



Food & Beverage Trends

2021 SUB-TRENDS & MANIFESTATIONS



CONFIDENTIAL
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FOOD & BEVERAGE TRENDS

Four Emerging Food & Beverage Sub-Trends

Our category sensing has uncovered four important emerging food and beverage sub-trends that have sticking power. We've highlighted how each is manifesting and beginning to shape our world:

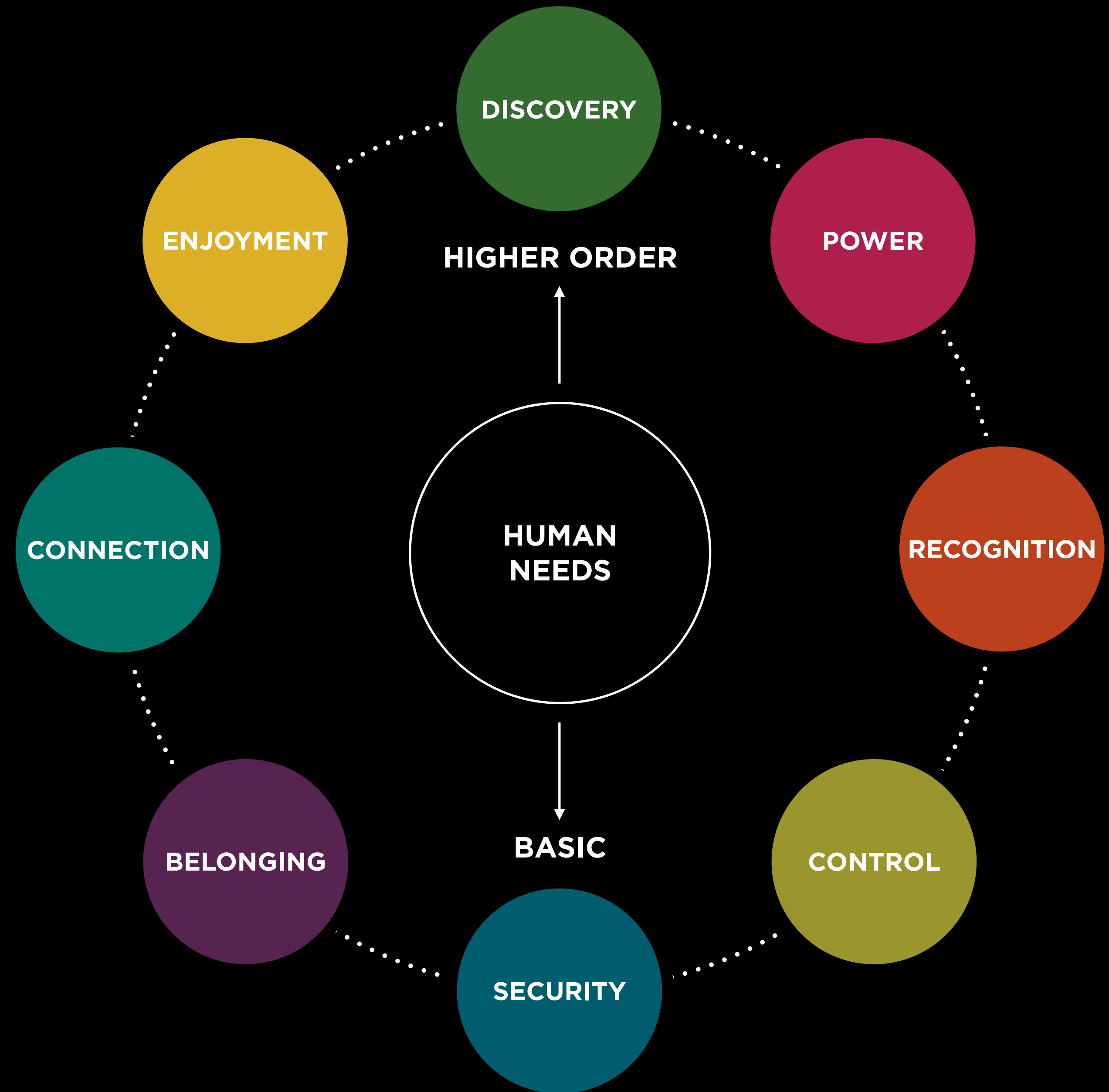
- **Food Freedom**
- **Eating for Me**
- **Changing Culture**
- **You & the Planet**



