

Insight Report

THINK.
EAT.
SPEND.
2023/24



Brain food

Linney futurologists, data analysts and retail psychologists are on a restless quest to understand how we live today. It's helping us predict how we'll **EAT**, **THINK** and **SPEND** tomorrow.

In this report, we'll explore the current food and beverage landscape while setting our sights on the horizon. We're serving up insights into the ingredients, dishes and environments that we believe will shape dynamic, surprising, dining, drinking and snacking experiences throughout 2023 and beyond.

From fresh takes on old favourites to quirky cuisine creating disruptive dining moments, it's a menu packed with food for thought.

So, devour and digest our nuggets of knowledge as we unearth the 'What' and, more significantly, the 'So what'.

Then check out our other publications exploring what's new and what's next in the way we **THINK** and **SPEND**.



A BALANCING ACT

In 2023, the food and beverage landscape is bursting with ideas and opportunities, yet it remains constrained by challenge.

While new products and exciting ingredient discoveries are energising demand, market potential is being held back by supply chain disruption and the rising cost of living. So, as the challenges posed by the Covid-19 pandemic are now fading from the collective consciousness, people's focus has largely shifted onto the bills they pay at the checkout. Despite this drive for value, there will continue to be call for investment and activity in sustainable initiatives.





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LINNEY DISCOVERIES



Likely to be used
in the future

62%

**OF BRITS TURN TO
NOSTALGIC FOODS
FOR COMFORT
WHEN THEY NEED
CHEERING UP.**

Source: Ramsden International

Chapter 1

RETRO REVAMP

*Comfort food makes a comeback
as the cost of living bites*

**MORE THAN
71%
OF CONSUMERS
ARE INTERESTED
IN BUYING AND
TASTING THE
NOSTALGIC
FLAVOURS OF
THEIR CHILDHOOD.**

Source: LionsDeal

Noshtalgia

Consumers with an appetite for affordable, comforting and familiar eating experiences are tucking in to retro foods.

Nostalgic nosh has never really fallen out of fashion but, in these unsettling times and amid a cost-of-living crisis, we're turning to comfort-centric grown-up spins on the memorable – and often mediocre – meals of the past.

Innovation's elevating time-honoured icons (remember Potato Smiles?) and serving up subtle nods to generation-specific childhoods. We're heading back to the food future in 2023, with fresh takes on favourites from down the decades dominating the food and drink scene.

It's the year where childhood food meets grown-up experiences in dishes, drinks and décor.

Down to a tea

Turns out there's a reason why we can't seem to give up our faithful favourites. French novelist Marcel Proust was the first to identify this phenomenon, now called the Proust effect. Proust wrote that his brain became flooded with involuntary memories about his past after he dipped his madeleine biscuits (his favourite childhood treat) into his tea.

Sensory experiences have the power to bring memories to the forefront of our minds. Foods and drinks have a superpowered Proust effect because eating is a multisensory experience.

What's appealing to the comfort-craving consumer?

In 2018, Kim Kardashian tweeted "Obsessed with Dunkeroos" to her millions of followers. The original Dunkeroos hit the market in 1988, with the frosting and cookie snack gaining popularity in the 1990s and early 2000s. They were the cool snack to be seen with at school. In 2012, the snack disappeared from the shelves in the US. But that didn't stop it being talked about. In 2020, the much-loved product made a return to the market as a sell-out within hours.





Old-school puddings

The resurgence of retro desserts has gone one step further – with restaurants creating high-end versions of classic school dinner puddings.

The Palmerston in Edinburgh, and London's Nessa, which opened in March 2023, serve classic roly-polies and custard with a modern twist.

Norman's Café, which opened in Archway in 2020, offers diners a modern interpretation of the old-school English caff. It looks like a typical greasy spoon, with its gingham tablecloths. And it does the classics well – including chocolate concrete cake with custard. But at its eight-week pop-up with the One Hundred Shoreditch Hotel, it served up a playful take on nostalgic dishes – from tempura-fried nuggets and chilli sauce to whipped cod's roe and Frazzles.

Comeback dine with me

1.

Bringing back our childhoods

Brands are working to reproduce these memories in store and at home.

2.

Comeback brands and products

Old meets cool as fan favourites, back by popular demand, return to the market.

3.

Upscaled comebacks

Applying contemporary twists to appeal to present-day tastes and palates with a focus on health and sustainability.

4.

Comeback flavours

A nostalgic flavour is versatile and can be used for a variety of different executions beyond its traditional format.

5.

Newstalgia

It isn't always just about taste itself but visual cues and experiences that evoke memories.

Blockbuster Bar

A pop-up bar in Los Angeles capitalised on the notion of nostalgia.

The Blockbuster Bar was themed and featured pre-2000s DVD rental-style décor. Guests could walk up and down the aisles to browse the 'menu', just like you used to do at Blockbuster. Instead of movie genres, aisles were sectioned off by different kinds of cocktails and snacks – including grown-up 'Lunchables' and Dunkeroo ice cream sundaes – with guests checking out with a 'membership card'.



Not just for kids

At the end of 2022, McDonald's USA reinvented the Happy Meal for adults in the USA.

It was a first-of-its-kind collaboration with fashion brand Cactus Plant Flea Market. The redesigned box featured iconic characters and two meal choices. The limited-edition boxes proved to be hugely popular, with toys from the meals and merchandise selling on eBay.





Considerations

Consumers are craving indulgent, approachable offerings rooted in nostalgia and comfort.

Creating comforting concepts that connect on a personal level can evoke memories that resonate with diners and give a reason to dine out.

It's an opportunity to be disruptive with flavour combinations that fuse old and new to create modern updates.

Old meets cool

Nostalgia and retro themes have an opportunity to be playful and Instagram-worthy to engage audiences.

Chapter 2

SOBERING THOUGHTS

Low and no-alcohol in high spirits

Low-to-no beer, cider, wine and spirit products grew over 7% in volume across 10 key global markets in 2022 – with predictions that consumption is set to rise another third by 2026.

No-alcohol is growing faster than low-alcohol. More of us are opting for a booze break on certain occasions or abstaining altogether. Improved taste, enhanced production techniques and a diversification of consumption occasions are driving no-alcohol's dominance over low-alcohol in many markets.





**THE MATURITY
OF THE CATEGORY
VARIES BY MARKET
BUT GERMANY,
JAPAN, SPAIN, THE US
AND THE UK MAKE
UP THE TOP FIVE.**

Source: IWSR

Spirit of adventure

Society is looking to mindfulness and moderation in its consumption habits be this due to concerns about the health of our planet or our own wellbeing. The latter is increasingly a factor when considering alcohol, where there is a growing interest in no-and-low-alcohol alternatives.

16% OF CONSUMERS GLOBALLY ARE ACTIVELY TRYING TO REDUCE THEIR CONSUMPTION OF ALCOHOL, WHILE 39% SAY THEIR APPROACH TOWARDS DRINKING ALCOHOL IS 'MODERATION'.

Source: Global Data

HALF OF UK ADULTS (49%) ARE EITHER NOT DRINKING ANY ALCOHOL OR ARE PLANNING TO CUT DOWN SOON – A POTENTIAL MARKET OF 25 MILLION PEOPLE.

Source: Club Soda





Club Soda Tasting Room and Shop

Following the success of a pop-up, which initially opened in 2022 for the popular Dry January period, the Club Soda Tasting Room, Bar and Shop's opening was extended until March and preceded a permanent launch in November 2022. While the exterior makes it appear like another boutique off-licence, looks can be deceiving.

