

Market Trends: Food Flavors and Ingredients Outlook 2006



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The Food Flavors and Ingredients Outlook

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Chapter 1 Executive Summary

Today's consumers are looking for a bigger bang for their bite. Whether it's more flavor, nutrition, or exotic ingredients or less fat or other "demonized" ingredients, there's no doubt that consumers are increasingly demanding food options that meet a variety of needs. And, as today's fast-moving trends jump from chat rooms to cable TV shows with the speed of the latest "silver bullet," food manufacturers, restaurateurs, retailers, and other food industry professionals are ever more challenged to stay on top of – and hopefully ahead of – flavor and ingredient trends in today's competitive marketplace.

With the global flavor market reaching the \$5 billion mark, ever-growing competition and evolving consumer preferences are driving the flavor and ingredient market as never before. Consumers, increasingly interested in more complex and authentic flavors, are encouraging more innovation and new ways of looking at foods and flavors. According to food industry analyst Phil Lempert, today's new flavor combinations, such as chipotle mamey orange or parsley black currant, are part of a trend away from a 50-year focus on creating flavor through fat, salt, and sugar.

This report highlights some of the main trends Packaged Facts expects will gain steam in 2006 and beyond, including the latest customer preferences, creative approaches, and industry advances.

Key Cultural Drivers — Convenience, Quality/Luxury, Nutrition/Fresh, and Customization

Convenience and nutrition will share top billing for consumers' interests in 2006 and beyond. As a result, on-line food offerings will continue to explode, demand for high-quality, easy-to-prepare (or take out) food will be key, and nutrition and wellness will strongly influence customers' purchasing patterns. Super foods will be hot, as consumers continue to search for magical ingredients that taste good and also address medical concerns.

High quality and customization will also be key drivers. Authenticity and sustainable will become more marketable, along with terms that imply uniqueness or naturalness. Informed consumers will also increasingly want to create and control their own food choices, from products that can be adapted to meet their individual taste preferences to small plate options

and customized menu choices. Marketing to specific demographic groups, whether it be boomers or women or seniors, will become more widespread.

Spices as Nutritional Ingredients

The booming health and wellness trend is fueling attention on spices as nutritional ingredients. Although spices have long been associated with healing properties, today's trend is accelerating thanks to consumers' increasing interest in natural nutritional ingredients as functional foods. For instance, researchers are looking at the potential of cinnamon in helping control diabetes. Other studies are investigating whether the yellow pigment in curry spice inhibits the destructive growth of Alzheimer's disease. And, such spices as rosemary, oregano, and sage are being looked at for their potential antioxidant properties.

Some innovative products are beginning to combine nutrition and spices all in one handy package. Grainy Seasonings is a new concept that blends spices with vitamins and other nutrients. Manufactured and distributed by Double K, Springfield, VA, the seasonings blend assorted grains (including oat bran, barley wheat bran, whole millet, whole wheat, and rice) with legumes, garden vegetables, fruits, soy products, proteins, and herbs. Spices are also added for a mild Mediterranean taste. The formulations are in powdered form and can be used in a variety of applications from pizza to sauces and dips. Products include Fiber, Soy & Protein, Vegetable, Fruit, Nutritional Salt, Nutritional Pepper, and Vitamin Plus.

Breaking Down Barriers, Breaking Out of the Box

Another key trend we'll see in 2006 is flavors and ingredients breaking out of the box, and even moving beyond their original borders. As consumers have become more comfortable with ethnic flavors, for instance, certain foods have begun to move beyond their roots. Chipotle is a prime example. Once mostly associated with south-of-the-border foods, chipotle has become one of the most versatile, popular flavors throughout the industry. New products in 2005 ranged from carrot chipotle juice to chipotle-flavored fig nuggets. As the world continues to get smaller, food trends will move faster and faster and become less ethnic-oriented, and more assimilated.

Highlighting individual flavors has become a science as well. Termed "molecular gastronomy," the trend brings chemistry, physics, and other scientific principals out of the lab and into the kitchen. For instance, executive chef-partner Jeannie Pierola at SideBern's in Tampa, FL, uses a food processor that mixes frozen, diced produce and proteins without

thawing to create intensely flavored sorbets, soups, and sauces. And, chef-owner Hector Santiago creates fruit “caviar,” pearl-like spheres created by adding emulsifying compounds to fruit juices or purees, to top raw fish preparations at Pura Vida in Atlanta.

Food as Art

“No question that food is a fashion statement,” says John Lord, professor and chair of food marketing, Saint Joseph’s University, Philadelphia, PA. Not only is food a reflection of fashion trends, but it is also becoming an art form of its own.

In late 2005, IFF, the New York-based manufacturer of flavors and aromas, teamed up with Visionaire magazine to launch Visionaire 47 Taste, possibly the first time that flavor has been used as a pure art medium. The project, which combines artists, chefs, photographers and flavorists, includes specially created flavors on taste films. The unusual flavors include a sea spray and sweat flavor termed “Power” to go with a photograph of surfer Laird Hamilton, and a fresh pine cone tip flavor developed for celebrity chef Ferran Adria’s contribution named “Luxury.”

A possibly more accessible art/food pairing is the musical sandwich created by British retailer Tesco. Opening the top of the sandwich box activates a tiny sound module that plays a selection of music. Introduced in December 2005, the first offerings included holiday tunes to accompany turkey sandwiches. Other flavor/song combinations under consideration include Prawn To Be Wild, Let it Brie, and that old Julio Iglesias favorite, Fillings, according to Tesco.

Emerging Research Will Affect Industry

Today’s research could completely transform tomorrow’s food industry. For instance, nutrigenomics, the study of how nutrients and genes interact and how genetic variations can cause people to respond differently to food nutrients, is still in its infancy, but scientists predict that their work could bring about enormous changes in how food is grown, processed and consumed, and lead to personalized diets tailored to individual preferences. Imagine children happily snacking on vegetables designed to appeal to their particular taste profiles.

Manufacturers are increasingly involved. Kraft Foods, for instance, is helping to finance a seat at the Monell Chemical Senses Center in Philadelphia to focus on how the quality and intensity of flavor is processed. The center’s goal is to provide information on the sensory

basis of dietary choices and eating behaviors of children and adults. Scientists are also looking into how food temperature affects taste. By better understanding the taste mechanism, researchers believe they can help manufacturers mask bitter, unwanted tastes.

Another aspect of food under study is satiety, or how full a particular food makes us feel. The University of Sydney has created “The Satiety Index” designed to measure how full a certain food makes a person feel after eating it. For instance, eating a certain amount of protein can help provide a feeling of fullness. As more information becomes available, this could be another important area of innovation for the food industry.

And, how food affects individuals’ emotions is another area of interest. For instance, Unilever, the world’s largest ice cream maker, has backed a study to uncover ice cream’s affect on mood. Researchers at the Institute of Psychiatry in London tracked the brain activity of people eating vanilla ice cream and discovered it perks up the brain’s pleasure zones. Could ice cream become the next functional food?

New Technology Will Affect Flavor and Ingredient Trends

In 2006 and beyond, technology may have as much or more impact on flavor and ingredient trends as top chefs. Even communication technology is changing the food industry dramatically. Not so long ago, consumers got their primary source of food information from their friends and families or the weekly food section in their local newspaper. No longer. Today, cable TV offers food shows around the clock and countless internet blogs and food sites can start or stop food trends in the blink of a “send” key.

Several new developments may affect upcoming flavor and ingredient trends. For instance, FlavorMagic, from Real Chef, is a new, non-edible spice wrap used to season food. Chef-inspired spice blends are applied to a clear sheet, similar to thick plastic wrap. The sheets are then wrapped around meat, fish, or other items to marinate for 30 minutes, then removed and discarded. Current flavors include Asian Citrus-Ginger, Lemon Peppercorn, and Memphis BBQ flavors.

Now flavor can even be sprayed on. David Burke, chef and author, has launched Flavor Spray, a collection of concentrated liquid sprays that avoids calories, carbohydrates, cholesterol and fats, while adding flavor to poultry, seafood, beef, salads, vegetables, dairy, and bread. The 18 flavors, which debuted in July 2005, range from Buttermilk Ranch to Strawberry Shortcake.

Cooking methods are also getting a boost from technology. Although *sous vide* is not a new concept, it is beginning to get more attention in more mainstream markets. The process, which involves vacuum-sealing a food product in a plastic bag and then cooking it in simmering water, creates dishes that are incredibly delicate and tender. Flavors are intense and concentrated because they have not been diluted in any way.

Packaging is also becoming more innovative. In response to consumers' ongoing interest in freshness, CRYOLOG, based in Gentilly, France, has developed a new label that allows people to trace freshness at a glance. Applied over a bar code, the TRACEO label turns opaque when the product is no longer fit for consumption by using an innovative patented microorganism technology. When the label turns opaque, it can no longer be read or scanned, providing a quick way to identify whether the product is fresh or not.

Technology, research, and consumer preferences will all help create the marketplace of tomorrow. The following section provides "a look back and a look forward" to put some perspective on how today's key flavor and ingredient trends are evolving, and what the food industry of 2006 will look and taste like.

A Look Back and Ahead

Below are seven key categories Packaged Facts believes will drive flavor and ingredient trends in the upcoming years. To gauge how trends are (or are not) moving forward, we've included our expectations for last year, along with predictions for 2006.

World Flavors

2005: Last year, Packaged Facts predicted Asian flavors would take center stage, with the flavors and spices of India becoming more prominent. We expected Spanish and Latin ingredients would still be hot; while Caribbean would slow somewhat. We estimated that African and Moroccan flavors were on the horizon, along with the regionalization of international cuisines.

2006: One year later, international ingredients are even more prevalent. Some professionals are saying this year may even be the tipping point in American's openness to world flavors. Asian flavors have indeed taken center stage, and we expect the Asian influence will continue to expand as Americans increasingly appreciate the different Pan Asian cuisines. Latin and Spanish flavors will continue to be hot, and also seem to be evolving into more regional directions. A growing interest in Middle Eastern, North African and Eastern Mediterranean flavors will be an emerging interest in 2006. The jury is still out on Indian cuisine; some professionals think 2006 may be its year to shine, others believe "not yet."

Flavor Trendsetters

2005: Bold flavors were a major category in last year's report. Ingredients were expected to move beyond heat toward layering flavors and creating sensations like tingling and tartness. We expected key ingredients would be chiles, mustard, turmeric, international spice mixtures, peppercorns, and cumin.

2006: Several of those trends are continuing through 2006, along with a couple of new flavor profiles we're highlighting such as smoky, strong flavors; pungency; and the pairing of cool and fiery ingredients. Hot is still hot, but the usage of chiles is becoming more sophisticated and varied. Peppercorns may be one of the hottest ingredients in 2006 as chefs become more

tuned into their colorful and varied profiles. Another key trend in 2006 will be a “pumping up” of the pantry, as basic ingredients become more specialized and flavorful, including salt, condiments, sauces and marinades, flavored oils, and vinegars. The “big 4” non-ethnic flavor trendsetters, Barbecue, Caesar, Cajun, and Buffalo, will also affect flavor trends this year.

Sweet Partners

2005: In 2005, we expected flavor partnerships to evolve into more combinations of sweet, savory, and sour. Our predictions included more attention paid to honey, cinnamon, vinegar, and verjus.

2006: Flavor partnerships have continued to evolve, and seem to be taking a swing toward sweet. In 2006, we expect to see more pairings of sweet tones with spicy, tart, and salty. Also in 2006 we project more gourmet sugar varieties will become more prevalent, including demarra and muscovado. Honey will continue to become more popular, thanks to its natural roots and distinct regional flavors. Beverage flavors, including chai, tea, and coffee, are increasingly showing up as ingredients, particularly in desserts. And, chocolate (talk about a healthy image change) is going to explode in 2006, as the food industry takes full advantage of its tasty health benefits.

Fruits and Berries

2005: Last year Packaged Facts predicted fruits would play a starring role in flavor and ingredient trends. We suggested 2005 would bring more usage of orange, pummelo, pomegranate, tamarind, Asian fruits (yuzu, kaffir lime, and lychee), and berries with health benefits, including guarana, acai, and goji berry.

2006: No doubt fruit’s celebrity status will continue in 2006 and beyond. With its appealing flavors, often exotic personalities, and strong association with health and freshness, there will be no stopping fruit flavors anytime in the near future. Exotic fruits will continue to grow, particularly pomegranate with its strong super-fruit profile. Other flavors to watch are mango, tamarind, passion fruit, quince, and lychee. Citrus, including Meyer lemons, Seville oranges, blood oranges, and grapefruit varieties like the pummelo, will also gain attention. Berries are coming into their own, with blueberries leading the way and some less well-known varieties such as black currant, marionberry, and gooseberry, on the horizon. Several exotic super fruits will also get a lot of play in 2006, including acai, guarana, goji berries, and even

cupuacu, a Brazilian favorite. Packaged Facts also believes several “new” old fruits will move into the spotlight, including figs, guava, and good ole watermelon.

Fresh, Natural, and Authentic

2005: In 2005, Packaged Facts expected to see “fresh,” “pure,” “natural,” and “authentic” become increasingly powerful terms. Some of the characteristics we projected to gain attention were organics, labels that provide a certain authenticity, heirloom produce, and fresh ingredients.

2006: In the year ahead, many of those trends will continue to grow and evolve. Packaged Facts expects “fresh” and “authentic” will gain even more cachet in 2006. Organic, particularly private label products, will gain ground next year, along with other “pure” terms like kosher and “uncontaminated” labels like “GMO-free” or “no added hormones.” Vegetables, including root, petit/micro, and heirloom varieties, will attract attention in 2006. Also, some old favorites like pickles and pickling will see renewed interest, along with fresh herbs in new ways. Fresh cut produce is on a fast track.

Protein Power

2005: Last year’s report highlighted meat and cheese as “old favorites” that would be served up in new ways.

2006: For 2006, we expect to see even more attention paid to these segments along with other protein-packed ingredients like seafood and tofu. In the meat category, premium meats are gaining cachet, as are international favorites like goat and game meats such as buffalo. A new way of approaching meat traditions, like creating new value cuts or up-scaling bacon, is also on tap for 2006. Seafood is expected to be particularly hot in 2006, including tilapia and black cod, and lightly seared or raw dishes. Americans’ love affair with cheese is certain to continue through 2006 and beyond. International flavors and even chocolate combinations will gain attention. Soy, a powerful protein, will get a boost in 2006 as tofu and edamame attract more interest.

Health and Wellness

2005: Last year we expected to see a great deal of interest in low-fat products, functional foods, antioxidants, and probiotics. We projected growth in fiber and whole grains, as well as tea.

2006: In 2006, wellness will again be one of the industry's top influences; the relationship between health and food has become big business. Such terms as whole grains, antioxidants, omega-3, no-gluten, probiotics and glycemic index will become increasingly important this year. Several ingredients will get an additional boost in 2006, thanks to the shifting tides of health and wellness. For instance, the comeback of carbs will add fuel to the growing interest in breads and rice. Grains, such as kamut, quinoa, barley, farro, buckwheat, and wheatberry, will move into the spotlight. We also expect to see yogurt and tea continue to evolve and grow.

Chapter 2 Distribution Channels

Dining Out Is A Way of Life

Eating out has become a way of life for most Americans. More than three quarters of consumers rank dining out as one of their favorite activities, and 44 percent treat themselves to a restaurant meal at least once a week, according to *Restaurants & Institutions*. The restaurant industry continues to grow. Sales are expected to increase 5.1 percent and reach \$511 billion in 2006, according to Washington, DC-based National Restaurant Association.

Consumers have long chosen to go to restaurants for the experience – a special occasion, an opportunity to try something they can't easily prepare at home, or simply to enjoy themselves. Increasingly, however, diners visit restaurants to make their lives simpler. Three quarters (73 percent) of Americans say it's often easier to go to a restaurant than to prepare a home-cooked meal.

Convenience will continue to affect restaurant trends in 2006 and beyond. Other key trends will include health and wellness; the move toward upscale, gourmet or exotic flavors and, on the flipside, a move toward comfort foods and familiar flavors; an interest in small plates and portion sizes; and a broader look at breakfast.

Variety of Flavors

Flavor trends abound throughout the restaurant industry. No longer are fine-dining restaurants the only places to find new ingredients. "Bolder flavors such as lemon grass and coconut, artisanal goat cheese and blue cheese, different kinds of pestos -- in other words, ingredients that were upscale a few years ago -- are trickling down to the quick-serve and casual menus," says Maria Caranfa, an analyst with Mintel Menu Insights, which surveyed 550 restaurants including 350 chains and 50 of the country's top chefs for upcoming trends. (*Washington Post*, January 4, 2006)

The top 20 fastest growing ingredients on chain menus in 2004 reflect the increasing variety of offerings. According to Food Beat, the Wheaton, IL-based chain menu tracking firm, the five ingredients showing the most popular gains included chimichurri (a thick herb sauce that is often referred to as Argentinian ketchup) with a whopping 60 percent in mentions on chain

menus; kalamata olives (55 percent); gorgonzola (35 percent); walnuts (32 percent); and asparagus (31 percent). Just those five reflect consumers' growing interest in world flavors, gourmet items, and health-oriented offerings. As *Restaurants & Institutions* reports, "all signs point to 2006 playing out as a year in which the best chefs, supremely confident in their own professional stature, allow ingredients to bask in the limelight. (January 1, 2006)

Take Out Takes Off

Americans are increasingly time crunched, and it's changing the way restaurants do business. Twenty years ago, consumers ate 93 meals per person at restaurants on an annual basis, and purchased a much smaller 33 meals per person for take out, according to NPD's 2005 "Eating Patterns in America" report. Today, that ratio has changed dramatically. In 2005, the number of take out meals has jumped 42 percent to reach 57 per person each year. At the same time, the number of eat-in meals has dropped to 80 meals per person.

More than one in 10 (12 percent) American households eat take out food five times or more in an average month, according to *Restaurants & Institution's* "New American Diner 2005" study. Three quarters (75 percent) order take out food between once and four times a month. Only 14 percent don't regularly carry out food in a month. Restaurants are responding by creating special take out menus, offering curbside service, and offering convenient packaging. For some restaurants, such as Applebee's, the extra effort to provide convenience is paying off. The company's *Carside To Go* program accounted for more than 10 percent of its total sales in 2005, up 9.4 percent over 2004.

According to NPD, take out sales are growing fastest among casual restaurants. In 2005, the most popular takeout foods in this segment were Asian, pizza, pasta, Mexican, and shellfish.

Consumers aren't just eating more meals at home; they are also eating more meals in their cars. According to NPD's "Eating Patterns in America" report, 32 restaurant meals were eaten in the car, compared with just 19 in 1985. Restaurants, from fast food to upscale are adapting to this trend with more hand-held and convenience-oriented products. For instance, Taco Bell's Crunchwrap Supreme was named the "Best Meal on the Move" by *QSR Magazine*. (December 8, 2005) With its hexagonal shape and completely sealed sides, the Crunchwrap offers "maximum portability." In 2006, look for more creative, convenience items.

The Search for Quality/Gourmet/Exotic

Diners are increasingly looking for new high quality, gourmet, and exotic foods. More than four in 10 (44 percent) of consumers say they usually try to order something at restaurants that they've never had before, according to the *Restaurants & Institutions* "New American Diner Study 2005." Restaurant consultants Joseph Baum & Michael Whitman say one trend for 2006 will be the "democratization of luxury" and predict Americans will look for more accessibly-priced premium "enjoyment foods" on menus. Some examples might be extra courses of appetizers, cheeses or desserts; flights of mini food-and-wine pairings; specialty salts; branded beef and pork (like Korobuta, Niman Ranch); house-made offerings from breads to potato chips, and cured fish and salumi.

Diners are increasingly looking for and expecting high-quality ingredients. Terms like artisanal, organic, locally-sourced have become powerful labels. "Across the board, you see people paying a lot more attention to quality. It's a growing trend," notes Martin Heierling, executive chef at Sensi at Bellagio Hotel & Casino in Las Vegas. (*Restaurants & Institutions*, January 1, 2006)

Making it MY Way

An offshoot of the demand for high quality is consumers' increasing interest in "having it their way." Datamonitor research has found that 86 percent of consumers in the USA and Europe say that products and services for individual needs are important.

Food & Wine identifies "DIY seasoning" as a key movement in its January 2006 trend report for restaurants. Increasingly, restaurants are creating opportunities for customers to create their own dishes or put together an individual combination of dishes. For instance, at Waldy's Wood Fired Pizza & Penne in New York City, diners can snip their own basil and sage from an herb planter. And, at the Ventana Room in Tuscon, AZ, patrons are provided with a variety of freshly ground peppers at their table and encouraged to add their own level of flavor intensity.

Casual concepts are also marketing customized approaches. Applebee's, based in Overland, KS, has just added "choose a meal" to their permanent menu, which offers customers the opportunity to build their own combination of appetizer, entrée, and dessert for a set price. T.G.I. Friday's gives customers a chance to create their own three-course meal, choosing from a variety of appetizers, main courses, and desserts, depending on whether they're feeling "mild" or "wild."

Specialized Restaurants

Another growing trend in this area is the increasing interest in specialized concepts or restaurants that offer just one type of product. *Entrepreneur* magazine named “one-product restaurants” as one of its hot trends in its 2006 forecast. Already we’re seeing concepts that focus on selling only cream puffs, soup, cereal, or even peanut butter. Restaurant consultant Joseph Baum & Michael Whiteman predicts a new narrow category may emerge in 2006. “As tastes become more sophisticated, niche players are opening small cafes specializing in chocolate, coffee, and red wine -- all three having a commonality of bitterness.”

Comfort, Familiarity, and Tradition Also Key Drivers

One-third of chain chefs believe comfort foods will be among the next major menu trends, reported food industry analyst Nancy Kruse at *Nation’s Restaurant News’* Health and Nutrition Summit, held in September 2005. ICR Research, Media, PA, says that about six out of 10 consumers eat comfort foods between one and three times a week, and 11 percent chose comfort foods daily.

According to Mintel Menu Insight database, 3rd quarter 2005, meatloaf, stew, macaroni and cheese, pot roast, sausage, spaetzel, apple/fruit pie, potatoes, and barbecue are among the most frequently menued comfort foods in American restaurants. Comfort food is also going upscale. For example, such favorites as grilled cheese sandwiches are going gourmet with specialty cheeses, artisan breads, and exotic toppings.

Barbecue Back Again

Barbecue is one of America’s favorite traditional foods. Currently there are 13 full-service barbecue chains with at least \$25 million in annual sales. All but three experienced healthy sales growth between 2004 and 2003, according to Technomic. Interestingly, barbecue may be taking the next step to the fast food segment, according to QSR magazine. “It’s just the hot, new old food,” says Caroline Wells, executive director of the Kansas City Barbecue Society. Tom Meyer, co-owner of a new fast casual barbecue concept called the Q-Shack, which has locations in North Carolina and one on the drawing board for Boston, says the time is ripe for expansion. “Barbecue is no longer solely regional,” Meyer says, citing the number of sit-down barbecue restaurants popping up in the Northeast and the introduction of barbecue sold out of carts in New York City. “There’s enough awareness.” (*QSR magazine*, November 2005)

International variations of barbecue are also catching on fire. For instance, churrasco, the Brazilian version of barbecue, is popping up around the country. The Center for Culinary Develop's (in collaboration with Packaged Facts) "Culinary Trend Mapping Report" features churrasco as a Stage 1 ingredient, which means it is just emerging into the food industry as a trend. Steve Raichlen, host of U.S. public television's "Barbecue University" and author of several books on barbecuing, calls Brazilian barbecue "one of the hottest categories in the barbecue scene," and adds "I think that this concept could become the Outback of the new millennium." (*Culinary Trend Mapping Report*, Summer '05)

Traditional Foods: Slow Food and Native American

Foods that have a traditional or regional association are also gaining cachet. The Slow Food movement, which fosters indigenous foods, has a number of foods it is trying to put back on consumers' plates. One of these, the pawpaw fruit, tastes a bit like a mango and is the largest North American edible tree fruit. "There's a real future for the pawpaw in terms of savory recipes," says cultural historian Katherine Dillon. If the pawpaw goes mainstream, there are plenty of other fruits waiting in the wings, including the American persimmon, the native heartberry, the maypop, the medlar, and the beach plum. (*USA Today*, November 28, 2005)

Native American specialties may also get more play in the year ahead. "American Indian food is the only ethnic cuisine in the nation that has yet to be addressed in the culinary world," says Loretta Barrett Oden, a chef who learned to cook growing up on the Citizen Potawatomi reservation in Oklahoma. (*New York Times*, November 23, 2005). One ingredient that is getting attention is the tepary bean, which looks a little like a flattened black-eyed pea. Along with local cooks, big-city chefs are beginning to feature the white or brown beans in cassoulet, salads, or beds for braised local pork.

Eye-Opening Breakfast Trends

There's no better comfort food than breakfast. In today's competitive restaurant environment, breakfast is emerging as an eye-opening opportunity. According to Restaurants and Institution's "2004 Tastes of America" survey, 42.9 percent of households purchase breakfast away from home at least once during the average week.

Consumer research from U.K. food and beverage researcher IGD shows that the breakfast market has huge potential. The report, "Breakfast: The Main Meal of the Day," found that 81 percent of people are eating breakfast at home on a weekday, yet only 18 percent enjoy it. Breakfast takes on a different flavor during the weekend. IGD found that the number of

people eating cooked breakfasts quadruples on the weekend and that they crave more indulgent foods. This suggests that there may be two different breakfast markets, one driven by convenience and another by indulgence. (*Specialty Food*, April 2005)

Restaurants in all segments are rolling out products to try to capture the early-bird consumer. Some are adaptations of their existing menu items, such as Chick-fil-A's Chick-n-Minis (chicken nuggets with warm rolls brushed with honey); while some are creating unusual twists that emphasize flavor along with convenience. For instance, Dallas-based Corner Baker Café's offers Swiss muesli (chilled porridge mixed with fruit and cream) in a plastic cup ready to go, and Pandini's, Sodexho USA's Italian bistro concept for campuses, offers grab-and-go options, such as breakfast pizza and calzones (folded omelet sandwiches).

Convenience stores, too, are ramping up their breakfast menus. Altoona, PA-based Sheetz convenience stores has a Shmuffin, Shmiscuit and Shmagel lines of breakfast sandwiches. In December 2005, Sheetz introduced the Shmonster, a breakfast sandwich with double egg, double meat and double cheese.

