



**thefoodpeople™**  
shifting the future of food and drink

# THE END OF YEAR SHOW 2023

AI SPECIAL  
Ride the Wave



# WELCOME



**SUSANNAH CROUCHER**  
Chief Impact Officer



**ANDREW WARDLAW**  
Chief Ideas Officer



**ALEXANDRA KUZMINA**  
Associate Director, NOVA



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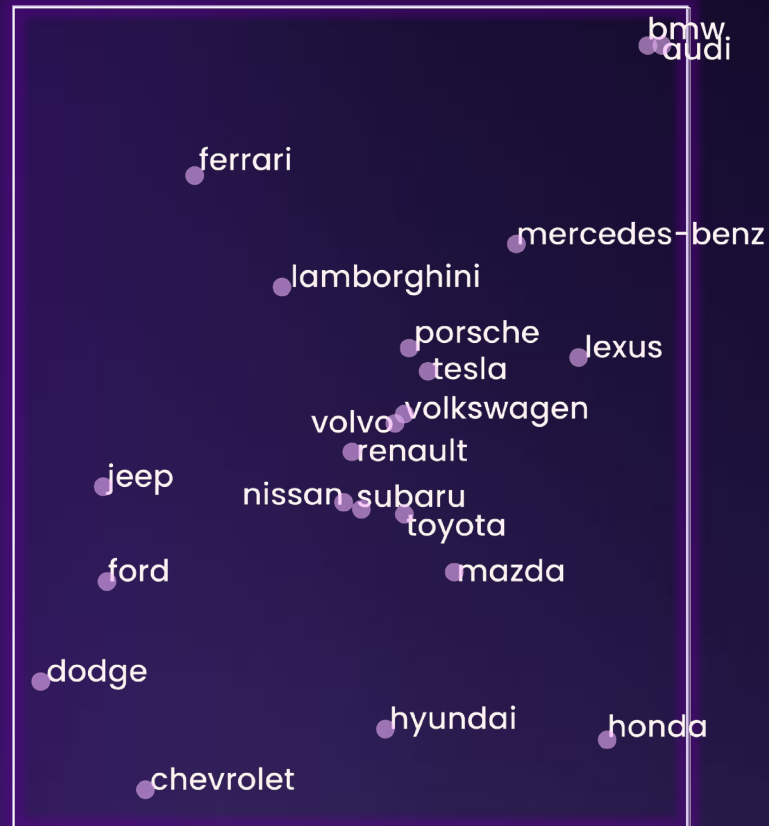
# SYNTHETIC DATA

**“The era of synthetic  
data is clearly upon us.”**

**MARK RITSON, OCTOBER 2023**



# HUMAN DATA



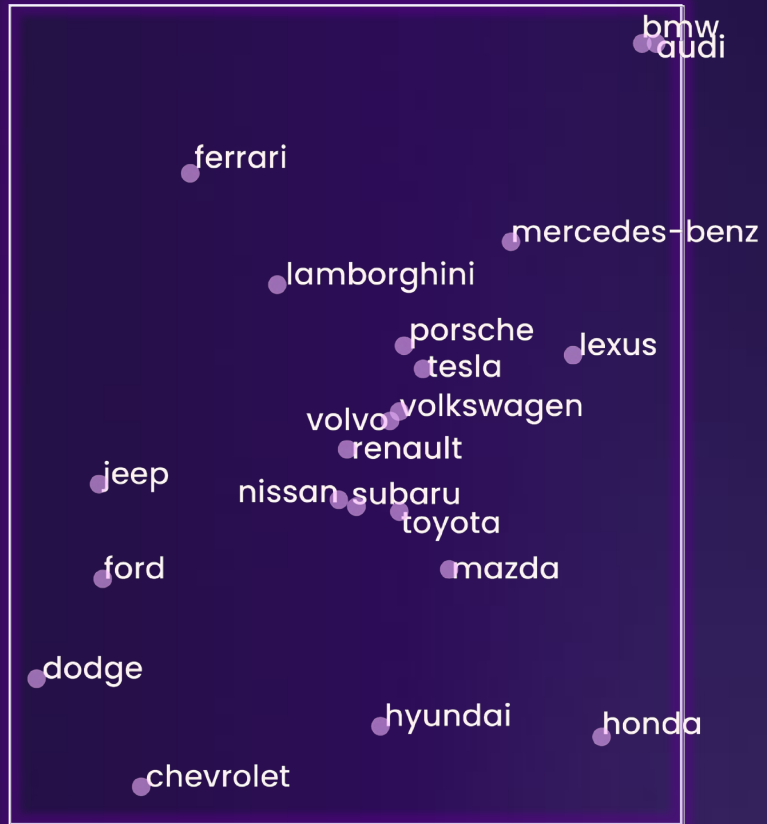
**Source:** Language Models for Automated Market Research: A New Way to Generate Perceptual Maps. Li, Castelo, Katona and Sarvary. Human subjects (n=530).