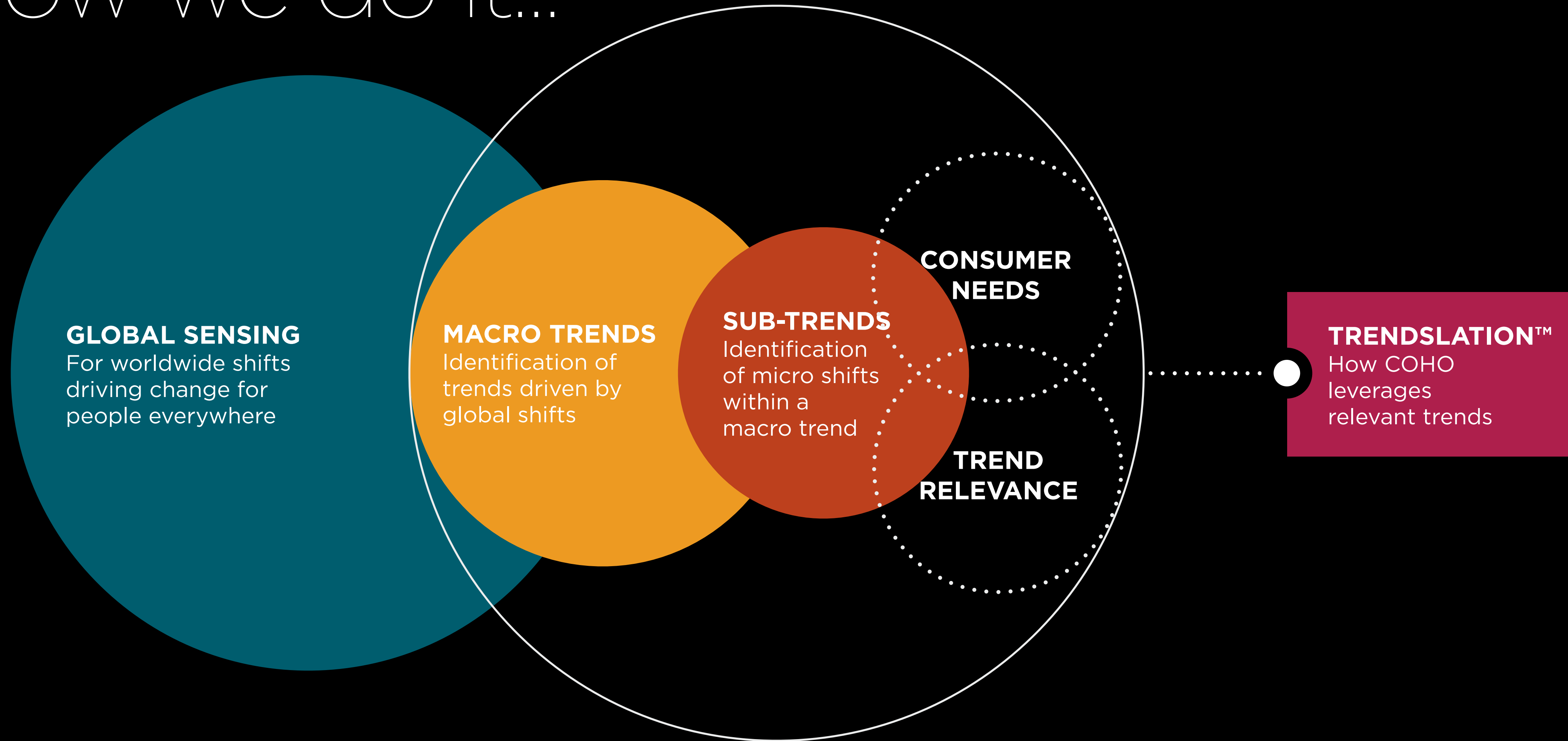
Shifting Needs Create Opportunities

We believe that all trends are driven by human needs. A brand must be able to understand and address those needs for a trend to be of value.

Large populations act in predictable ways and are motivated by similar forces. When paired with a current trend, these motivations show why specific audience groups adopt some trends but not others.



How we do it...



What does Trendslation™ mean?

For trends to drive growth, businesses need to leverage them while they are emerging. Of course, that's easier said than done. Identifying and engaging relevant shifts is always a challenge. It requires a broad view of where your business fits in the world as a whole and an intuitive understanding of how trends will influence the world.

It's not just about seeing trends but thoughtfully leveraging them when you do—that's why we *trendslate*. This is COHO Creative's biggest point of difference in our approach to trends.

Why it's important.

The food and beverage industry is rapidly changing as consumer needs quickly evolve. Many food and beverage businesses are in reaction mode, simply trying to keep up or hang on. It's time to step back and proactively rewrite the rules for your business's future.

That's where we come in! We created this report to help jump-start your thinking and reimagine what could be.

So let's go!

Macro Trend:

Consumers are readopting practices and reestablishing habits from the past that are pure and uncomplicated.

Food Freedom

Food Freedom

After a year of indulging in comfort foods, consumers are looking for ways to reshape their relationship with food & drink that does not involve diet culture. Instead, they are trying Mindful Eating—taking time to enjoy satisfying food with all five of their senses and following their body’s hunger and fullness cues. Mindful eating can also include environmental, social, racial, and economic consciousness.

FOOD FREEDOM: MANIFESTATIONS



