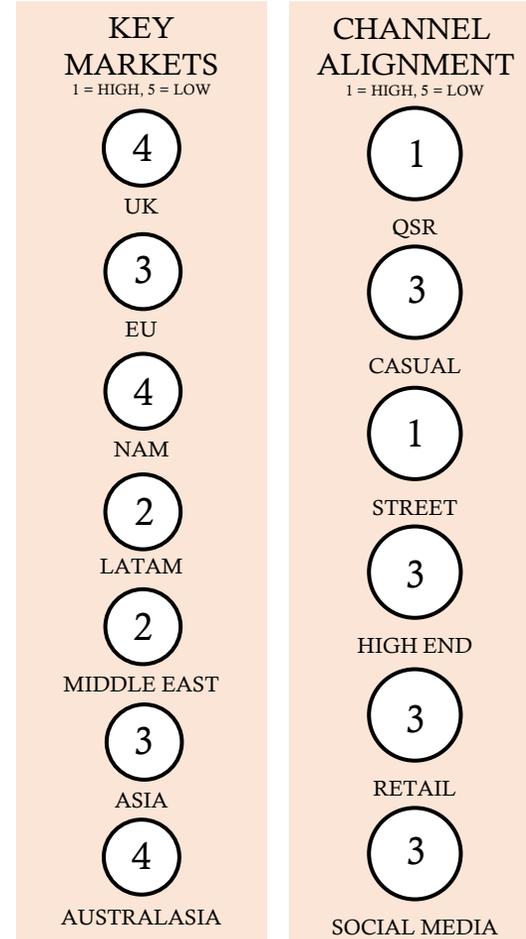
The big news last year was the explosion of food halls onto the scene. While the future of these after the pandemic is uncertain, foodservice and retail have been pivoting and flexing to adjust to the new normal, or at least the new normal for now. Hotels have doubled as grocery, wholesalers and restaurants as takeaway.

MANIFESTATIONS:

- Restaurants/hotels come grocery stores
- Wholesalers sell direct to shoppers
- More restaurants do take out & delivery
- Cafés delivering breakfast boxes
- Coop and M&S on Deliveroo
- Selfserve foodservice in supermarkets
- Foodservice diversifying with adjacencies in delivery e.g. masks, candles

RELEVANCE FOR TUCO MEMBERS:

- Review space usage across sites and adapt solo function outlets to be more flexible
- Consider adding take out, kit and grocery offers to foodservice outlets
- Create versatile spaces that can be multi use



LIFE EXPECTANCY: 7-10 years

EXPERIENTIAL

OMNI-CHANNEL BLUR



**Home deliveries
of fresh fruit &
veg from New
Covent Garden
Market
businesses**

**Wholesalers start delivering
fresh food and vegetables to
consumers**

New Covent Garden Market,
UK



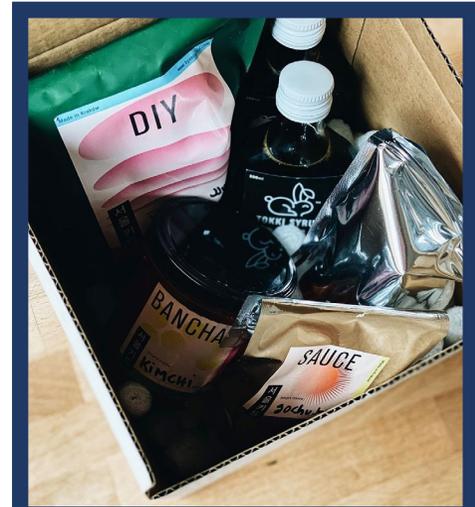
**Supermarket debuts their
new chicken fast food
concept in store**

7-Eleven, US



**Takeaway & bake hot cross
bun flavoured croissants
from café**

Abbotts & Kinney, Australia



**'Care packages' of key
ingredients, e.g. kimchi, sent
out by restaurant**

Sweet Life, Poland

EXPERIENTIAL

HOME EXPERIENCE



The fully immersive dining experiences of last year have necessarily ebbed owing to practicalities, but this hasn't dampened consumer appetite for culinary adventure. So operators are taking the party to the home - from getting the restaurant experience in your dining room with retail products through to online wine tasting.