Located on London's Drury Lane, it's filled with a huge range of more than 150 beers, wines and spirits – all classed as either low or no-alcohol. Claiming to be Britain's first non-alcoholic tasting room, it's paving the way for 'mindful drinking'.

Founder Laura Willoughby gave up drinking a decade ago and was disappointed by the range of low-alcohol beers, juices and tokenistic mocktails on bar menus. The intention was not to banish booze but instead increase awareness and make the drinking experience more inclusive for people in pubs and bars. There's also a teaching room in Club Soda's basement with the aim of educating restaurant, pub and bar managers on the potential of alcohol-free sales and consumption. And the brand offers online courses, priced at £50, to encourage people to find the best alcohol-free alternatives, whatever their reasoning – whether it's reducing alcohol intake, having a break or giving up altogether.

“The interest in alcohol-free, and around alcohol-free cocktails in particular, is really high. We've got our own mixologists and our own cocktail list. It's certainly exceeding our expectations in terms of customers coming in and having drinks.”

Laura Willoughby – Club Soda founder

Caleño

The Caleño range of tropical non-alcoholic spirits was created in 2018 by Ellie Webb. Its products are now retailing in UK grocers and across the world. It takes inspiration from the flavours of Columbia, with pineapple, coconut, lemon peel, ginger and kola nut featuring across its two variants.

Webb's mission was to create a product with a unique taste profile that was different from everything else in the alcoholic and non-alcoholic categories. However, Webb doesn't believe brands should stray too much from the world of alcoholic drinks, for fear of becoming unfamiliar. It's why Caleño comes in a spirit bottle and is recommended to be served as a double measure.



Lucky Saint

Alcohol-free brand Lucky Saint claims to have created 'A Pub For Our Times'.

The brand restored The Masons Arms pub in London's Marylebone and opened its doors to punters in March 2023. The idea came two years ago when founder Luke Boase was looking for new head office space and thought two concepts could be combined. Offering a place for the brand to call home as well as somewhere for customers to enjoy the product, The Lucky Saint pub aims to cater for all. As such, it's serving alcoholic beverages alongside no-and-low options – and is rustling up reimagined classic pub grub. Not shy about being a proper boozier, it's just offering much more choice across the low-and-no-ABV spectrum. It's truly set to be a welcoming place for any type of drinker.

Barriers to growth

Price

Challenges in the market have been linked to price perceptions of low-and-no-alcohol versions.

Due to the lack of duty paid compared to their alcoholic counterparts, it's thought they should command a lower price point. When the cost-of-living crisis is added in, it's felt that if consumers are going to spend money, they'll want to spend it on something that gives them an exceptional experience – a product that competes on taste and flavour. However, there's movement in the right direction, with cost becoming less of a barrier for non-consumers of no-and-low-alcohol options – dropping from 14% in 2021 to 7% in 2022 (*IWSR*).

Regulations

A lack of consistency across global markets in low-and-no-alcohol regulation standards means that it can be hard for brands to forecast and transfer products across markets.

In Australia, non-alcoholic needs to be 0.05%, while in the UK it's 0.5%. The Adult Non-Alcoholic Beverage Association is advocating for more consistency in legislation to provide clarity for producers.

Availability

The biggest challenge facing the no-and-low category is availability.

The specific approach needed for each product line and the increased hygiene required due to the missing alcohol results in limited ranges. It's not just a case of removing the alcohol content from a spirit product – this is a premium product and a separate production process.

WE STILL NEED TO ANSWER THE QUESTION OF WHERE PRODUCTS SHOULD BE MERCHANDISED: IN THE BEER, WINE AND SPIRITS AISLE, WITH SOFT DRINKS OR ON THEIR OWN?

The future

Product innovation focuses on packaging, flavour and functional benefits

So far, most NPD approaches have been modifications of ABV (alcohol by volume). Some producers are focusing on innovation in packaging, functional benefits and the use of botanicals to create more intense flavour and broaden the options available. Product messaging is shifting from the absence of alcohol to flavour and other benefits. Some mixer brands are also broadening their range to offer products that can be enjoyed without a spirit or spirit alternative.



SENTIA is a functional spirit and the world's first range of 'GABA drinks', designed by scientists, innovators, and botanists to enhance social drinking without the inclusion of alcohol. GABA spirits are alcohol free but very different from all other non-alcoholic spirits, which are purely for flavour. The aim is to offer the good effects we seek from alcohol, relaxation and sociability, without the downsides of having too much alcohol.





Considerations

Last orders

'No alcohol' no longer has to mean complete abstinence; consumers are reducing their alcohol for a range of reasons and drinking on their own terms. It is about moderation.

Move over mocktails, the low-and-no-alcohol category should not be about compromising on taste and quality. Low-and-no options shouldn't make consumers feel as though they are missing out.

Category comparisons can present a dilemma, but also an opportunity to pull on parallels and create new flavour profiles to offer something truly different.

Challenges in the market linked to price, regulations and accessibility mean that increased education and messaging are needed to support brands and consumer engagement.



**IN 2022, SALES OF
CANNED SEAFOOD
SHOT UP BY 10%
TO \$2.7 BILLION
IN THE US.**

Source: Euromonitor International

**THE INDUSTRY IS SET
TO ENTER A CANNED
FISH GOLDEN
AGE, WITH THE
MARKET EXPECTED
TO RISE TO OVER
\$11BN BY 2027.**

Source: IndustryARC

Chapter 3

TIN TO TABLE

LINNEY DISCOVERIES



Likely to be used
in the future

Tinned foods are store-cupboard staples in almost every household, yet have long been considered somewhere down at the bottom of the food chain when it comes to freshness and nutrition.

TODAY THE TIDES ARE TURNING, AND TINNED FISH IS GETTING ITS MOMENT IN THE SUN.

Shore thing: How the tinned fish market is making waves

Traditional tuna – a long-term UK favourite for filling sarnies and topping spuds – is still the most popular choice in the west. But sales of sardines and kippers are going upstream, with curious consumers branching out to more exotic seafood, like belly tuna, stuffed baby squid and smoked oysters.

