

tfp

Trends

**Food & Beverage
2023 - 2024**



FROM CULTURAL TO FOOD & BEVERAGE TRENDS

1 GLOBAL DRIVER

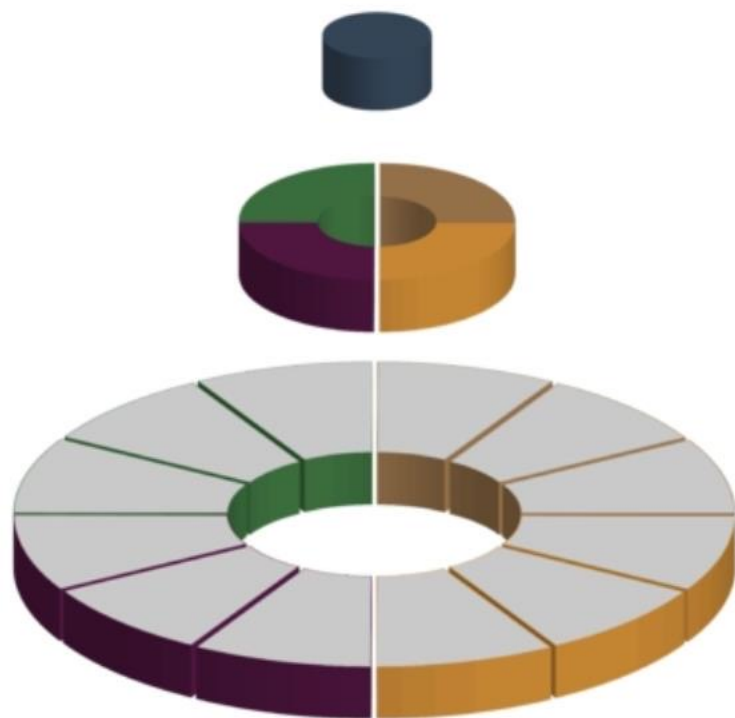
Under Pressure

48 CULTURAL DRIVING FORCES
OF 4 MACRO CULTURAL TRENDS

Unlock Time & \$\$\$ // 12
Displace & Distract // 12
Treasure Planet // 12
Health Wise // 12

12 FOOD & BEVERAGE TRENDS
LEADING TO 64 SUB TRENDS

Cost of Feeding // 6
Humble Hero // 6
Reliable Convenience / 5
Around The World // 6
Super Sensory // 5
Phygital World // 4
Food Odyssey // 5
What Waste? // 5
Invest In The Earth // 5
Accessible Health // 6
Clean & Whole // 5
Love Your Lifestyle // 6