RELEVANCE FOR TUCO MEMBERS:

- Expand online learning to online socialising and extracurricular learning e.g. cocktail masterclasses
- Use restaurants and kitchen spaces to run classes (which can be virtual too) – include packs which can be bought to try along at home e.g. fresh pasta kit to make

MANIFESTATIONS:

- Online wine, beer or cider tastings
- Cook-alongs and online classes from chefs
- Foodservice favourite products e.g. condiments in retail
- Outlets share the recipes for their most popular menu items
- Michelin starred home delivery
- Virtual dining: order from a waiter

KEY MARKETS
1 = HIGH, 5 = LOW

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MIDDLE EAST

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ASIA

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AUSTRALASIA

CHANNEL ALIGNMENT
1 = HIGH, 5 = LOW

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QSR

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CASUAL

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STREET

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HIGH END

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RETAIL

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SOCIAL MEDIA

LIFE EXPECTANCY: 1-3 years

EXPERIENTIAL

HOME EXPERIENCE



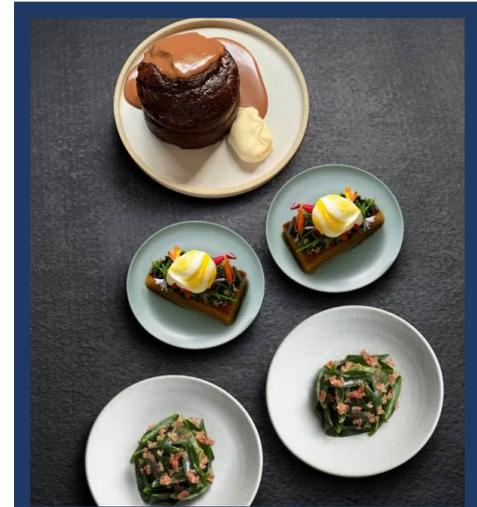
Café offers coffee courses online
Coffee Lab, Brazil



Offers public the chance to vote on which of their dishes they would like the recipe for
e.g. the Love Bar
Pret, UK



Online wine tastings
The Fine Wine Experience,
Hong Kong



Multi course menu for 2 including kangaroo tartare plus wine matching for delivery
Attica, Australia

TRENDING TASTES

Statement flavours continue to dominate. Exotic chillies, fragrant florals and sour flavours have grown in presence as opposed to evolving significantly. The trend for aromatic smoky flavours has expanded to include all things charred and burnt, following a surge in fire cooking. Spices are offering depth of flavour to sweet dishes but 2020 has seen a particular enthusiasm for chai and cinnamon. Tropical tastes are back but CBD has been moved to Health for All as we have seen the claims around it become more connected to healthy mood and calm.

GENERATION RELEVANCE:

- 55% 18-24 year olds consider themselves to be 'foodies', rising to 62% for 25-34 year olds¹
- 59% 18-24 year olds like to try out new flavours as soon as they're available, going up six percentage points for 25-34 year olds¹
- 40% 18-24 year olds like spicy flavours in snacks and 31% consume chilli or soy sauce on a regular basis¹

HEAT WAVE | SPICED | WHERE THERE'S SMOKE | PICKLED & FERMENTED | BOTANICALS

TROPICAL TASTES

¹ Global Data, global, 2019

TRENDING TASTES

WHERE THERE'S SMOKE



Imparting an aromatic umami flavour to all it touches, smoke continues to waft across food and drink. Mezcal is proving to be one of the hottest spirits on cocktail menus. But we have evolved this trend to include fire cooking in general, which has massively taken off in a variety of cuisines, not just American BBQ.

MANIFESTATIONS:

- Live fire cooking has become hugely popular, with some restaurants only using this method
- Searing directly on coals
- Plant-based e.g. charred okra, burnt cabbage
- Charred lemon as a savoury dish garnish
- Smoked, roasted & burnt chocolate
- Popularity of burnt Basque cheesecake
- Smoked drinks & lots of mezcal cocktails

RELEVANCE FOR TUCO MEMBERS:

- Investigate the opportunity for open flame cooking through BBQs and wood fired pizza ovens
- Introduce charred and burnt sweet items to menus e.g. crème brûlée and Basque cheesecake
- Call out smoking processes/techniques