Treat Yourself

In April 2021, Target launched a new food and beverage store brand called Favorite Day. It has more than 700 innovative sweet and savory indulgent products **for shoppers who want a treat** after everyday stressors.



True Taste Training

Siggis' "Palette Training Kit" aims to reverse flavor desensitization caused by excessive sugar. It enables consumers to **activate all their senses while eating** Siggis' yogurt. The brand believes this may help consumers recognize products loaded with processed sugars and learn to prefer natural sweetness.



Feel Good Fun

Stone Brewing has collaborated with JuneShine to create StoneShine, a hard kombucha that mixes hops, stone fruits, and kombucha. It provides a **beer-like drinking experience with gut-health benefits** for health-conscious drinkers wanting to indulge.



Fun Plus+

Consumers are seeking health benefits from indulgence brands they already love. Babybel met this need with Babybel Plus+ Probiotics for immunity and Babybel Plus+ Vitamins for eye health and metabolism. Now consumers can **enjoy the cheese and playful packaging they love but with better health benefits.**



Indulge Well

When they choose to indulge, consumers want unique experiences. Some chocolate brands are responding by partnering with breweries, wineries, and distilleries to create **treats that borrow from alcohol production—like** Nestle Japan's whiskey barrel-aged KitKat. The premium chocolate market is expected to grow to \$7 Billion by 2022 (Ecolechocolat).



Olive Oil Love

Olive oil is gaining new popularity for benefits including brain and heart health, reduced inflammation, relaxation, and boosted collagen. A few examples are Wildgood, plant-based ice cream with olive oil as an essential ingredient, and Living Elixir by L.A. startup Saint Supply, an olive oil product meant to be consumed daily.

Macro Trend:

With an overwhelming number of choices, personalization helps brands connect authentically.

