

NOURISH

food marketing

Food Trends and How to Leverage Them in On-Farm Markets

02. 22. 2023

2023 TREND REPORT

THE Future IS
Transformative

Trends are not Fads



2022



2021



2020





Our top food & beverage industry and agricultural trends for 2023 are:

The Rise of Reducatarianism:

Trading “either/or” for “everything, but less”

Good Eats, Better Sleeps:

The role of food as a sleep aid to promote overall well-being

This One's for the Ladies:

Female food is a missed opportunity we can no longer overlook

Food Without Borders:

Social media unites us globally so we can shop and cook together

Robots, AI, and Connected Kitchens:

The future of food automation finally arrives

Breaking the Chains:

Localized production offers an alternative to shaky global supply lines

Closing the Loop:

Self-contained food systems are the future

From Science Fiction to Science Farming:

Ag innovation sees exponential growth to meet environmental and market needs

Solidarity for Sustainability:

The future of eco-conscious agriculture is cooperative



What We Want From Food



What We Want From Food



- During COVID shifted discretionary entertainment & travel budget into food as a way to deal with boredom & anxiety
- Rediscovered joy of family mealtime, although we'd like more help getting it on the table
- 85% planning to eat family meals more often or the same amount



What We Want From Food



- Whole health includes mental wellbeing
- Less “diet culture”
- Relaxation, calm, immunity, resilience
- Elevated comfort foods



How We Prepare Food



How We Prepare Food

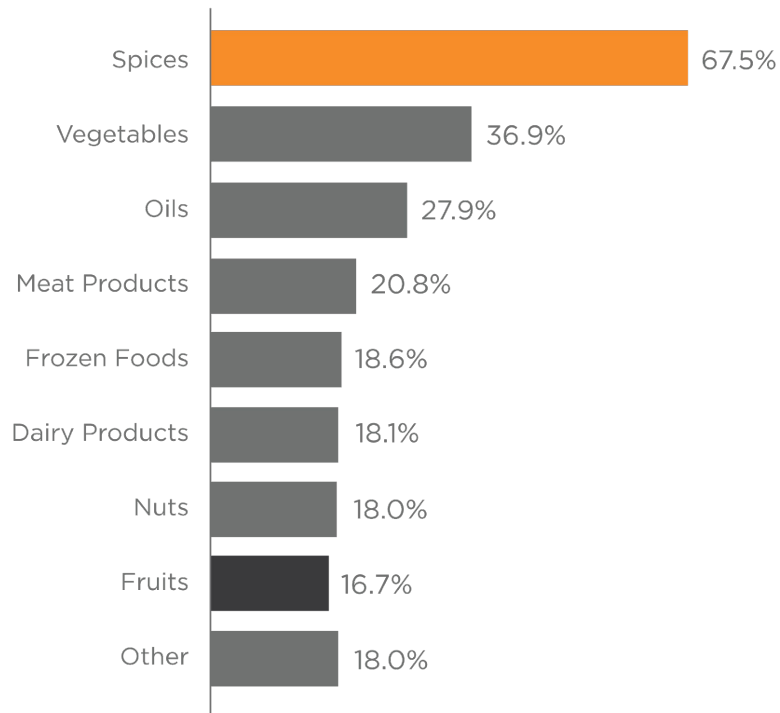


- During COVID we invested in kitchen tools & gadgets
- Only 37.5% of Canadians believe that their ability to manage meals throughout the day has improved
- “What’s for dinner decision” - decision fatigue



How We Prepare Food

You indicated you're using new ingredients, what kind?



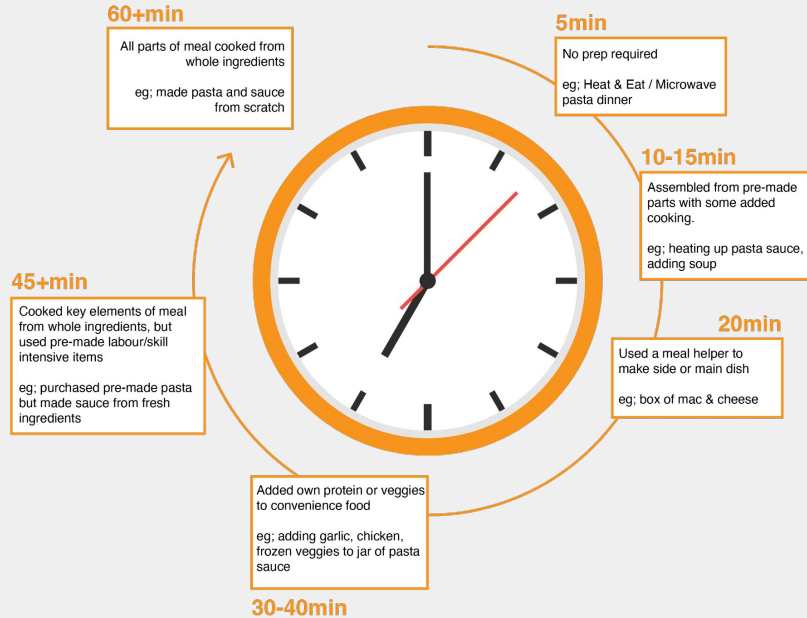
- Sticking with what we know, limiting experimentation to basics like spices & oils or a new vegetable
- Only 36% of Canadians learned a new recipe