KEY MARKETS
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SOCIAL MEDIA

LIFE EXPECTANCY: 4-6 years

TRENDING TASTES

WHERE THERE'S SMOKE



**Smoked chilli chocolate
mousse with chocolate
coating**
Ichu Peru, Hong Kong



**Clarified butter gently
smoked over beech wood
shavings**
Nobelhart & Schmutzig,
Germany



Burnt tomato panzanella
Aya, Dubai



**Wagyu ribeye seared directly
on coals then dunked into
white soy sauce to stop
cooking process**
Lazy Bear, US

HIGH BROW LOW BROW

Make no mistake, the quality of ingredients continues to be of paramount importance. The democratisation of dining is about preserving this and fostering innovation, but without the pretension or ‘unnecessary’ trappings of the white tablecloth. All of the trends from last year within this section continue in force, partially spurred by lockdown and the rise of delivery. We only expect casualisation to grow post-pandemic, as purse strings are likely to tighten and food is perceived as an affordable luxury.

GENERATION RELEVANCE:

- 92% of young consumers agree that allowing for indulgences every once in a while is good self-care¹
- 57% of Millennials & Gen Z have cut back on some spending because of Coronavirus but they’re still spending on the food that they feel they need to get them through this time²
- 21% of Millennials and Gen Z are actually ordering more food delivery during the COVID-19 crisis²

ELEVATING EVERYDAY | TOAST 2.0 | FISH FOR THE MASSES | SIMPLE DONE GOOD
CASUALLY FINE DINING | FANCY BAR FOOD

¹ YPulse, US, 2018

² YPulse, US, 2020

HIGH BROW LOW BROW

TOAST 2.0



Toast beautiful toast. Last year the focus was very much on how this humble format was serving as a vessel for fancy toppings in savoury. This current of innovation is still strong, with thick slices of bread now emerging. Doorstop bread is also a common feature of sweet topped toasts, which have increased significantly.

MANIFESTATIONS:

- Thick Texas toast & shibuya toast
- South East Asian kaya toast: topped with coconut milk & pandan
- Sweet tooth: French toast with fruit, topped banana bread, overloaded chocolate toast
- Cheesy toasted sandwiches
- Fancy toppings e.g. confit garlic & goat curd, egg mayo & truffle

RELEVANCE FOR TUCO MEMBERS:

- Expand the breakfast and brunch range to create a more indulgent, topped, thick toast offer
- Push toast into an all day occasion with dessert-style topping or savoury flavours
- Explore global influences when developing, specifically kaya toast

KEY MARKETS
1 = HIGH, 5 = LOW

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LATAM

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ASIA

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AUSTRALASIA

CHANNEL ALIGNMENT
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HIGH END

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RETAIL

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SOCIAL MEDIA

LIFE EXPECTANCY: 4-6 years

HIGH BROW LOW BROW TOAST 2.0



Chocolate brioche toast
Butter Dessert Salan, UAE



Sloppy Jeremy: Texas toast with beef strawberry Bolognese & goat cheese
Birdie G's, US



Banana bread with protein ice-cream, date caramel, smashed peanut butter cups, oat clusters & coffee bubbles
The Bowl One, UAE



Kaya toast: milk bread, coconut pandan jam & Maldon sea salt
Breadbelly, US

HIGH BROW LOW BROW

CASUALLY FINE DINING



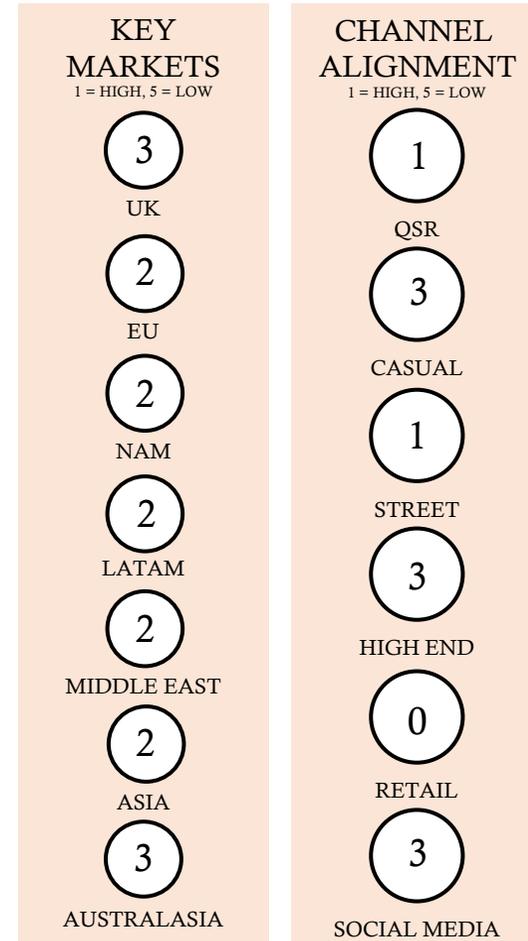
The global lockdown accelerated the development of this trend from last year. It's no longer about the odd chef opening a diffusion line, but all of high end dining has been forced to find ways to reach their audience under restrictions. And this has inevitably led to casualisation, primarily through delivery.