SUB-TREND

Eating for Me



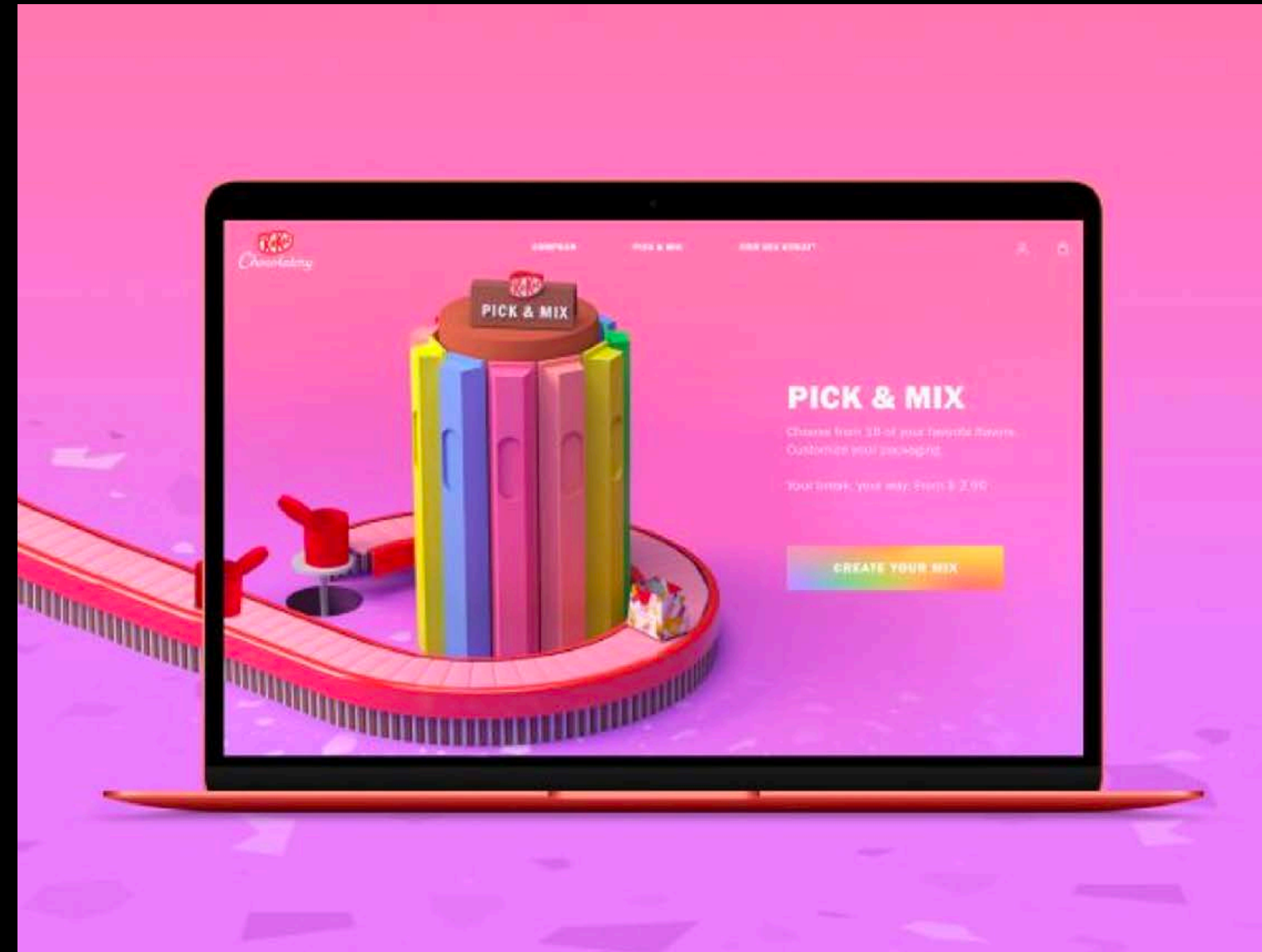
Eating for Me

Consumer interest has increased in services that support personalized nutrition. After seeing how COVID-19 affected people differently, consumers see that their lives and bodies are unique and should be fueled and cared for in ways that work best for them. This is especially true across genders and races.