# SYNTHETIC DATA

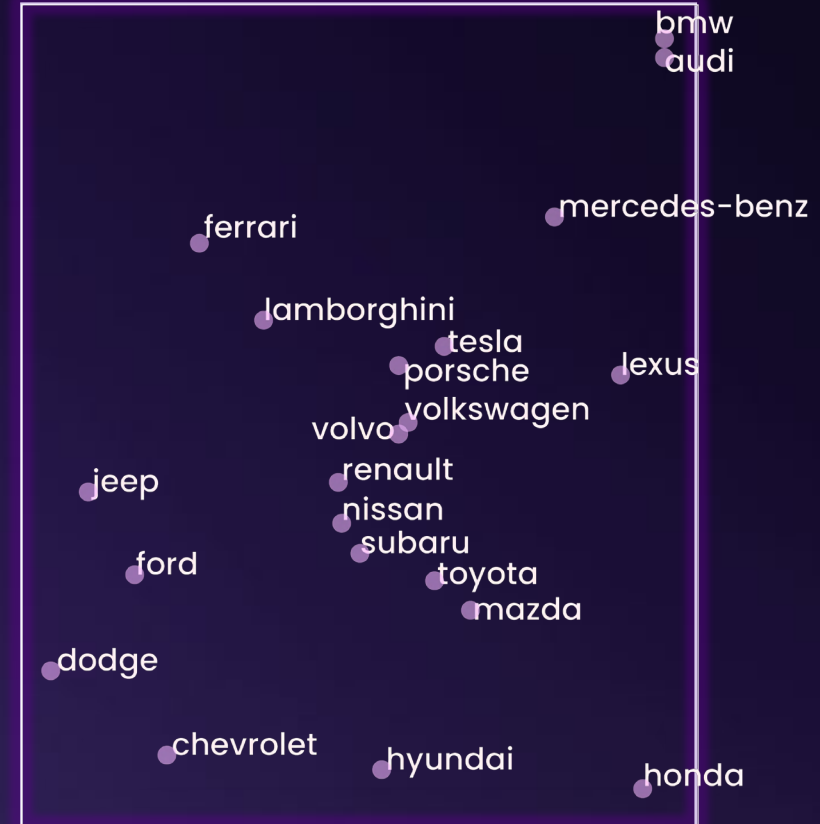


**Source:** Language Models for Automated Market Research: A New Way to Generate Perceptual Maps. Li, Castelo, Katona and Sarvary.