In tableservice restaurants, traditional breakfast items from bacon to pancakes are getting a new look. For instance, bacon is going more upscale, with house cured, specialty-flavored varieties turning up as signature items. Pancakes are popping up with different batters from buckwheat to buttermilk, often brightened with a variety of fruits, spices, and syrups. At Riingo in New York City, pancakes have even moved to the dessert menu. The restaurant offers chocolate pancakes spread with a thin layer of mango chutney or calamanci mousse (a small, orange-flavored Asian fruit) and then sandwiched with chocolate ganache.

Fresh and Healthy — Huge Influence in 2006

Nearly three in four adults (72 percent) say they are trying to eat more healthfully in restaurants than they did two years ago, according to the National Restaurant Association. Restaurants are responding. On Food Beat's list of fastest growing ingredients on chain menus, several vegetables show up for the first time: asparagus (with a 31 percent increase in mentions on chain menus), green beans (28 percent), and broccoli (12 percent). Glazes (26 percent) and marinades (12 percent) also showed positive gains, a reflection of the growing trend to add lighter layers of flavor.

"Chefs now say the number one menu trend is freshness," says Nancy Kruse. "More and more you'll see chain chefs develop menus to take advantage of fresh and seasonal items."

For instance, Boulder, CO-based Noodles & Co. has made a commitment to offering items inspired by seasonal produce. Last spring the 100-unit chain introduced two in-season-only dishes, angel hair pasta with fresh asparagus and a chilled asparagus and romaine salad.

In the fast food segment, some chains are working hard to add healthy items to their menu. Restaurant Research of Fairfield, CT, reports that products deemed “healthy” accounted for 18 percent of all quickservice promotions in 2004, an increase of five percent over 2003. The quickservice industry has been trying to proactively offer more healthy items. McDonald’s has announced it is going to add a greater variety of freshly prepared foods, and will also begin putting nutritional information on all packaging.

Salad Days for Greens

“There’s been a bit of a renaissance in produce,” says Nancy Kruse. “And the salad category is just on fire.” Entrée salads, another beneficiary of the “fresh” trend, are also getting a lot of play on restaurant menus. According to the National Restaurant Association, more than half (52 percent) of casual dining restaurants, 45 percent of family dining, and 39 percent of fine-dining establishments are receiving more orders for entrée salads.

Lettuce wraps are making the move from Asian restaurants to more mainstream settings. Typically, lettuce wraps are shaped like a cup and enclose spicy chopped chicken. A signature dish on P.F.Chang’s menu, the lettuce wrap is now on the menu at the Cheesecake Factory, for instance, where customers can customize the dish with different vegetables, coconut curry noodles, satay chicken strips, and three spicy Thai sauces. The Culinary Trend Mapping Report, Summer 2005, categorizes lettuce wrap as a Stage 3 ingredient.

“We are seeing an interest in vegetables prepared in such a way that they can be served in a QSR environment,” says Joanie Brown, director of research development in process improvement at Brooks Food Group, Bedford, VA. “We’ve noticed quite a bit of interest in sweet potato bites, corn products, and buttermilk-flavored vegetables.” (*Prepared Foods*, November 2005)

Portion Size Big Topic

Four out of 10 chain chefs believe portion size will be a major menu trend in 2006, according to menu analyst Nancy Kruse. Most consumers seem to agree. According to Technomic, 30 percent of diners think restaurant portions are too large; 62 percent feel there are not enough small portions in restaurants; and 61 percent say they want to cut down on the amount of food they eat. “Americans’ total calorie intake is too much. We need to find ways to give them what they want,” says Mark Erickson, CIA. “We’re going to have to focus on quality, not

quantity.” Some restaurants are already providing smaller portions, including Metairie, LA-based Ruth’s Chris Steak House offers smaller cuts of beef, and Au Bon Pain, based in Boston, offers smaller wraps and half sandwiches.

Challenge: Healthy Doesn’t Always Sell

One challenge for restaurants is that “healthy” doesn’t always sell. Several restaurants have experienced a drop off in sales when a healthy icon is placed next to a menu item. “We’ve trained people to think healthy doesn’t taste good,” explains Mark Erickson, C.M.C., vice president of continuing education, the Culinary Institute of America, Hyde Park, NY. “We just can’t seem to get their desire for healthy and desire for flavor on the same plate. I think there’s an opportunity, though, with the emergence of more world cuisines to make this happen.”

Meanwhile, “big” just keeps getting “bigger.” For instance, in honor of the new King Kong movie, Burger King introduced its biggest burger ever, the triple Whopper with cheese. The new three-quarter pound burger, which was introduced in December 2005, will be a permanent menu addition. The company has had success with huge, health-busting items; it credits the Enormous Omelet with helping to fuel its recovery in 2005. Sales of the sandwich were strong enough that the chain introduced a second version, the Meat’normous Omelet sandwich in the Fall 2005

Burger King isn’t alone in offering gigantic portions. Many other fast food companies, as well as casual restaurants have huge menu items.

Small Is Big

On the opposite end of the portion-size spectrum, Restaurants are also having success with small plates. Tapas, antipasti, meze, antojitos, cicchetti -- call them what you will, small plates are making a big impact on menus. “It doesn’t matter whether restaurants are Greek or Chinese, Malaysian or Mexican, if they can downsize their main course or dress up snack food, they’re doing the “tapas” dance,” reports restaurant consultant Joseph Baum & Michael Whiteman. The sky’s the limit, from desserts to appetizers.

Sliders With a Touch of Class

Sliders may have gotten their start as tiny, steamed burgers at White Castle, but today they’re going uptown. The result of an evolving combination of market trends – nostalgia and upscale small plates – sliders are increasingly showing up in trendy restaurants as small decadent bites of high quality meats generally topped by gourmet breads. Today’s classic

slider is often made with American Kobe beef, but chefs are offering a range of tasty variations, from pulled pork to seared tuna with Asian slaw

Japanese Tapas

Tapanese, or Zakaya Bars, are beginning to gain attention in New York City and other large cities. Generally, a tapanese menu offers small dishes of intricate food made to pair well with wines. An Asian take off on tapas. Food Watch, a River Forest, IL-based company that analyzes culinary trends, lists this as an emerging concept.

Table 2-1
Fastest Growing Ingredients on Chain Menus in 2004

Ingredient	% Increase in Mentions on Chain Menus
Chimichurri	60 %
Kalamata olives	55%
Gorgonzola	35%
Walnuts	32%
Asparagus	31%
Green Beans	28%
Green Chilies	26%
Glazes	26%
Feta	25%
Ricotta	23%
Baguette	19%
Chipotle	17%
Asiago	16%
Raisins	16%
Lemon	15%
Pulled/shredded Pork	14%
Marinades	12%
Broccoli	12%
Red Onion	12%
Roasted Red Peppers	11%

Source: Food Beat, Inc. (www.foodbeat.com) 3rd Quarter Newsletter 2005, Wheaton, IL

Table 2-2
How Often Do You Order Carryout?

Number of Times Carryout Ordered In an Average Month	Percentage of Households
Never	14%
Once	24%
Twice	24%
3 to 4 Times	26%
5+ Times	12%

Source: Restaurants & Institutions New American Diner Study, 2005

Supermarkets Adapting to Competition and Consumers' Needs

The supermarket industry, battled by competitive issues and changing consumer demands, is struggling to find its niche. Increasingly, flavors and ingredients, and how a company chooses to merchandise and market its product mix, are becoming critical competitive strategies.

“The gap between the restaurant as the point of introduction and the supermarket is closing,” says Nancy Kruse, president of The Kruse Company, a food industry and menu trends analyst based in Atlanta, GA. Today’s supermarket offers an incredible variety of products. “When Pathmark has a no-frills version of Thai fish sauce,” says food historian Elisabeth Rozin of Haverton, PA, “that’s amazing.” (*Philadelphia Inquirer*, March 10, 2005) Even big-box stores offer a wide variety. “I’m bowled over by the ingredients at Super Wal-marts, says Nancy Byal, director of the Trendspotters Network based in central Iowa outside Des Moines. “You can get several flavors of goat cheese there; produce is full of exotics. It’s not difficult to get pomegranate, organics, Mexican fruit and vegetables.”

Some industry executives believe supermarkets will continue to evolve to offer more fresh and convenience-oriented products. “Five years from now, grocery stores will be bigger and bigger, but not necessarily have more groceries,” predicts Norman Rich, president and CEO, Weis Markets Inc., a regional grocery chain headquartered in Sunbury, PA. “The bigger space is being used for take-out prepared foods and other amenities people are looking for.”

Bloom, a new supermarket concept from Charlotte, NC-based Food Lion, is perhaps a first step toward a revamped supermarket experience. The store takes a completely new approach to store design, layout, and merchandising. Every-day items, such as milk, bread, eggs, and prepared foods are at the front of the store in an area called the “Table Top Circle,” making it easy to run in and out quickly. Center store products are grouped together by how they are eaten, rather than by brands.

Demand for Convenience and Home Cooked

Consumers’ demand for convenience will dramatically affect the food industry in 2006 and beyond. According to Datamonitor, time-saving products and “quick fixes” are important to 82 percent of European and US consumers. As a result, prepared meal consumption in Europe and America is forecast to double in 10 years to exceed \$40 billion by 2009, up from \$29 billion in 1999. (*Dairy Reporter*, August 19, 2005)

Although 75 percent of all adults eat dinner at home on a regular basis, the number of meals prepared at home continues to drop, falling from 64 percent in 2003 to 58 percent in 2005, according to the 2005 Gallup study of home meal replacements, MultiSponsor Surveys, Inc., Princeton, NJ. “Scratch” dinners prepared at home dropped another seven percent over the past two years and now account for only 32 percent of all evening meals. One quarter (26 percent) used convenience foods and 17 percent used restaurant/supermarket takeout, while 23 percent were eaten at a restaurant.

Even so, consumers seem to want to prepare more food at home. According to a 2005 SupermarketGuru.com consumer panel, when asked what they would like to change about their eating habits in 2006, 55 percent said they would like to “cook more meals from scratch at home,” an increase from 51 percent in 2003. “There seems to be a need to want to do more than pick up a bag and take it home and eat it,” says Eleanor Hanson, president of Food Watch, a River Forest, IL-based company that analyzes culinary trends. “There’s some investment in what’s put on the table without that 4:20 p.m. dread of what’s for dinner.”

Consumers’ definition of “homemade” is not exactly what it used to be. According to *Parade Magazine’s* “What America Eats Survey 2005,” more than half of shoppers (51 percent) believe homemade means “using a combination of fresh and convenience foods.” A smaller 36 percent define homemade as “preparing the whole meal from scratch.”

Complete meal kits remain very popular in the supermarket aisle. According to *Food Technology*, “it is the organic and health-driven dry and shelf stable meal kits, ethnic mixes, and premium upscale dry mixes that are grabbing the spotlight.” (October 2005)

Table 2-3
What is Your Definition of a Homemade Meal?

Definition	Percentage
Using a combination of fresh and convenience foods (e.g. bag salad, fresh meat, frozen vegetables)	51%
Preparing the entire meal from scratch (e.g. fresh meats and side dishes)	36%
Anything that is not fast food or takeout	9%
Anything that requires the use of kitchen appliances	4%
Pre-made, pre-packaged foods that I cook at home (fresh dinners, side dishes prepared and packaged by store/restaurant)	2%
Reheating or warming up meals	1%

Source: Parade Magazine, What America Eats Survey, 2005

Health and Fresh Big Winners

Supermarket shopping trends reflect consumers' efforts to eat more nutritionally. According to *Parade Magazine's* "What America Eats 2005," more than three quarters (77 percent) of consumers said they look for ways to shop for foods that are healthy and better for their families.

Nutrition is even trumping price. When a recent Supermarket Guru.com survey asked "What is the ONE most important factor that determines which food product you would purchase as the main ingredient for dinner," the number one answer was "nutritional value" (an increase from 28 percent in 2003 to 32 percent in 2005). In 2003, the number one answer was "price," which has taken on a less important role in 2005. (*Facts, Figures and the Future*, December 12, 2005)

Most Americans are eating healthy foods on a regular basis. According to NPD's "Eating Patterns in America" 2005 study, three quarters of consumers ate a reduced/non-fat food in the past two weeks at home or in a restaurant, 51 percent lite, 39 percent calcium-fortified, 27 percent vitamin-fortified, 31 percent reduced-cholesterol, 26 percent reduced-sodium, 25 percent decaf/caffeine-free, 23 percent sugar-free, and 13 percent organic.

Refrigerated and Frozen Items Warming Up

Refrigerated meal solutions have become one of consumers' top choices for healthy, convenient meal options. According to IRI's October 2005 *Times & Trends* report, sales of refrigerated meal solutions rose 8.2 percent over the previous year, compared with 4.7 percent for frozen, and 2.5 percent for shelf-stable. Refrigerated side dishes have become particularly popular, with sales jumping 79.9 percent. Other strong categories are prepared refrigerated salad/fruit/coleslaw (18.1%), handheld refrigerated entrees (16.5%), fresh-cut salad (6.7 percent), refrigerated dinners/entrees (6.1 percent) and refrigerated pizza (5.6 percent).

Frozen products are also hot, with growth particularly expected among healthy and international items. For instance, organic frozen foods are a particularly popular segment, reaching \$206 million in 2004 with increases of nearly 20 percent a year since 2001 in mass channels, according to ACNielsen. More world-wide frozen products, such as Indian, Thai, and Island, continue to emerge.

Banking on the continuing growth of frozen foods, a new retail concept has begun operating in the New York/New Jersey area. White Toque, currently the largest importer of frozen specialty foods from Europe for the foodservice industry, has opened several frozen-food-only stores. Each unit stocks about 300 items; 150 more products are under development.

Manufacturer Perspective

Foodservice manufacturers face the challenge of trying to stay one step ahead of consumers and market trends. In *Prepared Foods'* "2005 R&D Trends Survey" respondents said consistency (75 percent), price per serving (67 percent), and convenience (63 percent) were the top three most important traits for foodservice customers. Reflecting the industry's fast-moving trends and interest in new and different flavors, newness of product received 31 percent, up significantly from the 21 percent posted a year earlier.

Manufacturers often watch different food industry segments to get a better idea of what is on the cutting edge in flavors. The top three flavoring trends that surveyed manufacturers wanted to know more about were: flavoring trends in baked goods (34 percent), flavorings typical of authentic foreign foods (29 percent) and flavoring preferences of ethnic groups in North America (33 percent).

On the food processing front, 2006 and the following couple of years will most likely be a time of "incremental product improvement with the emphasis on functional foods, fortified foods, and natural/wholesome foods," according to *Food Processing* magazine's "34th Annual Top 100 R&D Survey." (*Food Processing*, October 2005) Other long-term trends getting increased attention were ethnic foods and reducing carbs. Two areas respondents said would show decreased growth were reducing fat and microwave-ability. R&D department heads believe reduced fat products are nearing a mature market. "It's last decade's blockbuster, and time to move on" reports the magazine.

Table 2-4
Culinary and Foodservice Product Development Trends

Voted Most Popular	2005	2004
Consistency	75%	81%
Price per serving	67%	61%
Convenience (speed to prepare)	63%	65%
Labor savings (ease in handling)	53%	52%
Sensory quality	37%	37%
Newness of product	31%	21%
Extended shelf-life	28%	33%
Their ability to customize it	21%	24%
Packaging appearance	15%	17%
Reduced-fat	13%	8%
Specialty health (low-carb, diabetics)	13%	17%
Ethnic cuisine	12%	12%
Foods for specific age groups	7%	3%
Organic	7%	4%
Kosher or Halal	6%	9%
Increased fiber	5%	5%
Reduced-sodium	5%	4%
Vegetarian	5%	3%
Reduced-calorie	4%	6%
Reduced-cholesterol	2%	1%
Count (base)	176	157

Source: 2005 and 2004 Prepared Foods' R&D Trends Survey

Chapter 3 World Flavors

Packaged Facts Flavor Picks: Asian, Latin, Spanish, Eastern Mediterranean, Middle East and North Africa, Indian

This year may be the tipping point for ethnic flavors. Lines are blurring and the globe is getting smaller. “We are certainly accelerating into the wide range of flavors, particularly world cuisines,” says Victor Gielisse, D.B., C.M.C., C.H.E., associate vice president and dean of culinary baking and pastry studies, the Culinary Institute of America, Hyde Park, NY. Greg Drescher, senior director for strategic initiatives and founder of the college’s Worlds of Flavor International Conference and Festival, agrees. “Given the dramatic changes to the American palate and American cooking during the last 15 years, we can definitely state that we are presently witnessing an irreversible ‘tipping point’ in the country’s openness to world flavors.”

New American Dimensions, a marketing research and consulting firm in Los Angeles, CA, estimates the demand for ethnic food will increase by 50 percent over the next decade and predicts about one out of every seven food dollars will be an ethnic food dollar. According to a Supermarket Guru.com consumer panel, 23 percent of those surveyed said they would like to “eat more ethnic cuisines in 2006, an increase from 19 percent in 2003. The growth is both a reflection of the growing diversity among the American population as well as consumers’ increasing interest in trying new foods. According to the National Restaurant Association, 25 percent of diners can be categorized as “adventurous” and enthusiastic about trying new foods and ingredients.

The sheer availability of more world-wide flavors and ingredients, along with mushrooming television and internet exposure, is also creating more awareness throughout the food industry. For instance, according to the American Food Institute, we spent more than \$5.9 billion on frozen dinners in 2004; more than a third of that (\$2.2 billion) was spent on ethnic food.

Generation Xers and their children, the first to grow up among ethnic and culinary diversity, now take sushi and pad Thai for granted, along with spring rolls and tamales. The continuing integration of international flavors into the American culture will significantly affect the food

industry in 2006 and beyond. “CPG manufacturers would be well advised to understand the global nature of such preferences when plotting strategies for the future,” advises the Bellevue, WA-based consultant The Hartman Group. “We can promise you that tomorrow’s consumer will never be content with potato chips, gum, pretzels, and cola. Really.” (*HartBeat*, December 14, 2005)

Key Trends – Authentic, Yet Individual

In 2006, we will see a couple of somewhat divergent trends. One is the movement toward more authenticity. “We have to drill down deeply to understand the roots of a cuisine,” explains Gielisse. “It’s all about the art of building flavor; and the different kinds of techniques used.” To learn first-hand about different cuisines, many companies are sending chefs abroad to learn traditional flavors and dishes, as well as preparation methods. Authenticity can be a challenge, however. “Authenticity is a moving target,” explains Mark Erickson, C.M.C., vice president of continuing education, The Culinary Institute of America, Hyde Park, NY. “It can vary from region to region, house to house, and cook to cook.”

On the other hand, chefs are increasingly pulling out distinct international ingredients and using them more for the individual flavor they provide than for the country they are from. “It’s a bit like fusion,” says Eleanor Hanson, president of Food Watch, a River Forest, IL-based company that analyzes culinary trends. “The word may not be there, but the activity is. Chefs are looking at bringing out flavors and marrying them and balancing them.”

J. Hugh McEvoy (Chef J), C.E.C., C.R.C., and a contributing editor to *Prepared Foods* magazine, predicts there will be more interest in blending the exotic flavors of the East, such as lemon grass and kaffir lime, with the already intense flavors of Spanish and South American-Latino cuisines. “The resulting exotic fusion has not been officially named,” says Chef J. “However, a number of very successful upscale restaurants are specializing in this exotic blend of flavors, ingredients and techniques.” (*Prepared Foods*, November 2005)

Moving Beyond Borders – Chipotle, Wasabi, and Chimichurri

Some international ingredients are becoming so familiar they are moving beyond their ethnic roots. For instance, chipotle is beginning to show up in everything from chips to mayonnaise. “Chipotle continues to appear on the list of high-growth ingredients,” says Nancy Kruse, president of the Kruse Company, a menu trends analyst in Atlanta, GA. “Somehow chefs are finding more and more ways to use it.” New products range from chipotle-flavored fig

nuggets to cranberry cider with a chipotle splash, and the number of products is climbing steadily. In 2005, 99 chipotle-flavored products were introduced, up from 68 in 2004, and 46 in 2003, according to Productscan Online.

Wasabi is another cross-over ingredient, and is adding its fiery flavor to such condiments as dressings, dips, sauces and marinades. The well-known Asian ingredient is also beginning to show up in some non-familiar places like ice cream and gelato. A donut shop in the Philippines has even created donuts with a wasabi-flavored glaze. In 2005, there were 38 wasabi-flavored new products, up from 30 in 2004.

Chimichurri, a thick herb sauce that is as common in Argentina as ketchup is in the U.S., is just beginning to travel beyond its traditional usage as a steak sauce or marinade for grilled meat or seafood. “We used to only find chimichurri in a clearly Latin dish,” says trend analyst Nancy Kruse, “We’re now seeing it in a number of places like pasta or as a sandwich sauce.” The Center for Culinary Development has named chimichurri as Stage 1 ingredient, which tags it as an emerging ingredient at fine dining, ethnic, and independent restaurants. “With the combination of Americans’ interest in more authentic, ethnic foods, protein diets as well as its recent casual dining restaurant exposure, chimichurri will continue moving toward the mainstream,” reports Packaged Facts’ *Culinary Trend Mapping Report*, Summer 2005.

Asian Continues to Be Top Influence

The Asian influence on food trends continues to expand and grow. With its bright, clear tones and incredible variety of flavors and ingredients, Asian cuisine is holding on to its number one spot in the ethnic food scene. “We expect continued evolution and awareness of Southeast Asian food in the U.S.,” reports Epicurious in its Food and Beverage Predictions for 2006. (December 30, 2005)

As consumers have become more familiar with different Asian ingredients and food preparations, the variety and depth of offerings has grown steadily. “We’re still seeing some growth in Asian [cuisine] in general,” says Robert Goldin, executive vice president of Technomic in Chicago. “But more in emerging Asian cuisines. Indian is seeing increased interest, along with second- and third-generation Chinese and Vietnamese – not the stuff we’re all used to already.” (*Stagnito’s New Products Magazine*, September 2005)

Consumers are definitely eating Asian foods more often. According to a recent SupermarketGuru.com consumer panel, almost one quarter (23 percent) of those surveyed eat

Thai food on a regular basis, up significantly from the 14 percent reported in 2003. Japanese also saw healthy gains, from 14 percent in 2003 to 21 percent in 2005. Chinese remains the most familiar Asian flavor. Three quarters of Americans say they have eaten Chinese food, according to PARADE Magazine's What America Eats, 2005 survey.

Following are just a few key Asian ingredients that may gain attention in 2006.

Asian Trends 2005: Comfort Foods (Pho, Bao, Gyoza), Seaweed/Nori Kaffir Lime, Miso

Comfort foods – Pho, Bao, Gyoza

Pho, a much-loved Vietnamese beef noodle soup, continues to capture taste buds across the nation. Spreading the word are several pho restaurant chains, along with countless independent restaurants. There is even a blog dedicated to pho sightings and musings. Pho may be going more upscale. Epicurious, in its Food and Beverage Predictions for 2006, reports "... this is more of a hope than a prediction – organic Vietnamese pho joints will open nationwide." Packaged Facts believes pho will continue to become more popular. As a result, other Asian soups, such as khao soi, a classic Thai noodle dish, may also get more attention.

Other up-and-coming Asian comfort foods include **bao** (steamed buns) that are as common in China as sandwiches are in the U.S. The light and tender buns are generally stuffed with steamed sweetened bean paste, ground pork or a vegetable mixture. **Gyoza** are also getting more attention. The Japanese potstickers are filled with such ingredients as ground pork, cabbage, leek, garlic, and ginger. Food Watch has identified gyoza as an emerging ingredient.

Seaweed and Nori

Seaweed (sometimes called sea vegetables) and nori (thin dark sheets of seaweed used to make sushi) are generally loaded with vitamins, minerals, and protein. Their health attributes and exotic appeal are beginning to pop up on high-end restaurants in the United States. Restaurant industry consultants Joseph Baum & Michael Whitman Co. named seaweed a 2006 "buzzword" in its Top Ten Dining Trends. "Seaweed is going into salads, wrapping fish, and flavoring pasta," said the Brooklyn, NY-based firm.

Interestingly, sushi wraps are evolving – and becoming more colorful. In 2006, sushi-style wraps will be available in a variety of colors, providing a convenient and healthful alternative for food wraps. Made of at least 75 percent vegetable or fruit, the colorful wraps include a bright-orange carrot-based wrap surrounding a cucumber, garlic, and rice filling, or a deep-

red tomato and basil wrap holding a spicy tuna and rice filling. The products are being created by the Agricultural Research Service and Origami Foods, both based in California.

Key Ingredients: Miso, Kaffir Lime, White Soy

Miso, an ancient Japanese paste made from fermented soybeans, is suddenly showing up on trendy restaurant menus. Available in colors from blond to red and brown, miso is being used in salad dressings, marinades, risotto, noodle broth and more. “It’s almost like anchovies in Caesar dressing,” says Ben McCarter, corporate executive chef for the 13-unit The Bamboo Club Asian Bistro, Phoenix, AZ. “You know something is there; you’re just not sure what it is.” (*Restaurants & Institutions*, March 1, 2005) In 2006, watch for more usage of specialty misos, such as Conway, MA-based South River Miso’s Dandelion Leek Miso, Black Soy Barley Miso, and Azuki Bean Miso.

Kaffir lime, floral, fragrant, and citrusy, is a favorite Asian ingredient. Food Watch has named kaffir lime as a Stage 2 flavor that is gaining popularity. And, flavor company FONA International has also identified it as a key ingredient. “Thai and Vietnamese flavors like lemongrass and kaffir lime continue to get attention,” says Cara Newkirk, senior market manager, FONA International, Geneva, IL.

White soy has a lighter color and a smoky, sweeter taste than its more familiar cousin. Just beginning to gain some attention, white soy is particularly flavorful in fish dishes, lighter soups or salad dressings.

Latin Continues to Sizzle

Along with Italian and Chinese, Mexican has been one of the top three big international cuisines for several years now. Thanks to a steadily growing Hispanic population that is expected to account for about 25 percent of the American population by 2050 and an increased interest in more regional flavors, South-of-the-Border cuisine continues to sizzle. “Mexican works so well as it segues into other directions,” points out Eleanor Hanson of Food Watch. “The umbrella term has become Latin. There’s a lot of interest in pursuing the specific Latin countries – Cuba, Brazil, and Peru,” she says. “Columbian food is remarkable, with really high-end classical preparation,” adds David Kimmel, a product developer and importer/exporter, based outside New York City. “

The International Association of Culinary Professionals surveyed their members to get an idea of how familiar certain ethnic flavors and ingredients are to the general public. Interestingly, many of the most cutting-edge terms are Latin, such as annatto oil (made from

the pungent seeds of the annatto tree in the Yucatan and used to flavor and add color), arepas (round, handmade corn cakes stuffed with stews, meats, cheeses, beans and vegetables), yerba mate (traditional South American hot beverage), barbacoa (chile-marinated braised beef), and tostones (twice-fried plantain patties).