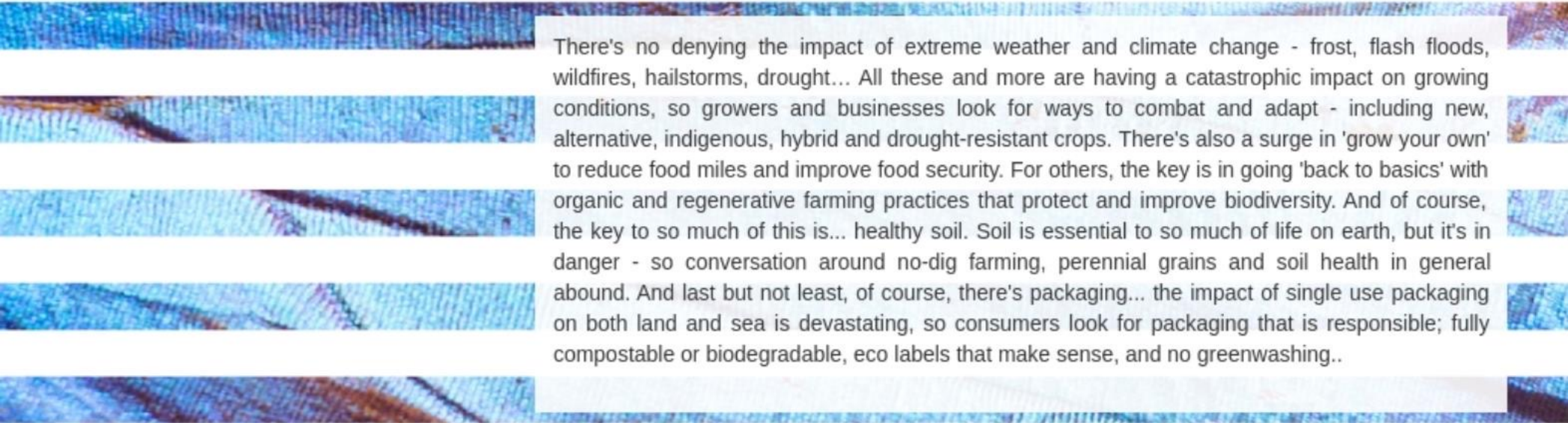
FOOD & BEVERAGE TRENDS MAP



2023-24



INVEST IN THE EARTH



There's no denying the impact of extreme weather and climate change - frost, flash floods, wildfires, hailstorms, drought... All these and more are having a catastrophic impact on growing conditions, so growers and businesses look for ways to combat and adapt - including new, alternative, indigenous, hybrid and drought-resistant crops. There's also a surge in 'grow your own' to reduce food miles and improve food security. For others, the key is in going 'back to basics' with organic and regenerative farming practices that protect and improve biodiversity. And of course, the key to so much of this is... healthy soil. Soil is essential to so much of life on earth, but it's in danger - so conversation around no-dig farming, perennial grains and soil health in general abound. And last but not least, of course, there's packaging... the impact of single use packaging on both land and sea is devastating, so consumers look for packaging that is responsible; fully compostable or biodegradable, eco labels that make sense, and no greenwashing..

SUB TRENDS

New Climate & Crops || Healthy Soil || Grow Your Own || Need to Regenerate || The Whole Package

ESTIMATED LIFESPAN

10+ Years

MACRO CULTURAL TREND DRIVER

Treasure Planet





LEVEL OF TREND ESTABLISHMENT



GROW YOUR OWN

NEED TO REGENERATE

THE WHOLE PACKAGE

HEALTHY SOIL

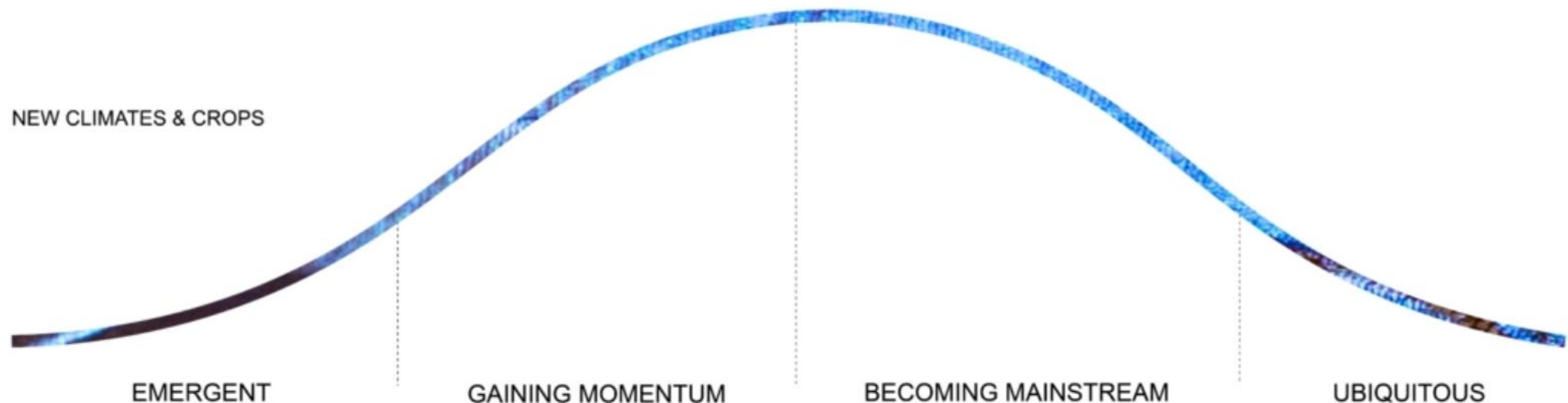
NEW CLIMATES & CROPS

EMERGENT

GAINING MOMENTUM

BECOMING MAINSTREAM

UBIQUITOUS



INVEST IN THE EARTH: NEW CLIMATES & CROPS

Growers need to adapt to changing climate conditions, so they look to new, alternative, indigenous, hybrid and drought-resistant crops.