# HUMAN



# SYNTHETIC



# COMING UP...

**Walter Pasquarelli**

Generative AI, and Data Expert



**Charles Banks**

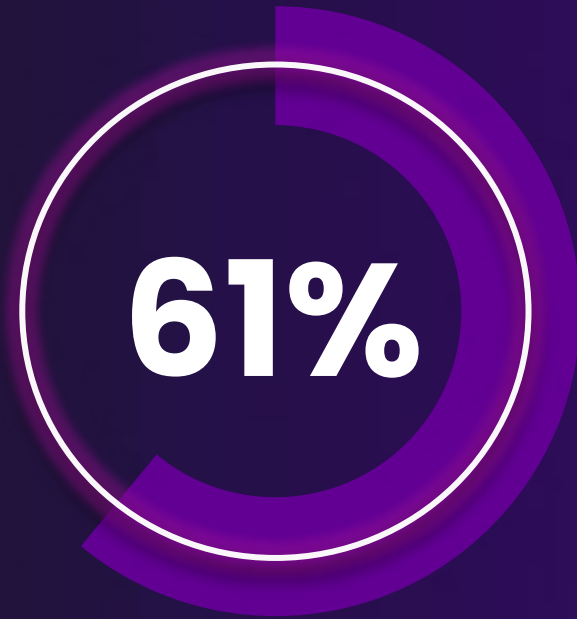
Co-Founder

**thefoodpeople™**

shifting the future of food and drink



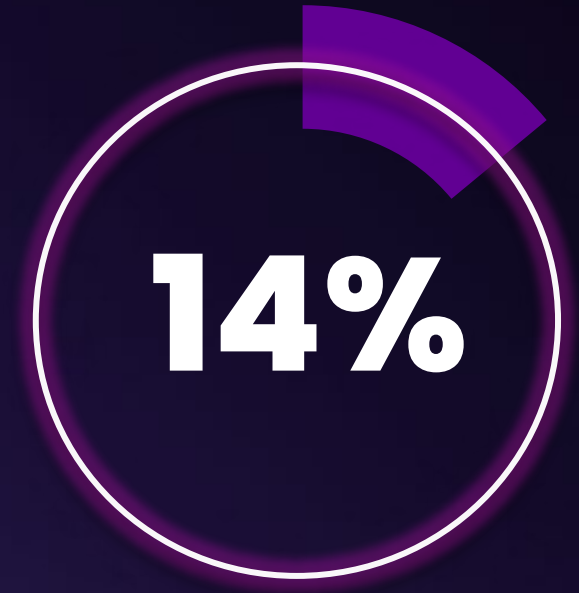
# RISING OPTIMISM



**BETTER (51%)**



**SAME (29%)**



**WORSE (20%)**

**SOURCE:** WARC n=1400 September/October 2023

“

**We absolutely need to make sure that we are consistently delivering remarkable products and experiences**

”

**Doug Martin**

Chief Marketing & Disruptive Growth Officer  
General Mills

“

**Consumers continue to  
prioritize indulgences and  
moments of joy and pleasure.**

”

**JONATHAN HALVORSON**

Global Vice-President for Consumer  
Experience & Digital Commerce  
Mondelez

“

**An act of defiance at the sacrifices they are making elsewhere in their shopping.**

”

**Emma Fishwick**

Director of Prestige Beauty  
CIRCANA

# YOLO ECONOMY

Shift in consumption towards less, but better.





44%

% consumers who plan to 'splurge'.

SOURCE: McKinsey.



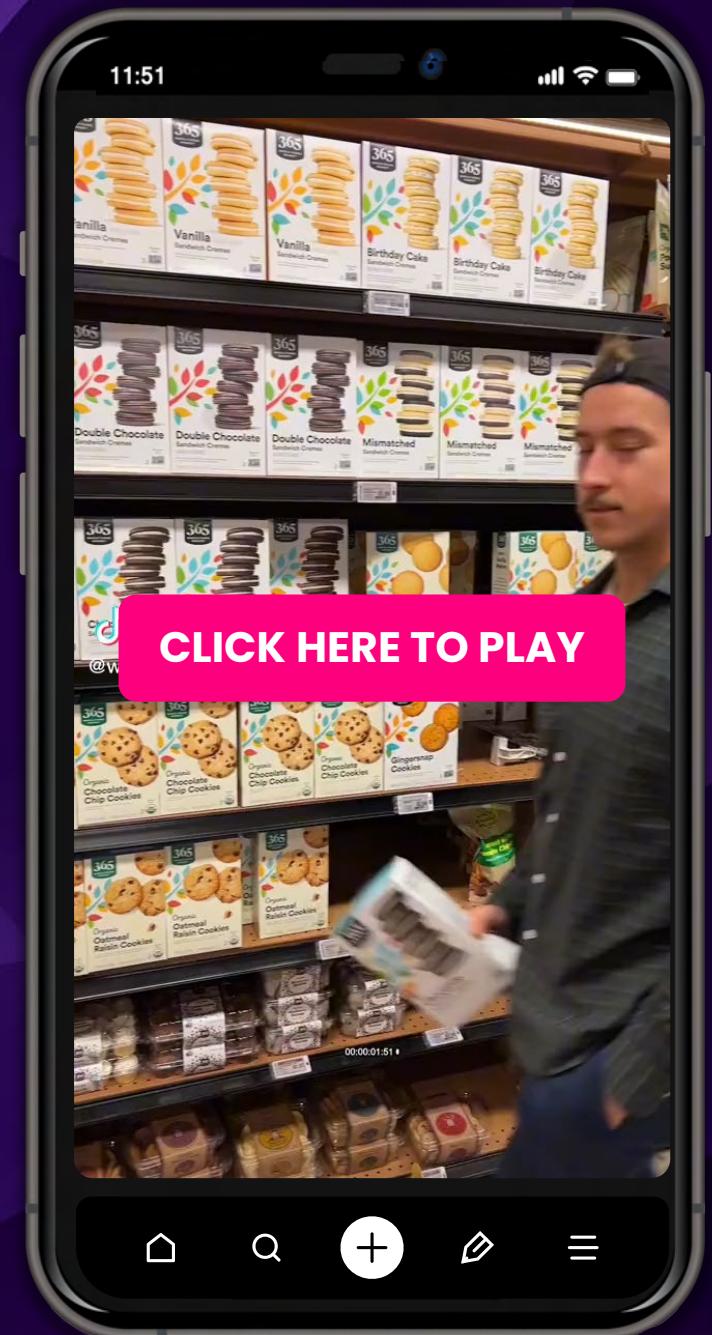
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# Bacardi acquires super-premium artisanal mezcal brand



# GEN Z DISCONNECT

A new spin on value.