Source: Caddle/Dalhousie University, 2021



How We Prepare Food

The Meal Scratch Timeline



- “Aided Cooking”
- Consumers moving from “making” to “blending” meals
- Meal components coming from various places
- Added-value products - pre-cut, mixed washed greens



How We Consume Food



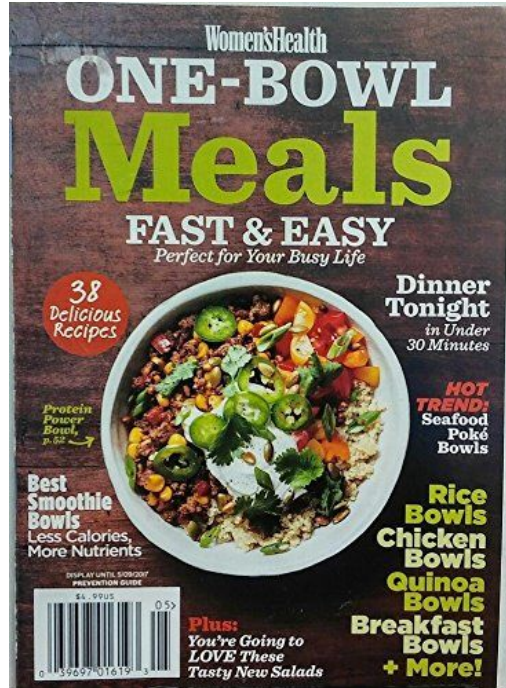
The Return of Breakfast



- Traditional 3 square meals/day
- More convenient breakfast options - RTE/RTH
- Elevated coffee drinks
- Breakfast is back!
- Hybrid in-office/work from home



How We Consume Food



- Portability less important & more multiserve options
- Dinner plates being replaced by bowls

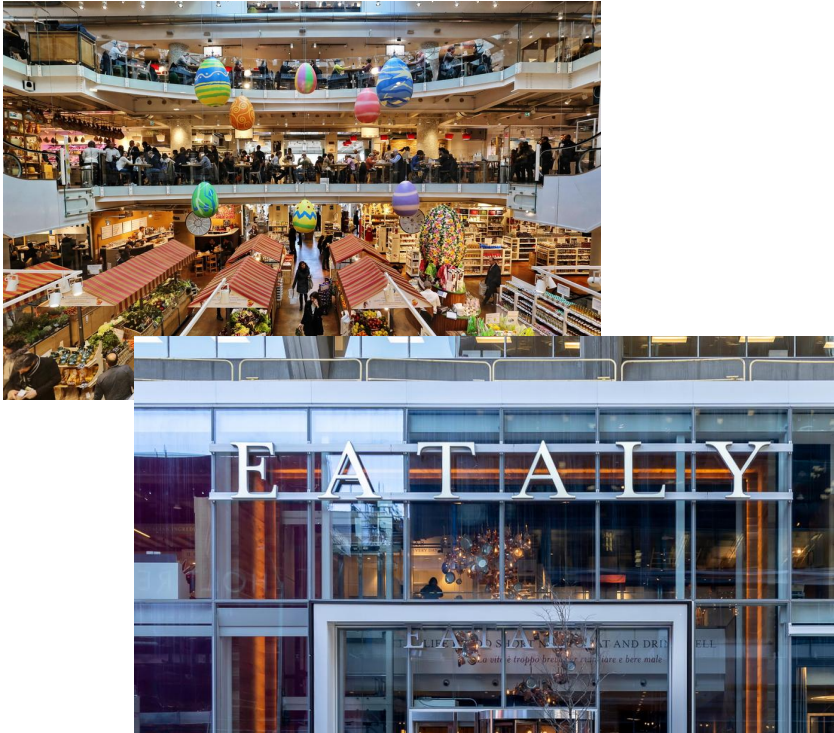


How We Purchase Food



How We Purchase Food:

Evolving Grocery Shopping from Chore to Experience



- Eatertainment/Agritainment - craving innovation & IRL experiences
- Centre of store moving to digital, albeit slowly.
- Perimeter focusing on shopper inspiration with sampling & food demos
- 62% of consumers 18 to 34 enjoy going to these type of venues because they view them as a social occasion



How We Purchase Food:

Evolving Grocery Shopping from Chore to Experience



- More pantry-loading behaviour as way to combat inflation
- Perception of frozen produce improving with 57% of Gen Z/Millennial see as good or better than fresh



Food Without Borders:

How trends develop within
the food ecosystem



Food Without Borders:

How trends develop within the food ecosystem



Wired to be social and now wired to be global

- While supply chains are moving away from globalization, social media encourages behaviour globalization
- TikTok and KITTCH have “glocalized” food trends
- Social media unites us globally so we can shop and cook together
- 36% of meal preparers are cooking multicultural dishes more often than last year (IPSOS5)



Food Without Borders:

How trends develop within the food ecosystem



Innovation path in the food ecosystem has changed

- Dalgona coffee on TikTok
- Starbucks Via Instant
- PC's Dalgona Coffee Cake

Entire cooking process is converging on social

- New social media network Flavrs bridges gap between browsing recipes and actually cooking them with integrated ingredient shopping courtesy of Instacart



A close-up photograph of a person's hand holding a clump of dark, rich soil. The hand is positioned in the upper left quadrant of the frame. The background is a vast field of similar dark brown, tilled soil, stretching towards the horizon under a warm, golden light. An orange semi-transparent rectangular box is overlaid on the left side of the image, containing white text.

Made Matters:

How was everyone &
everything treated?



Made Matters: Better for Me, Better for the Planet



- Made in
- Made by
- Made how
- Provenance = Confidence



Made Matters: Generational Divide

Top Consumption Factors of Importance



BOOMERS, GEN X

Product Provenance

MILLENNIALS

Product Provenance

+ Environmental Sustainability

GEN Z

Product Provenance

+ Environmental Sustainability

+ Governance



Made Matters: Product Provenance



- We connect through stories - wired for emotion first, rational comes after
- Storytelling wins
- “Nothing tastes as good as food served with a good story”
- Food’s journey contributes to consumer’s enjoyment - we eat with our eyes



Made Matters: Craft Authenticity



or



or



- Importance of Tone & Manner
- Need consistency at every touchpoint
- Avoid "faux" craft



Local Matters

We trust our
neighbours



Local Matters



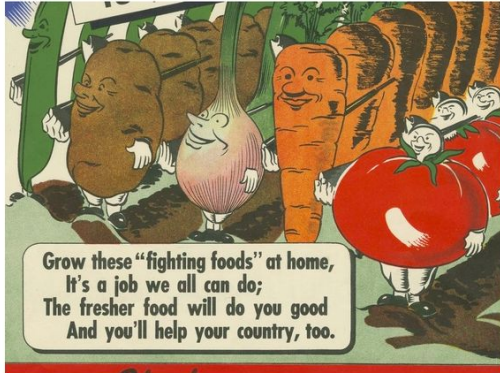
- Speaks to consumer's desire for food with integrity
- Greater transparency & trust
- Seen as tasting better, more nutritious
- Support community
- Equals higher quality in consumer's mind



Local Matters

Growing Things: New wave of victory gardens taking root during COVID-19

Gerald Filippek
May 14, 2020 • Last Updated 6 months ago • 5 minute read



Victory gardens sprouted up during the Second World War to provide food and boost morale. Supplied



- New appreciation for locally grown produce, with 4 in 5 Canadians claim they're willing to pay extra for
- Gen Z over twice as likely as Boomers
- New appreciation for foraged foods
- Interest in heritage, indigenous produce



Local Matters



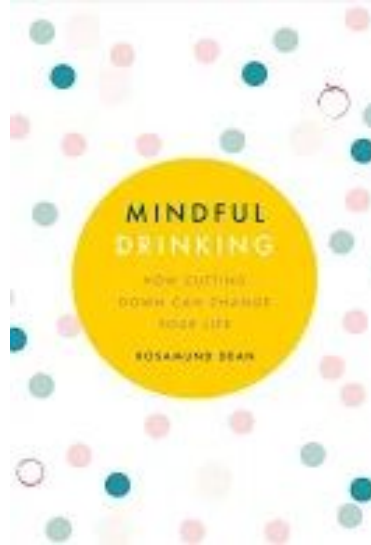
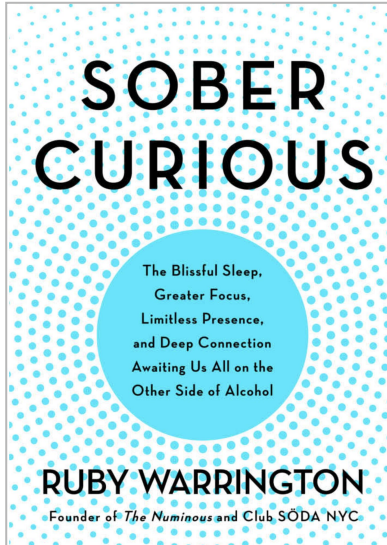
- Hyperlocalization with vertical farming & indoor ag
- Need to call out local year-round, not just with seasonal produce. Think added-value products as well.