Kind Connections

Kind's free platform Kind RD Connect matched registered dietitians with 3,000 consumers seeking nutritional guidance in January 2021. The dietitians were assigned to align **with consumers' lifestyles and wellness goals**. The initiative hopes to be a positive step in general food education.



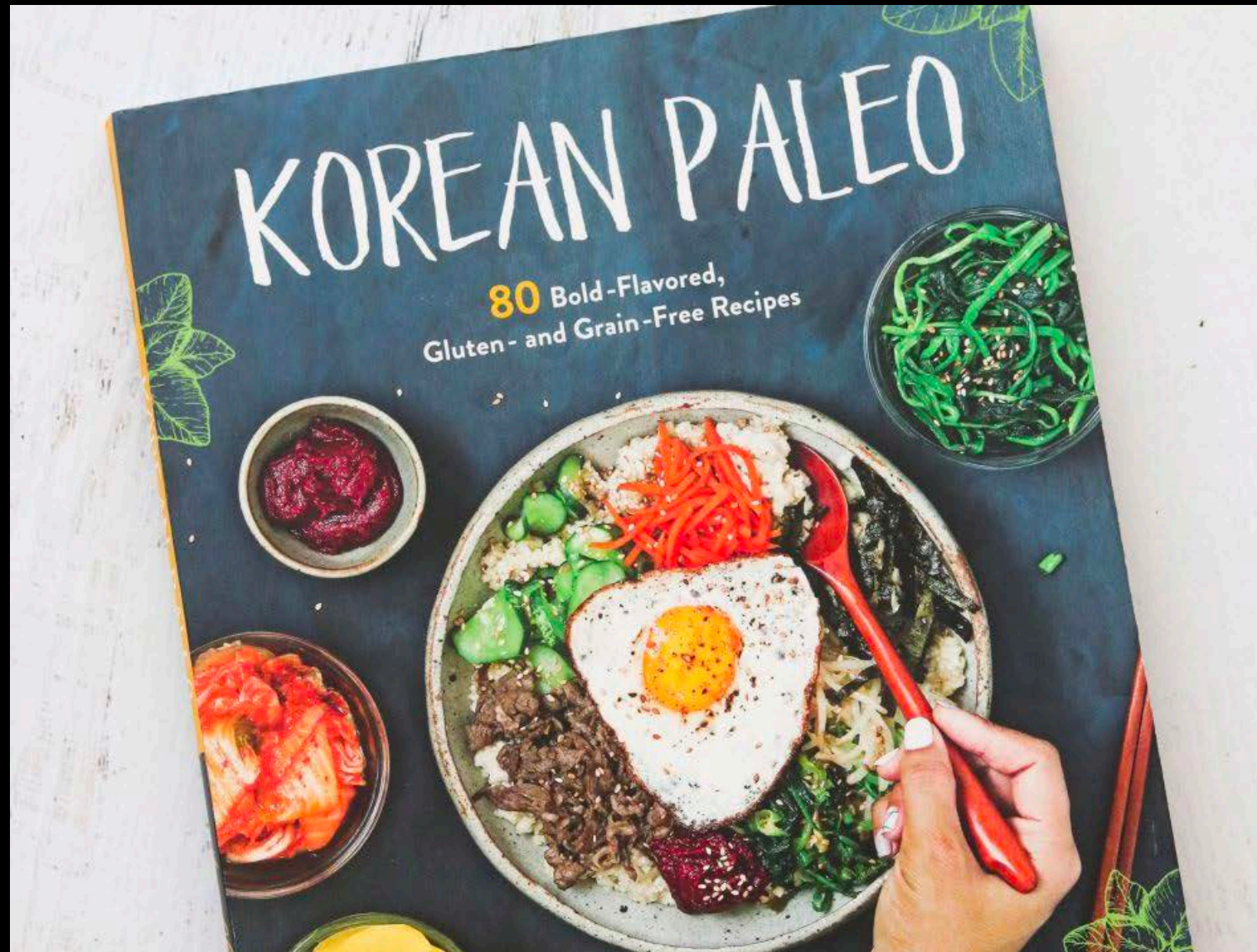
Customizable Confection

Nestle created the KitKat Chocolatory—a digital store based on a flagship store in Brazil—focused on customization. Customers “pick & mix” bars from 18 flavors and three types of packaging with personalized messages and images. KitKat hopes to appeal to Gen Z, of whom 75% are **more likely to buy a product if they can customize it** (WP Engine).



Perfect Match

Sargento launched Snack Bites—two kinds of cheese paired in small portions for consumers to pick their favorite. With 26% of U.S. consumers snacking multiple times a day and 38% replacing meals with snacks (IFIC), **personalized snacking options are growing**, and charcuterie grows with smaller portions of meat and cheese for everyday celebration.



Inclusive Cooking

Popular diets like keto and veganism have become white-washed and very exclusive. There has been a recent push to **popularize cookbooks and recipes that adapt dishes from specific cultures for certain diets.**

Latinx keto cookbooks, Korean paleo recipes, and vegan soul food are a few examples.



Enhanced Eats

65% of consumers report wanting more functional health benefits from their food and beverages (Kerry Group). Deux offers a line of vegan and gluten-free cookie dough **enhanced with supplements, enabling consumers to pick the flavor and added benefit they're looking for. Beneficial ingredients** include collagen, ashwagandha, protein, biotin, and B12.



Skin Food