# VALUE DECODED

value  
DECODED

- 700 participants
- Unboxing experiences.  
Chatbot conversations.  
Deep sensory.
- Free access

ACCESS HERE





● New Podcast Episode

# What products rock Gen Z's world, and why?

Value Decoded

[LISTEN HERE](#)

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# COMING WAVE

Age of artificial intelligence.



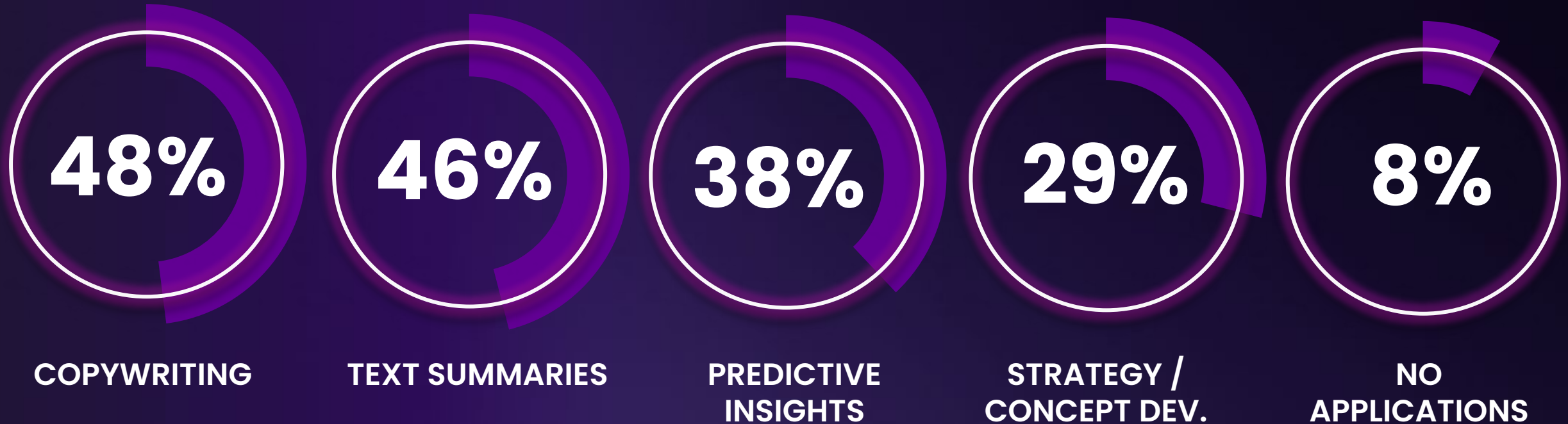
“

**A race no one  
wants to lose.**

”



# AI APPLICATIONS



SOURCE: WARC n=1400 September/October 2023

# BIG BRAND MASH-UP

Fantastical brand collabs  
and far-out products...







# MISH-MASH



# BIG BRAND MASH-UP

Fantastical brand collabs  
and far-out products...



# NIKE X RED BULL



# STARBUCKS X CHEERIOS



# MAC X MAGNUM



# VOTE!



NIKE x RED BULL



STARBUCKS x CHEERIOS



MAC x MAGNUM

# **PRODUCT BREAKERS 2023**

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“

**Entire categories are at  
risk of becoming  
innovation deserts...**

”

**Ananda Roy**

Global SVP, Strategic Growth Insights  
CIRCANA

“

**Winning brands will invest  
in bold, agenda-setting NPD  
that responds to new  
behaviours and moments...**

”