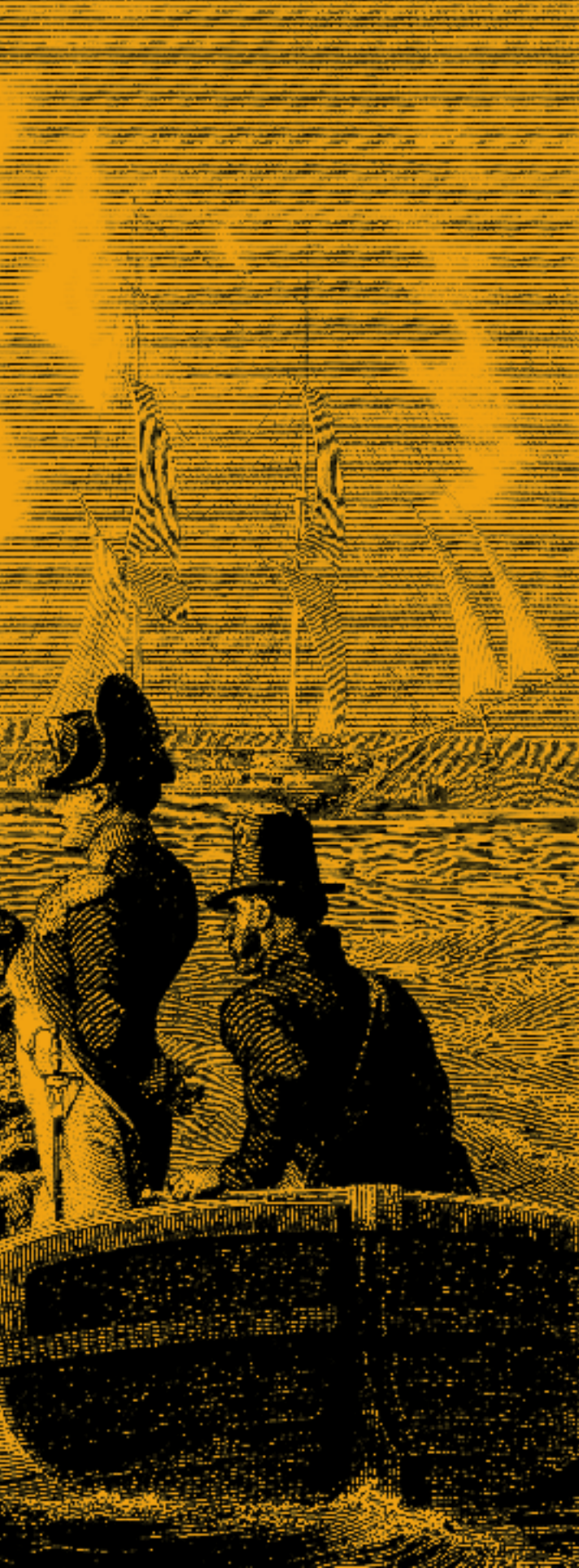


A slice of fishstory

Like most recent food and beverage trends, the rising popularity of tinned seafood can be traced back to high-performing videos on TikTok. However, in Spain and Portugal, conservas (canned fish) has been a staple snack for centuries, with products dating back to the 1700s.

In 1795 during the French Revolutionary and Napoleonic Wars, the French Army had a very smelly and deadly problem – how to store food safely. Napoleon offered 12,000 francs to anyone who could solve it, and the solution was preserving food in glass jars.

Frenchman Nicholas Appert – a chef and the so-called father of canning – invented the method of preserving food in sealed containers, while closer to home, Englishman Peter Durand is credited with receiving the first patent for the use of tin cans.



Scaling up

Back to TikTok where a new school of creativity is having a ripple effect.

Professional chef Ali Hooke is one half of the couple that went viral when they shared their *#tinfishdatenight*. On the back of their online success, Ali netted a sponsorship deal with Vancouver-based brand Scout Canning, which revealed it was getting 500 customer referrals a month as a result of Ali's TikToks.

Meanwhile, the online trend for building traditional charcuterie boards has led us to a wave of sea-cuterie, with canned products swimming with opportunity for quick, easy, and visually pleasing creations.



Catch the eye

As popularity for tinned fish continues to swell, we're seeing companies jump on the can-wagon with fresh new strategies. They're swimming away from the more functional packaging we're used to seeing on supermarket shelves and developing sought-after luxury tins with vintage designs, dialling up luxury and collectability.

Jose Gourmet (1) is combining quality products with beautiful packaging illustrated by designer Luís Mendonça, who heads up its art direction.

Fishwife (2) is a female-led company making premium, ethically sourced tinned seafood. Founded in 2020, its range has quickly expanded with key products now including rainbow trout, and a smoked salmon tin.

NURI artisanal tinned fish (3) features delicacies such as spiced mackerel with chilli, cloves, black pepper and laurel, packed with carrots and cucumber with the tins wrapped in coloured paper.



4



A new wave

In financially challenging times, there is still the desire for luxury. Perhaps TikTok star Allison O’Conor had it right when she said tinned fish date night was the Great Depression version of lobster and champagne.

A tin of good-quality tuna is now considered a treat, with the brand Ortiz being the original ‘posh tuna’. Newer competitor brands include Zallo, Olasagasti, La Narval and Pinhais. If you want to treat yourself to a few luxury tins, The Tinned Fish Market has created a discovery box (4) of the finest fish for £48.

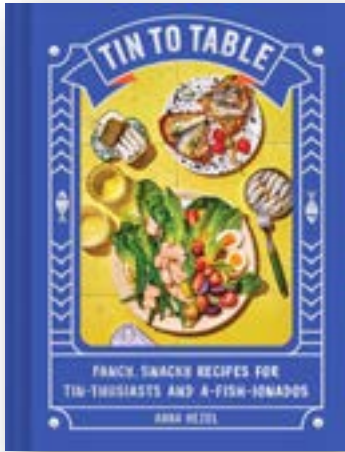


The restaurant scene is also riding the tinned fish wave. For example, Bottle + Rye in Brixton is selling a plate of four anchovies on toast for £10 (5), while the new Salties Girl has its own Tin List on which tinned red tuna will set you back an eye-watering £47. Stateside, Kippered restaurant in Los Angeles is a bar with a focus on tinned fish (6) and bubbles. Elsewhere, diners can browse a tinned fish menu at haleylhenry in Boston.

TikTok’s latest fishy trend is also seeing users now transfixed by innovative ways to use canned seafood. We’ve also browsed dedicated tinned fish cookbooks such as The Magic of Tinned Fish and Tin to Table (7), which cracks open the secrets of tinned fish cooking with more than 50 recipes – from no-fuss snacks to fresh salads and hearty mains.



7



Quite the catch

Nice for the earth too, tinned fish's long shelf life, lack of need for refrigeration and recyclable packaging make for a relatively climate-friendly protein compared to other animal-based options.

However, seafood suppliers are concerned that the rapid increase in demand could affect supply chains as anglers struggle to keep up with the need for artisanal production.

Fish is hailed as being a rich source of lean protein and omega-3 fatty acids, essential elements in a healthy diet.

It has been claimed by health experts that eating fish can help reduce the risk of heart disease. It is also lower in saturated fat than other animal proteins. Caution should be exercised around over-consumption, however, as fish can be high in the toxic element mercury. It has also been well documented that our oceans face a significant threat following decades of harvesting the seas, which have disrupted the delicate balance of our marine ecosystems and the environment.





Getting on board with tinned fish



Shop Sustainable

To avoid contributing to problems like overfishing, bycatch and habitat damage, look for how the fish was sourced. From pole to line, trawl to free school or school-caught.



Set a Budget

Some tinned fish can fetch hefty prices upwards of £150. Tinned tips include applying a similar approach to that of choosing a wine to help guide purchases.



Find Your Flavour

Conservas from Spain or Portugal tend to be grilled or fried before canning in flavoured oils, while in Scandinavia it's common for fish to be smoked before preservation. The options are endless and set the scene for a voyage of discovery.



How to Serve

Much like wine, tinned fish provides the opportunity to create a dining experience.

Peel back the lid and dig in, or find your own perfect pairings. Recommendations include smoked trout, toast and fresh herbs or octopus, lemon and crispy potatoes.





Considerations

Tinned fish

Britain and the US are rediscovering their love of this larder staple for its convenience, cost-effective credentials and sustainable solutions.

A classic store-cupboard item

The versatility of tinned fish means a lot can be done with it – add it to salads, toss in pasta or simply serve it on toast.

Not just a flash in the pan

Although it's been around for decades, foodies cannot get enough of the fun, modern branding and flavour combinations now available.

COGNITIVE EATING



37%

**OF CONSUMERS
NOW CONSIDER
FOOD NOT JUST AN
ENERGY SOURCE, BUT
A FUNCTIONAL TOOL
TO REACH MENTAL-
HEALTH GOALS.**

Source: Green Chef



66%
OF CONSUMERS
GLOBALLY ARE
NOW INTERESTED
IN COGNITIVE
HEALTH PRODUCTS.