Singapore skincare brand, Kumuya, offers a **personalized skin wellness meal plan.** The 7-day plan has 7 options for different skin types. It includes shopping lists, recipes, and suggested meals and ingredients. More than 1 in 10 Japanese consumers buy food and beverage products that claim to improve their skin (Mintel).

Macro Trend:

During the pandemic, almost every brand and consumer shifted behaviors to meet the new normal.

Changing Culture

Changing Culture

Because of the pandemic, 85% of Americans report having changed how they eat and/or prepare food (IFIC). Consumers developed a wider willingness to try new flavors, prepare food in new ways, and experience dining differently—prioritizing local, emphasizing breakfast, etc. This openness to experimentation is expected to continue post-pandemic as consumers seek excitement and stimulation after a long period of isolation and deprivation.

CHANGING CULTURE: MANIFESTATIONS



Fun in the Familiar

Pre-sliced and grab & go deli meat sales grew last year as at-home lunches became the norm while consumers looked for comfort. Cargill Protein **took advantage of this behavior and launched three smaller portioned hams in unexpected premium flavors** for consumers to try: Hawaiian BBQ Chicken, Chili Lime Turkey, and Bourbon Whiskey Brown Sugar Ham.



Sweet Substitutes

Sugar substitutes are poised to become a \$16 Billion market by 2026 (Values Report) as 74% of U.S. consumers in 2020 sought to reduce their sugar intake (IFIC). Ocean Spray partnered with Israel's Amai to cut the sugar in their drinks by 40% with "hyper-sweet designer proteins." Other sugar substitutes like Allulose, Belgium's Zusto, and Israel's DouxMatok are also growing.



Alcohol vs. Adaptogens

Searches for stress-fighting adaptogens like lion's mane, reishi, chaga, and rhodiola, **grew 85% YOY** at the end of 2020 (Tastewise). UK non-alcoholic brewery, Fungtn, released three 0.5% ABV beers infused with 500 mg of pure medicinal mushrooms. Beyond beverages, salad dressing brand Tessemae's has also released a new product with lion's mane mushrooms.