**Ananda Roy**

Global SVP, Strategic Growth Insights  
CIRCANA

# GROWTH SPACES

- 20 emerging demand spaces
- European health priorities
- Emerging food tech

DOWNLOAD



# **PRODUCT BREAKERS 2023**

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# FORESTA

Capitalizing on animal relations



# NORTHERN WONDER

Combatting loss of biodiversity





# TALLOW + ASH

Reimagining wash day



THE  
END OF  
YEAR SHOW  
2023



# DR BRONNER'S

Making regenerative farming real



THE  
END OF  
YEAR SHOW  
2023

# PIENAAR & SON

Creating new occasions



# VOTE!



**FORESTA**



**NORTHERN  
WONDER**



**TALLOW +  
ASH**



**DR BRONNER'S**



**PIENAAR &  
SON**



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# THE END OF YEAR SHOW 2023



# TRENDS

2024  
—  
2025

top 10  
new &  
rising

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**tfp**

Charles Banks – Co-Founder thefoodpeople

# Top 10 Food and Beverage Trends 2024 / 25



**harnessing ai**



**pillars of protein**



**awesome ambient**



**simple gourmet**



**umami 3.0**



**retro throwback**



**regenerate land and sea**



**smart plants**



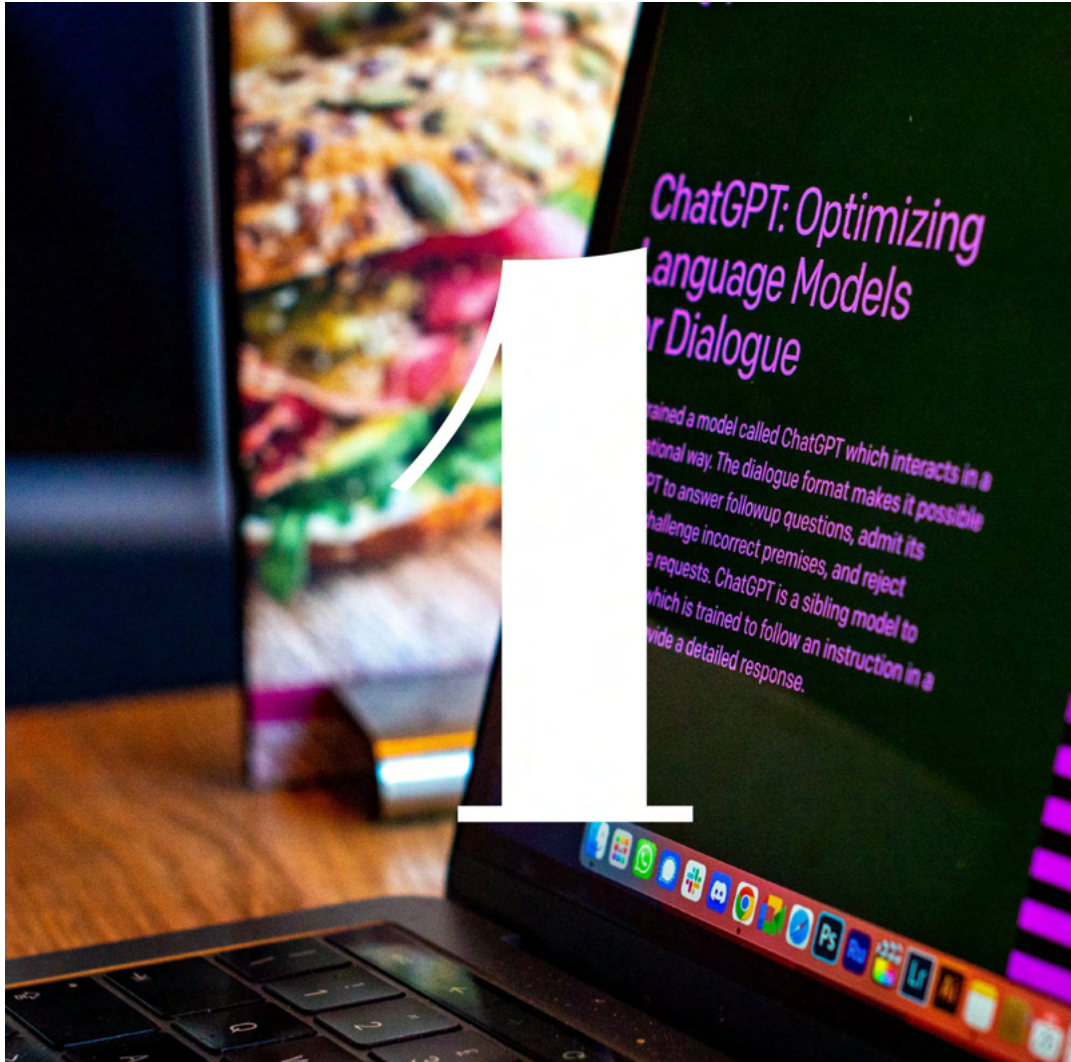
**hack my health**



**ultra processed impact**

# HARNESSING AI

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AI is a modern-day reality, with the possibility to revolutionise any and every industry.

And the real winners will be those who can leverage AI alongside human intelligence, to get ahead.

Scientists are already using AI to speed up world-changing discoveries, while food producers are working with AI-powered tech to cut costs and improve efficiency.

It also has the potential to improve agricultural sustainability, and help to provide streamlined and personalised consumer experiences.

Mega Trends: Harnessing AI

Macro Cultural Driver: Evolve Smarter

# HARNESSING AI

**ai + human intelligence** - In foodservice, for example, this may mean that an AI-powered robotic chef could take over chopping, achieving uniformity, increasing productivity and potentially reducing food waste.