Extreme weather events have been devastating for growing conditions the world over – frost, flash floods, wildfires, hailstorms... But perhaps most impactful are heatwaves and droughts so severe, that even crops that traditionally thrive in warm, dry conditions struggle. Growers and producers are adapting to new climates as best they can. For instance longer, hotter summers in the UK mean that whilst salads and leafy vegetables flounder – suddenly, tropical and Mediterranean produce like avocados, figs and watermelons can thrive (so farmers plant these). But most conversation here centres around the need for more drought-resistant crops generally. Robusta coffee beans, for example, tolerate high temperatures better than more traditionally sought-after Arabica, and so 'robusta' is shaking off its instant-coffee-grade stigma. There's also a lot of talk around the dangers associated with over-reliance on rice, wheat and corn – and so climate-friendly pulses are championed more widely, as well as ancient grains and indigenous crops like einkorn, amaranth and fonio. Farmers and scientists alike are also experimenting with hybrids and new, cultivated crops that might be better equipped to withstand climate change (like kernza, a perennial grain that's been developed and adapted for agricultural farming by the Land Institute in Kansas).

EXTREME WEATHER || DROUGHT || ANCIENT & CULTIVATED CROPS



Craft beer made with West African fonio; nutty, wheaty twist on classic white beer, Brooklyn Brewery x Yolélé (USA)



Ready-to-drink 100% robusta cold brew, Nguyen Coffee Supply (NYC, USA)



Hot summer hard on some crops, but bolstered a bumper harvest of tomatoes, cucumbers and aubergines, The Small Holding Kilndown, UK



Taking out the bolted salad after a long(!) dry spell, to replant with winter greens, mustard and early broad beans, Oak Restaurant (Bath, UK)

INVEST IN THE EARTH: HEALTHY SOIL

We need to act now, to save our soil... that means crop diversity, organic and no-dig farming, cover crops, perennial grains, and more.

Soil is essential for growing food, filtering water, providing raw materials and life on land generally... but it's eroding at alarming rates. According to the UN Food & Agriculture Organization, 90 per cent of the Earth's topsoil is likely to be at risk by 2050. It's time to act now to *save our soil*. For instance, it's time to think beyond rice, wheat and corn, which provide half the world's calories. Over-reliance on these crops contributes heavily to soil degradation, as monoculture (cultivating just one crop at a time) upsets the natural balance and structure of soil. So look to invest more heavily in alternative grains like spelt, farro, amaranth, freekeh, quinoa, millet, sorghum, teff or kamut. Environmentalists also encourage growing more perennial crops (e.g. fruit trees) that don't need to be replanted each year, unlike annual crops. It's also time to back game-changing perennial grains like kernza, which researchers are working to commercialise. And we better understand the importance of letting soil rest and recover. On organic farms, that might mean not planting anything every third year, for instance, letting animals feed on the land instead. Or planting cover crops like legumes, clover or alfalfa – dubbed 'green manure', these return nitrogen to the soil. And at home, you can try your hand at 'no dig' gardening (layering organic compost, rather than digging).

CROP DIVERSITY || NEW & PERENNIAL GRAINS || REST & RECOVER



Organic Kernza Fusilli, made with kernza flour and semolina, Patagonia (USA)



Growing heritage grains (e.g. April Bearded, Maris Widgeon) in rotation with other produce, Flourish Produce (Hildersham, UK)



Organic Hylander Golden Onion from organic form with 'no dig' approach to growing, Hexhamshire Organics (Hexhamshire, UK)



Linguine, penne and spaghetti, made from whole-milled artisanal einkorn, Revival Einkorn (USA)

INVEST IN THE EARTH: GROW YOUR OWN

Global food supply chains are under immense pressure, so there's more focus on 'growing your own' for food security, cost and sustainability.