In 2006, we'll see more growth in a variety of Latin flavors, from more authentic regional dishes to interesting and unexpected combinations of exotic ingredients. "Latin cuisine is the ultimate melting pot," says Randy Zweiban, executive chef and partner of Nacional 27, the Lettuce Entertain You restaurant group's Nuevo Latino concept in Chicago. "It combines the indigenous ingredients of the region with all of the outside influences that have put their stamp on the culture, including Spanish and other Europeans, the Chinese [who came to work on the railroads] and the African slaves." (*Flavor & The Menu*, Spring 2005)

Latin Trends 2006: Regional Cuisine, Sandwiches and Small Plates, and Beverage Flavors

Latin Regional Favorites – Peru and Yucatan

In 2006, we'll see more interest in exploring some of the key regional flavors. For instance, many believe Yucatecan cuisine might be hot in 2006. Signature flavors to watch include recados, seasoning combinations that are rubbed into pork and chicken before cooking, and anchote paste. Yucatan cuisine also includes spicy moles and cochinita pibil, pork wrapped in banana leaves and roasted in a pit.

Peru is another region that may see a lot of interest in 2006. One of the country's key staples are potatoes – a re-energized category now that the low-carb craze has abated. Peruvian potatoes are available in hundreds of varieties, sizes, and colors. Many of Peru's most famous potato dishes, like causas, or mashed potato cakes with key lime and hot peppers, may be particularly well-suited for American palates.

South-of-the-Border Sandwiches

There are a variety of sandwich-like favorites from South America that are becoming more popular, including **arepas** (round, handmade corn cakes stuffed with stews, meats, cheeses, beans and vegetables) and **pupusas** (plump, corn tortilla-like patties stuffed with various combinations of meat, beans, and cheese).

As these local favorites become more mainstream, we will also see an emergence of specialty ingredients that are often served with them. For instance, loroco, a Central American green flower bud with an intriguing flavor the *Houston Press* calls "something of a cross between

asparagus and chocolate” is often used in pupusas. In the states, loroco are most often found packed either in water or pickled in vinegar or frozen.

An interesting evolution in this category is fish tacos. According to Bon Appetit, which named fish tacos one of its Top Ten Trends for 2006, “fish tacos are sweeping the nation.”

Flavorful Beverage Trends

Beverages provide one of the most flavorful – and colorful – avenues for Hispanic flavors. For instance, one of the most popular non-carbonated beverages among Hispanics is aguas frescas, a refreshing drink made with water, ice, and sugar with fruit, seeds, or flowers added for flavor. According to FONA International, popular aguas frescas flavors include hibiscus, tamarind, lemon, guava, mango, and horchata.

In 2006, look for more interesting combinations and flavors in this market. “Currently we’re looking at Hispanic beverage concepts like a peach tamarind combination or melon pineapple, which is very much a cantaloupe flavor, and limon – not a lemon, not a lime, but similar to key lime,” says Cara Newkirk of FONA. Another flavor that is just beginning to emerge is chamoy, a popular taste that is a combination of apricot and tamarind. Sometimes paired with chile to add a heat component, chamoy is beginning to show up in confections and sauces.

Spanish Continues to Grow

Spanish flavors and ingredients are increasingly capturing the imagination of American diners. “Spanish has been and continues to be a cuisine to watch,” says Eleanor Hanson of Food Watch. The Culinary Institute of America is betting Spanish is the next hot trend. Its well-regard annual Worlds of Flavor conference is focusing on Spain and its regional traditions in 2006. According to PARADE Magazine’s *What America Eats* survey, more than a quarter of consumers have tried Spanish food and the percentage will probably go higher in 2006.

Chefs and consumers alike are just beginning to appreciate the many varied tastes of Spain. “Spanish flavors and foods – their hams, cheeses, and olive oil – it’s almost like a door has opened,” says Giellisse of the Culinary Institute. Although some Spanish ingredients seem to have skyrocketed onto the scene, the cuisine as a whole is still being discovered. “What’s happening so often now is an ingredient or the flavor that is being picked up. For instance, marcona almonds suddenly became the chic almond to have,” says Hanson.

Spanish Trends 2006: Ham and Cheese, Saffron and Paprika, Salted Seafood

Ham and Cheese Still Hot

Several of the trends mentioned in last year's report will continue to grow in 2006. **Manchego cheese**, for instance, is now found in most mainstream supermarkets. Now that consumers have gotten a taste of Spanish cheese, interest in other varieties will surely grow, including cabrales (a fragrant blue cheese), garrotxa (an unpasteurized goat's milk cheese with a sweet, nutty flavor) and mahon (a versatile semi-soft cow's milk cheese).

Serrano ham continues to become more familiar as well. *The Culinary Trend Mapping Report*, by Packaged Facts, has labeled it a Stage 2 ingredient that is becoming more noticed on cooking shows, specialty food publications and culinary outlets like Sur La Table. Serrano ham is beginning to show up in some interesting places, including on pizzas and in salads.

Jamon Iberico, the distinctive ham considered to be a Spanish national treasure, will begin to arrive in the United States in 2007. The meat's distinctive flavor comes from the rare Iberian black-foot pigs that live only in Spain and eat primarily acorns. The first Jamon Iberico production facility to meet USDA standards was recently given approval by the Spanish government to export to the U.S. LaTienda, a food retailer based in Williamsburg, VA, will begin to deliver the hams in 2007. Already 300 fans have placed \$199 deposits for the hams, which will cost around \$1,000 per ham.

Saffron and Paprika Going More Mainstream

Smoked paprika and saffron, prized Spanish ingredients, are moving mainstream. Both paprika and saffron were chosen as McCormick's Top Flavors of 2006. Smoked paprika, in particular, may experience a strong growth pattern. Some suggest it may be the next "chipotle" or the kind of flavor profile that crosses all borders. Saffron, too, is becoming more familiar as chefs and consumers realize how just a few golden tips or threads can add a wonderful floral, almost earthy aroma to dishes.

Salted Cod, Cured Tuna

Many Mediterranean countries have a fondness for salt cod. In France it is said there are more recipes for salt cod than for any other single fish. Italy, Spain, Greece, Portugal and the countries of South America and the Caribbean also have a myriad of salt cod dishes. Dried salt cod is a staple of Basque regional cooking in Spain. Dishes such as Bacalao (salt cod with dried peppers, tomatoes and cayenne) and salt cod cakes are among the most popular. In 2006, we may see more interest in salt cod in the U.S., a reflection of the growing interest in

cured meats and also the increasing demand for seafood in general. Also on the horizon is mojama, a tuna fillet cured in sea salt, which some call the jamon Serrano of seafood.

Eastern Mediterranean – Middle East and North Africa – Coming Into the Sun

The Eastern Mediterranean area is sometimes called “the other” Mediterranean and includes such diverse areas as Tunisia, Morocco, and Middle Eastern countries that are often discussed more for their politics these days than for their foods. Some industry analysts believe the area offers great opportunity. “Once things settle down in the Middle East, there’s a world of foods and flavors to be discovered,” says Mark Erickson of the Culinary Institute of America. Nancy Kruse agrees and calls Middle Eastern cuisine “tremendously undervalued.” Consumers’ exposure to Middle Eastern flavors is growing steadily. According to the SupermarketGuru.com survey, 14 percent of respondents eat Middle Eastern foods regularly. This is up from 11 percent in 2004 and nine percent in 2003.

Middle East and North Africa Flavor Trends 2006: Pomegranate Molasses, Turkish Kebabs, Middle Eastern Sweets, Harissa, and Ras el Hanout

Pomegranate Molasses, identified as an emerging ingredient by several trend watchers, promises to be one of the hottest flavors in 2006. A thick syrup made from cooked-down pomegranate juice, the molasses has a slightly astringent, sweet-sour flavor. The versatile condiment also benefits from the buzz about pomegranate’s super food status. The dark brown syrup can add a wonderful sweet and sour taste to barbecue sauce, vinaigrettes, or give an interesting edge to braised meat and fish. Look for more of this rich ingredient in 2006.

Turkish Kebabs, although not a new taste, are poised to gain more attention in 2006. “Turkish cuisine is evolving, with chefs often substituting more contemporary salmon for traditional meats in kebabs and other dishes,” says Nancy Kruse. “Kebabs lend themselves to dramatic presentation and benefit from culinary creativity, and they warrant greater presence on chain menus.” (*Nation’s Restaurant News*, January 9, 2006)

Middle Eastern sweets are becoming more recognized for their unique combination of crunch and sugar. Food & Wine name the confections in their Trend Report 2006, suggesting “top choices include Persian saffron nougat and marshmallow-like sour cherry delight and nicely chewy Lebanese sesame bars.

Harissa, a spicy red pepper paste, and other Tunisian ingredients are an emerging flavor profile. “Tunisia is becoming more recognized for their contribution to cuisine,” says Mark Erickson of the Culinary Institute of America. Harissa, made from pepper fruits and tomatoes, is specially known as a condiment for couscous. It is also used in sandwiches and with pasta, a reflection of its neighbor Italy. Some chefs suggest that using harissa in a vinaigrette, as a marinade, salad dressing or sandwich topper, may be a tasty way to introduce the Tunisian hot sauce to American palates.

Ras El Hanout is a dazzling combination of spices and herbs that is traditionally improvised by Moroccan merchants in their souks or markets. Depending on the needs of the customer and the complexity of the dish, Ras El Hanout can include 20 and 50 ingredients. Jeannie Pierola, executive chef-partner at Bern’s Steak House in Tampa, FL, says ras el hanout brings dishes “a phenomenal pinch of flavor.” (*Restaurants & Institutions*, January 1, 2006) “We might sear lamb loin in it for a spicy crust and serve the dish with pickled mangoes for a juxtaposition of spice and complexity,” she says.

Indian – In or Out?

Indian cuisine is still hovering on the edge. “Every year the next hot cuisine is Indian,” says Eleanor Hanson, president of Food Watch, a River Forest, IL-based company that analyzes culinary trends. “I am skeptical how far it will go. So far I’m not seeing it explode.” Nancy Kruse, food industry analyst, believes there is a way to go. “The cuisines of India are just so badly misunderstood,” says Nancy Kruse. “It’s just an opportunity waiting to happen.”

Slowly but surely, consumers are becoming more familiar with Indian flavors. According to SupermarketGuru.com, 13 percent of respondents eat Indian food on a regular basis. This is up from the eight percent in 2003, and the nine percent in 2004. With its strong vegetarian and nutritional association, and also its blend of fiery and cooling flavors, Indian food will most likely continue to slowly gain favor among mainstream Americans.

Indian Trends 2006: Regional Cuisine, Chaat, Cardamom

Cardamom – Starring Role for 2006

According to chefs interviewed at a recent American Culinary Federation conference, cardamom tops the list of hot spices for 2006. “Use of this spice is going through the roof,” notes J. Hugh McEvoy (Chef J), C.E.C., C.R.C, and a contributing editor to *Prepared Foods* magazine. In fact, According to Datamonitor, cardamom sales are up at least 650 percent over

the last 12 months. Cardamom, which has a pungent aroma and a warm, spicy-sweet flavor, is one of the most common spices used in Indian cooking. Its growth, however, is not just due to its traditional role in Indian curries and Asian entrees. Increasingly it's showing up in Latin American and North African dishes as well, along with exotic sweet goods and coffee products. Cardamom is also moving quickly among packaged foods. According to Productscan, the number of new products with cardamom jumped from nine in 2004 to 24 in 2005.

Chaat – On the Move

Chaat, a traditional Indian snack is moving into the fast track. "Chaats are jumbles of flavor and texture; sweet, sour, salty, spicy, crunchy, soft, nutty, fried, and flaky tidbits, doused with cool yogurt, fresh cilantro and tangy tamarind and sprinkled with chaat masala, a spice mixture that is itself wildly eventful," reports the *New York Times* (March 9, 2005) Chaats can be made with almost anything crispy, including fried bits of chickpeas, puffed rice, or spice-dusted lentils. There are endless varieties, but the most popular are pani puri, papri chaat, and samosa chaat. Chaats are beginning to show up in more upscale restaurant settings, and may become more popular due to their convenience and exotic flavors.

Regional Cuisine

J. Hugh McEvoy (Chef J) believes regional Indian food is going to be one of the "next big things" as chefs and consumers begin to appreciate that not all Indian food is vegetarian and that there are major differences among regional flavors. "India has wonderful seafood dishes, and it's relatively unknown," says Chef J. One of the regional areas getting attention is Southern India, particularly the Keralan cuisine. Since "Kerala" means the "land of the kera" or coconut, it's no surprise that coconut oil and coconut milk are a key part of the area's flavors. Located along the Arabian Sea, Kerala also has an abundant seafood heritage. Its essential spices include black pepper, green chiles, ginger, turmeric, mustard seeds, coconut, tamarind, cardamom, and kari leaves.

Table 3-1

Ethnic Foods' Trendiness: Culinary Professionals Rate General Public's Awareness of Ethnic Foods

Stage One: Not Known	Annatto Oil, Arepas, Arancine, Yerba Mate, Barbacoa, Tostones, Biryani, Ponzu
Stage Two: New to General Public	Queso Fresco, Pomegranate Molasses, Churrasqueria, Cabrales Cheese, Miso, Soba, Chimichurri, Taleggio Cheese
Stage Three: Becoming Accepted	Plantain, Granita, Asiago, Edamame, Manchego Cheese, Tandoori, Panko, Dulce de Leche, Hoisin, Wasabi, Pad Thai, Lychee, Chimichurri
Stage Four: Mainstream	Bruschetta, Hummus, Risotto, Tofu, Chutney, Curry, Couscous, Gorgonzola Cheese, Kalamata Olives, Green Tea, Tabbouleh

Source: International Association of Culinary Professionals Tomorrow's Table Trend Initiative, in cooperation with FoodWatch and Pranses Research Services

Table 3-2

Ethnic Cuisines Most Often Represented on Menus

Ethnic Cuisine	On Menu
1. Mexican	50%
2. Cajun/Creole	34%
3. Chinese	33%
4. Tex-Mex	31%
5. Mediterranean	26%
6. French	22%
7. Greek	21%
8. Caribbean	20%
9. Latin American	17%
10. Japanese	14%

Source: Restaurant & Institutions 2005 Menu Census

Table 3-3

Which Ethnic Cuisines Do You Currently Eat on a Regular Basis?

Cuisine	2003	2004	2005
Italian	64%	64%	72%
Mexican	60%	61%	62%
Chinese	53%	53%	55%
Brazilian	49%	46%	45%
Thai	14%	16%	23%
Japanese	14%	16%	21%
Mideastern	9%	11%	14%
Indian	8%	9%	13%

Source: SupermarketGuru.com Consumer Panel

Table 3-4

Which Ethnic Foods Have you Eaten In/Out of the Home?

Ethnic Food	Percentage
Chinese	74%
Italian	73%
Mexican	73%
Cajun	34%
Japanese	30%
Spanish	28%
Greek	28%
French	22%
Thai	24%

Source: PARADE Magazine, What America Eats, 2005

Table 3-5
Ethnic Cuisines Highlighted by Consumer Media

Cuisine	# Recipes on FoodNetwork.com	# Recipes on Epicurious.com
Italian	3842	1933
French	1827	1296
Asian	1102	1105
Mexican	788	581
Spanish	758	344
Chinese	516	254
Mediterranean	412	280
Caribbean	417	110
Latin	385	41
Thai	356	228
Indian	262	241
Greek	254	208
Middle Eastern	220	233
African	91	97
Moroccan	43	100
Tunisian	4	4

Source: FoodNetwork.com, Epicurious.com; Packaged Facts

Table 3-6
Trend Map: Asian Influences

Stage 1: Emerging	Udon and Somen noodles, Kurobuta pork, green papaya, nori, maki sushi, seitan, gyoza, tapanese (Zakaya Bars), cold/chilled noodles.
Stage 2: Gaining Popularity	Tamarind, lychee, soba noodles, black sesame seeds, Korean and Mongolian BBQ, yakitori, sake in cooking, Thai basil, ponzu, fish sauce, mirin, panko, fresh ginger, pad Thai, sesame oil, rice vinegar, rice flour, Kobe/Wagyu beef
Stage 3: Mainstream	Green tea, edamame, satay, sushi rice, jasmine rice, pot stickers, miso, spring rolls, lemon grass, peanut sauce (savory), wasabi, mango, hoisin, sesame/ginger, ginger/garlic

Source: Food Watch, www.foodwatchtrends.com, July 2005

Table 3-7
Asian Regional Recipes on Food Network

Region	# of Recipes
Chinese	516
Japanese	364
Thai	356
Indian	262
Vietnamese	78
Korean	41
Indonesian	9

Source: FoodNetwork.com; Packaged Facts

Table 3-8
Latin/Hispanic Regional Recipes on Food Network

Region	# of Recipes
Cuban	51
Brazilian	31
Peruvian	25 (last year 2 ahead of Brazilian)
Puerto Rican	7
Venezuelan	7
Argentinian	4

Source: FoodNetwork.com; Packaged Facts

Chapter 4 Flavor Trendsetters

Packaged Facts Flavor Picks: Smoky, Pungent, Cool/Fiery, Peppercorns, Salt, Nut Oils, and Sandwiches

Food has not only become more flavorful; it has also become more fun. Increasingly, flavors and ingredients are adding personality and pizzazz to food items throughout the industry, from supermarkets to exclusive restaurants. “After four or five years of trying to be more conservative and in a comfort zone, people are getting more experimental,” says Nancy Byal, CCP, director of The Trendspotters Network based in central Iowa near Des Moines. “The creative side -- we’ll be seeing more acceleration in that area.”

Consumers’ acceptance and curiosity about new flavors continues to grow. According to Parade Magazine’s “What America Eats Survey 2005,” diners are interested in trying a variety of ethnic tastes, from Cajun (27 percent), Thai (19 percent), and Creole (19 percent). Spicy flavors, such as jalapeno/chipotle (22 percent) and wasabi (12 percent) are also on the radar. Americans are also interested in more familiar spices, but perhaps using them in new ways. For instance, 51 percent of those surveyed are interested in trying or cooking with fresh herbs. This may reflect a growing appreciation for the full flavors and textures that fresh herbs can provide.

In 2006, flavor and ingredient trends will expand in several directions, from more layering of flavors to more demand for specialized spices and ingredients. The following section highlights several of the key flavor trendsetters in the year ahead.

Table 4-1

A Taste For Adventure: What New Flavors Are You Interested In Trying In Your Cooking/Eating?, 2005

Flavor	Percentage
Fresh herbs	51%
Garlic	43%
Balsamic vinegar	27%
Cajun	27%
Jalapeno/Chipotle	22%
Ginger	20%
Red pepper	20%
Creole	19%
Thai	19%
Pesto	18%
Soy	16%
Wasabi	12%

Source: Parade Magazine, What America Eats Survey 2005

Layering Flavor Intensity

One of the key trends in 2006 is the interest in layering flavors. “The desire for intensity is still there and will continue to grow,” says Eleanor Hanson, president of Food Watch, a River Forest, IL-based company that analyzes culinary trends. “Flavor on top is becoming very much a way of life -- including rubs, sauces, drizzles, marinades, and lots of designer salts, like salt with rosemary and lavender.”

“We may be seeing a heck of a lot of flavorful preparation techniques,” adds Nancy Kruse, president of The Kruse Company, a menu and food industry trends analyst based in Atlanta, GA. “There has been a tremendous increase in the incidence of entrees that have been encrusted; glazing has increased 100 percent in the last five years. It doesn’t take a rocket scientist to marinate at home, but what chefs do is give it a little twist. If the technique isn’t at the highest end of culinary art but still gives it something extra, that makes it both acceptable and interesting for the consumer.”

New products are even helping consumers customize their own layering of flavors. San Francisco, CA-based Dave’s Gourmet Specialty Food Company figured out how to make one product suit all with its Gourmet Adjustable Heat Sauce. “Marketed as “the world’s first adjustable heat sauce,” the new product allows consumers to vary the spiciness of the product simply by turning the cap. The bottle is actually divided in half; one half is mild hot sauce, the other is zesty hot sauce. A pump spray cap mixes the contents.

Sandwiches: Today's Top Flavor Ambassador

One segment that personifies today's flavor and ingredient trends is the sandwich. No longer just a brown-bag mainstay, sandwiches have become top flavor ambassadors, jumping borders and combining cutting edge ingredients, while at the same time projecting a healthy, yet familiar profile. "Sandwiches are one of the most popular foods in America," says Harry Balzar, vice president of the NPD Group, which tracks consumer eating habits. "It's almost by definition a homemade, fresh product, and it requires a lot of fresh ingredients." (*Stagnito's New Product News*, September 2005)

According to CREST data, the average American eats close to 200 sandwiches a year. Not surprisingly, sandwiches make up the largest percentage of new menu items. According to Food Beat's 3rd Quarter Newsletter 2005, one in five of the new dishes added to chain menus in the first half of 2005 were sandwiches. The next largest segment was appetizers, which represented just 11 percent of all new items.

In today's accelerated flavor climate, sandwiches have become the perfect flavor carriers, combining all kinds of ingredients, sauces, and toppings enfolded by a wide medley of "wrappings" from tortillas to toast. Often used as a "gateway" for new spices, sandwiches provide a familiar entryway into sometimes unfamiliar ingredients and traditions.

Close to becoming mainstream are two popular sandwich-like items: tortas and fish tacos. Tortas, a traditional street food from Mexico, is a versatile kind of sandwich that can be filled with almost any combination of ingredients, from barbecued pork in adobo sauce to beans and scrambled eggs with spicy Mexican sausage. Packaged Facts' *Culinary Trend Mapping Report*, Fall 2005, indicates that tortas are a Stage 1 ingredient and notes that "a growing number of restaurants are presenting tortas as an alternative to other popular international sandwiches such as Italian panini and the Vietnamese banh mi.

The Vietnamese banh mi is another emerging sandwich variety. Generally served on a crusty, but soft baguette, the sandwich features barbecued pork or other meats, flavored with pickled carrots, daikon, sprouts or onions and cilantro. Banh mi shops and bakeries are increasingly popping up in large cities across the country.

Cuban sandwiches are another growing segment. According to Food Beat, Cuban sandwiches were not mentioned on any of the Top 200 chains. Today, seven chains in the Bakery/Bagel and Casual Dining segments include a Cuban sandwich (or variation on that theme).

In 2006, watch for even broader blending of flavors and traditions in the sandwich segment.

Beyond the Burn — Emerging Flavor Profiles

“Our society, for the past couple of decades, has wanted more intensity in food,” says Eleanor Hanson. “A lot of it has come from heat and hot. But today people have realized there is more to flavor than just heat and are exploring flavor intensity.” Following are a few flavor profiles we will see more of in 2006 and beyond.

Where There’s Smoke, There’s Fire

A growing flavor trend is smoky, strong, and bold flavors. “Savory-seasoned rotisserie, spit- and pit-roasted and smoked fruitwoods convey outdoor authenticity and add flavor and complexity without the burn, and all are gaining momentum,” according to *Flavor & The Menu*, Summer 2005.

“Smoke” is increasingly more of a flavor than a cooking method. According to Productscan’s Online Flavor and Ingredient Report, the number of new products with “smoke,” “smoked,” or “smokey” flavor tags rose to 167 in 2005, up from 145 in 2004 and 121 in 2003. “Anything smoked is hot, including smoked pepper, smoked ancho, and chipotle” says Nancy Byal, of The Trendspotters Network.

Smoked and cured foods are becoming more common at restaurants of all kinds, and moving beyond familiar barbecued ribs. For instance at Bradley Ogden’s Parcel 104 at the Santa Clara Marriott in Santa Clara, CA, executive chef Bart Hosmer is enthusiastic about smoking proteins of all sorts. He creates dishes such as smoked brisket, cured in a spice rub for a day or two and smoked for six hours over hickory blended with fruit woods for sweetness, and also experiments with various elements in dry rubs, incorporating everything from brown sugar, smoked paprika and dried mustard to Caribbean jerk-style seasonings and ras el hanout, a Moroccan spice blend.

Pungency Adds Punch

Pungency is gaining some buzz as an up-and-coming flavor note. “There’s a certain amount of pungency showing up — not exactly a heat factor, but it has a bite,” says menu trends analyst Nancy Kruse. “Consumers seem increasingly interested in this type of flavor.”

Kruse mentions gorgonzola as a pungent flavor on the move. According to Food Beat, the Wheaton, IL-based chain menu tracking firm, the number of times gorgonzola was mentioned on chain menus jumped 35 percent between 2003 and 2004. The blue-veined, Italian cheese

is increasingly adding its sharp flavor to salads, dressings, and even desserts where it is often paired with pears. The Food Network lists 109 recipes with gorgonzola; of which 10 are also categorized as desserts.

Cooling Down Assertive Flavors

“Another thing we’re seeing, but it’s not a trend yet, is the use of very assertive flavors along with something that is cooling in the same dish,” says Nancy Kruse. The cool and spicy combination is a familiar pairing in Indian and Middle Eastern cuisine where flavored yogurt sauces often accompany fiery dishes. Today that profile is beginning to show up in different sorts of combinations on mainstream menus. For instance, Olive Garden serves a spicy Caribbean entrée that is paired with a cooling mango salsa. And Chili’s Boneless Shanghai Wings is a crispy breaded chicken breast topped with sweet and spicy ginger-citrus sauce and sesame seeds. The dish is served with a wasabi-ranch dressing that is “spicy-cool.”

The Evolution of Hot — From Peppers to Peppercorns

In the last couple of years, there has been an explosion in the appreciation for peppers and the wide range of heat and flavor they provide. “There’s been so much more emphasis on peppers,” says John Lord, professor and chair of food marketing, Saint Joseph’s University, Philadelphia, PA. “There are at least 1,000 different varieties of peppers, and we’ve only begun to explore them all.”

In the U.S., chipotle became the first pepper poster child, evolving very quickly from a fairly obscure ingredient to the name of a prominent fast food chain. Now, as American palates have warmed up to peppers, other varieties are beginning to get more attention. For instance, the poblano chile, a dark green chile with a rich flavor, only appeared in four new products in 2004. This year, 23 new products included the poblano. Ancho chiles, too, are expected to be hot in the coming year. “Chipotle has pretty much peaked,” says Trendspotter Nancy Byal. “Ancho may be the next hot chile; it seems to be the one getting the most attention.” Still growing slowly, the number of anchos in new products increased from 14 in 2004 to 16 in 2005.

Other peppers beginning to show up in products are banana peppers, Peppadew peppers, Thai chili peppers, and piparras peppers. Each of these appeared in one new product in 2005, according to Productscan.