Source: FMCG Gurus

In The Mood For Food

Rather than seeing food purely as fuel, there is a growing awareness among brands and consumers of the connection between emotional wellbeing and nutrition.

Consuming food and drink is now about more than just about physical health, as people are increasingly seeking ways to support their cognitive health.

Spilling the guts

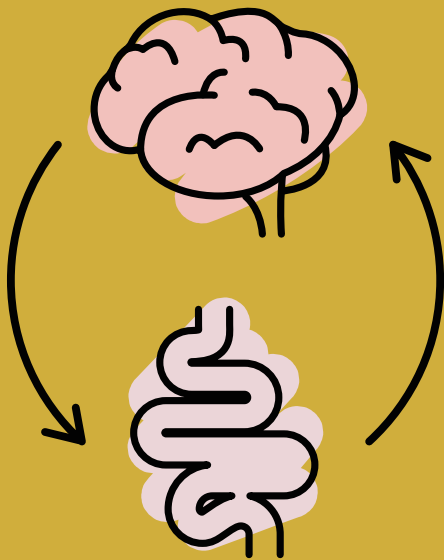
The discussion about the links between the brain, gut and general wellbeing is not a new one. It has been proven that what we can eat can affect our memory, concentration and focus, just as consumer interest in brain health is growing. Consumers are demanding formulations that help them optimise their lifestyles – incorporating better mental performance at work, home and play. They are looking for food and drink that improves their cognitive capacity, with a focus on emotional wellbeing and functionality.

Combined with growing science on ingredients like adaptogens and nootropics and their role in brain health, cognitive health is quickly gaining a strong foothold in the food and beverage space.

Our gut = Our second brain

Nootropics work to enhance brain health and cognitive performance, whereas adaptogens focus on reducing both mental and physical stress.

Owing to the effect of external factors, which are often out of our control, consumers are looking to take back control through the consumption of certain food and drinks to help 'future proof'.



Boosting brain power

The interest in functional foods and beverages has been bubbling for some time, and while emphasis has been on immunity in the wake of the pandemic, there is now also an interest in feel-good foods that can help fight depression, ward off dementia and support brain health.

Food focus

Consumers seek food and drink that promotes strong body and mind, protecting the brain to help it reach optimum functioning – this is the so-called 'cognition, nutrition' diet. Natural examples of brain food include oily fish such as salmon, mackerel and trout, along with broccoli, blueberries, tomatoes and pumpkin seeds, among others. Wholegrains are considered specifically beneficial to aid cognitive function and support nerve cells, while legumes and pinto beans are being tipped as sources of magnesium, a mineral that has been linked with reducing stress and fatigue.

Rooted in science

It might seem obvious that if we consume more fresh vegetables, we experience better moods compared to those who skip their greens. However, this has been confirmed following research by USDA.

Scientists at the Grand Forks Human Nutrition Research Centre conducted an eight-week study which was part of a larger research project to measure the correlation between eating vegetables and the mental health of 75 men and women between the ages of 18 and 65. Researchers gave one group fresh pre-sliced vegetables, while the control group, who experienced the same level of interaction from the researchers, were not given any. By measuring the group's emotional wellbeing before and after eating, the study showed that the moods of the individuals who ate vegetables were significantly higher than the control. Citing previously published research, scientists hypothesised how the antioxidant and anti-inflammatory properties of vegetables, along with vitamin C, contribute to the brain's production of feel-good neurotransmitters (serotonin, norepinephrine and dopamine).





Caffeine: culprit?

While caffeine is known for giving a boost of energy, there are concerns around its impact on health and wellbeing when a high level of it is consumed.

There is a range of products entering the market positioned as 'lower-caffeine', aiming to provide sustainable and balanced energy over a period of time, rather than a spike, which can mean a dramatic increase in blood pressure followed by a stark slump.



Some products have become available in the UK that seek to mitigate the impact of traditional caffeine.

1. Mission

Mission is on a mission to help consumers beat the caffeine crash by providing products that are 100% natural and provide a slow release of energy. Its Yerba Maté Tea blend looks to help with focus and clarity.

2. Café Libre

Café Libre is a start-up with products that aim to deliver uncompromising low-caffeine coffee that “will make you feel great all day”.

3. Peak Rise

Peak Rise is made with ashwagandha and is said to provide a peak start of clarity and focus. It uses natural caffeine from the guayusa superleaf to provide sustained wellness and sugar levels.

From the source

Coffee from the Laurina plant is naturally lower in caffeine, while the Yaupon holly, native to the US, contains 30% less caffeine than normal versions.

Getting smart

Nootropics or smart drugs are also gaining traction – substances that claim to enhance cognitive functioning such as L-theanine in green tea, ginseng, lion’s mane mushroom and ginkgo biloba. They work by increasing the mental function such as memory, creativity, motivation and attention.

Functional beverages

Hydration is not the only thing we seek from our drinks. Research shows that consumers are seeking energy, a buzz, vitamins and digestion support. Functional beverages are considered to be one of the fastest-growing markets in the drink industry with key brands paving the way.



Nexba expands its functional drinks offering with nootropics range

“The drinks are suitable for everyone, from the health-conscious consumer to the person looking to feel good, improve focus and be calm.”

Nexba

The range includes Blueberry Calm, Pink Grapefruit Glow and Passionfruit Focus flavours.



BEYOND, THE UK'S FIRST-EVER 'MENTAL PERFORMANCE DRINK', HITS TESCO SHELVES FOR 2023

The UK's first-ever mental performance drink is now stocked in Tesco, just two years after its development.

Beyond NRG uses nootropics, vitamins, minerals and clean green caffeine to kickstart the functionality of the brain – especially useful for creative work. It launched in health giant Holland & Barrett in 2021, before retailing in Superdrug in 2022.

The drink, which is designed to serve as a pre-workout supplement for the mind rather than the body, comes in powdered form and is mixed with water before being drunk. It contains seven 'brain-boosting' nootropics that promote endurance, memory, reactivity and learning, and contains less than 20 calories per serving. It is also sugar-free, making it one of the healthiest focus-inducing products on the market. This latest retail listing, incorporating more than 250 stores, marks a powerful moment for the UK energy drinks market – demonstrating that health and the science behind it are becoming top of the agenda for consumers.







Game on

Gaming nootropics set to power up the market

Nootropics are popular among several demographics, including busy professionals, students and athletes – but also, interestingly and increasingly, gamers. Studies have found that nootropic products can help gamers by increasing energy, reducing anger and decreasing errors while playing.

Source: Tartar, J.L., Kalman, D., Hewlings, S.
'A Prospective Study Evaluating the Effects of a Nutritional Supplement Intervention on Cognition, Mood States, and Mental Performance in Video Gamers' Nutrients (2019)

Nootropic drinks ready to make a splash

Nootropics' ability to be digested more quickly than food allows them to boost the brain more rapidly. With the market still very much in the early development phase, nootropic drinks are being tipped for substantial growth. Specifically developed nootropic beverages for video game and esports players are designed to help maintain peak performance by boosting cognition and mental focus, featuring on-trend ingredients and exciting product concepts.