Extreme weather, post-Brexit import issues, Covid, the impact of the Ukraine war on global feed, fertiliser and fuel supplies... These are just some of the issues having an adverse impact on global food supply chains. So it's no wonder that there is increased focus on 'learning to grow our own' – not just for food security, but also to reduce the food miles and carbon impact of what we eat. And we aren't just talking industrial farming initiatives, but also local and community drives... Indeed, sustainability-driven chefs and restaurants are leading by example here. They plant herbs on window ledges, create rooftop gardens, grow micro-herbs in back rooms, raise their own animals, and more. At Where the Light Gets In (Stockport, UK), for example, they not only grow produce on their own farm – they also grow mushrooms in the basement and built an urban growing space for the community. Meanwhile, at Restaurant Pine (Northumberland) they are working to become self-sufficient with their own farm, garden, beehives, etc – and in the meantime, they source all of their produce not grown onsite from within 20-miles. Beyond 'growing our own', also key to strengthening food security are more simple wins – e.g. championing local and seasonal ingredients, sourcing from local suppliers, and buying in bulk to reduce transport emissions.

FOOD MILES || SELF-SUFFICIENT || GARDENS & FARMS || GO LOCAL



Strawberries from local growers, Lemken Farm; field to plate within a few hours, Moor Hall (Aughton, UK)



Aerial view of restaurant's gardens, complete with beehives and planting beds, Restaurant Pine (Northumberland, UK)



Cucamelons, originating from Mexico... now grown on the roof of a car park in Stockport, Where The Light Gets In (Stockport, UK)



Gourmet mushrooms being farmed to supply local community & small businesses, Margate Mushrooms (Margate, UK)

INVEST IN THE EARTH: NEED TO REGENERATE

Fully 'regenerative' farming should take account of the whole ecosystem - that means soil, crops, water, insects, animals and air...

'Regenerative' is a buzzword in the sustainability sphere, but what does it mean? The Regenerative Organic Alliance suggests that 'regenerative organic agriculture is a collection of practices that focus on regenerating soil health and the full farm ecosystem'. Of course, in practice, this can include a lot of things – e.g. crop rotation, composting, and low- and no-till farming. Indeed, in that vein, gardeners are increasingly committing to campaigns like Plantlife's 'No Mow May' – a month without mowing, to let plants grow wild and provide nectar for insects. And for those willing to keep the lawnmower locked up – there is a renaissance in pre-industrialised farming practices like *scything*. As well as reducing pollution, using a scythe blade (in lieu of mowers) also protects the ecosystem of insects and small animals that live amongst the crops. But this is just the tip of the iceberg! Other regenerative practices include using natural predators instead of chemical pesticides, harvesting rainwater, development of pollinator habitats, planting perennials, creating vegetative barriers... And of course, it's not all about land farming – regenerative ocean farming is also of crucial, and there is increasing conversation around initiatives that (for instance) grow seaweed and shellfish in underwater gardens.

FULL ECOSYSTEM || SOIL & CROPS || GROW WILD || GO NATURAL ||
INSECTS & ANIMALS || OCEAN FARMING || SEAWEED GARDENS



Regenerative Organic Certified (ROC) quinoa range, SIMPLI (USA)



Farm saves seeds to re-sow next year; reuse makes seeds more resilient as they acclimatise, Four Acre Farm (New Forest, UK)



Getting a lesson in the basics of scything from Scythe Africa, Geoff Lawson; Discover Permaculture (Online)



Beer brewed with seaweed harvested at UK's largest offshore seaweed farm, SeaGrown Hold Fast (Yorkshire, UK)

INVEST IN THE EARTH: THE WHOLE PACKAGE

Consumers look for packaging that is responsible; fully compostable or biodegradable, eco labels that make sense, and no greenwashing...