RELEVANCE FOR TUCO MEMBERS:

- Consider building relationships with high end restaurants for educational initiatives and brand link ups
- Take inspiration from casualised high end items

MANIFESTATIONS:

- High end does delivery e.g. Benares, Tim Raue, Pujol
- Delivery app for Michelin starred dining
- High end chefs do cook-alongs
- Noma serves burgers at opening after pandemic; fried chicken in high end
- High end restaurant produce wholesalers supply direct to consumers



LIFE EXPECTANCY: 4-6 years

HIGH BROW LOW BROW

CASUALLY FINE DINING



As restrictions eased, high end restaurant opened their outdoor wine bar & served burgers
Noma, Denmark



Platform specialises in delivery of Michelin starred dining
Supper, UK



High end chef cooked every day at 7pm with his family on Instagram live during lockdown
Massimo Bottura, Italy



3rd best restaurant in Latin America delivers baskets of 'basic' products e.g. pineapple tamales
Pujol, Mexico

GLOBAL LARDER

With unprecedented global border closures this year, it may feel as if the world is getting smaller but, from a culinary perspective, it continues to expand. Global Cuisine is now less conscious fusion, and more fluid creativity. There are also new cuisines to add to this mega trend: Spanish, with a focus on quality ingredients, Authentic Italian, especially unusual pasta shapes, and South East Asian beyond just Thai. Korean of 2019 is still present but with little evolution, and Central Asian hasn't moved beyond an emerging level of establishment.

GENERATION RELEVANCE:

- Interest in unusual or exotic products ranks highest with Gen Z and they are much more likely than older generations to be inspired by social media to cook international cuisines¹
- 45% 18-24 year olds are inspired to try new flavours when in a different country²

JAPANESE | LATIN AMERICAN | MIDDLE EASTERN | AUTHENTIC ITALIAN | GLOBAL CUISINE
MODERN INDIAN | SOUTH EAST ASIAN | SPANISH INGREDIENTS | EXPLORING AFRICA

¹ Mintel, US, 2018

² Global Data, global, 2019

GLOBAL LARDER

AUTHENTIC ITALIAN



A new entry, this cuisine has experienced a quiet renaissance recently. Say goodbye to bog-standard Bolognese and penne arrabiata and hello to unusual pasta shapes, both in foodservice and in kits. While 'nduja and burrata are everywhere, interesting Italian vegetable varieties and pulses are also getting a look in.

MANIFESTATIONS:

- Pasta shapes: fettucine, pappardelle, conchiglie and taglierini, handkerchiefs, caramelle, orecchiette
- Italian veg & pulses: radicchio, cannellini beans, broccoli rabe, friarelli
- Popular dishes: cacio e pepe, aglio e olio, gnocchi, burrata
- New pasta kits in retail & delivery

RELEVANCE FOR TUCO MEMBERS:

- Bring authentic naming and fresh ingredients to an easy format e.g. fresh taglierini
- Hero seasonal ingredients by highlighting herbs and vegetables in classic Italian dishes
- Pasta making kits and workshops

KEY MARKETS
1 = HIGH, 5 = LOW

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AUSTRALASIA

CHANNEL ALIGNMENT
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HIGH END

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RETAIL

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SOCIAL MEDIA

LIFE EXPECTANCY: 4-6 years

GLOBAL LARDER

AUTHENTIC ITALIAN



Cacio e Pepe: house made tonnarelli dressed with a sauce of pecorino cheese and black pepper
 Americano, India