New opportunities for nootropics across different formats

**AS MANY AS
35%
OF UK GAMERS BUY
FOOD AND DRINK
SPECIFICALLY FOR
PLAYING VIDEO
GAMES, A FIGURE
THAT RISES TO
55% FOR GAMERS
AGED 18 TO 24.**

Convenience is these gamers' top priority, who look for easy-to-consume products, such as snacks, gummies and beverages. There is also potential in the market for greater innovation in gamer drinks, going beyond caffeine to explore further cognitive benefits.

Source: LionsDeal



Considerations

There is a growing awareness of the connection between food and mood, providing a dynamic platform for the future development of food and beverage products.

As we live longer, protecting the brain is becoming just as important as finessing the body physically – and there's greater acceptance among consumers that what we eat and drink matters.

Continued research is needed before emerging cognitive ingredients can go mainstream, proving their efficacy as they do so. Regulatory approval of claims made about such ingredients is currently sparse – and we know that brands have a responsibility to be transparent and educate consumers with evidence-based information.

Expect to see a move away from single-use solutions and a one-size-fits-all approach to products that speak to very specific aspects of cognition such as focus, memory, attention and mood.

Consider dayparts when choosing types of cognitive health benefits – such as focus for morning, destress for afternoon, relaxation for evening.

SUSTAINABILITY SPOTLIGHT

Sustainable initiatives are being implemented across every aspect of our daily lives to help counteract the impact of global warming. The food and beverage market is no different. We delve into the world of sustainable cuisine and developments taking place across the landscape. Here are some of our findings...

The coming months will see a continuation from previous years of people educating themselves about where their food comes from. Leading the charge will be climate-conscious foods, many of them sourced from grains and crops grown with concern for soil health, creating an easier environment for continued cultivation.

Increasing interest in plant-forward dining will also support choices for more environmentally conscious cuisine. The explosion of non-meat protein alternatives will highlight a desire for mindful options.

From what we consume to how it is consumed, preserving our planet is front of mind for many brands, businesses and consumers. Read on to find out more...



Sustainable sustenance

Super seaweed

The kelp-in-everything trend is gaining traction, largely for its sustainable credentials. Kelp absorbs carbon in the environment, grows quickly and doesn't require fresh water – plus it's also incredibly nutritious and versatile. Our research predicts that the number of products using kelp will continue to skyrocket. Look out in supermarkets for products made with kelp across a range of formats – think kelp burgers, vinegar, noodles and even hot sauce appearing on the menu.



LINNEY DISCOVERIES
Marmite ingredient



Coffee-less coffee

We have seen meatless meat, milk-less milk and fishless-fish. Now coffee is the latest item to get a sustainable makeover. Scientists have raised the alarm that coffee plants are extremely susceptible to climate change, and brands are starting to listen. Seattle-based company Atomo was an early pioneer with its bean-less cold brew, while Whole Earth's Wake Up coffee drink is available in the UK.

The rise of climate consciousness

Have you heard of the climatarians? Instead of counting calories, so-called climatarians count carbon emissions, avoiding products and food that bear unnecessary carbon outputs or even excessive packaging. We predict that the availability of ingredients farmed responsibly, with lower-impact growing methods, will expand the climate conscious mindset in new ways.



Steak your claim

Following the success of the carbon labelling scheme that it introduced in April 2022, Mexican-inspired restaurant Wahaca has made significant changes to its menu.

Carbon neutral and proud, Wahaca has consistently made efforts to prove its sustainable credentials. In April 2023, the brand announced that it was pulling steak from its menus in a bid to reduce its carbon footprint. The chargrilled steak burrito, and the steak and cheese taco were found to be the most polluting items on the menu – but they were also some of the most popular. In a bold move, they now have been removed. The changes follow Wahaca's involvement with research conducted by the Centre for Environmental Policy at Imperial College London, which found that the brand's carbon ratings were helping prompt discussion among consumers about the planetary impact of the food they chose when eating out.

In 2016, Wahaca became the first restaurant group in the UK to be certified as carbon neutral. The company says it achieves this through a variety of means, including recycling its used cooking oil into biofuel, using heat from its refrigeration system to make hot water, and giving customers takeaway boxes made from sugar cane fibre.

“Being conscious that meat and dairy products are among the biggest culprits from an emissions perspective has led to us expanding our vegetarian and vegan offering in recent years. We wanted to look at a way of reducing the amount of meat dishes further, while still offering truly tasty options for those that enjoy eating it. The result has been the decision to remove all steak dishes from the menu, with beef fans still having the option of delicious slow-cooked beef tacos and a burrito. Doing the right thing for the planet is not always a simple journey, but by making these changes, we continue our commitment towards being as sustainable as it's possible for us to be – while exploring new ways to push ourselves even further.”

Thomasina Miers – Wahaca Co-founder

WAHACA
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## Got beef?

The UN estimates that global livestock farming accounts for more than 14% of all manmade greenhouse gases, with beef being the biggest offender. It accounts for 25% of emissions produced by growing food and raising livestock.



## The plant side

As noted by Cambridge University Press, it is well documented that excessive meat consumption, especially of red and processed meats, can have damaging effects on our health and environment. Limiting consumption of animal-based foods is at the heart of the 'reducetarian' movement, in which people aim to work towards a more environmentally conscious way of eating. Plant-based protein innovations are set to grow further across the quick-service restaurant landscape, providing more choice and inclusivity. In addition to this, lab-grown meat and dairy products are likely to gain further traction across the board.

## A new bake

**In March 2023, bakery chain Le Pain Quotidien teased that its new sustainable bread was almost ready to leave the oven with the mission that it that is uses "ingredients that are just as good for you as they are for the planet."**

The new bread uses hemp seed and claims to be carbon friendly, support soil health, and cause less waste in the baking process. To make the bread, bakers mix hemp flour with sourdough for a flavour of hazelnuts and pine nuts with a hint of rosemary. The brand also claims that the product is rich in plant-based proteins and omega-3. From savouring to sourcing considerations, the brand's ambition is to help 'Taste the Future' with this latest bread.



## Ultra-processed?

The plant-based category has faced criticism for feeding us ultra-processed food while masquerading as the 'healthier option' which is putting its reputation under pressure. This is due to the manufacturing processes plant-based meat and dairy substitutes go through to mimic their conventional counterparts often using additives and emulsifiers.

*"The more you're trying to make something imitate something that it's not, the more processing it's going to have to go through."*

**Sophie Medlin, dietitian and chair of London Dietetic Association.**

# No time to waste

**MORE THAN 900 MILLION TONNES OF FOOD ARE THROWN AWAY EACH YEAR, WHICH CONTRIBUTES UP TO 10% OF GLOBAL GREENHOUSE GAS EMISSIONS. INNOVATIVE WAYS OF REDUCING FOOD WASTE WILL LOOK TO DIVERSIFY AND GET MORE CREATIVE, AS AWARENESS FOR THE HUGE IMPACT IT HAS ON CLIMATE CHANGE GROWS.**

Source: WWF

The collective enthusiasm for no or low-waste food is going to be even greater in 2023. Consumers, retailers and restaurants will respond to this by using unusual parts of vegetables and meat, in a bid to throw less away. For example, preserving and pickling techniques will be used with fruit and vegetables to create garnishes, while peels and cuttings will be dried into snacks and crisps.