**speeding up science** – allowing researchers to identify patterns and potential breakthroughs significantly faster than through manual analysis - Shiru, USA, whose OleoPro plant-based fat ingredient was discovered in under three months, when without AI this would have taken years

**cost and efficiency** – leveraging ai driven stock management, cooking processes, vision systems, sorting and packaging systems and delivery routing to drive significant improvements in waste, time, fuel, labour and energy

**green machines** - AI can evolve conventional agriculture practices, such as mono-cropping, blanket application of synthetic chemical fertilisers, and intensive land use, with more regenerative agriculture practices.

**consumer experience** - AI to drive apps and recommendation systems that can personalise menu suggestions based on individual preferences, dietary restrictions, and past choices, healthier choices to the right wine to pair with one's signature dish.



AI tech detects the 'signals' fruits send to deliver them perfectly-ripened

**Strella  
Biotechnology**  
(USA)

OleoPro, a novel plant-based fat ingredient discovered by AI in under three months

**Shiru**  
(USA)



UPP's 3D cameras and machine learning to harvest broccoli with minimal waste

**UPP**  
(UK)



# AWESOME AMBIENT

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Convenience, waste reduction, and the cost saving benefits of longer shelf life and ease of transport...

The ambient aisle always had a lot going for it. Now, a renewed focus on tinned, dried and shelf stable produce has encouraged creativity and innovation in the category, adding many more to the list of pros.

Ambient foods are getting the gourmet treatment, with elevated quality ingredients, exciting flavours and global cuisine influence.

And health need not be sacrificed - with dietaries taken care of, and super nutritious solutions in meals, powders, grains and legumes.

Mega Trends: Awesome Ambient

Macro Cultural Driver: Savvy Living

# AWESOME AMBIENT

**gourmet canned** - Tinned and jarred staples are upgraded with quality ingredients and inspired flavours. Home cooks look to the global pantry for easy twists. Tinned icons go with daring flavour combinations. Gourmet spreads twist up breakfast time.

**more-ish meals** – adventurous cuisine-led ambient meal kits, veg packed meals in tins, pouches and jars. And cuisine influence is spotted everywhere – we see Indian black dal or off-the-beaten track cuisines e.g. Cuban ropa vieja

**powder power** - Powdered food and drink has picked up speed because it's 1. Affordable, 2. Convenient but, also, 3. It generally doesn't require artificial preservatives and 4. Sustainability

**grains & legumes** - Millets and legumes are being used in baking, desserts, crisps, crackers and frittatas, millet porridge and cereal or ancient grain viennoiserie. Pasta and risotto dishes get a nutritious upgrade e.g. einkhorn spaghetti, emmer risotto.

**noodles & pasta** – a new lease of life and a new relevance – regional varieties, new flours, new occasions, ultra convenience, ultra premium and hacks galore

**rice revolution** – the new protagonist at meal times, debunked rice perfection, global cuisine rice – Kimchi, Persian, Szechuan, Jambalaya, Jamaican, Tteobokki, regeneratively sourced



Powdered ice cream - just add milk

**True Scoops**  
(USA)

Premium instant noodles with more sophisticated flavours and noodles



**Omsom**  
(US)



Ambient kits for more adventurous dishes e.g. Ngoh Hiang (summer rolls)

**Naksha**  
(UK)

# REGENERATE LAND & SEA

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“Regenerative” is poised to replace “Sustainable” as the way to describe environmentally and socially desirable business models. In part this is because “sustainable” tends to have the connotation of maintaining the status quo while regenerative evokes restoration and positive change.

There are encouraging signs that a regenerative, circular concept will evolve into a highly significant and impactful expansion of optimized existing systems and avoid being limited to a niche status.

It can be good for farmers, good for the consumer, good for brands/business and good for the planet. However consumers don’t really understand what it is and what it means.

Mega Trends: Green & Blue

Macro Cultural Driver: Evolve Smarter

# REGENERATE LAND & SEA

**critical debate** – on the future, scalability, communication and certification of regen-ag.

Emerging consensus key principles - Minimize soil disturbance, Maintaining living roots in the soil, Continuously cover bare soil, Maximize diversity with emphasis on crops, soil microbes and pollinators and Integrating livestock where it is feasible.

Many significant players are visioning a scalable model that can have significant impact in terms of Climate Resilience and Climate Mitigation.

**crop resilience** - Improving crop resilience is critical for ensuring food security in the face of climate change and environmental challenges.

regenerative farming practices can also significantly bolster crop resilience. The wet and dry method of rice farming, for example, allows paddy fields to dry out during the growing season, aerating the soil.