The impact of single use plastic on land & sea remains a top climate issue – and businesses are doubling down on sustainable packaging solutions. Innovative packaging is being made with natural and agricultural materials like flax, hemp, cocoa shells, mushrooms, pineapple leaves, coconut... the list goes on. But consumers are wary of 'greenwashing' and scrutinise more closely. It's not enough to produce paper bottles, for instance; consumers want fully recyclable/biodegradable packaging – e.g. caps, multipack wrapping, etc. And don't forget the barriers inside cartons which protect the contents inside; e.g. Tetra Pak is developing a fibre-based barrier to replace the aluminium layers currently needed in juice boxes, milk cartons, etc (without compromising on quality or shelf life). But that's just the tip of the iceberg in innovative solutions; e.g. US-Singapore researchers have developed an anti-microbial, plant-based coating that can both replace plastic and extend shelf life (tests found it extended shelf life of avocados by 50%). And on the subject of truly 'green' packaging – transparency is king. That means total honesty about not just whether the package is recyclable or biodegradable – but also ensuring that any 'green' claims on the outside, are accurate (entailing transparency about *the whole life cycle* of your product and packaging).

NATURAL || PAPER BOTTLES 2.0 || ALL IN || SHELF LIFE || ECO LABELS



Generation 2.0 Fibre Bottle with new plant-based PEF lining (compatible with plastic recycling systems), Carlsberg x Paboco (Europe)



Hug&Hold, a recyclable, paper-based solution to replace plastic shrink wrap, Mondi (Europe)



New algorithm developed to calculate more accurate eco impact of products based on ingredients, Oxford University (UK)

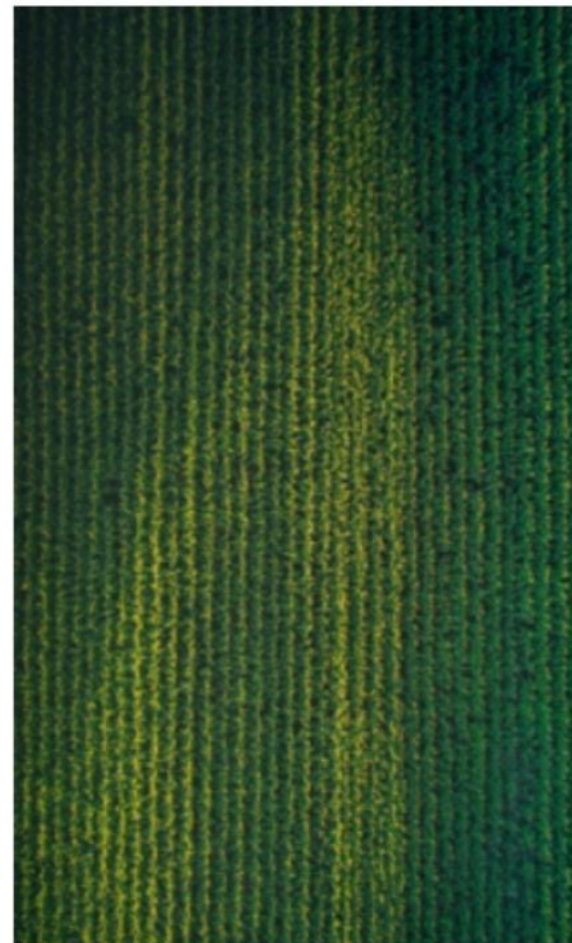


'Mushroom packaging' made with agri-waste and mycelium; biodegradable, breaks down naturally in 45 days, Magical Mushroom Co (UK)



WHAT COULD THIS MEAN FOR YOU?

- How can you partner with growers to utilise species and varieties of crops (e.g. kernza, fonio) that are better suited to changing climate, but also drive improved soil health, biodiversity and food security?
- How can you leverage alternative / ancient grains in your products and production processes to drive species diversity - but also new, interesting food experiences? (e.g. beer made with ancient grains can offer a new, exciting flavour profile and alternative to traditional lagers)
- Could changes to supply chains and manufacturing processes mean that your products and services have a net environmental benefit?
- How can work with regenerative farmers and producers and develop regenerative programmes to build and scale these practices? How would you business look if you applied a 'circular' approach?
- What is your legacy as a brand or business? Are you leaving the world a better place?
- Beyond commercial gain, what is your purpose? Be bold, brave and honest.
- Does your business have the knowledge and skills to be climate positive?
- Understand that consumers are on the start of a journey in terms of shifting their eating and shopping behaviours... How can your business support them, in a meaningful and practical way? (e.g. clear and honest labelling, education initiatives)
- How do you make your packaging truly 'green' - e.g. if you have paper bottles, think about how to make the label, cap, outer packaging etc all fully compostable too





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