Another pepper on the horizon is the Balinese long pepper. First imported to the U.S. in 2004, this pepper was once hailed by the Romans as the ultimate peppery spice. Used in the same

way as regular black pepper, the Balinese peppers have a floral bouquet and a complex, earthy flavor.

Peppercorns Hot in 2006

Peppercorns promise to be one of the hottest ingredients in 2006. Exotic peppercorn varieties, such as Tellicherry, Muntok white, Chinese Szechuan, Madagascar, and Malabar are lending flavor nuances and varying degrees of spiciness to menus around the country.

Chef Philippe Trosch considers pepper as important and as individually unique as a sommelier considers wine. At his Ventana Room in Tucson, AZ, every table is equipped with a tray covered with six tiny pewter bowls, five for pepper and one for fleur de sel, the sea salt from Brittany. The spices are reground and refilled several times during each evening as diners are encouraged to try different variations.

Other chefs are showcasing peppercorns, as well. For instance, at Excelsior in Boston, Chef Eric Brennan features tuna that has been rolled in white, black Tellicherry, pink, and dried green peppercorns. The tuna is seared quickly so the pepper adheres, and then sliced thinly over a bed of rainbow chard tossed with toasted sesame seeds. Peppercorns are also being used to spice up dressings, sauces, and even desserts, such as the saffron panna cotta with poached quince and pink peppercorns served at Babbo in New York City.

Table 4-2
New Product Introductions: Peppers

Pepper	Number of New Products Introduced 2005	Number of New Products Introduced 2004
Jalapeno	119	148
Chipotle	80	75
Habanero	27	32
Poblano	23	4
Ancho	16	14
Serran	5	6
Scotch Bonnet	2	2
Guajillo	2	0
Pasilla	1	2
Balinese Long Pepper	1	0
Banana Pepper	1	0
Peppadew Pepper	1	3
Thai Chili Pepper	1	0
Piparras Pepper	1	0
Piquillo	0	1
Cascabel	0	1

Source: Productscan; Packaged Facts

Buffalo, Barbecue, Caesar, and Cajun — the Big Four

Some flavors are getting so popular and well-known they are becoming distinct categories and creating their own trends. “The four non-ethnic flavors that keep getting bigger and bigger are barbecue, buffalo, Caesar, and Cajun,” says menu analyst Nancy Kruse. “In all four cases, usage just continues to jump and jump; it’s now bubbling out of the mass market and finding its way onto fine dining menus.”

Kruse believes the biggest of “the big four” is the barbecue flavor, which is showing up in lots of flavor pairings, not just as a protein accent. “Chefs have gotten smart about taking time-tested products and reinventing them,” says Kruse.

The Buffalo flavor is also growing rapidly. “The Buffalo flavor is huge, but it’s not just Buffalo wings, but Buffalo fried shrimp, calamari, sandwiches, pizza, and salads,” observes Maria Caranfa, who collects menu statistics for Menu Insights. (*Prepared Foods*, November 1, 2005)

The number of Buffalo wings on appetizer menus and the number of chains menuing wings has grown steadily over the past five years, according to Food Beat. Menu mentions of wings are up 54 percent since 1999. In fact, Buffalo wings have overtaken nachos as the number one frequently mentioned appetizer among the Top 200 largest U.S. restaurant chains. Wings have gone international as well. For instance, Bahama Breeze serves Jamaican Grilled Chicken Wings (spicy jerk seasoning with tangy dipping sauce) and Bertucci’s offers Tuscan Chicken Wings (spicy wings marinated in lemon and rosemary. According to Food Beat’s *1st Quarter Newsletter 2005*, the use of the word hot or spicy to describe wings outnumbers the word mild four to one.

Pumping Up the Pantry

The basics are still the basics, but there is a change afoot in the pantry. A familiar container of Morton’s salt may not do the trick. Instead consumers (and chefs) may have two or three specific flavored salts from exotic locales to add flavor punches. More and more basic pantry staples are being pumped up, blended, or used as flavor carriers. “People are being more selective, much more purposeful in their selection of ingredients,” says Mark Erickson, C.M.C., vice president of continuing education, The Culinary Institute, Hyde Park, NY. “People are beginning to know the subtle differences; it’s a totally different pantry today.

Condiments, seasonings, and spices are also an easy way to experiment with new flavors. “Although Americans are adventurous, we don’t really change,” says Marianne Gillette, director of research and development, McCormick Sensory Center, Hunt Valley, MD. “We still eat hams and fried chicken, but we are changing what we put on those dishes.”

The growth in specialty flavorings and spices is also a reflection of consumers’ steadily increasing desire for upscale and gourmet products. According to the Boston Consulting Group (BCG), products with higher levels of quality, taste, emotional resonance, and aspiration posted average sales gains of 21 percent in 2004. BCG estimates that 122 million adults, excluding households with incomes greater than \$150,000, have the means and desire to “trade up” for foods important to them. “I believe there’s going to be a greater appreciation for spices in general,” says J. Hugh McEvoy (Chef J), C.E.C., C.R.C., and contributing editor to *Prepared Foods*. “Just like people today recognize the differences in coffee, one day people will realize there are 30 kinds of black pepper in Madagascar.”

Following are some of the key flavor trends we may see in 2006.

Condiments Coming On Strong

“One of the growth areas is the condiment and sauce area,” says Nancy Byal. “People are looking for ways to add flavor and doing so with condiments and steak sauces.” Although the number of SKUs dropped slightly between mid-2005 and mid-2004, some segments within the condiment area grew steadily. For instance, pickles, olives, savory spreads and condiments jumped 18.9 percent according to Productscan Online. Jams, jellies, marmalades, and sweet butters increased 17 percent, and sauces and gravies gained 16.7 percent.

Specialty flavors seem to be driving the gains. For instance, according to the Specialty Food Magazine’s 2004 State of the Specialty Food Industry Report, specialty preserves/jams/nut butters jumped by 29.4 percent between 2001 and 2003. This compares to a much slower 0.3 percent for mainstream products during the same period. Specialty flavors, such as exotic mountain berries like rose hips; the “new” old favorite, figs; and tropical flavors like mango and passion fruit led the way. Other trends in this area are the increasing number of nut and fruit blends and jam-like condiments to accompany cheese.

Basic condiments like ketchup are getting spruced up with new flavors like mangoes, mushrooms, and even truffles. Aioli, a traditional garlic-mayonnaise combination, is suddenly showing up everywhere, from sandwiches to fritters to seafood dishes. The versatile flavor is going multi-national, and is being paired with ingredients like whole-grain mustard, basil-pesto, capers, lemongrass, chipotle, and saffron.

Ready Made Sauces and Marinades

Shelf-stable sauces and spreads were among the fastest growing categories in the center store in 2004, according to Mintel's U.S. Condiments August 2005 report. In 2004, barbecued foods topped the list of meal preparations using a cooking sauce or marinade (83 percent). The next most popular were international flavors, including Mexican dishes/tacos (70 percent), Italian dishes/pasta salad (68 percent), stir-fry/Asian dishes (67 percent), and Indian dishes/curry (19 percent).

Flavored Oils Heat Up

Olive oil has become the most popular cooking oil in America; and infused olive oils are rapidly becoming one of the pantry's favorite flavoring ingredients. With a variety of flavors, from truffle to citrus, infused oils are being used to drizzle flavor on a finished dish, to add a subtle flavor while cooking, as well as in dips and sauces. The Center for Culinary Development (in conjunction with Packaged Facts) has named infused olive oils a Stage 4 ingredient, which indicates the oils are becoming fairly mainstream. The Packaged Facts Culinary Trend Mapping Report, Summer 2005, predicts the category will continue to flourish: "On the horizon, look for infused oils with spices such as peppercorn, exotic fruits, vegetables including Vidalia onion, white-wine vinegar, seafood, and cheese."

Nut oils are another growing category. "Nut oils such as macadamia and pumpkin are becoming popular due to their flavor and also the health benefits they provide," says Catherine Proper, corporate executive chef for ConAgra Foods Inc. (*Stagnito's New Product News*, August 2005) Like the nuts they are pressed from, nut oils are very low in saturated fat, and provide a variety of wellness advantages. Fragrant nut oils are bringing added dimension to salads, vegetables, grilled bread, and fish.

Vinaigrettes Add Tartness

Another growing category is vinaigrettes and specialty vinegars. Brooklyn-based restaurant consultancy, Joseph Baum & Michael Whiteman Co., predicts vinaigrettes will be one of the buzzwords for 2006, and suggests "complex vinaigrettes that enlighten the palate are replacing sauces — composed of rare vinegars, tropical fruits and syrups and Asian spices, impossible to duplicate at home." Vinaigrettes are adding tart, piquant flavors to desserts, fruit and sauces. In 2006, look for more flavors and gourmet offerings like Banyuls Vinegar from Cave de l'Abbé Rous, which is said to have "a uniquely rich and complex palate, highlighted by honey, vanilla and licorice notes."

Salt of the World

Salt has become an international star with specialty versions from around the world increasingly available, from Kashmir, Peru, Hawaii, and Bali. The flavors are as exotic as their locales, including coconut lime smoked, Andes dessert, Australian pink, and Indian black. *Food & Wine* named flavored salts one of its 2006 restaurant trends. Chefs at some upscale eateries are already creating unique signature salts. For instance, At Uraswa in Beverly Hills, chef Hiro Uraswa mixes salted water and seaweed, lets the moisture evaporate, then grinds the newly formed crystals into a fine briny powder. In Manhattan at Kittichai, white hamachi sashimi is crusted with black squid-ink salt, and the new Jovia mixes Maldon sea salt with the crystals that form inside wine barrels to make Merlot-flavored salt. In 2006, we'll see even more flavors and spice combinations as well as more diverse uses, from salt-crusting grilled proteins to texturizing butter.

Color Intensity as a Flavor?

Another interesting "intensity" trend may be an increasing awareness of color and its influence on how foods are perceived. "Color intensity can give you a rush the way flavors can," says Eleanor Hanson. "Some of the most intensely colored foods are the healthiest – fresh blueberries and lycopene in tomatoes, for instance. And cooked foods tend to be creamy colored and brown." Hanson notes that bright, beautiful intense colors are being used in a lot of ways. "There's a lot of positive, exciting reasons to be eating brightly colored food," explains Hanson, "particularly equating beautiful colors and foods with health."

Table 4-3
New Product Counts: Condiments

Product	SKUs 2005 to 6/30/05	SKUs 2004 to 6/30/04	% Gain/Loss
Condiments	1303	1331	-2.1%
Catsup	4	6	-33.3%
Jams, Jellies, Sweet Butters, Marmalades	110	94	17.0%
Mustard	26	70	-62.9%
Nut Butters	18	37	-51.4%
Pickles, Olives, Savory Spreads & Condiments	176	148	18.9%
Salad Dressings	139	139	0.0%
Sauces & Gravies	265	227	16.7%
Sauces, Pizza & Pasta	115	103	11.7%
Spices, Extracts & Seasonings	366	383	-4.4%
Sweet Toppings	84	124	-32.3%

* SKU counts are for 12-month periods
Source: Productscan Online/www.productscan.com

Chapter 5 How Sweet It Is

Packaged Facts Flavor Picks: Sweet and...Spicy, Tart, Salty; Gourmet Sugar, Brown Flavors (Dulce De Leche, Caramel, etc); and Chocolate

Sweet, one of our primary taste sensations, is stepping out of the pack and moving uptown. Today's chefs are focusing on sweet notes more than ever, adding such ingredients as honey, fruits, gourmet sugars, and chocolates to bring out different flavor intensities. Sweet flavors have become valued partners, helping to mute bitterness, tone down saltiness or turn too-sour into more tempting tart.

Desserts and chocolates are both creating their own niches. For instance, stand-alone dessert bars, such as Finale in Boston, Sugar in Chicago, and Chickalicious in New York are becoming hip, popular hang out places. *Entrepreneur* named "Chocolate Cafes" one of the best business ideas for 2006. "America has a sweet tooth – leaving entrepreneurs with an opportunity to satisfy it," reported *Entrepreneur*, December 2005. Already several concepts have emerged, including Chocolate Salon in Fort Myers, FL, Chicago-based Ethel's Chocolate Lounge chain, and Bittersweet in San Francisco, CA.

The year ahead may bring some interesting changes to the world of sweets. Evolving consumer interests will affect this segment, from wellness to world flavors. The sky's the limit. Just think – if chocolate can become a health food, anything can happen.

Sweet – Top Partner in 2006

Sweet and Spicy Hottest Trend

One of the hottest trends is the pairing of sweet and spicy. For instance, Mintel Menu Insights notes a 13 percent increase in chiles in restaurant desserts. The most popular chile partners are chipotle, jalapeno, and habanero. More than six out of 10 (64 percent) of the menus at family/midscale restaurants offer a sweet and spicy pairing. More than 36 percent of dessert menu items on fine-dining restaurants offer a chocolate-chile combination.

"Mild, sweet milk chocolate holds up to the spiciness of ginger, peppery flavors and certain fruits," explains Stephen Durfee, pastry chef and instructor at the Culinary Institute of

America at Greystone. “Chocolate comes from Latin America, so a lot of Latin fruits and flavors pair well: pineapple, banana, certain citrus, fruits, sugar cane and rum. (*Flavor & The Menu*, Fall 2005) At New York’s Vosges Haut-Chocolat, ancho chile, Ceylon cinnamon, Mexican vanilla and dulce de leche chocolates are part of an Aztec collection, and the dark Black Pearl Chocolate is flavored with ginger, wasabi and sesame seeds.

Sweet and Tart – A Fresh Approach

“The combination of sweet and tart is growing,” says Nancy Byal, director of The Trendspotters Network based in Central Iowa near Des Moines. Examples include balsamic vinegar with fruit, savory herbs and spices or sweet basil or sage served with pears, for instance. “A lot of chefs are finding these contrasts are a wonderful accent they didn’t expect,” says Byal. The combination creates lively and light flavors that mesh well with today’s interest in fresh, sharp tastes.

Sweet and Salty – Going Nuts

Whether it is due to their newly burnished health profile or simply their familiar saltiness, nuts are adding a welcome crunch to desserts throughout the food industry. In restaurants, almonds, pecans, and walnuts are making a particularly strong showing, according to Food Beat’s 3rd Quarter Newsletter 2005, the quarterly newsletter produced by the Wheaton, IL-based menu trends analyst (www.foodbeat.com). Over the past five years, the number of mentions of almonds on desserts is up 32 percent; pecans 62 percent; and walnuts 186 percent. One interesting twist is the Banana and Coconut “Spring Rolls” created by Chevy’s Fresh Mex that features fresh bananas, toasted coconut and pecans in a rich vanilla cream wrapped in a crispy spring roll and served with dulce de leche ice cream, chocolate, and cajeta sauces.

Bon Appetit named caramel with salt one of its top dessert trends for 2006, reporting “It’s clear why this combo is big: That salty-sweet contrast is so easy to love.” (*Bon Appetit*, January 2006)

More than 1,000 dessert recipes on Epicurious.com and almost 400 recipes on FoodNetwork.com include nuts. New formulations of nutty, sweet combinations are popping up in supermarkets. For instance, Diamond Nuts of California recently introduced glazed walnuts topped with chocolate brownies – an interesting, and convenience-oriented reversal of the familiar brownie with nuts.

Ice Creams and Gelatos Often Showcase Trendsetting Flavors

Ice cream, according to *Restaurants and Institution's* 2005 Menu Census is the most often served dessert, appearing on 70 percent of commercial menus and 79 percent of noncommercial operations. No doubt the popularity of ice cream and other frozen desserts helps encourage consumers to try new and unfamiliar flavors. As a result, ice creams, sorbets, and gelatos are often the place trendsetting tastes and flavor partnerships first appear. "The combination of fruit or chocolate with herbs, florals and even peppers has been seen in high-end restaurants and ice cream shops. It's only a matter of time before these intriguing flavors go mainstream in both foodservice and on grocery shelves," reports flavor company David Michael & Co, Philadelphia, PA. Some of the company's flavor trendsetters include Chocolate Espresso Chipotle Gelato and Coconut, Pineapple, Thai Basil Gelato.

"Orange cardamom is extremely popular in restaurant sales, and cashew and burnt sugar both sell extremely well," explains Stephanie Reitano, chef and owner of Capogiiro Gelato Artisans in Philadelphia. (*Flavor & The Menu*, Fall 2005) Green tea, cinnamon, dulce de leche, coconut, ginger, and banana all made Irvington, NJ-based Ciao Bella's bestseller list last year. Dulce de leche, green tea and cinnamon all outsold strawberry.

Wasabi, one of the hottest of the hot, has jumped from sushi to ice cream. Coldstone Creamery offered wasabi-ginger ice cream last summer; and Il Laboratorio del Gelato, in New York City, offers wasabi and black sesame flavors.

Table 5-1
Most Popular Desserts on Menus

Dessert	Commercial	Non-commercial
Ice Cream	70%	79%
Cheesecake	68%	75%
Chocolate Cake	68%	75%
Brownies	45%	90%
Cookies	43%	94%
Apple Pie	46%	78%
Carrot Cake	43%	67%
Cobbler/Crisp	33%	75%
Pumpkin Pie	27%	68%
Pudding	20%	79%

Source: *Restaurants & Institutions*, 2005 Menu Census, September 1, 2005

Sugar Goes Upscale

No longer just used to add flavor, sugar is getting more attention as an individual ingredient. Consumers are increasingly interested in learning how different kinds of sugar can be used, how natural they are, and where they originate. Zingerman's, a gourmet foods merchant

based in Ann Arbor, MI, markets several different sugars from Mauritius, for example. “While there is certainly some small difference of flavor between commercial brown and standard white sugars, the difference is miniscule in comparison to that between the flavor of commercial brown sugar and that of these natural dark brown sugars from the island of Mauritius. These are richer, toastier, tastier, rather amazing.” Sugars are becoming more flavor-ized as well. For instance, India Tree, a Seattle-based spice merchant has developed a Vanilla Sugar that combines turbinado sugar with a fine Bourbon vanilla bean. The company suggests sprinkling the sugar over cereal, yogurt, cookies or desserts.

As consumers become more savvy and the variety of sugar products grows, look for more attention paid to gourmet and upscale sugars in 2006. A few to watch include:

Turbinado. This warm, honey-colored sugar is obtained or crystallized from the initial pressing of sugar cane. Deeper and richer in flavor than fully-refined sugar, turbinado sugar is prized for its smooth melting qualities and is often used as a coffee or tea sweetener. Turbinado is beginning to get more attention. Four products were introduced with turbinado in 2005 and 2004. The Food Network featured the sugar in 24 recipes that ranged from a dry rub for pork to caipirinha cocktails.

Demerara. This coarse and mild brown sugar has a light golden color and a soft caramel-like flavor, as well as sweetness. Used in Europe as a table sugar, it adds deep flavors to breakfast cereals, yogurts, or a steaming cup of coffee. Demerara is just beginning to pop up on chefs’ radars. Two new products were introduced in 2005, up from just one in 2004. The Food Network featured demerara in 14 recipes, and Epicurious included it in eight dishes.

Muscovado. This specialty brown sugar is very dark brown and has a particularly strong molasses flavor. The crystals are slightly coarser and stickier in texture than “regular” brown sugar. This flavorful sugar is just beginning to emerge. Only one new product featured it in 2005; and both Epicurious.com and the Food Network included it in just three recipes.

Panela. As consumers increasingly search out pure and natural ingredients, this traditional sugar from South America may get more play. An unrefined whole sugar, panela is thought to be one of the healthiest sugars in the world. “It looks like sugar in the raw, but browner, says David Kimmel, a conceptual product developer and importer and wholesaler of food and beverage items based outside New York City. “It has more nutritional value and flavor; all the nutrients haven’t been stripped out.” Panela is often found in thick rounds shaped almost like hockey pucks. “In South America, people chip away at it and add it to hot water and

drink it for energy as a pick-me-up,” says Kimmel. The Food Network features panela in 34 recipes; Epicurious has it in just five dishes. Although no new products included panela in 2005, it may become more appealing to mainstream consumers interested in using more traditional, natural sugar products.

Sweet Brown Flavors

“Brown flavors of all kinds, such as butterscotch, toffee, caramel, and maple, continue to grow in usage and preference,” reports Packaged Facts’ Spring 2004 *Culinary Trend Mapping Report*. One of these is dulce de leche, a traditional Hispanic sweet caramel flavor. Familiarity with dulce de leche has been steadily growing in the United States since Haagen-Dazs first introduced it as a flavor profile in 1997. Since then, dulce de leche has become the company’s second most popular flavor after vanilla. A number of other companies have introduced products with the flavor, including Hershey’s, Edy’s, Dannon, and Smuckers. The Center for Culinary Development has named dulce de leche a Stage 3 ingredient, which means it is becoming more prevalent at chain restaurants and stores such as Williams Sonoma.

Another “brown” flavor getting attention is caramel. “Caramel is making a resurgence,” says Trendspotter Nancy Byal. Kraft Foods has named it one of its top flavors for 2006. The flavor is moving through the food industry, from fine dining to fast food. Taco Bell, for instance, has introduced a Caramel-Apple Empanada. Caramel is becoming a more popular upscale flavor as well. For example, Smoked Salt Caramels, an award-winner from Fran’s Chocolates in Seattle, blends smoked sea salt, milk chocolate, and soft buttery caramel. As for the supermarket shelves, there were 234 new products introduced in 2005 that featured a caramel flavor, up from 223 in 2004.

Toffee and maple are other flavors we may see grow in this family. Toffee, with its rich tones and association with traditional comfort, is gaining popularity. For instance, Chicago’s Terry’s Toffee offers crunchy blends of spices including cinnamon, clove, ginger, cardamom, and pepper. Toffee was featured in 80 new products in 2005, up from 10 in 2004. Maple also offers potential with its versatility and the opportunity to highlight regional flavors. Productscan reported 69 new maple products in 2005, a slight gain from the 61 in 2004.

Table 5-2
New Product Introductions: Sweet “Brown” Ingredients

Ingredients	# New Products Introduced 2005	# New Products Introduced 2004
Caramel	234	223
Toffee	80	70
Maple	69	61
Butterscotch	20	14
Dulche de leche	9	13

Source: Productscan Fragrances and Flavors Report; Packaged Facts

Coffee, Tea, and Chai

Several traditional beverage spices are beginning to add a new look to the dessert table. For instance, *Bon Appetit* named green tea one of its top dessert trends in its 2006 Best of the Year forecast. The magazine featured a Green Tea Cheesecake with Raspberries and Raspberry-Mint Tisane, a tea-like aromatic infusion. The Food Network includes 65 dessert recipes with tea, while Epicurious features 36.

Coffee as a flavoring ingredient is coming on strong. The center for Culinary Development has identified coffee as an emerging ingredient. “In desserts, there is a certain bitterness that coffee brings to the table that counteracts the sweetness and acidity of desserts,” reports the *Culinary Trend Mapping Report*, Spring 2005. Coffee was mentioned in 263 dessert recipes, about 45 percent of the total coffee recipes available, on the Food Network. Some of the dishes included coffee panna cotta and mocha madness biscotti pie.

Chai, an increasingly popular sweet drink from India, is making the move to desserts. With its warm, exotic flavor, chai adds a wonderfully exotic accent. So far, it only appears in eight recipes on the Food Network; half of those are desserts, though. On the Epicurious site, four recipes with chai are featured – all four are dessert-oriented, including chai-spiced honey bundt cake and chai-poached apricots and plums.

Table 5-3
Dessert Ingredients Highlighted by Consumer Media

Ingredient	FoodNetwork.com Mentions (Dessert Recipes Only)	Epicurious.com Mentions (Dessert Recipes Only)
Honey	281	241
Coffee	263	212
Tea	65	36
Dulce de Leche	19	17
Chai	4	4

Source: FoodNetwork.com, Epicurious.com (dessert recipes only); Packaged Facts

Honey is Hot

It's sweet, it's natural, and it's versatile. Honey can help enhance sweetness and mask bitterness and, like several other natural products, it is becoming more specialized and sought after. "Honey is branching out," says Nancy Byal, director of the Trendspotters Network. "We're now seeing more specialty honeys with added flavors like lavender, honey, or other varieties."

Food & Wine named artisanal honey one of the hot ingredients in its Trend Report 2006. The editors highlighted fireweed honey, a mild-flavored variety that comes from the hot-pink blossom that springs up after forest fires, and star thistle weed, which has a more fragrant flavor. *Flavor & The Menu* also named varietal honey one of its Top Ten Hot New Ingredients, Fall 2005.

There are more than 300 unique types of honey available in the United States, each from a different floral source. Honey color ranges from nearly colorless to dark brown, and its flavor varies from delectably mild to distinctively bold, depending on where the honey bees buzzed. As a general rule, light-colored honey is milder in taste and dark-colored honey is stronger.

Honey is produced in every state, but depending on floral source location, certain types of honey are produced only in a few regions. In 2006, honey is well positioned to become a top trendsetter, with its wide variety, natural sweetness, and increasingly gourmet profile.

Chocolate Heats Up

Chocolate promises to be a formidable force in 2006. According to Vienna, VA's Chocolate Manufacturers Association, total retail sales of all chocolate rose 5.6 percent to \$15.1 billion in 2004. The healthy growth is expected to continue, primarily due to the new wave of information and products that emphasize chocolate's wellness properties. New products and new approaches will also contribute. "Gourmet chocolate is certainly providing an inspiration," says Cara Newkirk, senior market manager, FONA International, Geneva, IL.

Chocolate Becomes Even More Specialized

No longer categorized by basic flavor groups like "semi-sweet" or "dark," chocolate is becoming sought after for where and how it is made. "In a repeat of the wine and coffee experiences, people are clamoring for darker chocolate from exotic places," says restaurant consultant Joseph Baum & Michael Whiteman. The Brooklyn-based firm predicts we'll see restaurants pairing specific chocolates with specific cocktails; cheese-chocolate-port menus; balsamic vinegar chocolate; and chocolate place-names on menus.

One of the biggest trends is single-origin chocolate (also known as pure origin), which identifies cacao beans from a specific country, region, plantation, or estate where the local environment affects aroma and flavor profiles. Gourmet chocolatier E. Guittard now offers single-origin chocolate bars made from cacao beans harvested in certain regions of Venezuela, Madagascar, and Columbia. “The point is that there’s a certain cachet around the provenance of the beans that consumers are willing to spend more money on,” says Jeff Cirese of the Center for Culinary Development. (*Chicago Sun-Times*, January 16, 2006) At Aria restaurant in Chicago’s Fairmont Hotel, one of the most popular desserts is the \$11 Chocolate Origins, a sampling of desserts based on single-origin chocolates from Ecuador, Venezuela, and Madagascar.