**aquaculture** - Sustainable aquaculture, seaweed farming, and microalgae are booming industries in the new food revolution.

Such practices help to meet the growing global demand for seafood while reducing pressure on wild fish populations, mitigating habitat destruction and cutting back on water pollution

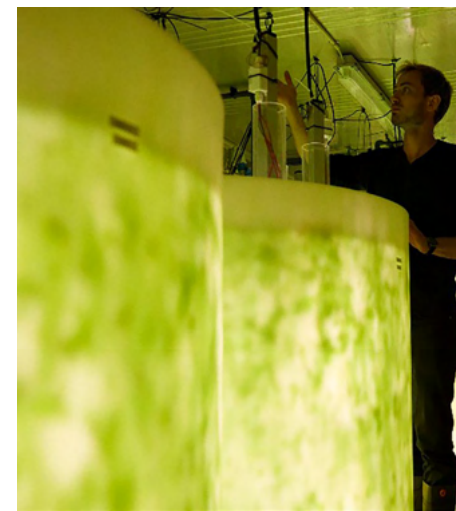


Rice grown with alternate wetting and drying method

**Mission Brands**  
(UK)

Regeneratively produced dairy cheese

**Silvo Cheese**  
(UK)



Using nutrients and CO2 from seafood farming to grow seaweed for food and healthcare

**SeaFree**  
(Denmark)

# HACK MY HEALTH

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Consumers are leveraging the power of genetics, neuroscience and nutrition to 'hack' their unique biology – it's not about just live longer, but BETTER optimized living.

And one size does not fit all... For some it's about simple day-to-day choices like changes to diet, maybe more plants, or meditation and breathwork to feel better as we age.

Others think further outside the box, looking to digi-health and beyond to not just slow down ageing – but perhaps even reverse it.

What's clear is that health and wellbeing is more about ME and its more about proactive prevention.

Mega Trends: Individual Health | Feed Me Functional | Nutrition Matters

Macro Cultural Driver: Empowered Self

# HACK MY HEALTH

**biohacking** - health management goes more minute as consumers get familiar with their unique biochemistry to focus on optimization. Leveraging the power of genetics, biology, neuroscience and nutrition to focus on health creation not just disease prevention

**eating for life stage** – age is just a number except when it comes to targeted solutions that support people whatever their life stage – kids, teens, pregnancy/post partum, menopause/andropause, golden years.

**whatever the budget** – greater demand for health and wellness products, initiatives and education solutions for all – health can't come at a price.

**weight management** – half the world is predicated to be overweight or obese by 2035, this is driving a wave of disruptive innovation in weight management.

**blue zones** – decoding the factors that mean the populations of certain locations live longer and better than anywhere else

**epigenetics** – epigenetics (factors beyond the genetic code) now combining with wearables, dna testing to lower biological age and reverse the effects of cellular aging.



Social wellness club where patrons can access infrared saunas & IV vitamin drips to 'offset everyday stressors'

## Remedy Place

(LA & NY, USA)

Muhdo levels up personalized nutrition through epigenetics

## Muhdo

(UK)



The first personalised medical meals to help reduce preventable diet-related diseases,

## Food For Health program

(Wisconsin, USA)

# ULTRA PROCESSED IMPACT

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The debate around 'ultra processed' foods continues to gain momentum, as we begin understand the links between what we eat now and how that food is processed – and our long-term health down the road.

There's still a lot to unpack about the definition of ultra-processed, and why these ever-prevalent foods have an impact on health outcomes

In the meantime, the era of expose media will continue and the mantra 'You Are What You Eat' rings truer than ever.

What's clear is this is a moral as well as a food system discussion that the industry is at the heart of the way forward.

Mega Trends: Nutrition Matters

Macro Cultural Driver: Empowered Self



# ULTRA PROCESSED IMPACT

**the definition** – one of 4 levels of NOVA classification that denote foods that have a multitude of sequences of processes to combine the often many processed ingredients to create the final product

**a lot we don't yet know** – it has been established that there are links between over consumption of these foods and ill health but there is so much that we don't know – why, what is it about these processes, how much is too much, which are the primary offenders?

**the tension** – this isn't just about a choice, its about the broader food system, education and policy. For many reasons the alternative is inaccessible for many, especially during a cost-of-living crisis.

**hyper palatable foods** – a subdivision of UPF's that have specific combinations of fat, sugar, sodium and carbohydrates that make them artificially rewarding to eat and harder to stop consuming

**uniting industry** – what is for sure the path forward is about leveraging the knowledge now and into the future to unite industry in 'better processing'

For every 10% of your ene intake that comes from *ultra-processed foods*, your risk of all-cause mortality increases by 15%...