CHANGING CULTURE: MANIFESTATIONS



Booming Breakfast

With consumers staying home, **breakfast has become a more consistent part of the day**. 73% of U.S. parents used breakfast as an opportunity to connect with their children in 2020 (General Mills). Kind debuted a line of frozen breakfast bowls to grow their share of this meal occasion.



Just Right Buzz

Coffee pros and cons have become clearer with consumers working from home, surrounded by less stimulation. After a personal experience with this, Andrew Cooper created Buzz Lite, a coffee micro-dosed with 10% of the caffeine in a regular cup of coffee. It allows consumers to **enjoy the taste and energy boost of coffee without the negative effects**.



Tech Grown

Latin America's NotCo has patented its AI tech that breaks food down to its basic molecular composition, identifies **vegetables that can imitate that structure**, and works with humans to determine what tastes good. Additionally, **lab-grown meat is currently available for delivery** in Singapore. Eat Just is offering three dishes with GOOD Meat chicken grown from animal cells.

Macro Trend:

Wellness is being sought after throughout categories and is encompassing more than just superficial routines.

You & the Planet

You & the Planet

The term “wellness” is moving beyond personal fitness and nutrition to include outside factors, specifically the environment. Consumers are turning away from the trendy, white-washed definition of wellness to something more inclusive and balanced. To be well, we must consider our physical & mental health as well as our environmental, social, and spiritual health.



Gut Health Grows

Gut health remains an important focus in the better-for-you space. **Brands are now looking beyond pre and probiotics to postbiotics.** Postbiotics are the “waste” by-products from fermentation that help immunity, digestion, and gut health. Postbiotics are not live, so they are more shelf-stable than probiotics.



Responsible Treats

41% of global **consumers eat and drink dairy alternatives** (FMCG Gurus), and 68% of European **consumers say they would pay more for products made with sustainable cocoa** (Confectionary News). HIP is a new chocolate brand made from oat milk, which is the most sustainable plant milk and loaded with health benefits. The cocoa used is also sustainable and socially-conscious.



Sourced for Good

Whole Foods has launched Sourced for Good, a program that supports responsible sourcing. The Sourced for Good seal will be on more than one hundred products so shoppers can easily identify them. **75% of Americans say that responsibly sourced products are important to them, but 65% are confused about how to identify them** (The Harris Poll).

YOU & THE PLANET: MANIFESTATIONS



Natural Energy

63% of consumers are **interested in products that offer a natural energy boost** (Nutra Ingredients). Proper Wild created a new line of fruit and vegetable energy shots, and sales grew by 800% between April and December of 2020 (Forbes). They are all organic with no artificial ingredients.



Faux Fish

As consumption of animal products continues to decline, **plant-based seafood is expected to boom in 2021**, and new companies like Good Catch, New Wave Foods, and Save da Sea are popping up everywhere. Algae is also an important ingredient in this category, with both protein and omegas.



Chickpea Power

As **consumers seek alternative sources of protein, chickpeas are gaining popularity**. Beyond hummus and falafel, they are in bars, granola, chips, and even ice cream. ChickP is a brand that has created an innovative protein powder that is “not only helping to feed a growing world,” but is also “not harming the planet in the process.”

Ready to Trendslate?

Have we piqued your interest? Do you want to get ahead—and stay ahead—of competition by anticipating and meeting your consumers' future needs? Let us know. We're ready to collaborate. We'll identify the trends that impact your business. We'll trendslate them to help you adapt, innovate, and deliver tangible business results.

[Let's talk!](#)

We help companies create

BETTER BRANDS *to* BETTER THE WORLD

COHO is an independently owned **brand STRATEGY, INNOVATION, and DESIGN** company. Our sole focus is to help our clients bring out the best in their brands. From giants that influence globally to startups doing one little thing to make a person's day brighter. We challenge all brands to unite with those they touch and help change the world for the better.



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