Other chocolate labels that may become increasingly important in 2006 are fair-trade and organic.

Healthy Chocolate

The big news for chocoholics is that it’s now ok to eat chocolate. In fact, it’s more than ok. Recent research shows dark chocolate includes heart-healthy antioxidants. We will see more emphasis on dark chocolate in the year ahead. According to the Productscan Online database of new products, more than 20 healthy chocolate bars have been released globally. And, according to the Chocolate Manufacturers Association, dark chocolate sales jumped 17 percent.

More companies are jumping on the dark chocolate band wagon. New products include Mars’ CocoVia snack bars, rolled out in October and Hershey has several new varieties of dark chocolate bars. Barry Callebaut announced in November 2005 that it had new evidence to support the anti-cancer and anti-aging properties of its healthy chocolate Acticoa.

Increasingly, chocolate products are pairing up with other healthy ingredients. For instance, the Plantations Arriba Collection from Elizabeth, NJ-based Vintage Chocolate offers a new bar with quinoa, an indigenous Andean grain high in protein. Since most functional foods in the U.S. market are bakery, cereals, beverages, and confectionaries, there should be plenty of growth for chocolate functional products.

Nibs, Beans, and New Flavors

In 2006, we’ll see an increased variety of ways to eat chocolate. For instance, nibs – the meat of the cacao bean that has been hulled, cracked and toasted – are becoming increasingly popular. The crunchy treats are being combined with a wide variety of unexpected

ingredients like the espresso, chicory root and nibs partnership in Vosges' Exotic Candy Bar line.

The actual cacao bean, which often packs a bold punch of flavor and texture, is another growing treat. For instance, Austin, TX-based Cocoa Puro offers Kakawa, a whole roasted, chocolate-covered cocoa bean dusted with cocoa powder.

The Center for Culinary Development believes we will see more chocolate drink concoctions in the years ahead. Its Summer 2005 *Culinary Trend Mapping Report* written in conjunction with Packaged Facts, named Drinking Chocolate as a Stage 3 ingredient.

Exotic fruit flavors, particularly citrus, are expected to be key growth areas in 2006, along with herbs and green tea. Even cheese is becoming a popular partner. "Goat cheese truffles have become some of my customers' favorite purchases," notes Cheryl Robbins-Dooley, owner of Blackflower Chocolates, Shelburne, VT, which offers fresh truffles with local goat, Camembert, and mascarpone cheese. (*Specialty Food magazine*, October 1, 2005)

No doubt we'll be eating, drinking, munching, and cooking with more chocolate in 2006. Although it's only recently we've learned about its health benefits, enjoying chocolate is actually nothing new. The Aztec emperor Montezuma was said to drink 50 golden goblets of hot chocolate flavored with honey and chili peppers every day.

Table 5-4
New Product Introductions: Sweet Flavors and Ingredients

Ingredients	# New Products Introduced 2005	# New Products Introduced 2004
Chocolate	638	625
Vanilla	412	405
Caramel	234	223
Honey	207	189

Source: Productscan Fragrances and Flavors Report; Packaged Facts

Chapter 6 Fruits and Berries Lead the Way

Packaged Facts Flavor Picks: Pomegranate, Meyer Lemon, Black Currant, Acai, Guava

Fruits and berries, possibly more than any other flavor and ingredient category, exemplify the convergence of today's key food trends. With their appealing flavor profiles, often exotic personalities, and strong associations with health and freshness, there's little doubt fruit and berries will be top growth areas in 2006 and beyond.

Last year's report indicated fruits would play a "starring role in 2005." In 2006, that starring role will expand dramatically to a wider range of fruits – from the exotic to the familiar – and to a broader variety of products – from convenient dried options to intriguing blends of fruit-flavored beverages.

Sunny Long-term Forecast

The long-term forecast for fruit is bright. USDA projects that fruits – especially citrus – will be among the fastest-growing food categories through 2020. The government's 2005 food pyramid recommends adults consume about two cups of fruit each day. According to Port Washington, NY-based NPD, fruit is the top snack preferred by children and the third favorite for adults.

The food industry is already responding. *Stagnito's New Products Magazine* reports that new product introductions for fruit and fruit side dishes jumped 33.6 percent between June 2004 and June 2005. Beverage Marketing Corp. expects fruit-flavored waters to add \$800 million to beverage sales by 2008. And, companies such as PepsiCo's Tropicana are broadening their product lines to include new items like fruit bars, fruit strips, and "all-fruit" juices that emphasize the number of fruit servings they offer.

Fresh fruit is increasingly brightening – and lightening – salads, side dishes, and desserts on menus from upscale restaurants to fast food chains. Chefs are steeping unusual grains in fruit juices and pairing exotic fruits with decadent desserts, while fast food chains are offering fresh fruit slices and fruit-based salads as healthier options for both adults and children. According to Mintel's Menu Insights, the top five fruits in salads are oranges, pears, apples,

cranberries and mangos. The study also suggests “keeping a look out” for pineapple, green apples, grapes, strawberries, currants, grapefruit, and pomegranates. (*Prepared Foods*, 9/1/05)

Exotic and Tropical Fruits Blossom

The market for exotic and tropical fruits will continue to blossom in 2006 as consumers’ interest in unusual, light, and healthy flavors broadens. Increased availability and exposure will also fuel growth. “There’s going to be an enormous acceptance for tropicals and exotics in the next generation,” predicts J. Hugh McEvoy (Chef J), CEC, CRC, certified executive chef with the American Culinary Federation, a certified research chef with the Research Chefs Association, and a *Prepared Foods*’ contributing editor.

Pomegranate Top Banana

No doubt, the biggest news in the exotic fruit segment is the pomegranate. Although the pomegranate tree’s fruits, seeds, bark and flowers have been used medicinally for thousands of years, consumers really caught on to the fruit’s powerful health and antioxidant benefits last year.

In 2003, Productscan reported nine new products with pomegranate. The next year, 15 new products featured pomegranate. By the end of 2005, the number of new products with pomegranate jumped to 39. “There was a tremendous marketing campaign that got pomegranate in the mainstream,” says David Kimmel, a creative conceptual developer and designer of food and beverage products based outside New York City. “Now it’s an explosion, and I believe it will continue.”

The California-based POM Wonderful was the first to offer pomegranate juice blended with other fruits like blueberries and mango. The company’s initial introduction in 2003 featured unique 16-ounce glass bottles shaped like two pomegranates stacked on top of each other. The high-end juices were marketed as luxury items in the produce section. Today, the juice has crossed into other retail channels and is now available in convenience stores in lightweight 8-ounce plastic bottles.

The pomegranate’s success is not just due to its healthy profile, but is also a reflection of the fruit’s appealing taste and color. “Pomegranate started out as a health-oriented ingredient,” explains Cara Newkirk, senior market manager, for Geneva, IL-based FONA International Inc. “but now has become a flavor profile.” Recent product launches underscore the fruit’s wide reach. According to Datamonitor, new entries include SheerBliss Ultra Super Premium

Ice Cream Pomegranate Bars and Hauser Chocolatier Pomegranate Truffles that feature fruity, dark chocolate ganache infused with antioxidant-rich pomegranate juice. There is even a new pomegranate and wild blueberry-flavored chewing gum, Pomegranate Power Sugar Free Chewing Gum, made with natural pomegranate extract. In 2006, Packaged Facts expects pomegranate to become more mainstream and diversify even further.

Mango Continues to Lead; Tamarind and Passion Fruit Attracting Interest

Mango, one of the first exotic fruit flavors to catch the public's attention, continues its lead. In 2005, Productscan reported almost 100 new product introductions that included mango, significantly above the 28 items featuring tamarind and 26 with passion fruit.

Although the number of new products with tamarind or passion fruit dropped slightly in 2005, both these flavors are being tracked by flavor professionals as emerging ingredients. "There's a diversity of population that is interested in tamarind," says Cara Newkirk of FONA. "It's a flavor that I think will continue to appear in restaurants and product introductions." FoodWatch (www.foodwatchtrends.com), a monthly newsletter that tracks consumer food trends, has also identified tamarind as an ingredient that is "gaining popularity." The Fall 2005 Culinary Trend Mapping Report, a quarterly collaboration between Packaged Facts and the San Francisco-based Center for Culinary Development, which traces the evolution of food trends through five stages, has highlighted tamarind's spicy, tart, sweet, and sour flavor as a "Stage 2" ingredient that is just beginning to show up in specialty food publications and the Food Network.

Passion fruit, with its sweet-tart flavor and tropical fragrance, is also on the Center for Culinary Development's radar. "Due to its exotic nature and versatility, we see the passion fruit flavor profile as having big potential for growth," notes the Spring 2005 Trend Mapping Report. The report pegs passion fruit as a "Stage 3 ingredient" – one step before entering the mainstream media.

Quince and Lychee Up and Coming

Two other exotic fruits to watch are quince and lychee. Highlighted in last year's Food Flavor and Ingredient Outlook, lychee is a delicate, sweet Chinese fruit that is slowly getting more attention in the U.S. In 2005, four new lychee products were introduced (up from only one in 2004). Popular chefs are increasingly using the ingredient and the Food Network featured 18 recipes with lychee as of January 2006. This flavor is particularly popular in Asia and Europe and may start catching on in 2006 in the U.S.

Quince, a tart fruit often found in jams, preserves, desserts, and savory dishes, may be another up and coming ingredient. “We’re seeing it in fine dining and it just recently moved into the casual segment onto the menu at Otto, Mario Batali’s pizzeria,” says FONA’s Cara Newkirk. “We’ll be watching how that moves in the next year.” The Food Network featured quince in 23 recipes in early 2006.

Table 6-1
New Product Introductions: Exotic and Tropical Fruits

Exotic and Tropical Fruits Introduced 2005	# New Products Introduced 2004	# New Products Introduced 2005
Mango	98	98
Pomegranate	39	15
Passion fruit	26	31
Tamarind	28	35
Quince	5	5
Lychee	4	1

Source: Productscan Ingredient Reports; Packaged Facts

Citrus – Still the Leading Fruit Flavor

Citrus, with its bright flavors and bold colors, is the leading category in the fruit segment. Kraft Foods has named citrus one of its five top flavors for 2006. In 2004, orange seemed to be everywhere, from household cleaning goods to chain menus. In 2005, orange seems to have slowed somewhat, with a 3.4 percent increase in new products reported by Productscan’s Flavor and Fragrance database. Lemon and lime reported stronger percentage increases, 9.7 percent and 17.3 percent, respectively. A strong increase was posted by grapefruit – a 73 percent jump to 45 products from 26 in 2004.

Meyer Lemons Looking Sweet

Among the citrus categories, specific varieties seem poised to gain more attention. Meyer Lemons, for instance, are popping up in more and more recipes and upscale menus. “Their mild sweetness and lush fragrance make them a natural in desserts, but they’re also great in savory dishes where you don’t want astringency, just brightness,” according to *Bon Appetit* (February 2005). Although still featured in a small number of new products – one in 2005, down from five in 2004 – Meyer lemons have caught the fancy of food professionals and trend watchers. For instance, the Center for Culinary Development’s Spring 2005 Culinary Trend Mapping Report says, “The darling of many chefs, we have classified the Meyer Lemon in Stage 2 and see great potential for growth.” A February 2005 *New York Times* article reports, “the Meyer seems to be crossing the line from cult favorite to commercial success.” Some flavor analysts remain on the fence, however. “We’re kind of waiting to see if it will actually take on as a flavor,” says Cara Newkirk of FONA.

Seville Orange and Blood Orange Attracting Attention

Under the orange umbrella, two varieties are beginning to attract attention – the Seville orange and the blood orange. The Seville orange, which showed up in two new products in 2005, has a very high acid content, which makes it popular in marmalades, as well as liqueurs, sauces, and relishes. “The Seville orange is in no way similar to an orange, it is closer to a lime,” says J. Hugh McEvoy (Chef J). “It’s going to become more well-known and used as we use more South American recipes because it’s a vital part of the flavor.” In early January 2006, the Food Network featured the Seville orange in just four recipes.

The blood orange, a sweet-tart orange with a bright red or red-streaked white flesh, is already showing up frequently in specialty food publications and the Food Network. In early January, there were 62 mentions of blood orange in Food Network recipes, from salsas to sorbets. Three new products included the blood orange flavor in 2005; none were introduced in 2004.

Grapefruits Not So Sour

Grapefruits, although not as popular as oranges, lemons, and limes, may be getting a bigger share of the limelight in 2006. Fueled by the growing Hispanic population and the interest in more exotic flavors, several varieties may gain more recognition. For instance, the pummelo, a slightly sweeter pinker grapefruit, is increasingly available in mainstream supermarkets. The Oroblanco, a white-fleshed hybrid of a low-acid pummelo and a white grapefruit, has an even sweeter flavor. Although developed in the 1950s, the Oroblanco has only recently become more accessible. According to Melissa’s Specialty Produce, the company has seen double and triple-digit growth in Oroblanco sales since it became more widely available. (*The San Diego Union-Tribune*, January 5, 2005)

Table 6-2
New Product Introductions: Citrus

Citrus	# New Products Introduced 2005	# New Products Introduced 2004	% Change
Lemon	361	329	9.7%
Orange	333	322	3.4%
Lime	197	168	17.3%
Grapefruit	45	26	73.1%

Source: Productscan Flavor and Fragrance Reports; Packaged Facts

Berries Bursting Out

Blueberries Lead the Way

Bolstered by a combination of positive health attributes and appealing fresh flavors, berries are bursting out onto upscale menus, supermarket shelves, and popular food shows. Blueberries are leading the way, with 56 new products introduced in 2005, up from 45 in

2004. Thanks to their high antioxidant levels and memory-sharpening attributes, blueberry consumption has skyrocketed. In 2002, Americans bought 106 million pounds of fresh blueberries, according to the Blueberry Council. By 2004, the total jumped about 66 percent to 166 million pounds. No doubt blueberries will continue to be a key ingredient in 2006 and beyond as more products incorporate their flavor and health benefits.

Cherries and Cranberries Branching Out

Other familiar berries are also experiencing steady growth. For instance, cherries and cranberries have gotten much press for their positive health characteristics. As a result, these berries are increasingly showing up in a variety of forms, from dried to puree. Cranberries are even moving into the pet market. A substantial one-third of pet food makers already use cranberries in their products and the market is expected to grow.

Less Familiar Berries May Bloom

Several less-familiar berries, such as black currants and marionberries, may begin to show up more in the mainstream market as consumers begin to look for more exotic berry flavors. “Watch as berry flavors, especially those with extreme intensity like cranberry, marionberry, and black currant, join tropical fruits to form a new generation of tart and tangy recipes,” reports *Flavor & The Menu*, Spring 2005. Products with these flavors are already increasing. In 2005, 21 new products included black currant, almost double the 14 reported in 2004. Nine new entries with marionberry were introduced in 2005, up from zero the year before. Food and beverage developer David Kimmel believes gooseberry, a South American form of blackberry, is another flavor to watch. “It’s very tart,” says Kimmel. “It could possibly be the next sour apple martini.”

Table 6-3
New Product Introductions: Berries

Berries	# New Products Introduced 2005	# New Products Introduced 2004
Blueberry	56	45
Cherry	44	42
Cranberry	36	33
Black Currant	21	14
Marionberry	9	0
Gooseberry	1	0

Source: Productscan Ingredient Reports; Packaged Facts

Emerging Exotic Super Fruits

Acai Creating Biggest Buzz

The big berry buzz seems to be all about acai, a Brazilian rainforest fruit that is known for its rich antioxidants, high levels of fiber, minerals, vitamins, and anti-aging properties. In 2004,

Productscan reported six new products with acai. By the end of 2005, there were 11 launches that included acai. “It’s only in a handful of products,” says Tom Vierhile, executive editor of Datamonitor’s Productscan Online database of new products. “But recent launches containing acai have grown at an exponential rate which bodes well for the future.” The berry is getting lots of attention, and is beginning to be used in a variety of ways, from smoothies to energy bars to functional beverages. “We’re certainly seeing it in the beverage aisle,” says Cara Newkirk. “A fine-dining restaurant in Detroit is also featuring it in a dessert.” Last year’s Food Flavor and Ingredient Outlook suggested acai would begin to move into more food products. Ditto for 2006.

Gurarana Also Getting Notice

Another energy-providing berry is guarana. The small red fruit from the Amazon is believed to provide more energy than caffeine. One of the best-loved fruits in Brazil, guarana is available in a wide variety of forms, from carbonated soft drinks to syrups and capsules. In 2004, 57 new guarana products were introduced in the U.S. In 2005, the number of new products slowed somewhat to 49, still dramatically above the 27 developed in 2003, however. As of now, guarana is found primarily in beverages in the states. The Center for Culinary Development’s Culinary Trend Mapping Report has identified guarana as a Stage 2 ingredient and is watching to see if the energy-boosting ingredient starts showing up in foods.

Goji Berries Going Places

Goji berries, revered for centuries in Tibet for their healthful, anti-aging properties, are slowly beginning to capture more attention. Goji berries have been on the menu at the exclusive Kinara Spa Café in Los Angeles since it opened three years ago. In the past year, several other restaurants have begun to feature the berry. For instance, at La Cachette in Los Angeles, purreed goji berries are the featured item in the restaurant’s signature pale-pink vodka martini and the tiny red berries also top a crème brulee. More restaurants may begin experimenting with the berry, both for its flavor and its bountiful health benefits. “What could be better than taking your vitamins with foie gras?” poses *Nation’s Restaurant News* (August 15, 2005). The berry has recently moved into the retail sector; Whole Foods now sells goji berries in 8-ounce packages. There were two new products introduced with goji berries in 2005 – a slow pace that Packaged Facts believes will speed up as more consumers become familiar with the berry’s tasty benefits.

Cupuacu on the Horizon?

Cupuacu, a culinary delicacy in South American cities where demand often outstrips supply, may be another health-oriented exotic on the horizon. Rich in vitamins, minerals, fats and

fatty acids, the fruit is widely cultivated in Brazil. The white pulp of the cupuacu is uniquely fragrant, and related to cocoa, it contains many of the same beneficial ingredients without the damaging ones such as caffeine. As a result, the fruit offers myriad possibilities for day-to-day foods for children, such as a replacement for chocolate milk. Currently the pulp is most often used for fresh juice, ice cream, jams, and tarts. Although cupuacu has not attracted much notice as of yet, *Food Processing* notes the ingredient in its 2006 flavor trends forecast.

Table 6-4
New Product Introductions: Exotic Super Fruits

Exotic Super Fruits Introduced 2005	# New Products Introduced 2004	# New Products
Guarana	49	57
Acai	11	6
Goji	2	0
Cupuacu	0	0

Source: ProductsScan Ingredient Reports; Packaged Facts

“New” Old Fruits

One of the interesting trends in the fruit and berry segment is how some very traditional, familiar fruits are being “revived” in creative new ways. Whether driven by new research on nutritional benefits or a renewed interest in specific flavors, the following are several fruits that Packaged Facts expects we’ll see even more of in 2006.

Fashionable Figs

Figs, once primarily known for their association with comfort food like Fig Newtons and fig pudding, are taking on a whole new look. “Figs are on the upswing,” says Nancy Byal, director of the Trendspotters Network, based in Central Iowa near Des Moines. “Not just on their own, but as a flavoring agent.” Today, figs are popping up in a variety of places, from dried versions for snacking to gourmet purees designed as cheese accompaniments. Fig vinegars, fig-flavored syrups and fig jams are also increasingly available. “Figs have skipped out of the dessert category into a savory role with other boldly flavored ingredients,” notes *Flavor & the Menu*, Fall 2005. The culinary magazine identified figs as a “Top Ten Hot New Ingredient.” In 2005, 44 new products included figs, a dramatic jump from the 25 reported in 2004.

Guava – Next Super Fruit?

Guava is another well-known fruit that is getting renewed attention. “Guava is poised to make a comeback,” says Nancy Byal. “Not so much by itself, but blended.” David Kimmel, Food and beverage developer, agrees. “Guava is coming on strong,” he reports. The sweet, fragrant

tropical fruit is often used in jams, preserves, juices, and sauces. Guava is also showing up on more menus in such pairings as guava-banana ketchup, quava BBQ chicken, and arugula salad with quava vinaigrette. The number of new products featuring quava seems to be growing steadily. In 2005, 17 new introductions included quava, up from 14 a year earlier.

Recent research conducted by USDA may further propel guava into the mainstream. Preliminary findings, which will be published in 2006, indicate guava may be the next super fruit with antioxidant levels in the same league as blueberries, broccoli, pomegranate juice, spinach and sweet potatoes. Further tests still have to be run to determine whether the findings translate into higher blood levels of antioxidants in people who consume the fruit.

Watermelon Ripening?

With more lycopene than tomatoes, watermelon may just start popping up in more places. “Watermelon is the new tomato in salads and even cooked dishes,” predicts the Brooklyn, NY-based restaurant consultancy, Joseph Baum & Michael Whiteman Co., in its Top Ten Dining Trends for 2006. Watermelon is already a familiar addition in salads, slushies, and salsas. Recently spotted on pizzas in New York City, the summer-favorite may surprise us.

Although new product introductions have stayed steady at five in both 2004 and 2005, we may see wider watermelon usage in 2006 – particularly if a new low-sugar watermelon comes to market. According to *Specialty Food* magazine (June 2005), an agricultural Research Service plant geneticist is developing red-fleshed watermelons with about five percent sugar content, about a third of the average 14 percent found in most typical watermelons. The reduced-sugar fruits will still include plenty of lycopene.

Table 6-5
New Product Introductions: “New” Old Fruits

“New” Fruits	# New Products Introduced 2005	# New Products Introduced 2004
Figs	44	25
Guava	17	14
Watermelon	5	5

Source: Productscan; Packaged Facts

Chapter 7 Fresh, Natural, and Authentic

Packaged Facts Flavor Picks: Organic; Kosher; Root, Micro, and Heirloom Vegetables; Pickling; Pre-cut Produce; Fresh Herbs

There's a fresh wind blowing in the food world – literally – and it promises to strongly influence flavor and ingredient trends in the years ahead. Whether it's an over-saturation in changing food nutrition news (avoid what? eat more of which?) or an interest in avoiding man-made ingredients like pesticides, or simply the desire to eat foods that are naturally healthy (an apple a day...), terms like “fresh”, “natural,” and “authentic,” are gaining cachet like never before.

“The hottest new buzzword being everywhere during this year's chefs' sessions [at the American Culinary Federation national convention] was authenticity,” says J. Hugh McEvoy (Chef J), CEC, CRC, certified executive chef with the American Culinary Federation, a certified research chef with the Research Chefs Association, and a *Prepared Foods*' contributing editor. “Customers are beginning to look for food items they know are authentic through prior knowledge. By authentic, they mean not made in a laboratory.” (*Prepared Foods*, November 2005)

The demand for authenticity and fresh is evident throughout the food industry. “From CPG products to grocery retail, to quickservice restaurants (QSR) and even local farm economies, the growing interest in “fresh” products and offerings is transforming the way we all do business on a daily basis,” predicts Bellevue, WA-based The Hartman Group in its “Trends to Watch in 2006. “Those who keep a close eye on this trend will generally find themselves well ahead of the curve.” (*HartBeat* newsletter, December 2005)

“The word ‘fresh’ will be used a lot,” agrees Eleanor Hanson, president of Food Watch, a River Forest, IL-based company that analyzes culinary trends. “Almost in the place of ‘healthy.’” HealthFocus International's 2005 U.S. Trend Report reports that fresh is still the top attribute shoppers look for on food labels and is extremely/very important to 62 percent of consumers.

Most food industry watchers believe the fresh and authentic trend is here to stay. “Green cuisine -- anything sustainable, fresh, local, natural, and seasonal, really has legs,” says Joan Lang, editorial director of Full Plate Communications, Cape Elizabeth, ME.

Terms that Promote Authenticity

There are a number of labels that promote the idea of authenticity on food products. According to Productscan, “natural” was the most-often used labeling term in this category in 2005. The company’s package tags and claims study reports 1,607 new products introduced in 2005 labeled “natural”, a 17.8 percent rise from 2004. “Fresh,” although posting a 15.2 percent increase in labels between 2004 and 2005 still lags behind “natural” with just under 700 “fresh” new products in 2005. “Pure” is growing as well, up to 340 products in 2005, while “real” seems to be grabbing less attention, with a 3.7 percent decline in usage.

Table 7-1
“Natural” Most Popular Label

Product Tag	2005	2004	Percentage Change
Natural	1607	1364	17.8%
Fresh	690	599	15.2%
Pure	340	295	15.2%
Real	419	435	-3.7%

Source: Productscan Package Tags or Claims; Packaged Facts

Organic – The Original Pure

Since national standards were enacted in 2002, the organic label has become the most familiar standard of purity. “For many consumers, organic simply means authentic. It means safe. It means reliable. It means trustworthy. People do not want eating to be a stressful, difficult task,” says J. Hugh McEvoy (Chef J).

According to the 2005 Whole Foods Market Organic Trend Tracker, the number of Americans who have tried organic foods jumped to 65 percent in 2005, compared to 54 percent in 2003 and 2004. The Natural Marketing Institute’s 2005 Organic Consumer Trends Report indicates that 2004 organic food and beverage sales were \$10.9 billion, an increase of 18 percent compared with 2003. The number of new organic products keeps rising as well. According to Productscan, 672 new products labeled “organic” were introduced in 2005, up 26.1 percent from 2004.

The Organic Trade Association, in a new study published in December 2005, predicts the segment’s strong growth will continue, but level out at five to 10 percent annual growth by

2025. The Greenfield, MA-based organization suggests organic food “will be sold anywhere and everywhere” by 2025, and will reach \$50 billion in annual sales, nearly six percent of total U.S. food sales.

The organization suggests several demographic segments will bolster future sales, such as younger shoppers, particularly Gen Xers, who will pass down their belief systems and ethnic shoppers, including Asian Americans and Hispanic Americans, who will continue to be more likely to buy organic products in proportion to their representation in the general population.

Private Label and Produce – Top Picks

A key area of growth is expected to be private label organic products. Organic store brands “may well prove to be a formidable segment,” reports Facts, Figures & the Future (September 13, 2005) A growing number of mainstream retailers including Kroger, Shaw’s, Giant Food, Loblaws, and most recently, Safeway, have developed their own private label lines of organic foods. As more private label products enter the marketplace, organic foods will become more widely available and competitively priced. This will address consumers’ top two barriers to purchasing organics – price and availability. According to Whole Foods’ study, 74.6 percent of consumers said the price of organics is the main reason they don’t buy more. And, 46.1 percent said availability was the key deterrent.