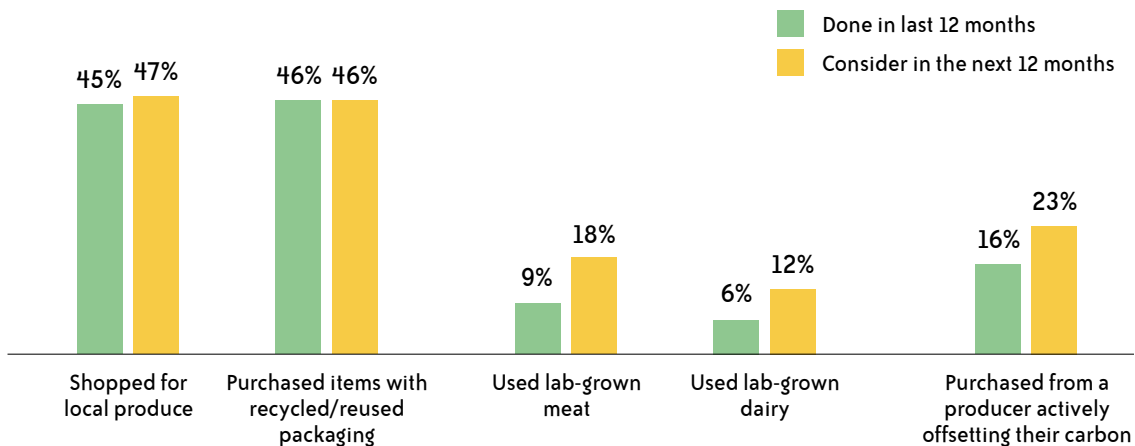
## Nextovers

Not to be confused with leftovers, Nextovers are surplus ingredients turned into something experiential and inventive. TikTok is cited as a source of inspiration, with examples of dishes including chicken skin nachos made with left over chicken skin.



## Sustainable shopping habits (claimed behaviour)

LINNEY DISCOVERIES



*Chapter 6*

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# CURVE

*Our bespoke research technique tracks the latest consumer trends in the food industry to serve up insights and help decision-makers stay ahead of the Curve.*



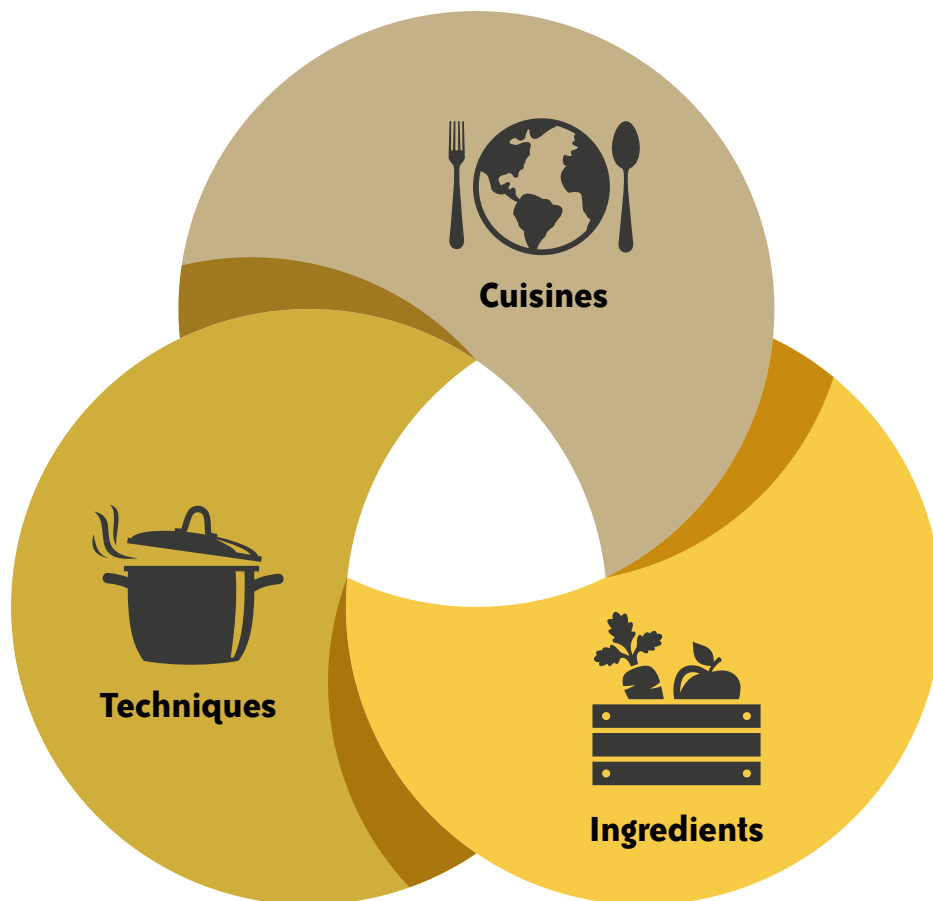


# Learning Curve

**The global food and beverage landscape is vast, dynamic and ever evolving.** There's a rich opportunity to explore and exploit endless ingredients, cultures and cuisines, from familiar and traditional concepts reimagined, to 'trending' ideas on TikTok that put dishes in the spotlight.

Curve is Insight at Linney's approach to understanding what's gaining traction across this diverse market, and the produce and processes resonating with and whetting the appetites of consumers in the context of awareness and consideration – from their buying, cooking and eating behaviours at home to their preferences when they're out and about.

Curve helps track, learn from and apply provocations, from flavour combinations and format executions across new product developments in a range of categories.



**The Curve channels of Ingredients, Cuisines and Techniques provide elements of distinction but also moments of relevant overlap**

# Curve in action

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**We surveyed a nationally representative same of UK adults in April 2023.** We wanted to build a picture of their food preferences – their meal behaviours, techniques, and ingredients and when and where they dined out and ate in.





# Ingredients

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**We fed a range of ingredients into our Curve tool.** These are items that EAT has been tracking from 2020 and emerging ingredients – from ube to banana flour – across four key categories.\*



## Becoming staples

*e.g. Oyster Mushrooms*

Ingredients on a good trajectory, with strong awareness and consideration – and, through growing familiarity, are then mainly used for cooking.



## Rising stars

*e.g. Moringa*

Ingredients with lower awareness which, through growing familiarity, are likely to be used. Many are incorporated into cooking to enhance meals.



## Marmite principles

*e.g. Hibiscus*

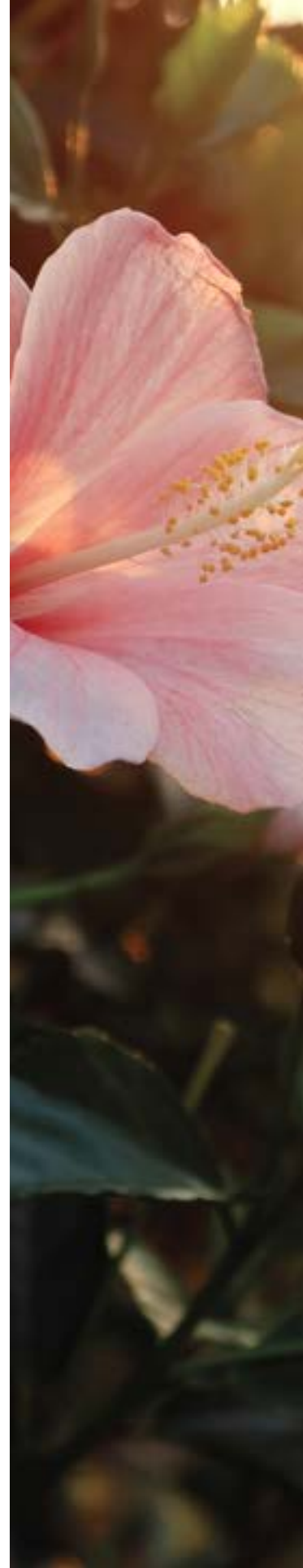
Ingredients that tend to be used in a mixture of ways and haven't necessarily found their niche yet. While there's solid awareness, the jury's out on future use.