Orecchiette with broccoli rabe pesto, Italian sausage, pickled cherry peppers & parmesan
 Da Toscano, US



New range of frozen pasta & sauce combos are “convenient, authentic Italian cuisine”
 Napolina, UK



Burrata, truffle cream, truffle pecorino & polenta
 Mercante, China

GLOBAL LARDER

SPANISH INGREDIENTS



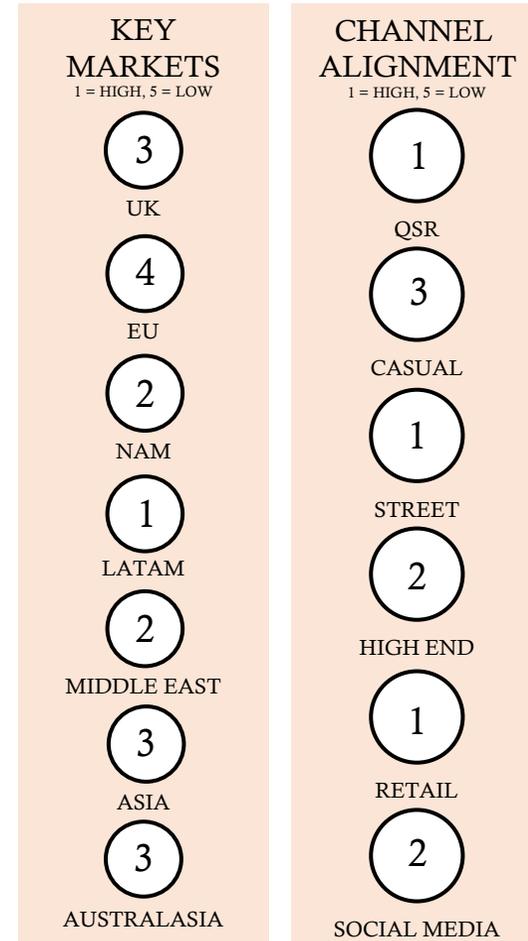
Spanish Regionality was a trend that surfaced and then settled in 2018. However, we've noticed the spotlight fall on this cuisine once again. Instead of a regional focus, the emphasis is on high quality and authentic ingredients in often simple dishes. This trend is particularly evident in new restaurant openings in Asia.

MANIFESTATIONS:

- Burnt Basque cheesecake with twists
- Popular ingredients & components: sobrasada, padron peppers, chorizo, pulpo, Iberian pork, romesco, aioli
- New Spanish restaurant openings in Asia
- 'Vermouth' eating and drinking occasion recently gained traction in the UK

RELEVANCE FOR TUCO MEMBERS:

- Consider adopting grazing style dining with authentic Spanish dishes
- Elevate recipes with named Spanish ingredients
- Broaden the shared dining experience and take inspiration from the aperitivo occasion



LIFE EXPECTANCY: 4-6 years

GLOBAL LARDER

SPANISH INGREDIENTS



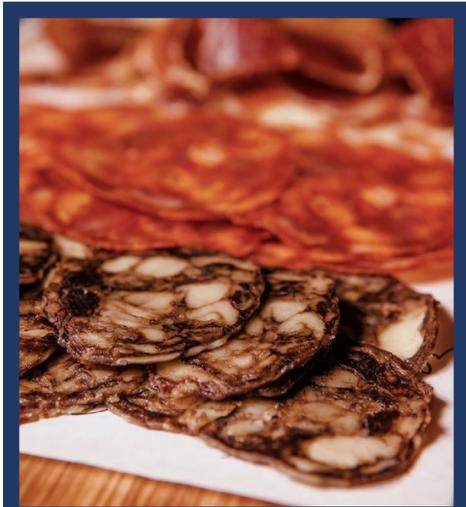
**House made boquerones:
pickled sardines**
Lazy Bear, US



Basque burnt cheesecake
Stone Espresso Bar & Coffee
Roaster, Taiwan



**Octopus brioche with
sobrasada mayo & padron
peppers**
Seabird, UK



**Thinly sliced morcilla blood
sausage from 100% acorn-fed
Ibérico pork**
Rubia, Hong Kong



GLOBAL FOOD & BEVERAGE REPORT

2020