Today’s most popular organic product is overwhelmingly produce, with almost three quarters (73 percent) of the respondents in the Whole Foods’ study reporting they purchase fruits and vegetables. Non-dairy beverages are the next most popular category (32 percent), followed by bread or baked goods (32 percent), and dairy items (25 percent). Packaged goods, meat, and snack foods were all bought by about 22 percent of organic shoppers, while 17 percent purchased frozen foods, and 12 percent chose prepared and ready-to-eat meals. Although just three percent of those surveyed bought baby food, sales of organic baby food have jumped nearly 18 percent since last year, double the overall growth of organic food sales, according to the marketing information company ACNielsen. (USA Today, 11/2/2005) This may be a reflection of parents’ broadening commitment to organic foods for their children.

“No” Labels Gaining Ground

Many Americans are buying organic products not just for overall health and nutrition purposes or to support the environment, but also to specifically avoid pesticides or genetically modified foods. According to the Whole Foods’ 2005 report, seven out of 10 shoppers purchased organic items to avoid pesticides and more than half (55 percent) did so to avoid genetically modified foods.

Genetic modification seems to be a particularly hot button. According to ACNielsen LabelTrends, August 2005, sales of GMO-free products jumped 19.5 percent between 2005 and 2004 to \$217 million. Productscan reports “no genetic modification” labels on new products jumped 25.7 percent in 2005. Although still a relatively small category with only 67 products in 2005, the number of “no antibiotics” labels jumped 34 percent in one year. “No added hormones” is also gaining interest, with a 32.3 percent gain to 86 products in 2005. Interestingly, there were only 76 new products labeled “no pesticides” in 2005, a very small increase from the 72 posted in 2004. This may be an interesting area to watch since such a large percentage of Americans are consciously avoiding pesticides.

Table 7-2
Why Americans are Purchasing Organic Foods and Beverages

Reason for Purchase	Percentage of Organic Shoppers
Avoidance of pesticides	70.3%
Freshness	68.3%
Health and Nutrition	67.1%
To Avoid Genetically Modified Foods	55.0%
Better for My Health	52.8%
Better for the Environment	52.4%

Source: 2005: Whole Foods Market Organic Trends Tracker Survey

Table 7-3
“No” Labels Gaining Ground

Product Tag	2005	2004	Percentage Change
No genetic modification	230	183	25.7%
No additives	150	128	17.2%
No added hormones	86	65	32.3%
No pesticides	76	72	5.5%
No antibiotics	67	50	34.0%

Source: Productscan Package Tags or Claims; Packaged Facts

A Cloud on the Horizon?

In November 2005, Congress passed an amendment that changed the rules regarding the regulation of synthetic materials allowed in the processing of organic foods. While some food industry groups believe this change will weaken the organic standards, other groups believe the change will help prevent disruptions in the availability of organic foods. Although it's too soon to see what the impact will be on the organic industry, several food professionals are predicting the change will mean an emergence of new “authentic” labels. “With the weakening of the meaning of organic, consumers will begin to seek out other labels such as Fair Trade Certified, Certified Humane Raised and Handled, and Biodynamic,” predicts Epicurious (the culinary website for *Gourmet* and *Bon Appetit* magazines).

Some food industry professionals believe “organic” has already begun losing its cachet. “Six years ago ‘organic’ was the next big thing in grocery shopping, but the term has begun to lose

its luster,” writes Marian Burros, food writer and columnist. (*New York Times*, January 4, 2006) “Today ‘local’ and ‘sustainable’ are the new culinary buzzwords.”

Packaged Facts believes consumers will continue to look for and demand “uncontaminated” food products, particularly younger consumers, families and individuals concerned about specific health issues. How well organic’s reputation and reliability will continue to resonate with consumers is the million dollar question.

Kosher Label Gains Cachet

Kosher is another label that is benefiting from consumers’ interest in authenticity. According to a recent study by Mintel, 21 percent of all Americans buy kosher. Among those, more than half (55 percent) say they purchase kosher because they believe the products are safer or healthier. “Big companies, small companies, and specialty food companies are making efforts to go kosher, as it seems to have equal ‘bragging rights’ with organic and natural,” says Marcia Molgelonsky, senior research analyst, Mintel International Group. “We’ll see more kosher products related to healthier eating like whole grain products, low salt and low sugar products, i.e., kosher whole wheat bread with low salt...those are what people are looking for.”

According to the study, the number of kosher items grew 14.6 percent between 2002 and 2004. Younger consumers are key drivers behind the growth. Some 70 percent of respondents who said they “buy kosher occasionally” were between the ages of 18 and 34. This segment also led all other age groups in believing that kosher was healthier and safer, suggesting the kosher label resonates particularly well with younger Americans.

Vegetables’ Day in the Sun

Vegetables are getting their day in the sun. Once relegated to supporting roles, vegetables are increasingly in the spotlight, propelled by “new” health attributes, consumers’ interest in “local” and sustainable products, and vegetables’ undeniable association with all things fresh and natural. According to NMI, more than two-thirds of adults say locally grown produce and foods from farms practicing sustainable agriculture are important in their selections.

According to Mintel International Menu Insights, “garden-fresh” is the top term used on menus to create a fresh, premium impression. “Vine-ripened,” “ripe,” and “seasonal,” are the next most popular descriptors.

Adding to the growth in the interest in vegetables is the sheer expansion of varieties available. “With virtually every fresh item, there’s more and more variety,” says John Lord. “Where were grape tomatoes five years ago?” In 2006, Packaged Facts expects we will see more vegetables in starring roles. Following are a few varieties and flavors to watch.

Table 7-4
Top Premium Marketing Claims on Menus – Fruits and Vegetables

Garden-fresh
Vine-ripened
Ripe
Seasonal
Tender
Farm-fresh
Gourmet
Premium
Delicate
Aromatic
Natural
Farmers market
Farm-Grown

Source: Mintel International Menu Insights, August 2005.
Data taken from the top 150 independent restaurants in the U.S.

Back to Roots

Once relegated to the cellar, root vegetables like turnips, parsnips, rutabagas, and beets are getting a new lease on life, thanks to consumers’ interest in authentic, seasonal foods, as well as the vegetables’ earthy flavors. “Where once we wanted uniform, perfect-looking produce, now we want it to look knobby and dirty,” says Edward Lee, chef-owner of 610 Magnolia in Louisville, KY. “It shows that the vegetables were produced on a farm, not in a factory.” (*Restaurants & Institutions*, October 1, 2005)

Flavor & The Menu included root vegetables in their “Top Ten Ways Old Foods are New Again” list in Spring 2005. “... root vegetables are packed with flavor, including natural sugars that benefit from cooking techniques like roasting,” reports the magazine. One particular tuber that may attract increased attention in 2006 is the Jerusalem artichoke. *Bon Appetit* named these “nutty-earthy roots” one of the year’s “Hot 10 Trends” in its January 2006 issue.

Consumers’ preconceived perception of the lowly root could slow down the vegetables’ acceptance. Carole Greenwood, chef and co-owner of Buck’s Fishing & Camping in Washington, DC, refers to rutabagas as “swedes,” as they’re called in Europe, because “you can’t put that word on a menu. It sounds like a punishment.” (*Washington Post*, October 12, 2005) Other chefs are pairing roots with familiar produce to ease the way. “If you add parsnips to mashed potatoes or make a soup of roasted parsnips and pears, it sounds friendly

because it has an ingredient customers are familiar with,” says Heather Terhune, executive chef at Kimpton Hotels & Restaurants’ Atwood Café in Chicago, where her root-vegetable chicken pot pie is a top seller. (*Restaurants & Institutions*, October 1, 2005)

It’s a Small World

Petit and micro specialty greens and produce continue to gain more attention thanks to their subtle, unique flavors and appealing shapes and colors. “Interest in petite produce – fingerling potatoes, baby pineapples and mini bell peppers – will continue to grow,” reports *Flavor & the Menu*, Spring 2005. Although still primarily showcased in high-end restaurants, micro greens and specialty produce are starting to show up more often on mainstream supermarket shelves. For instance, supermarkets such as Harris Teeter are beginning to merchandise seasonal varieties, including seasonal fingerling potatoes, complete with background information and preparation instructions.

As the market expands, new varieties and flavors will continue to debut in white tablecloth restaurants. Chef’s Garden, a specialty grower for high-end chefs in Huron, OH, now offers about 30 petite vegetable varieties, including “extremely flavorful okra, picked when they’re around two inches long – bigger than a microgreen, smaller than a baby green,” according to *Food & Wine*, January 2006.

One baby vegetable to watch may be pea shoots, the delicate leaves and tender shoots of a young pea plant. The Center for Culinary Development has labeled the long-time Asian delicacy a Stage Two ingredient, reporting “pea shoots are just beginning to find popularity on menus in the U.S.” (Culinary Trend Mapping Report, Spring 2005)

Heirloom Heir Apparent – the Tomato

Another expanding trend is the continuing growth in heirloom vegetables. Mintel’s Menu Insights first recorded the appearance of heirloom tomatoes in 2004. Since then, there has been a substantial 64 percent growth of heirloom vegetables and fruits on restaurant menus.

Heirloom and specialty tomatoes are leading the way. *Flavor & the Menu* identifies heirloom tomatoes as a “Top Ten Hot New Ingredient” in its Fall 2005 issue. “It may have started with Roma and grape tomatoes, but the whole farm-to-fork menu movement is now playing favorites with an entire lineup of old-fashioned ‘farm-stand’ tomatoes,” reports the magazine. Heirloom tomatoes are making their way into the mainstream media. For instance, there are 49 recipes on the Food Network website that include the term “heirloom.” All but five of those recipes refer to tomatoes. There’s no doubt the common tomato has moved into gourmet status. For example, *Saveur* magazine highlights the Sun Gold Tomato in its annual

“100” list. The appealing tangerine-colored cherry tomatoes are said to be so sweet and flavorful “they practically taste like candy.” (*Saveur*, February 2006)

According to Mintel, other heirloom vegetables and fruits showing up on menus include squash, potato, plum, lemon, cucumber, and apple. The specialty produce is adding pizzazz to a variety of menu items, including pizza, burgers, bisque, gazpacho soup, and pasta.

Natural Can Mean Nostalgia – Pickles, Relishes

The trend toward natural and nostalgic flavors is also fueling a growing interest in old-fashioned ingredients such as vegetable relishes, pickled ingredients, and specialty pickles. The trend seems to be growing both in restaurants and on retail shelves. For instance, *Food & Wine* highlighted “Pickled Everything” as one of their 2006 Restaurant Trends. Examples of the growing trend to use pickled ingredients in restaurants include pickled shallot and beet sorbets suggested as palate cleansers at the new Eldredge Room in Chatham, MA, and the braised lamb shoulder served with pickled heirloom cranberries and pickled red grapes with terrines at Spire in Boston.

The variety of pickled products is undoubtedly growing in supermarkets. *Saveur* magazine highlighted four pickled items in its most recent “100,” including Pickled Crispy Snappers from Tillen Farms and Talk O’ Texas Crisp Okra Pickles. (*Saveur*, February 2005) Spice manufacturer McCormick chose pickling spice as one of its Top Flavor Trends in 2005. “Pickling spice not only adds characteristic flavor to pickles, it adds complex flavor to braised meats, stews, beans, rice dishes, and more,” says the Hunt Valley, MD-based McCormick.

Sauerkraut – Super and Sexy?

One particular pickled vegetable that may get more attention in 2006 is sauerkraut. A recent study published in the Journal of Agriculture and Food Chemistry reported that fermentation of cabbage (how sauerkraut is made) produces a substance that prevents cancer growth. Suddenly tangy pickled cabbage is showing up in cocktails and diets, and is even being used by such celebrities as Wolfgang Puck and Bruce Willis. Sauerkraut is also packed with vitamins, iron, fiber, and disease fighting cruciferous phytochemicals. Besides being touted as a possible new Super Food, sauerkraut may also get some traction as a “libido booster.” Research conducted in the U.S. found that 90 percent of men were more “active” after eating sauerkraut. (*Specialty Food Magazine*, September 2005)

The Kimchi Cure?

Kimchi, a traditional Korean favorite, is a seasoned variety of sauerkraut that is getting a lot of attention both for its spicy, sharp flavor as well as for its potential as a possible preventative measure for Avian flu. *Men's Health* magazine fed the sauerkraut buzz in its November issue, suggesting Americans put together pandemic kits containing a few cans of sauerkraut, among other non-perishable foods, because -- like kimchi -- it is packed with lactic-acid bacteria "shown by Korean researchers to speed recovery of chickens infected with avian flu."

Fresh-Cut is on a Fast Track

Fresh-cut produce is on the move. Combining both freshness and convenience, there's no doubt this segment will grow strongly in the years ahead. According to the Produce Marketing Association, fresh cut produce sales will reach an estimated \$12 billion by 2005, almost double the slightly more than \$6 billion posted in 2000.

Companies are increasingly appealing to the grab-and-go market with such items as Ready Pac's 8-ounce cups of water-packed carrots and celery sticks, the perfect size to fit into a car's cup holder. Del Monte is also making cups of fresh fruit that are sold in convenience stores. "It's a huge market that keeps growing," says Kirk Teske, Del Monte's central region sales director. "It's just multiplied like crazy, and it'll get bigger," (CNN.com, May 2, 2005)

Manufacturers are also focusing on easy-to-prepare packaging, from microwaveable items to pre-cut vegetables like butternut squash, which are appealing to time-crunched consumers. Green beans, particularly those in microwavable packages, are among the fastest growing segments in this category.

Pre-Cut Salads Gaining Sophistication

Packaged salads, with 62 percent of the retail market, are the most established of the fresh-cut segment. According to ACNielsen and the International Fresh-cut Produce Association, fresh-cut salads are expected to reach sales of \$3 billion in 2005. This is triple the slightly more than \$1 billion recorded in 1997.

There is plenty of room for growth. Packaged salads account for about six percent of total retail produce sales, according to the International Fresh-cut Produce Association. To take advantage of the growth potential, companies are expanding and updating their fresh-cut salads. For instance, Dole's new Fresh Makes salad kits, featuring bags of dry pasta that consumers can cook and prepare in less than 14 minutes, offer consumers convenient and

quick meal options. Ready Pac is offering ready-to-go “bistro” salad bowls, including such flavors as Cobb, Chicken Caesar and Blue Cheese. The salads keep meat and other protein separate from the greens, come with a fork and dressing, and are ready to tuck into a lunch bag.

In 2006, watch for more creative and diverse product offerings in this area, including more ethnic ingredients and more depth in salad greens, including peppery arugula and more tender “baby” varieties.

Table 7-5
Retail Fresh-Cut Market Share by Segment, 2004

Packaged Salads	62%
Fresh-cut Vegetables	31%*
Fresh-cut Fruit	7%

* Carrots are 50% of vegetables

Source: International Fresh-cut Produce Association, Grocery Headquarters, March 2005

Fresh Herbs Continue to Gain Attention

Fresh herbs are another way to both heighten flavors and add a touch of authenticity and naturalness to dishes. “Fresh herbs and spices are going to grow even more because there is a huge difference in flavor,” explains J. Hugh McEvoy (Chef J).

Increasingly, fresh herbs and spices are being highlighted as central ingredients, rather than just subtle accompaniments. Herb-based salads, for example, as often seen in Mediterranean, Middle Eastern, and Asian cuisines, are becoming more common. The familiar parsley is a prime example. Mostly known as a garnish, parsley is now coming into its own. *Flavor & The Menu* included parsley in its “Top Ten Ways Old Foods Are New Again” list, and reports that its “clean, almost grassy, herbal flavor has caught many chefs’ fancy” and it is increasingly used in pestos, sauces, and salads.

Chefs are also going beyond herbs’ familiar leaves to add flavor. For example, Victor Gielisse, DBA, CMC, CHE, associate vice president and dean of culinary, baking and pastry studies, Culinary Institute of America, likes to use cilantro root to add an aromatic, powerful flavor. Traditionally found in Thai cooking, cilantro root has a taste similar to that of the leaves, with an additional nutty flavor. “The flavor it brings is astonishing,” says Gielisse.

Lemongrass continues to grow and thrive, thanks to the ongoing interest in Asian cuisine and the herb’s fresh and light flavor notes. Perfect for consumers’ penchant for natural and light

dishes, lemongrass, with its lemony perfume and hint of citrus, may soon be as common as cilantro.

Chapter 8 Proteins Pack More Power

Packaged Facts Flavor Picks: Premium Meats, Game and Goat, Seafood, Cheese, and Tofu

Low-carb has crashed and burned. Out of the dust has emerged a new focus – protein. Once primarily a background note, protein has evolved as a front-line ingredient that is perceived as important to building energy and strength, along with managing weight. “Protein is becoming a new product category,” explains Laurie Demeritt, president and COO of Bellevue, WA-based The Hartman Group, a consulting and market research firm focused on health and wellness issues. “Consumers are actively seeking out sources for it.”

Food industry professionals believe the trend has long-term implications, as shoppers look for more flavorful and convenient forms of protein, from snacks to center-of-the-plate solutions. “There are a lot of open spaces in this area – lots of room for product development,” says Demeritt. This section takes a look at some of the new and emerging flavor and ingredient trends that may get a boost from the growing attention on protein, including meats, seafood, cheese, and soy.

Meat – From Natural to International

The meat category has come a long way from just “meat and potatoes.” Today’s consumers have many more options, from goat to buffalo, as meat offerings become more and more diverse and flavorful. The following are some of the key trends Packaged Facts expects to grow in 2006.

Premium, Natural, and Organic

One of the strongest trends in the meat sector is the increasing demand for premium products. Myriad marketing claims abound, from what animals eat (corn-fed, grain-fed, vegetarian, grass-fed) to how they are grown (farm-raised, free-range, ranch-raised, pond-raised) to ethical considerations (line-caught, dolphin-safe, hormone-free, antibiotic-free). Thanks to consumers’ concerns about Mad Cow Disease and the long-term affects of hormones and antibiotics, these sorts of labels will undoubtedly increase.

Consumers' desire for premium meat products is reflected in the skyrocketing growth of organic meats, which jumped nearly 78 percent during 2003. According to the Organic Trade Association's *2004 Manufacturers Survey*, sales reached \$75 million, up from \$42 million. There is plenty of room for growth as the meat, poultry and fish segment represents a very small portion of overall organic food sales – just one percent. Poultry makes up the largest segment of organic meat sales with a 62 percent share of the market, followed by sausage and deli meat with a 21 percent share, beef at 13 percent and pork at 4 percent.

In 2006, we'll see more specialty natural and premium meats. The trend is already becoming more mainstream. Arby's and Panera Bread, for instance, have begun testing all-natural chicken. And Boston Market has added a USDA top sirloin to its menu.

One of the fastest growing natural market claims is "grass-fed." Four years ago, there were about 40 U.S. grass-fed beef producers selling to the public; now there are over 1,000. *Food & Wine* believes grass-fed will be a key trend; the magazine recently named grass-fed beef a top ingredient in its *Trend Report 2006*.

Building on the success of Korobuta pork and Niman Ranch beef, keep watch for more grass-fed and grass-finished Uruguayan beef in 2006, along with heritage breed meats from rare and endangered breeds.

Table 8-1
Top Premium Meat, Fish, Poultry Marketing Claims on Menus

USDA Choice
Premium
Grain-fed
Farm-raised
Free-range
Antibiotic-free
Hormone-free
Natural
Dolphin-safe
Vegetarian-fed
Ranch-raised
Grass-fed
Pond-raised
Line-Caught

Source: Mintel International Menu Insights, August 2005; Data taken from the top 350 chain and top independent restaurants in the United States

Table 8-2
Organic Meat Market Trends

Category	Percentage of Organic Meat Market	Total 2003 Sales
Poultry	62%	\$46 million
Sausage and Deli Meat	21%	\$16 million
Beef	13%	\$10 million
Pork	4%	\$3 million

Source: Organic Trade Association's 2004 Manufacturer Survey

No Kidding, More Goat

As the country's international population has grown, so has the demand for a greater diversity of meats. "There will be a continued evolution into more regional flavors and into different countries," says Karen Boillot, director of retail marketing, National Pork Board, Des Moines, IA.

One of the fastest growing areas is goat meat, a particularly popular flavor among the Latin American, Caribbean and Muslim communities. Curried goat and *birria* stew (a Mexican stew usually served with lime, onions, and cilantro) have become fixtures on the menus in California. Today, the interest in goat meat is crossing over into mainstream America as more supermarkets and high-end restaurants begin to offer goat items.

Since 1997, the number of people raising goats has jumped 19.5 percent, according to the U.S. Department of Agriculture. Demand for goat meat will increase 40 percent between 2003 and 2007 when Americans are expected to be consuming 72.2 million pounds of goat meat annually, according to Texas A&M. The versatile meat is being used in a variety of settings, from the hundreds of *birrierias del chivo* in East Los Angeles that serve tortillas stuffed with slowly roasted goat to more upscale restaurants such as Maestro in Tysons Corner, VA, whose Italian-born chef serves braised goat legs with foie gras tucked between the tender slices. Because the interest in goat bridges several cultural divides, look for more growth in the general marketplace.

Buffalo Stampeding Onto Menus

Bon Appetit highlights game meats such as venison, as one of the top 10 hot trends in its January 2006 issue. Buffalo, in particular, is stamped its way onto more restaurant menus. According to Mintel's Menu Insights, the incidence of buffalo meat on menus has jumped 24 percent since June 2004. Buffalo is said to have a sweeter, richer flavor than beef and is also low in fat and high in protein – a winning combination. Ted's Montana Grill, which offers buffalo as its signature protein, is helping mainstream the trend. Developed by Ted Turner, the concept now operates in 16 states.

Buffalo milk cheese is also gaining more attention, and is showing up in a variety of restaurants, primarily in caprese salads, margherita pizza, cheese tarts, bruschetta, paired with prosciutto or mixed with pasta.

Specialty Value Cuts Winning Favor

Beef industry research has developed several new tender cuts of beef that were historically made into ground beef. One of these cuts, the flat iron steak, is beginning to get a lot of attention. “It’s just starting,” says Joan Lang. “It’s another less expensive option that absorbs flavor well.” The flat iron steak comes from the top shoulder of the chuck and is tender, flavorful, and similar to a strip or loin steak. First available only in restaurants, the steak is now being marketed in supermarkets around the country, growing from about 300 retail outlets in 2003 to nearly 5,000 in 2005, according to the National Cattlemen’s Beef Association (NCBA) based in Centennial, CO.

Still mostly marketed by steak houses, the flat iron is beginning to move to more casual dining restaurants. For instance, TGI Friday’s added “an unbelievably, tender, flavorful 8-oz flat iron steak, hand-cut especially for Friday’s” to its menu in 2005. The Center for Culinary Development has named flat-iron steak a Stage 2 ingredient and believes it has a lot of potential. “Once word gets out about the taste and value of flat-iron steak, it may become a new American favorite,” reports the *Culinary Trend Mapping Report*, Fall ’05. The value cut is already selling briskly, reaching 47 million pounds in 2005, which surpassed the popular porterhouse in foodservice volume, according to NCBA.

On the horizon is the Petite Tender, also known as the Shoulder Tender, another value-oriented, versatile product. “Think of it as the beef version of the pork tenderloin,” suggests *Grocery Headquarters* (August 2005). Petite Tender has been available to the foodservice and restaurant channels for the last three years and is now making its way into the retail meat case. “Typically, food trends emerge in foodservice and transition to retail, so we expect the popularity of the Petite Tender to carry over in the meat case,” says Jane Gibson, director of foodservice marketing for NCBA.

Bacon Still Sizzling

Consumers are increasingly intrigued by smoked and cured meats. In 2006, bacon will particularly benefit from this trend and move far beyond its simple breakfast roots. “A search for better bacon is underway in this country, reminiscent of the one for better beer, and with a similar lure of the forbidden,” reports *The Atlantic Monthly*. (November 2005)

Bacon's key flavors, smoke and salt, mesh well with some of today's top trends and are helping fuel its growth. *Bon Appetit* named bacon its top ingredient for 2006 and *Flavor & the Menu* mentioned it in its "Top Ten Ways Old Foods Are New Again" list. "Bacon will become the chocolate of the new millennium," says Dan Philips, founder of the Bacon of the Month Club, www.gratefulplate.com, who offers dozens of tasty artisan bacons on his website, from Nadine's Bayou Brand Bacon to several smoked categories, including hickory, applewood, cob, oak, and alderwood. Packaged Facts expects bacon will really sizzle in 2006 as both manufacturers and chefs add new twists to this familiar ingredient.

A New Wave of Seafood

Seafood, with its high-nutrient profile, extensive variety of flavors and species, and myriad preparation techniques, is making a big wave. *Bon Appetit* calls fish "the new steak" and proclaims that "seafood rules." According to Food Beat, a menu and trends tracking source that analyzes the top 200 restaurant chains (www.foodbeat.net), fish entrees have risen 12 percent in the past three years and shellfish items have grown 14 percent. Nearly one in four of the 200 restaurant chains tracked added a seafood entrée during the first half of 2005. From supermarket shelves to corner cafes, no doubt there will be a rising flood of seafood in 2006.

Tilapia Today, Black Cod Tomorrow

Tilapia, which has a firm flaky texture and a mild, sweet flavor, may be the fish of the moment. Over the past two years, mentions of tilapia on chain menus have doubled from 13 to 26, as reported by Food Beat. The versatile fish seems to easily cross borders and is being paired with numerous flavor profiles from Cajun to Santa Fe and Mediterranean to Mexican. Although most often found headlining upscale center-of-the-plate dishes, tilapia is also being featured in more casual items, including tacos and burritos at Houlihan's and fish and chips at Dave and Buster's. Stable domestic production and imports of tilapia will help encourage growth. Some farm-raised options even have their own distinct flavor. At Napa Valley Grille in Paramus, NJ, a type of farm-raised tilapia, also called a sunfish, has a nutty, buttery flavor due to its diet that includes macadamia nut husks.

Black cod (sometimes known as sablefish) may be the next new fish on the block. The tender, versatile fish offers a lot of potential. Food Watch has identified black cod as an emerging ingredient, as has *Food & The Menu*.

Shrimp, Crab and Octopus

Already an established winner, shrimp will also see more growth in 2006. According to *Restaurants & Institutions 2005 Menu Census*, shrimp is found on 81 percent of commercial restaurant menus and 71 percent of noncommercial operators. Kraft Foods recently named shrimp one of its Top Five Flavors for 2006.