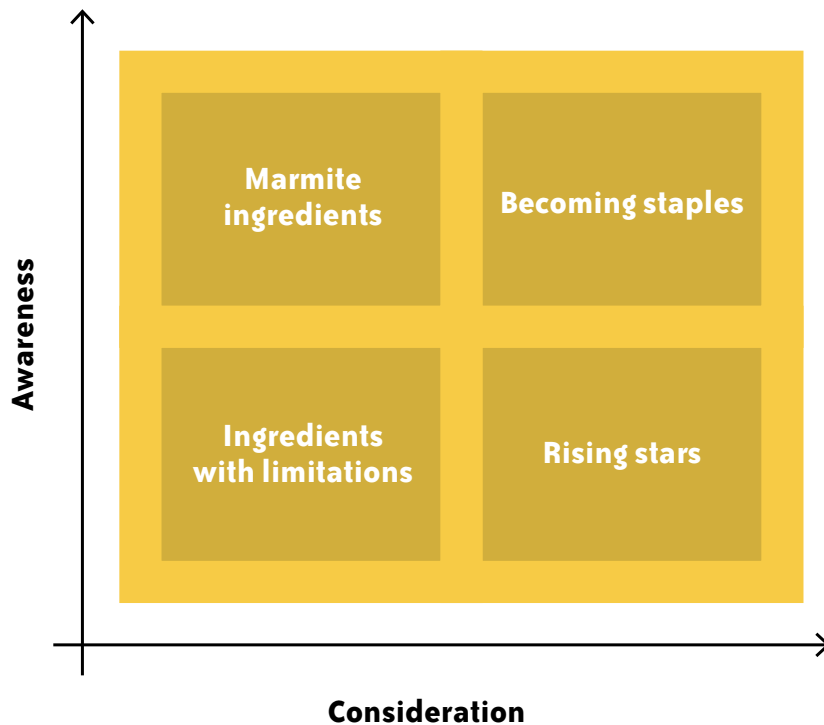


## Limitations levels

*e.g. Yuzu*

Ingredients with less awareness that, once discovered, aren't necessarily likely to be considered or their use established.





## KEY TAKEOUTS

Ingredients that have higher consideration and awareness are those that have a primary use (rather than a mixture). Ingredients must be positioned with messaging that shines a spotlight on their specific purpose, whether that's in the food-to-go market or use in cooking.

For ingredients with a higher use in cooking, recipe creators appear influential to support consumers picking them up and using them. Once familiar and deemed 'useful', they become a staple of a consumer's repertoire and kitchen cupboards.

# Cuisine

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**Cuisines have their own cultural identity, from the ingredients used to the flavours created. Each has iconic dishes that can be enjoyed at home, in restaurants or as a takeaway treat.**

Whether in their purest form or as cross-border borrowings, resulting in fusion cuisines, they offer an opportunity to be creative and get the taste buds buzzing for something that can be either familiar and comforting or different and interesting.

Curve allows us to understand how consumers are engaging with different cuisines in varying contexts. It presented three areas for consideration.



## **Tried and trusted**

*e.g. Mexican*

Familiar cuisines across the UK with high usage levels and consideration for the future.



## **Of the moment**

*e.g. Lebanese*

Cuisines that aren't necessarily being used yet but have potential as consumers have an awareness and are likely to consider in the future.



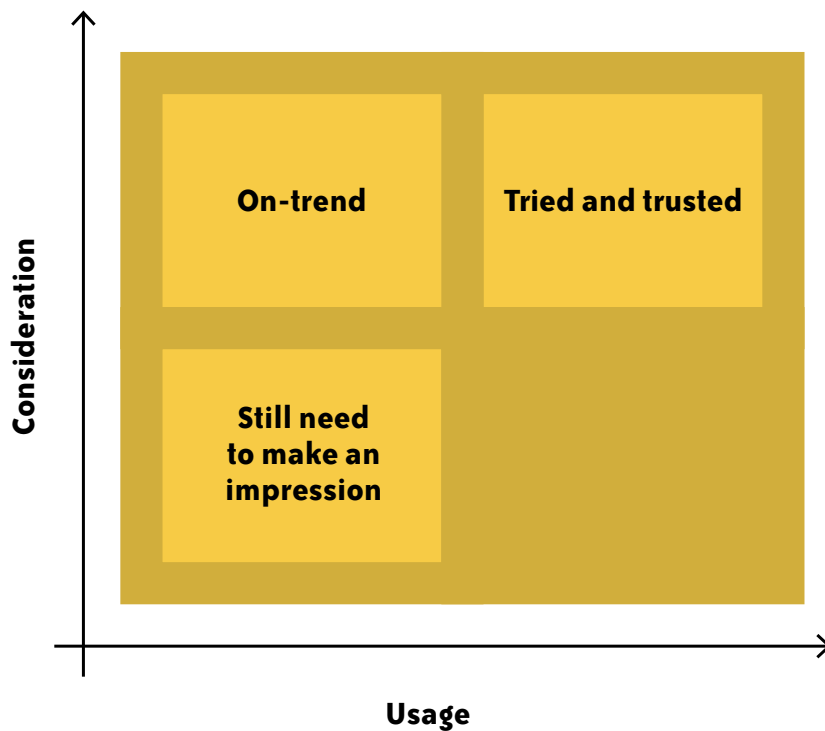
## **Still need to make an impression**

*e.g. Itameshi*

Less familiar and generating lower engagement in respect of knowledge of dishes and flavours from these cuisines.







## KEY TAKEOUTS

Tried-and-tested cuisines naturally show a higher penetration of consideration and usage. Any changes to well-known and traditional dishes could be met with challenges if it's felt the boundaries of familiarisation are pushed too far.

Lesser-known cuisines demonstrate higher consideration but naturally lower usage. Therefore these ingredients need to work harder to engage audiences across different contexts and formats but have the opportunity to pique interest as something new. However, amidst the cost-of-living crisis, education is needed to balance investment of trying something new and trust.

# GAINING MOMENTUM

*Air fryers*



*Tinned foods*



*Batch cooking*



*Slow cookers*



# ONES TO WATCH

*Nostalgic/retro recipes*



*Technology to help food waste*



*Charcuterie boards*



# Techniques

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**Amid the cost-of-living crisis, the presence of social media as a source of inspiration, and concerns around sustainability, a range of approaches is being considered by consumers in the context of how they prepare, are inspired by and are conscious about the food and beverages they consume.**

## Board report

The many techniques used to enhance cooking at home include traditional store-cupboard essentials and of-the-moment gadgets, with a correlation between awareness and likelihood to consider in the future.

Seeking comfort in challenging times will see a retro-revamp of nostalgic recipes with modernised and playful twists offering moments of escapism. Consumers will use technology to help educate them in pursuit of waste reduction to help preserve the planet and keep cash in their pockets.

Prepare for the next upgrade of charcuterie boards. They continue to be an opportunity for sharing moments with each other and on social media.

## Glossary

### Definitions of using/trying ingredients:

- As part of a meal at a restaurant
- As part of a takeaway
- As part of food to go, such as a Tesco meal deal or Starbucks takeaway
- As an ingredient used in cooking a meal
- Tried on its own

Mix of uses is when there is no significant difference between these uses.