PMID: 30742202

Awareness-raising on social media about UPF & health

**Tim Spector & ZOE**

Instagram

Affordable, non UPF, nutritious vegan meals that are ready-to-eat to consumers from Matthew Kinney

**Earth Company**

(US)



SUPERLOAF gut-friendly bread, made by upcycling carbs from UPF, gets more funds to expand range

**Modern Baker**

(UK)

# SAFE BET vs SPLURGE: STEAK & CHICKEN

- Simple 'guaranteed delicious' meals
- American steakhouses and French bistros
- Steak frites served classically (or with a twist!)
- Winner winner, chicken dinner...
- Chicken every which way – 'Chicken Shops 2.0' to 'Refined Rotisseries'
- 'Fancy' chicken and chips
- Cost credentials - one bird, multiple meals...



'Chicken shop' inspired menu with chicken everything - hot wings, chicken sandos, cornbread with chicken butter, and more,  
**Fowl**  
(London, UK)



'Glamorous rotisserie' concept; rotisserie chicken, served alongside champagne and caviar,  
**Bebe Bob**  
(London, UK)



Steak Frites; koji marinated flatiron or NY Strip with fries and house-made aioli, honey mustard or horseradish cream,  
**Birdie G's**  
(Los Angeles, USA)

# SAFE BET vs SPLURGE: GOURMET NOSTALGIA

- Back to basics; food that reminds us of childhood
- But don't compromise on craft and skill...
- Grown up 'happy meals'
- Handheld gourmet
- Think beyond burgers and nuggets – e.g. bagel pizzas, hot pockets, fancy crisp sandos, savoury doughnuts, etc
- Hot dogs and corn dogs



'Hot pocket' with  
cacciatore sauce,  
smoked mozzarella,  
asiago, pepperoni,  
**Tatiana**  
(NYC, USA)



Drive In-inspired corn dog  
with truffle ketchup,  
whisky mustard,  
**Rocco's Bologna  
Discoteca**  
(Melbourne, Aus)



Cult \$29 hot dog served  
with brisket chile, mustard,  
habanero-bacon crisps,  
relish, red kimchi and  
pimento cheese,  
**Mischa**  
(NYC, USA)

# SAFE BET vs SPLURGE: MEMORABLE MEALS

- Occasional extravagance, making memories
- Needs to be 'worth the splurge'!
- Trolley service and tableside flair; old school hospitality and personal touch
- Crepes suzettes flambéed to order, steak tartare your way, chicken carved tableside, custom sundaes...
- Japanese omakase – multi course tasting
- Classic (sushi, sashimi, tempura) and less classic (global sushi, fried chicken or even pizza omakase... why not!)



Steak tartare prepared  
tableside from a  
bespoke made walnut  
and brass trolley  
**Maison François**  
(London, UK)



Knickerbocker Glory  
cart - diners can build  
sundaes from ice  
creams and toppings  
**Dovetail**  
(London, UK)



Nigiri with cold smoked  
trout, bacon jam,  
cornichon, and BBQ  
sauce glaze; served in a  
17 course omakase  
menu,  
**Sushi|Bar**  
(Austin, USA)

# Top 20 Food and Beverage Trends 2024 / 25

Download this presentation and 24/25  
Food & Beverage Trends Infographic....





# TRENDS

2024  
—  
2025

top 10  
new &  
rising

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**tfp**



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shifting the future of food and drink

# THE END OF YEAR SHOW 2023

# **AI. RIDING THE WAVE.**

A thin, horizontal pink line that starts at the end of the main title and extends across the right side of the image.

**Walter Pasquarelli, with Alexandra Kuzmina**



the  
**NOVA**  
partnership initiative





**thefoodpeople™**  
shifting the future of food and drink

# BIG BRAND MASH-UP!

# THANK YOU!

## Design

Aradhana Chand  
Odelia Vaz  
Pranali Bandekar  
Bhairavi Patil  
AI Midjourney

## Production

Nick Twigg  
Michael Lebor  
Soner Metin  
Rob Hutchinson  
Tamas Makara  
Dan Brennan  
Adam Hurley

## Promotion

Simone Marcus  
Ally Guppy  
Autumn Cole  
Stephen Hartnett  
Kaylee Livanos  
Chase Carneson  
Palesa Mthiyane

## Sensory Science Centre

Phiala Mehring  
Expert Sensory Panel

## Special Guests

Walter Pasquarelli  
Charles Banks  
Jonathan Sands

## Product Breakers

Issaree Sismey  
Chantal van Son  
Claire McCormack  
Fiwany Wijaya  
Shreya Naidu



**SEASON'S  
GREETINGS!**



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