Crab is also getting a lot of attention. According to *Restaurants & Institution's 2005 Menu Census*, more than half of commercial restaurants serve crab, along with four out of 10 noncommercial operations. Crab cakes are particularly gaining strength. Mintel's Menu Insights reports that crab cake appetizers jumped eight percent in 2005. Restaurants are creating new flavors with which to pair the traditional favorite, including a sweet and spicy orange-chili reduction and apple-horseradish remoulade at Anzu in San Francisco and a Mango Pineapple Salsa served at Pappadeux in Houston.

Octopus, a perfect ingredient for today's interest in small plates, may be interesting to watch in 2006. *Flavor & The Menu* identified it as one of its "Top Ten Hot New Ingredients" in its Fall 2005 issue. "It happened with calamari; now here's another dense, chewy, daring seafood product to love," predicts the magazine.

Raw Strength

Lightly seared or raw seafood is another expanding area, as international favorites ceviche and sushi become more and more mainstream. "Sushi is probably pretty close to being this generation's tacos," says Eleanor Hanson, president of Food Watch, a River Forest, IL-based company that analyzes culinary trends. "Sushi is influencing entrees everywhere," agrees Maria Caranfa, who collects menu statistics for Mintel's Menu Insights. (*Prepared Foods*, November 2005)

Crudo, which means crude or raw seafood, may be the next evolution of this trend. An Italian form of sashimi, crudo is generally slices of silky raw fish embellished with olive oil, citrus, and sometimes finely chopped vegetables. Crudo is beginning to attract more attention in high-end restaurants across the country and promises to grow further in the year ahead. "In a town obsessed with sushi, crudo may be the next big thing," reports the *Los Angeles Times*, March 9, 2005. "It involves raw fish. It's light on the calories. It's almost pure protein. And it's very sensual."

Table 8-3
Most Commonly Menued Fish and Shellfish Varieties

Varieties	Commercial	Noncommercial
1. Shrimp	81%	71%
2. Fin fish	55%	52%
3. Crab	56%	39%
4. Scallops	52%	29%
5. Clams	45%	29%
6. Lobster	40%	18%
7. Oysters	36%	14%
8. Calamari/squid	36%	14%
9. Mussels	28%	15%

Source: Restaurants & Institutions 2005 Menu Census, September 2005

Just Say Cheese

Americans' love affair with cheese is certain to continue. The familiar protein has become a powerful flavor ambassador and courier, easily crossing international borders and meal periods. The movement to artisan, farmstead, ethnic, and organic cheeses continues to accelerate. According to the National Association for the Specialty Food Trade, sales of specialty cheese reached \$905 million in 2004, up 29.1 percent from 2002, excluding sales of Wal-Mart. The growth is expected to continue. USDA projects Americans will eat 34 pounds of cheese per person by 2014, up from 18 in 1980 and 30 in 2000.

According to menu tracker, Food Beat, cheese is among the fastest growing ingredients on menus. Cheese accounted for four out of the top 20 performers in 2004, according to Food Beat's 3rd Quarter Newsletter 2005. Gorgonzola, with a 35 percent increase, was the top performer, followed by feta (25 percent), ricotta (23 percent), and asiago (16 percent).

Cheese also tops the list of key sandwich ingredients. According to Food Beat's 2nd Quarter Newsletter 2005, 57 percent of non-burger sandwiches include cheese. Swiss was the most popular flavor, followed by cheddar, provolone, and mozzarella.

In the supermarket, cheddar remains the most popular cheese ingredient in new products. According to Productscan's Flavor and Fragrance Report, 149 new products included cheddar in 2005. Interestingly, this was about a 16 percent decline from 2004, which may reflect consumers' growing interest in more gourmet and international flavors. For instance, although still a relatively small market, the number of asiago-flavored products jumped from 16 in 2004 to 22 in 2005.

Burrata on International Horizon

International cheeses are getting a lot of attention, particularly Spanish and Italian varieties. One cheese to watch is burrata, a decadent creamy mozzarella with a hint of sweetness, originally from Southern Italy. Both Food Watch and the Center for Culinary Development have identified it as an “emerging” ingredient. Other forms of fresh mozzarella, from buffalo milk to specialty artisan flavors, are also coming on strong. Burrata is most often served in caprese salads or pasta or eaten as an appetizer with crusty bread. Currently on fine-dining menus and in specialty stores, burrata may move to mainstream channels in 2006. Another Italian cheese on the horizon is taleggio, a semisoft variety made from cow’s milk that is excellent with salads or served with fruit as a dessert.

Spanish cheeses remain hot as well. Now that manchego has become more familiar, mahon (a very versatile semi-soft cow’s milk cheese), cabrales (a fragrant blue cheese), and garrotxa (an unpasteurized goat’s milk cheese with a sweet, nutty flavor) may be the next emerging flavors.

Chocolate and Curds Coming Up

An interesting pairing – chocolate and cheese – is beginning to show up in such diverse places as high-end chocolate shops and Asian supermarkets. For instance, Vosges Haut Chocolat, with boutiques in New York, Chicago, and Las Vegas, includes a Rooster truffle in its Italian Collection that features taleggio cheese and organic walnuts enrobed in bittersweet dark chocolate.

On the other side of the world, Fonterra, a New Zealand dairy co-operative, reports its Chesdale chocolate cheese slices has gobbled up 10 percent of Taiwan’s entire cheese market in its first six months on the market. “Chesdale chocolate cheese slices are favored by parents of young children as they offer protein and calcium with less sugar than other similar products in the spreads category,” says Achyut Reddy, manager of Fonterra Brands Singapore. (*Food Navigator*, December 16, 2005) Next on the company’s drawing board – chocolate cheese pancakes.

Cheese curds, those squeaky, fresh nuggets long popular in Wisconsin, “will (slowly) sweep the country,” predicts the Wisconsin Milk Marketing Board in its 2006 Food Futures Forecast. Looking through its “cheese ball,” the organization notes that curds are increasingly finding fans in other areas of the country, particularly as improved packaging will protect their freshness – and squeak.

Table 8-4
New Product Introductions: Cheese

Cheese	# New Products Introduced 2005	# New Products Introduced 2004
Cheddar	149	178
Mozzarella	58	54
Blue Cheese	32	30
Asiago	22	16
Monterey Jack	20	12
Feta	17	16
Gorgonzola	7	6
Muenster	5	3
Havarti	4	1
Fontina	3	3
Gruyere	2	0
Manchego	2	1
Gouda	2	6

Source: Productscan Flavor and Fragrance Reports; Packaged Facts

Soy – Tofu and Edamame Gain Attention

Soy, rich in protein but lacking in the fat and cholesterol of meat and dairy products, is undoubtedly one of the healthiest protein sources. In 2004, total U.S. soyfoods sales rose 2.1 percent to hit \$4 billion, according to *Soyfoods: The U.S. Market 2005*, a recent study produced by Bar Harbor, ME-based Soyatech and SPINS Inc. of San Francisco, CA. Although the segment has grown steadily, the increase is the slowest year-over-year growth since the early 1980s when soyfoods first started taking off. “Shoppers are definitely looking for the next big thing in soyfoods,” says Peter Golbitz, president of Soyatech.

A Second Wind for Tofu

Some industry professionals think tofu may help lead the way. *Bon Appetit* has named tofu as the “Comeback of the Year: Its talent for taking on flavors... shows that the Asian staple once again gets a place at the table.” (*Bon Appetit*, January 2006.) With \$261 million in sales in 2004, tofu accounts for a fairly small percentage of the overall soyfoods market. But new products such as Tofettes from Soya Foods (Dorchester, MA), may tempt more Americans to take advantage of tofu’s healthy attributes. The specially pressed small pieces of fried tofu are available in barbeque, teriyaki, and Jamaican jerk. The result is a tofu that, according to Peter Golbitz, president of Soyatech Inc. is “unique in its textures and in its ability to take on other flavors.” (*Boston Globe*, January 2, 2006) The company has also developed a process to roll tofu into thin sheets – possibly to make the next new product – tofu pasta.

Artisanal tofu may also gain more attention. To tempt younger diners in Japan, for instance, tofu makers are adding new flavors such as black sesame tofu and grass green avocado to

traditional tofu blocks. Last fall *The New Yorker* magazine detailed the art of making specialty tofus in Japan and described how *Zaru dofu*, “a melting, ethereal confection with a mousseliike consistency which is eaten with a spoon,” is served in some of Tokyo’s best restaurants and flown to New York City twice a week. (*The New Yorker*, September 5, 2005)

Edamame, the Fresh Soy

The freshest soy product, edamame, is poised for continued growth in 2006. Becoming more widely known, edamame can be eaten as a snack, an appetizer, or in soups and salads. The Food Network, which lists 26 recipes for edamame, includes such dishes as edamame-crusted ahi tuna and edamame and scallion slaw. The Center for Culinary Development has named edamame a Stage 2 ingredient in its *Culinary Trend Mapping Report*. Noting that the edamame’s retail interest is strong, the report projects that “Edamame’s popularity is expected to increase as more and more consumers are willing to try it.” (*Culinary Trend Mapping Report*, Spring 2005)

Chapter 9 Health Claims and Nutritional Ingredients

Packaged Facts Flavor Picks: Whole Grains, Antioxidants, Omega-3, No-Gluten, Glycemic Index

In 2006, a myriad of health claims and nutritional ingredients will compete for consumers' attention – and their wallets. The relationship between health and food has become big business. For instance, Euromonitor International reports that global sales of functional foods and beverages reached \$68 billion in 2004, a 20 percent jump since 2002.

The road ahead may not be entirely smooth. Consumer preferences and behavior will continue to evolve as the health and wellness market expands and changes. Following are some of the key challenges and consumer trends that will affect flavor and ingredient trends in the years to come.

Taste is critical. “The market for health-directed products is still strong,” says David Kimmel, a creative conceptual developer and designer of food and beverage products based outside New York City. “But taste has been missing in many of the new formulations. Taste is a sensual gratification. If you overlook the taste, you miss the target.” Consumers are even less likely to sacrifice taste to eat healthy than ever before. According to HealthFocus International, 43 percent of consumers surveyed in 2004 rarely/never give up good taste for health benefits. This is up from 33 percent reported in 1990. The bottom line for 2006, no matter how healthy a product is, if it doesn't taste good, no one will buy it twice.

Confusion and skepticism. With the growing number of health claims, nutritional ingredients, and scientific “breakthroughs,” consumers are becoming more confused, and often more skeptical, about products' health claims. Two recent reports from Datamonitor and ACNielsen found that shoppers did not purchase functional foods because they did not believe in the health benefits. For instance, the Food and Drug Administration's (FDA) Unqualified Health Claims provide the positive news about a health benefit provided by a certain ingredient, but they also indicate the claim hasn't yet been scientifically proved, which can be confusing. Products that fall under this umbrella include tomatoes, nuts, green tea, olive oil, and sources of omega-3 fatty acids like salmon. “Consumers don't buy things

with a ‘maybe’ message,” says Linda Eatherton, executive vice president and global food and nutrition practice director for Ketchum. (*The Boston Globe*, November 30, 2005)

Dietary schizophrenia. Although many Americans profess an interest in losing weight or eating more nutritionally, many do not actually follow through. For instance, six out of 10 (59 percent) shoppers said they are familiar with the new food pyramid, but do not follow it, according to PARADE magazine’s *What America Eats*, 2005 survey. Only one percent said they followed the pyramid completely. “American consumers have a good understanding of what constitutes ‘healthy eating’ yet there is a disconnect between what they know and believe and what they actually do in terms of eating,” says Harvey Chimoff, marketing director for international ingredient firm, Tate & Lyle. (*Nutra Ingredients*, December 23, 2005)

Consumers are self-prescribing and looking for customization. Consumers are increasingly looking for more control over their dietary destinies and choosing their own combination of foods to address or prevent medical concerns. At the same time, shoppers are increasingly looking for specific silver bullets that can “fix” particular ailments like diabetes or arthritis. “... the early part of the 21st century is shaping up as a period of customized health and wellness products,” reports the *VNU Executive Perspective* (August 2005) The demand for customized food products will undoubtedly grow as the boomers continue to age. Faith Popcorn, a trend expert who spoke at the Future of Food conference in Washington, DC, in December 2005, predicts “the food industry will increasingly collaborate with healthcare providers to integrate food with medicine and preventative care. Imagine,” challenges Popcorn, “doctors prescribing Lays potato chips infused with birth control, calcium, Vitamin C and Echinacea.”

These divergent trends present a challenge, as well as the opportunity, for food industry professionals in the years ahead. The following are some of the health-related hot buttons that may have the most impact on ingredient and flavor trends in 2006.

Fat Continues to Be Hot Button

Fat continues to be the top hot button for consumers. According to a recent ACNielsen Online Consumer Confidence Study, 56 percent of Americans regularly check food labeling for fat; forty percent check for trans fat. And, four out of 10 shoppers surveyed by PARADE magazine say that a reduced fat claim would influence their decision to buy a product. With trans fat labels required by 2006, fat may be a key competitive issue in 2006, but will most

likely even out in time as more companies introduce trans-fat-free items. The number of new products introduced in 2005 with reduced fat (including saturated fat and trans fats) totaled 1,176, according to Productscan's Online Package Tags or Claims survey. This is up from 911 in 2004 and 774 in 2003.

Whole Grain, High Fiber Get Top Attention in 2006

The marketing claim that may gain the most attention in 2006 is whole grain. In 2005, the Food Guide Pyramid recommended, for the first time, that at least half of the grains eaten each day be whole grains. Currently Americans only consume 15 grams of fiber a day, about half of the 25 to 30 grams recommended by the Dietary Guidelines of America.

The challenge may be to get the message across to consumers. According to a survey commissioned by the Whole Grains Council and Unilever-owned brand Knorr-Lipton Sides, some 68 percent of adults in the US are unaware that they should consume at least three daily servings of whole grains, the daily intake recommended by the U.S. Department of Agriculture. The survey also revealed that 47 percent are seeking easier and tastier ways to incorporate whole grain foods into their diet. But yet, some 22 percent were unable to name any of the benefits of eating whole grains.

Adding to the confusion is the fact that FDA has not developed standard definitions for the whole grain content of foods. The Whole Grain Council has developed a system of rated stamps, however, that appears on 400 products.

Meanwhile, more consumers are looking for fiber and whole grains on labels. According to the PARADE magazine's *What America Eats*, 2005 survey, one-third of shoppers say a 100 percent whole grain label would influence their purchase decisions. ACNielsen's Online Consumer Confidence Study reveals that 28 percent of Americans regularly check food labeling for fiber.

The food industry is doing its best to provide more high-fiber and whole wheat choices. More than 650 new UPCs were introduced for whole-grain foods in 2004, twice as many as were brought to market in 2003. Whole grains are showing up in such products as soup, pretzels, chips, crackers, cereal, bread, cupcakes, and even pet food.

New products range from Tropicana's Pure Premium Essentials with Fiber, which has three grams of added fiber in an eight-ounce serving, to a whole wheat version of Wonder Bread that is intended to look, taste, and feel just like the familiar original white bread.

Ultragrain, a new whiter wheat flour produced by ConAgra, is already in several products, including Sara Lee's new Soft and Smooth Made with Whole Grain White Bread and a new pizza called The Max, made of 50 percent refined white wheat flour and 50 percent Ultragrain, which was introduced in more than 2,000 schools last fall.

To successfully market whole grain products, HealthFocus International recommends focusing on such benefits as energy management, weight management and digestive health in popular foods such as bread, cereal, and pasta.

Antioxidants and Super Foods

"Antioxidant" has become the term of the day. Foods labeled as antioxidant rich, from bottled tea to frozen berries, have become a \$526 million industry. "It's clear that regardless of whether or not people understand what 'rich in antioxidants' means, it is certainly a logo or a stamp that says 'Buy me! I'm going to help you live forever,'" says Phil Lempert, food industry analyst. (*Chicago Sun-Times*, December 12, 2005) Although there are some questions about what antioxidants can and cannot do for our health, the antioxidant market has exploded – particularly among foods.

In particular, ready-to-eat cereals, with a 17.9 percent gain in sales between 2004 and 2005, and tea bags, with a 193.5 percent increase, are quickly catching consumers' attention. In comparison, sales of vitamins, traditionally the key market for antioxidants, dropped 14.8 percent, according to ACNielsen Label Trends (Total U.S. excluding Wal-Mart, for the 52 weeks ending 11/5/05)

Fresh foods and ingredients are also getting a lot of attention for being "super foods." For instance, physician Stephen Pratt has published two books about super foods that highlight ingredients he believes can specifically affect health and longevity: beans, blueberries, broccoli, oats, oranges, pumpkin, salmon, soy, spinach, tea, tomatoes, turkey, walnuts, and yogurt. Recent nutrient-packed powerhouse additions include: apples, cinnamon, kiwi, herbs and spices, honey, dark chocolate, and pomegranate. According to USDA, the top 10 best sources of food antioxidants are small red beans, wild blueberries, red kidney beans, pinto beans, cultivated blueberries, cranberries, artichokes, blackberries, prunes, and raspberries. And, even the National Cancer Institute has gotten into the business of researching spices and ingredients, finding that anise, caraway, coriander, cumin, fennel, oregano, rosemary, sage, tarragon, thyme, and turmeric have anti-cancer properties.

Although the research is still out on super foods, there is no doubt the concept of super foods as magic bullets has caught on. For instance, natural foods retailer Wild Oats offers a 48-page

booklet to help shoppers incorporate super foods into their diet along with meal plans, recipes, and grocery shopping lists. Dole Food Company has developed a list of Dole Superfoods broken into eight health-related categories such as Superfood for your Skin (butternut squash, cantaloupe, and collards), Superfood for your Joints (cherries and pineapples). The company has developed a special SuperFoods logo to promote the concept on appropriate products.

Whether super foods will solve all our health issues, there is no doubt that consumers are increasingly interested in seeking out natural solutions to health-related concerns. “People are getting nervous about pharmaceuticals,” says Faith Popcorn, who runs BrainReserve, a marketing company. “If it’s food, people trust it more.” (*New York Times*, December 28, 2005)

Omega-3 Fatty Acids Gaining Interest

Research has shown that omega-3 helps in the prevention and treatment of cardiovascular disease, and is vital to normal growth and development. “Omega-3 fatty acids, particularly DHA and EPA found in fish oil, soon are likely to be seen as one of the biggest nutrients for fortification of food products in the U.S., second only to calcium,” reports *Prepared Foods*, October 2005. The average American consumer consumes approximately 130 mg EPA and DHA per day, when most scientists recommend between 500 mg and 1,000 mg per day.

For years the industry has been challenged by flavor and odor issues when supplementing foods with fish oil. Today that is changing as new advances result in such products as encapsulated forms of the ingredient, which can eliminate the flavor and odor. Other new developments are on the horizon. For instance, a Toronto-based firm, Salba Research & Development, claims to have developed the world’s richest whole-food source of omega-3 from a variety of mint called Chia that was used by the Aztecs for its beneficial qualities 500 years ago. The first food product to include Chia is Taste Wave, a 95 percent organic corn chip, produced by Nutraceutical Corporation in Denver.

The number of omega-3 products is growing steadily. According to Productscan’s online database of package tags or claims, the number of new products with high omega-3 more than doubled from 44 in 2003 to 108 in 2005.

Recent products include the launch of Arnold Smart & Healthy bread by George Weston Bakeries Inc., Greenwich, CT. New York-based Wegmans Food Markets has also introduced a new bread variety that is enriched with Omega-3. In 2006, we’ll see more omega-3 in dairy products, including cheese, milk, yogurt and margarine.

The top three food sources of omega-3 fatty acids are salmon (83.6% RDA), flax seeds (140.4% RDA), and walnuts (90.8%). The government recommends eating fatty fish such as mackerel, lake trout, herring, sardines, albacore and tuna. Concerns about mercury levels, however, are adding confusion and caution to the consumption of some seafood.

Omega-3 is projected to be a hot growth area in 2006. Although many items target children at this point, watch for more products targeted toward the aging population.

Probiotics On the Horizon

The market for probiotic foods, which contain nutrients that are required by bacteria for growth and metabolism, has been healthy in Europe for several years. The U.S. is beginning to catch on. A report from the Business Communication Company in May 2005 said the U.S. probiotic ingredients, supplements and foods market had risen 19 percent per year over the last two years, and forecast sales would reach \$764 million in 2005. Kefirs, yogurts, and cultured drinks make up around 65 percent of this total. Although growth is expected to slow over the next five years, an annual rate of 7.1 percent would put probiotic sales at \$1.1 billion in 2010.

Group Danone is introducing its established probiotic yogurt brand, Activia, in the U.S. in early 2006. According to the company, Activia is the first and only probiotic yogurt clinically proven to help naturally regulate the digestive system in two weeks, when eaten daily as part of a balanced diet. The product will be sold across the country in food retailers' yogurt sections and will come in six flavors: Strawberry, Vanilla, Blueberry, Peach, Prune, and Mixed Berry.

Some believe an even faster growing trend is the sale of foods that are prebotics, which are foods that contain nutrients that are required by bacteria for growth and metabolism.

The number of products with probiotics jumped from only two in 2004 to 10 in 2005, according to Productscan. Some of the foods and nutritional products that are being supplemented with prebiotic or probiotic microbes include vitamins and medications, yogurt, snack bars, snack mixes and some snack spreads, desserts, milk products for adults and infants, cheeses, and meat products.

Gluten-free Growing

Gluten will most likely be another hot button in 2006. Up to three million Americans may have celiac disease, a rare intestinal disorder triggered by gluten. As a result, "no gluten" easily remains the most pervasive among the allergen labels. According to Productscan, there

were 241 new products labeled “no gluten” in 2005, up from 159 in 2003. This compares to 152 for “no dairy” in 2005, 131 for “no lactose,” and 81 for “no lactose.” According to recent SPINS data, gluten-free product sales are growing at 14.6 percent and make up a \$600 million market.

Sugar Not So Sweet

Sugar is increasingly on consumers’ radar. “Sugar is the current demonized ingredient, says Laurie Demeritt, president and COO of Bellevue, WA-based The Hartman Group, a consulting and market research firm focused on health and wellness issues. “Most of the time when consumers look at labels they are only looking for one or two things. One of those things right now is sugar.” With the number of diabetics growing and more parents interested in sugar levels for children, sugar is under fire. According to ACNielsen’s Online Consumer Confidence Study, sugar is the third most checked package ingredient, with 48 percent of Americans regularly looking for this on labels. PARADE magazine points out that about a quarter of shoppers are influenced by sugar-related package claims. The number of no- or low-sugar product introductions is steadily rising, from 359 in 2004 to 545 in 2005.

In the years ahead, consumers will become more saavy about sugar and sweeteners. Products like Splenda will most likely become more prevalent. “Splenda as an ingredient that has almost created its own category,” says Demeritt. “People don’t want to worry about artificial sweeteners.”

Glycemic Index –Will it Catch On?

The glycemic index is a term we will see more of in 2006, but whether it will catch on with mainstream consumers is very much up in the air. The glycemic index (GI) is a ranking of carbohydrates on a scale of 0 to 100 according to the extent to which they raise blood sugar levels after eating. Foods with a high GI are those that are rapidly absorbed and result in marked fluctuations in blood sugar levels. Low-GI foods, due to their slow digestion and absorption, produce gradual rises in blood sugar and insulin levels, and have proven benefits for health. Low-GI diets have been shown to have benefits for diabetes, heart disease, weight management.

The first GI products were introduced in Australia in the early 1990s. In the U.S., according to Productscan’s Online Package Tags or Claims survey, only five new products were tagged “low-glycemic” in 2003. This jumped to 28 in 2004 and 46 in 2005. Sales are growing rapidly. According to ACNielsen LabelTrends, August 2005, sales of low-glycemic foods and beverages reached \$7.3 million in 2005, more than double the \$3.09 million reported in 2004.

What's ahead? Currently only seven percent of U.S. customers and 11 percent of international shoppers look for a product's glycemic index, according to the ACNielsen Online Consumer Confidence Survey of 38 markets around the world. Some industry professionals believe this will rapidly change as interest grows. "Phil Lempert, food industry analyst, for instance, says that the "Glycemic Index is the next big thing." Others such as Lynn Dornblaser, director, custom solutions group, Mintel International, Chicago, suggests that there may be "significant hurdles for wide acceptance in the U.S." because "the concept can be difficult to understand, and it sometimes feels as if an advanced degree in nutrition is required to understand the concept." (*FoodTechnology*, November 2005) Dornblaser suggests focusing on low GI numbers may be an effective marketing approach.

Table 9-1
New Product Introductions Package Tags or Claims

Claim	2005	2004	2003
No/Low/ Fat	645	617	656
No/Low Trans Fat	456	238	64
No/Low Saturated Fat	75	56	54
No/Low Sugar	545	359	395
No/Low Calorie	475	428	264
No/Low Carb	398	983	209
No/Low Cholesterol	276	279	285
No/Low Salt or Sodium	225	189	176
High Fiber	269	258	163
High Calcium	229	232	226
High Antioxidants	176	48	6
High Omega-3	108	74	44
No Gluten	241	176	159
No Dairy	152	130	139
No Wheat	131	82	71
No Lactose	81	72	65
No Allergy	11	14	15

Source: Productscan Package Tags or Claims; Packaged Facts

Table 9-2
Which Features Would Influence Your Decision to Buy a Brand at the Supermarket?

Feature	Percentage
Reduced fat	40%
100% Whole Grain	33%
Low Calorie	29%
High Fiber	29%
Vitamin Fortified	27%
Sugar Free/No Sugar Added	25%
Low Sugar	24%
No Trans-fats	22%
High Protein	22%
Reduced/Low Carbohydrates	21%
No Artificial Sweeteners	18%
Artificial Sweeteners	5%

Source: PARADE magazine, What America Eats, 2005

Table 9-3
Percentage of Respondents Who Say They “Regularly” Check Food Labels

Labels	U.S. Respondents	Global Respondents
Fat	56%	49%
Calories	50%	43%
Sugar	48%	42%
Salt/sodium	42%	26%
Trans fat	40%	24%
Carbohydrates	40%	28%
Protein	30%	28%
Fiber	28%	27%
Additives	25%	36%
Preservatives	24%	40%
Coloring	16%	36%
Gluten	7%	11%
Glycemic Index	7%	11%

Source: ACNielsen Online Consumer Confidence Study

Chapter 10 Wellness Winners

Packaged Facts Flavor Picks: Bread, Specialty Grains, Yogurt, Tea, and the Color Black?

Thanks to the far-reaching wellness emphasis in the food industry, the shifting tides of health information and research, and the new Dietary Guidelines, several flavors and ingredients may get an additional boost in 2006. Most of these offer health benefits as well as other pluses, which further cements their adaptability and future potential.