### Definitions of using/trying cuisines:

- As part of a meal at a restaurant
- As part of a takeaway
- As part of food to go, such as a Tesco meal deal or Starbucks takeaway
- Homecooked meal

Mix of uses is when there is no significant difference between these uses.



## *Chapter 7*

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# FOOD FOR THOUGHT

*Ingredients and flavours serving up inspiration  
through innovation to whet consumer appetites.*



1



### Dream Date

Hailing from the Middle East and known as ‘nature’s candy’, dates went viral on TikTok in 2022 with creative recipes reimagining sweet treats. The classic Medjool is set to be joined by the lesser-known Halawi, Khadrawi, Mazafati and Barhi varieties for use in a range of dishes and snacks.

2

### Incarnation Milk

The alternative milk category will continue to deliver new options to rival UK favourite oat milk. Potato milk was the star of 2022. Now, expect the next generation of milk innovation to include sesame and pistachio.



#### LINNEY DISCOVERIES

- Sesame milk – Marmite ingredient
- Potato milk – Ingredient with limitations

3



### Pasta la Twister

Here’s a new take on the classic comfort food. Pasta will pivot with healthier versions and alternatives. According to market trend experts Whole Foods, ‘Produce Meets Pasta’ is set to have its moment. It’s designed to work for people on high-protein, low-carb and ketogenic diets – and won’t fall apart in the water when it’s boiled. As well as tasting great, it will help deliver extra nutrition with added nutrient-dense vegetables such as sweet potato and greens.



#### LINNEY DISCOVERIES

- Rising star

4

### Kettle Petals

Beverage flavours are going floral with the help of elderflower and lavender’s delicate essences elevating tasting profiles and supplanting the need for sweeteners or additives.





5



### All A-board

Charcuterie boards will continue to have their moment in the sun. While the meat and cheese combination's a classic, the sea-cuterie offers a fishy alternative and there will be a sweet update in the form of chocolate. The sharing and versatile nature of the concept will allow for more creativity.

6

### Fungis to Be With

The humble and multipurpose mushroom's sustainable superfood creds will gain further traction with new varieties taking the stage. Maitake mushroom (aka hen-of-the-woods) is set to be fungus of the year. Uniquely rich with a feathery appearance and ripple-like structure, it's perfect for frying and roasting. Maitake means 'dancing mushroom' in Japanese because those who stumbled upon it in the woods would dance upon spotting it.



7



### Unique Ube

Awareness of Filipino cuisine has been bubbling for a while. Now the mashed purple yam known as ube is creating excitement for its crossover potential – from churros to tortillas.



LINNEY DISCOVERIES  
Rising star

8

### Fusion Mash-ups

The food scene loves it when cuisines collide for the creative opportunities this provides across taste and format. Itameshi is the latest example, where Italian and Japanese cultures merge. Think Japanese-curry-flavoured arancini.



LINNEY DISCOVERIES  
Itameshi – Still needs to make an impression

9

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## Time to Get Fruity

Fruity arrives hot on the heels of bubble tea and is inspired by the ultra-popular trend of fruity coffees in China, where you can expect to see pineapple, coconut and avocado flavours. Typically served as an espresso over ice with a thick fruit puree, chopped fruit and milk, Fruity's expected to be making an appearance in our daily brews. After all, coffee's made from a fruit's seed to begin with.

10

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## White Coffee

Not to be confused with an Americano with milk or a flat white, white coffee dates back centuries and has its origins in Yemen. Typical coffee beans are roasted at a lower temperature which is stopped just at the tipping point of caramelisation to create a white-looking bean. The result's a brew lower in acidity but high in antioxidants, with a flavour profile that's smooth and nutty with a subtle sweetness.



11

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## TikTok Eats Up Everything

As the fastest growing social channel for the last two years, it's no wonder TikTok continues to be a source of inspiration for creative, innovative recipes and ingredient hacks. It's becoming quite the food industry influencer. Simple recipes shared visually and virally will be with us for a while – it's a key way for brands to engage with audiences.

12

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## Crazy for Croissants

It's a decade since chef Dominique Ansel's Cronut first landed on our plates. So, we're long overdue a fresh flaky pastry craze and new variations are puffing up in all shapes, sizes and flavours. From Swedish baker Bedros Kabranian's cubed concept to Philippe Conticini's spiral stuffed variants – the race for the latest croissant crown is on.



LINNEY DISCOVERIES

Rising star

13

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### A Rind of Magic

Fermented drinks such as kombucha and kefir have been on the beverage scene for a little while. Now, tepache is joining the line-up. Originating from Mexico and Central America, it's produced by fermenting pineapple rinds and spices. The result's a refreshing, slightly sparkling drink. Its prebiotic properties and very low alcohol content enable it to position itself as a health-promoting option.

14

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### Exalting Yolk

Popular in Asian countries, the rich custardy salted egg yolk has a flavour profile of umami that bridges the gap between savoury and sweet, lending itself to a variety of formats from coffee to chips. It's tipped to be the emerging flavour of the year.



15

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### Chaotic Cuisine

Fusing flavour formats and taking inspiration from iconic dishes across a variety of cultures is where creativity thrives. Recognised menu items will be reinvented, with examples including cheeseburger arancini, masala cheesecake and tandoori spaghetti preparing to pique the interest of those craving an atypical taste experience.

16

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### Go West

West African food has been very much under the radar until now. Curious palates are discovering classic dishes of the region, including jollof rice, fufu – a dough which uses the root vegetable cassava – and egusi, a thickened soup made from seeds. The cuisine uses unique cooking techniques. Dedicated African sections in supermarkets means it can be tried at home as well as at new restaurants hitting the UK.





*Chapter 8*

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# TAKEAWAY MENU

*We condense these findings  
into key opportunities...*









# Engage the evolving palate

**Hectic lifestyles, tight finances, thrifty shopping...  
we can't talk food without considering the wider  
economic context. Can consumers cut down  
costs without compromising on taste?**

Despite challenges across the food and beverage landscape, there's still an appetite for innovation and escapism. People want food experiences where they connect, explore and fundamentally feel good about what they've consumed.

So, is it Back to Basics or With a Twist?

### **Why not both?**

Simple dishes have made a comeback, with people turning to new ingredients to reimagine classic combinations as their own.

As consumer priorities evolve, so does the need for the industry to create and position products that engage in meaningful and considered ways. More than ever, it's imperative that brands showcase their true value, in terms of price point and an end-use perspective.

'Nice to have' versus 'need to have' is a tricky balancing act. If brands want to be value-drivers, they'll need to adapt and find creative solutions that capture the attention of the cost-conscious consumer. With the cost-of-living crisis set to last well into 2024, a long-term approach is required.



Food has always been about more than just nourishment: it breaks down barriers, sparks joy, fosters connection and incites debate. More recently, consumers have recognised that their food choices provide the chance to actively engage with sustainable practices; eating well can be good for both people and the planet.





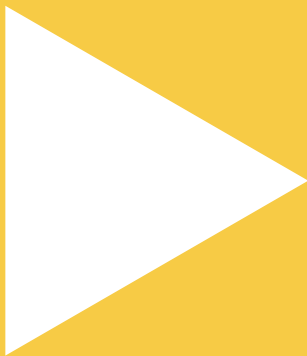
To distinguish themselves, brands must be hitting all the right notes.

The food and beverage landscape is dynamic and everchanging – keep up.





# THINK. EAT. SPEND. 2023/24



DISCOVER MORE INSIGHT IN  
OUR REPORTS: THINK AND SPEND.