The Carb Comeback

Carbs are back – particularly complex carbohydrates like grains. “Expect the final death-knell of low-carb diets this year, in favor of whole-grain bread, pastas, and even – gasp – potatoes,” says Epicurious, a culinary website that includes *Bon Appetit* and *Gourmet*, in its Predictions for 2006.

This year will bring a slew of new products that combine the familiar comfort of carbs, with a punch of added health benefits. For instance, Barilla Plus, which includes six forms of macaroni with multi-grains, fiber, protein and omega-3s, offers “plenty to entice carbohydrate-starved consumers to consider pasta again.” (*Food Processing*, December 2005) Created by Barilla America, Inc., the Bannockburn, IL-division of Italy’s Barilla group, the pasta’s packaging compares the product’s nutritional value, on the basis of protein, fat, fiber, and omega-3, to other products.

Bread is Rising and Shedding White Bread Image

A fast-growing “bridge” between the old and new carb world is white whole wheat that creates whole grain bread that looks, smells, and feels like white bread. For instance, ConAgra Foods, Inc., Minneapolis, MN, has developed a whole wheat flour called Ultragrain that is being used in Sara Lee’s Soft and Smooth line, which is white bread made with a blend of whole-grain flour. “Sara Lee Soft & Smooth can help many consumers make the transition to whole grains without shocking their taste expectations,” explains Frances Coletta, director of product nutrition at Sara Lee Food & Beverage. The formula is working well. Since its

launch in July 2005, Sara Lee's Whole Grain White bread has become a bestseller. Sara Lee is building on its success and has developed three new varieties of breakfast breads and two new varieties of English muffins. The company has declared 2006 "the year whole grain goes mainstream."

Although white bread products still reign in terms of sales volume, wheat bread is beginning to heat up. According to supermarket sales data compiled by Information Resources, Inc., for the 52 weeks ended Oct. 30, 2005, dollar sales of wheat bread, buns, bagels and English muffins increased by 7.8 percent, while sales of white bread, buns, bagels and English muffins decreased by 1.9 percent. White products are still the biggest sellers. Of the pounds of packaged bread, buns, bagels and English muffins sold, 57 percent was white products, 30 percent was wheat products and 13 percent was other flavors or varieties.

In 2006, we'll see bread become even healthier, with a variety of nutritional ingredients, including fiber, flax seed, omega-3, calcium, and other vitamins and nutrients. It's clear that consumers have become accustomed to breads that offer additional health benefits – and will increasingly look for them.

Specialty Breads Add Cachet

Specialty breads, like ciabatta, are piping hot. Ciabatta was named as one of *Flavor & The Menu's* "Top Ten Hot New Ingredients" and was also identified as a Stage 4 ingredient in the Summer 2005 *Culinary Trend Mapping Report*. "This crusty, round peasant bread has emerged as one of the winners in the high-stakes specialty-bread sweepstakes," reports *Flavor & The Menu*, Fall 2005. Ciabatta has moved from upscale to mainstream. Jack in the Box, a 2,200-restaurant chain, mostly in the Southwest and West, began selling chicken sandwiches on ciabatta in early 2005. "Bread is an emotional factor with consumers," explains Tammy Bailey, Jack in the Box division vice president of menu marketing and promotions. "People are looking for more sophisticated flavors and tastes and are willing to pay for it." (*USA Today*, March 17, 2005)

Other specialty breads are showing up with increasing regularity on menus across the country. In early 2006, Quiznos Sub introduced three varieties of Toasted Gourmet Bread Bowls that can be stuffed with soup, chili, or rings of toasted cheese and chunks of meat. The chain hopes the bread bowls will boost dinner sales as well as provide a more upscale cachet, much like the fast-casual chain Panera Bread, which says it sells one in five soup orders in a bread bowl.

Bread Coming into Its Own

Today's menus feature a wealth of breads, often the starring player in a specialty sandwich. No longer just the "carrier," bread has become a key part of the whole flavor package. The emergence of flavorful bread has had a large impact on the restaurant industry. "The rise of bakery-cafes and fast-casual concepts has been built in part on bread," reports *Restaurants & Institutions* in its 2005 Menu Census (September 1, 2005). Today, consumers can choose sandwiches made with an incredible variety of breads, from brioche to challah.

New flavors are beginning to show up in the supermarket aisles as well. According to Productscan, two new bread flavors emerged on its list of top 10 flavors in 2005 – butter and tomato. Neither of these flavors was in the top 10 ranking in the previous year.

Table 10-1
Most Used Flavors in Bread Products

Rank	Flavor
1	Blend
2	Wheat
3	Garlic
4	Cheese
5	Onion
6	Rye
7	Butter
7	Tomato
9	Herb

Source: Productscan Online, August 2004-July 2005 (www.productscan.com)

Go Go Grains

Although grains have been around for thousands of years, they have not gotten the attention they deserved in recent years. That is beginning to change. In 2006, chefs and product manufacturers will increasingly take advantage of grains' nutritional value, adaptability, as well as their intangible connection to ancient cultures. Some of the grains to watch in the year ahead are:

Kamut Coming on Strong

Considered by some to be the great-great grandfather of grains, kamut is a high-protein wheat with a deliciously nutty taste. In the last year or so, kamut has garnered a lot of attention, partially because people who are allergic to wheat can tolerate kamut. Also, with 30 percent more protein than wheat, kamut offers a lot of nutritional bang for its buck. The versatile grain is used commercially for pastas, puffed cereal, and crackers. According to Productscan, 13 new products with kamut were introduced in 2005, up from none at all in 2004. Kamut is beginning to show up on restaurant menus, often blended with other grains. For instance,

Jiko, an African-themed restaurant in Walt Disney World's Animal Kingdom Lodge in Lake Buena Vista, FL, features a popular five-grain pilaf with pearl barley, quinoa, wheat berries, black barley, and kamut. "Diners may not know all the grains in the mix, but they know the dish is good for them, and they know they like it," says Grecchi Gray, chef de cuisine. (*Restaurants & Institutions*, February 1, 2005)

Quinoa Emerges

After years of percolating as an emerging ingredient, quinoa is ready to take off. *Bon Appetit* named it one of its "Hot Ten" foods in its January 2006 issue. "Carbs are back," reports the magazine. "And quinoa's clean flavors and no-fuss preparation hit the spot." In 2005, Productscan reported 10 new products with quinoa, double the five launched in 2004. One of the new products is a Quinoa instant hot cereal. Created by San Francisco-based AltiPlano, the high-fiber, high-protein, 75-percent organic cereal is available in several flavors, including Chai Almond, Orange Date, and Oaxacan Chocolate. "When we decided to create delicious, nutritious, minimally processed foods for people with food allergies – quinoa was the perfect choice," says Christina Mueller, co-founder and President of AltiPlano Gold

Barley Buzz

In early 2006, barley got a key marketing boost. According to the Food and Drug Administration, manufacturers of products containing barley are allowed to claim that they may help reduce the risk of heart disease. With its chewy, hearty texture, barley is often found in comfort foods like pilafs and stews. In 2006, watch for more usage of the different forms of barley, including hulled, whole-grain, or pearl.

Farro/Spelt Takes Off

Considered an ancient wheat, farro has been around since 7,000 B.C. In the U.S., farro is known as spelt. With its rich nutty flavor, farro is showing up more often in soups, salads, and desserts and is considered an alternative to pasta and rice. The grain, high in fiber and protein, is also easy to digest for gluten-sensitive individuals. The *Culinary Trend Mapping Report* named farro a Stage 2 ingredient. "Touted as a 'good carb,' farro and other alternative grains will continue to stay in the spotlight, reports the *Culinary Trend Mapping Report*, Summer 2005. In 2005, 30 new products were introduced with spelt; a dramatic jump from the 11 items in 2004.

Buckwheat/Kasha Still Growing

Thanks to the popularity of soba noodles, buckwheat is beginning to show up more and more in a variety of products, from pancakes to the toasted form of its groats called kasha. In 2005, 18 new products included buckwheat, a big jump from the seven introduced in 2004.

Wheat Berry

Although wheat berry has not shown up yet in supermarket products, the berry is beginning to appear on more and more upscale menus. Very high in protein and low in calories, wheat berries are the original form of the wheat grain before any grinding or milling. “Wheat berries definitely have a solid mouth appeal,” say Chef James Jens of the Old Feed Mill in Mazomanie, WI. “They’re nutty, very herby and tangy.” He uses them on several salads, including mixed greens and turkey salad with walnuts and cranberries. At the Blue Dog Bakery & Café in Louisville, KY, a wheat berry salad flavored with a sherry-walnut vinaigrette is served as a side dish with sandwiches and also sold by the pound.

Table 10-2
New Product Introductions: Specialty Grains

Grain	# New Products Introduced 2005	# New Products Introduced 2004
Spelt	30	11
Buckwheat	18	7
Kamut	13	0
Quinoa	10	5
Pearl Barley	2	2
Wheat Berry	0	0

Source: Productscan Ingredient Report; Packaged Facts

Specialty Rice Takes On a New Role

Rice is taking on a new look. The ancient grain, which has been feeding people around the globe for centuries, is now showing up on menus and supermarket shelves in more flavors, colors, and flavor pairings. “It may be said that rice is the new pasta,” reports *Specialty Food* magazine. (May 10, 2005) Besides its variety of tastes and textures, rice is a complex carbohydrate that fits into a lot of diets, from gluten-free to cholesterol-free.

According to the USA Rice Federation, rice consumption has more than doubled over the past two decades, with Americans eating approximately 26 pounds per person annually.

Approximately two-thirds of U.S. consumers eat rice once a week, 85 percent have rice at least twice a month, and 90 percent are eating rice in restaurants, up from 75 percent in 1992.

Rice is also benefiting from its international roots. Almost all cultures have a national form of rice dish, from paella to risotto. The colors, aromas, and textures are almost endless and will lend themselves well to “new” products and menu items in 2006. Flavors to watch include red rice, which has a deep, honey-red bran and a savory, nutty, slightly chewy flavor; black rice varieties from Asia; and heirloom choices such as carnaroli from Italy that is a medium-grain rice traditionally used in risotto.

Yogurt – The “Food of the Day”

Yogurt, another key beneficiary of the ongoing wellness focus, is everywhere, from fast food to pet food, and it promises to become an even bigger category. “It’s the food of the day,” says Harry Balzer, vice president of the NPD Group. “In the 20 years we’ve done research, only pizza has such broad appeal” among men, women and children. (*USA Today*, January 22, 2006) NPD’s recent Snacking in America report says “yogurt takes the cake as the fastest growing snack food (based on consumption frequency) among kids under 13 years old.” The report indicates the average child under 13 ate yogurt eleven more times in the year ending June 2003 versus five years earlier.

There is plenty of room for growth. “Our per capita consumption to this day remains well below that of any western nation, so there’s still enormous upside,” says Gary Hirshberg, president and CEO of Stonyfield Farm, Londonderry, NH. (*Dairy Field*, August 2005) “In Europe, the average yogurt consumer eats yogurt multiple times per day, so there’s still a very long way to go.”

Many new products combine portability plus health benefits. According to *Stagnito’s New Product News*, Yoplait Healthy Heart yogurts, fortified with 0.4 grams of plant sterols in each six-ounce serving, is one of the most innovative new products in the yogurt category. Introduced in four flavors, the products carry an FDA claim that eating two servings of the sterol-containing yogurt a day can help lower cholesterol, which may reduce heart disease risk. Dannon just launched Aactiva, a yogurt with probiotics designed to improve digestive health. Appealing to parents, Stonyfield Farm recently introduced YoBaby Plus Fruit & Cereal with DHA, an omega-3 fatty acid said to help the brain develop.

Greek yogurt, an especially creamy, full-flavored yogurt, is beginning to show up on consumers’ radar. Both the Food Network and Epicurious feature 18 recipes with this ingredient, and Food Watch has identified it as an emerging ingredient. The primary brand in the U.S. is FAGE Total Greek Yogurt, which is now available in the U.S. in such retailers as Whole Foods and Trader Joe’s.

Other forms of upscale yogurt products are beginning to emerge as well. For instance, Water Buffalo Yogurt “is not only thicker than the cows’ milk version, but also comes in fun flavors like spicy chai and tart Vermont black currant,” reports *Saveur* magazine, which listed the yogurt in its annual list of 100 favorite food trends. (*Saveur*, February 2006)

In restaurants, yogurt is increasingly showing up in sauces paired with herbs and vegetables – - most likely an offshoot of raitas, the Indian yogurt-based sauces used to cool down fiery Indian dishes. “Yogurt sauces are easy to prepare, extremely flavorful and can be used with hot or cold dishes,” says Martin Heierling, executive chef at Sensi, Las Vegas, NV. “We’ve seen a trend in recent years away from heavy sauces, and yogurt has a natural balance of richness and acidity.” (*Restaurants & Institutions*, January 1, 2006)

In 2006, look for more and more yogurt products and menu sightings throughout the food industry. Interestingly, yogurt is already making the leap from ingredient to flavor profile. Several cereal makers are marketing products with yogurt, even though it is the live bacteria cultures in refrigerated yogurt that provide the most health benefits. And, now available in the cosmetic aisle, toothpaste with yogurt and a yogurt facial mask.

Table 10-3
Dairy New Products

Category	Skus 2005 to 6/30/2005	Skus 2004 to 6/30/04	% Change
Yogurt & Yogurt Imitations	100	91	9.9%
Dairycase Foods	34	31	9.7%
Ice Cream, Novelties & Frozen Yogurt	321	332	-3.3%
Margarine, Butter & Spreads	21	30	-30.0%
Cheese	109	229	-52.4%
Total Dairy	585	713	-18.0%

Source: Productscan Online, Stagnito's New Products Magazine, September 2005

Tea – Drink to Your Health

Tea is another category, thanks to its health and wellness association, that is evolving into a brand-like ingredient. Today, shoppers are just as likely to find tea in hair care products as they are in exotic, health-oriented beverages.

No doubt tea is sizzling. *Entrepreneur* magazine named tea as one of its hot trends for 2006. The Tea Association of the U.S.A. projects total wholesale sales of tea will reach almost \$6.2 million in 2005, more than triple the \$1.84 billion posted in 1990.

Premium and exotic teas are particularly hot. Packaged Facts expects the segment to reach \$10 billion by 2010. In particular, ready-to-drink red, green, and white teas are expected to grow most rapidly. Flavored teas are becoming more adventurous, with intriguing combinations of traditional tea ingredients along with unexpected tastes of unusual fruits and foods. For instance, TeaGschwender, a global specialty tea company with 130 tea shops in seven countries, has developed a changing collection of cutting edge trend teas. Recent picks

included Oolong Tangerine-Vanilla-Yoghurt, Rooibush Panna Cotta Rhubarb Cream, White Tea Lemon Vanilla, and Green Rooibush Lemon Myrtle.

White Tea Passing Up Green and Black

Among the general flavor categories of teas, white tea is definitely picking up steam. Said to be less caffeinated and more healthy than other tea varieties, white tea is expected to become the new “trendy health tea,” according to Mintel. The Center for Culinary Development has named white tea a Stage 2 ingredient and reports “many mainstream companies already offer white tea (s) in either a tea bag format or cold, ready-to-drink bottles, including Honest Tea, Celestial Seasonings, Republic of Tea and Revolution Tea.” (*Culinary Trend Mapping Report*, Summer 2005)

In terms of new products, though, green tea is still the fastest growing. According to Productscan, 123 new products included green tea in 2005, about a third more than were launched in 2004. In comparison there were 41 new products with black tea (up from 32) and 32 with white tea (up from 23).

Rooibos on a Roll

Virtually unknown a few years ago in the United States, this flavorful red tea from Africa has really made its mark. Epicurious predicts for 2006, “Rooibos, rooibos, rooibos Everywhere. We’ll all be chugging this increasingly available red, herbal tea,” (December 30, 2005) Rooibos has been growing steadily, fueled by its healthful benefits, which include an antioxidant level that is comparable to green tea. Rooibos also does not have caffeine, is rich in minerals, and is considered relaxing. In 2005, 20 new rooibos products were introduced, matching the 2004 level. Some say the next trend for rooibos is green rooibos, which is the same herb, but is minimally processed like green tea

Yerba Mate On the Horizon

Yerba mate may win the funky, trendy tea of tomorrow award. A traditional South American hot beverage, yerba mate has a lot of promising attributes, including a lot of the same antioxidants found in green tea. It is also an appealing “coffee alternative” because it has more caffeine than green or black tea, but is thought to have a less “jittery” buzz than coffee. For many North Americans, yerba mate, like green tea, is an acquired taste. It tends to have a grassy, raw flavor that consumers seem to favor when it’s combined with flavorings, spices, and other herbs. In 2005, 15 new products were introduced with yerba mate, more than double the seven launched in 2004. Several trend watchers have yerba mate on their radar, including the Center for Culinary Development, which rated the tea as a Stage 1 ingredient that is just beginning to emerge. A new Boulder, CO-company, Pixie Mate, offers a variety of

mate teas, from Chocolate Mate Solstice to Viva Mate Limon. Packaged in retro containers, Pixie Mate is designed to appeal to a hip, young crowd looking for something different. “Mate is the new beverage for the café culture. It offers great flavor -- the energy component that many consumers are looking for -- and it is loaded with antioxidants,” says partner TJ McIntyre.

Tea Rooms Bubbling Away

According to the Tea Association of the U.S.A., there are over 1,500 specialty tea rooms in major metropolitan areas across the United States. An interesting development is the growth of bubble teashops. Bubble tea, a milk and tea-based drink with marble-sized tapioca balls that rest at the bottom of the drink, originated in Asia. The drink is increasingly popping up on college campuses. In August, for instance, Bubble Teaze opened at the student dining facility at Arizona State University in Tempe, AZ. “It was a product that is popular in a lot of California colleges so we thought we’d give it a try,” says Ben Hartley, general manager for campus dining. (*Arizona State Web Devil*, August 29, 2005)

Table 10-3
New Product Introductions: Teas

Tea	# New Products Introduced 2005	# New Products Introduced 2004	# New Products Introduced 2003
White Tea	32	23	11
Green Tea	123	93	59
Black Tea	41	32	44
Rooibos/Red	20	20	25
Yerba Mate	15	7	7
Chai	6	6	2

Source: Productscan Ingredient Report; Packaged Facts

The Color Black?

There’s a growing wellness food trend in Asia that may be worth keeping an eye on – foods that are black. According to Mintel, black foods are currently among the most popular products for health-conscious consumers in Asia because these foods often contain more anthocyanins, isoflavones, and minerals than more lightly colored foods. Anthocyanins are natural ingredients that provide the blue, purple and red colors of berries, grapes and some other fruits and vegetables and have been found to include antioxidants.

Some of the black foods that are attracting interest are black vinegar, black soybeans, and black sesame. Japan-based analyst Paul Yamaguchi estimated the black foods market in Japan to be worth more than \$500 million. (*Nutra Ingredients Europe*, February 12, 2005) In

the U.S, scientists at the Agricultural Research Service have determined that Beluga black lentils get their dark color from anthocyanin.

Perhaps coincidentally, black sesame seeds are already attracting attention as an emerging ingredient in the United States. Food Watch has identified black sesame seeds as “gaining popularity.” Black sesame seeds are not just turning up in healthy dishes, however. Both the NoLIta Ice Cream Factory as well as at the Laboratorio del Gelato in New York City offer black sesame flavors.

Chapter 11 Trends and Opportunities

This section highlights some of the most promising flavor and ingredient opportunities in 2006 and beyond.

Make Fresh Easier

The trend toward eating more fresh products will continue to grow. The challenge, for manufacturers and supermarkets, will be to offer fresh foods that are easy for consumers to store and prepare. Harry Balzer, vice president of the NPD Group, which tracks consumer eating habits, says, “Consumers are under ‘fresh stress’ – they want to eat fresh but don’t want the hassle of having fresh products around the house.” He suggests that innovative ways to make fresh easier would be winners in tomorrow’s marketplace. “Except for bagged salads, which became popular in the mid to late 1990s, we haven’t seen much innovation in making fresh easier,” says Balzer. “The salads were one answer. Now another needs to be found.” (*Food Navigator USA*, January 13, 2006)

Health On-the-Go

Annual growth in the “health mega-trend” will exceed 10 percent in the U.S. and European food and drink markets over the next five years, according to Datamonitor. Whether it’s a new healthy fast food restaurant concept, nutritional snack foods, or just fresh fruit that’s more portable and long-lasting, there is definitely an opportunity for more convenient, portable healthy food items.

Not From Concentrate

Fresh, not concentrated, juice that is more flavorful and has more nutrients may be on the horizon. “Not-from-concentrate is a huge movement in Europe,” says David Kimmel, concept and product developer and importer/exporter based outside New York City. “By and large, most people want the pure because of the health benefits. Concentrating alters the flavor and takes out nutrition and color.”

Beverage Bouillon Cubes?

Out-of-the-box products that are convenient as well as tasty offer many opportunities. For instance, Small Pleasures is a new small cube of flavored coffee that, when dropped in a hot mug of water, produces an instant high-quality cup of coffee, a great idea for the hospitality industry or even for situations where storage space is a consideration, like camping or hiking. Other kinds of beverages are possible as well, and, if they are healthy or filled with super ingredients, even better.

Flavor + Convenience = Success

“Products that can capture good flavor profiles and are also convenient will be key,” says Karen Boillot, director of retail marketing, National Pork Board, Des Moines, IA. Innovative, ready-to-prepare products will be winners. For instance, in the meat case, products that already include flavorings and can be quickly prepared are appealing to time-pressed consumers. Because Americans seem to want to have a hand in preparing meals, products packaged in such a way that consumers can combine or add ingredients will have the most appeal.

Make it Fresh

Anything that can help a product look or feel fresher is a winner. Laurie Demeritt, president and COO of The Hartman Group, Bellevue, WA, suggests that even small changes can make a product seem fresher. For instance, a see-through package or a visible expiration date can help underscore freshness. Once soy milk moved from the shelf to the chilled case, its whole image changed to a fresher product. New products that project “fresh” will most likely gain a competitive advantage over similar products that seem more shelf-stable.

High Quality Speed Scratch

If given the opportunity to create a winning new product line, Joan Lang, editorial director of Full Plate Communications, Cape Elizabeth, ME, says she would “put all my dollars into high quality speed scratch.” The idea would be to meet consumers’ demand for convenience, as well as their interest in *the idea* of home-made gourmet dishes. Products could include upscale sauces and marinades and feature such gourmet dishes as braised pork shanks.

Customizing for Fragmented Families

No longer do families sit down like the Cleavers and all eat the same foods. Increasingly, family members prefer different menus. To meet the needs of fragmented families, manufacturers should create packages of ingredients that can be added or subtracted, according to individual preferences. For instance, a “family” taco kit could include small packets of mild, medium, and hot spice packets and crunchy tacos along with soft tortillas.

International Street Foods

International street foods, from saté to the cicchetti of Venice (little nibbles, like deep-fried stuffed olives) are gaining a lot of air time on cooking shows as well as food blogs. In May 2005, *Gourmet* magazine also took its readers on a trip around the world profiling various street foods. Combining convenience, small bites, and exotic flavors, international street foods offer lots of possibilities for tempting products and menu items. An example of the potential may be rice buns. A mega food trend in Japan, pressed rice as “sandwich bread” works with almost any filling. Perhaps it will catch on here in the States. In Singapore, McDonald’s is already offering rice burgers, fried beef slices between two pressed rice cakes. There are myriad possibilities and millions of flavors and foods to use as samples.

Early Bird Gets the Word

There’s a lot of money in breakfast. According to Packaged Facts, the total retail value of breakfast foods will jump to \$28 billion by 2009, up from about \$24.5 billion in 2004. With 78 percent of people not associating “enjoyment” of food to their current breakfasts, there is a huge potential for product innovation,” said authors of a report from UK-based think tank, IGD. The report also found that nearly 50 percent of consumers spend 10 minutes or less preparing and eating breakfast. Convenience and grab-and-go profiles are best for weekday products; while indulgent may be the watchword for weekend choices when consumers have more time and interest in splurging on breakfast. One new idea that may take off is a grab-and-go cereal. Drink ‘n Crunch uses a unique dual-cup design with a cup for cereal on the inside, surrounded by another cup for milk. The cereal and milk remain in separate chambers until they meet in the mouth, enabling the cereal to stay crisp and fresh. The possibilities are endless.

Customizing Nutritional Information Can Build Loyalty

Consumers are interested in easy-to-follow nutritional information. How about nutritional information that follows the consumer? The KnowFat! Lifestyle Grille in Brighton, MA, caters to health-conscious customers on the go, with a retail store on one side and a restaurant on the other. The company has come up with an interesting customization program that could provide a competitive edge and build customer loyalty. The restaurant not only provides nutritional information and calorie counts on each receipt, but also tracks customer eating with a web-based loyalty program that can link customers with nutritional counseling, if desired.

Looking for More Energy

According to Datamonitor's product predictions, energy products will grow in 2006 and beyond. "From energy drinks and energy bars to energizing jellybeans like Jelly Belly Sport Beans Energizing Jelly Beans, the variety of products that aim to vitalize the mind and spirit will continue to grow," reports Datamonitor. (Just-food.com, November 30, 2005) Consumers are increasingly open to energy-producing products. Those that have the most natural ingredients and a great, fresh-tasting flavor will, of course, do the best.

Out of The Box, Into The Car

With 32 meals per person consumed in a car, the food industry has an opportunity to think out of the box, and into the logistics of in-car dining. Packaging is a key issue, as is flavor retention and portability. Using some form of flavored seaweed wraps, for instance, could be one way to manage a hand-held item. As more children are probably eating in the car as well, that opens up a whole other world of possibilities. Parents would much prefer picking up food that tastes good, is nutritional, and is not too messy for their youngsters.

Premium Nutrition

More than four out of 10 adults are willing to pay more for healthy foods, according to the Food Marketing Institute. That's why pairing good health and gourmet quality can make such a winning team. Specialty labels, such as farm-raised, indigenous, and organic will lend a valuable marketing hand.

Small is Big

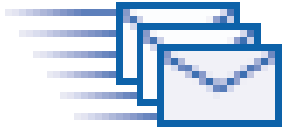
Technomic, a food industry consulting and research firm, reports that 61 percent of diners want to cut down on the amount of food they eat, 69 percent eat mini meals, and 61 percent don't think there are enough small portions in restaurants. Consumers' interest in small plates offers possibilities for manufacturers and retailers alike. For instance, products packaged in convenient "flights," might be appealing, or packaging or store signage that helps customers quickly figure out appropriate portions for themselves and/or their families.

The Jackpot

The most successful products in 2006 will combine three key factors: health, convenience, and taste. A small, hasn't-been-seen-since-1890, super berry from the wilds of Minnesota might do the trick. Anyone seen one?

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