Sober Me



Sober Me: Rethinking Alcohol for a New Generation of Drinkers

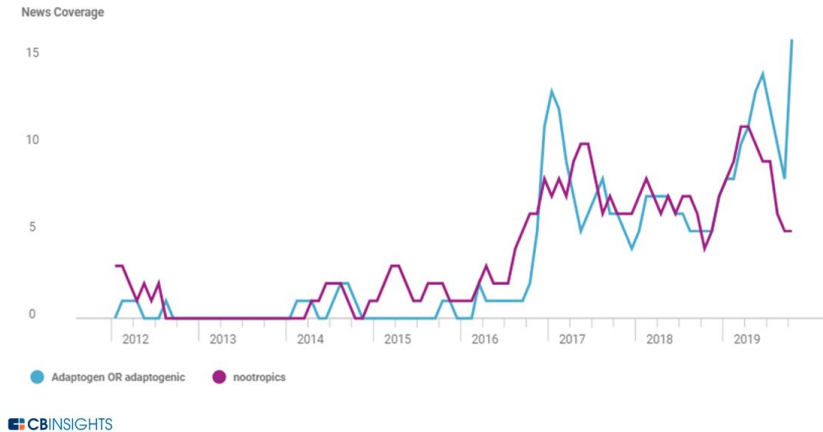


- Dry January evolving to sober 2023
- Younger gens drinking less than parents, but everyone reducing alcohol consumption with most recent medical advisory
- Next stage of wellness revolution



Sober Me: Rethinking Alcohol for a New Generation of Drinkers

New wellness ingredients emerge to challenge CBD



- Still want drinks “with benefits”
- Adaptogens (mushrooms & herbs, reduce stress) and nootropics (e.g. ginseng, enhances cognition & memory) - around longer, benefits better researched
- CBD has higher awareness but consumers confused





The Rise of Reducatarianism:

Trading “either/or” for
“everything, but less”

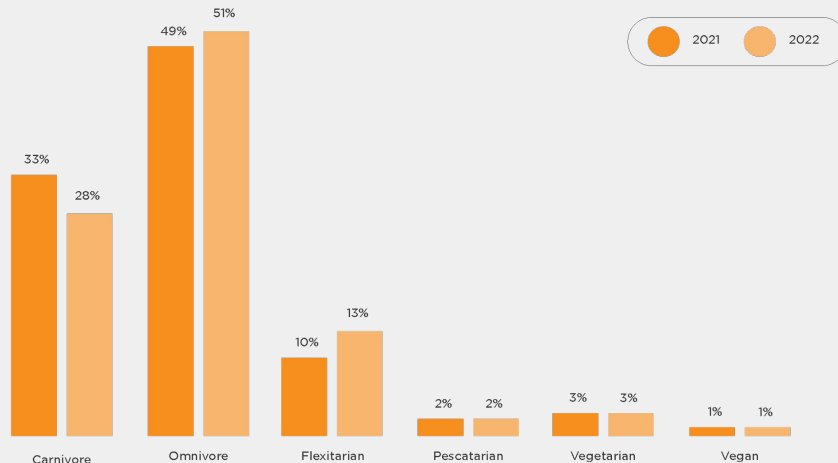


The Rise of Reducatarianism:

Trading “either/or” for “everything, but less”

Dietary classification:

Consumers becoming less carnivorous



Source: Mintel; 8,000 global online consumers aged 16/18+ March 2021; 16,000 global online consumers aged 16/18+ April 2022

About reducing meat intake instead of cutting it out

- Could faux meat category be a transition step?
- More attention starting to be paid to nutritional, environmental credentials plus ultra processing nature/ long ingredient list
- More of a focus on the quality of protein? Amt? Will consumers trade down on protein cost scale?



The Rise of Reducatarianism:

Trading “either/or” for “everything, but less”

Calls to clean up ingredient lists in plant-based will get louder

10% of consumer conversations on vegan/plant-based food were about clean eating.

Plant-based liquid egg 11 INGREDIENTS

Ingredients: Water, Mung Bean, Protein Isolate, Expeller-Pressed Canola Oil, Corn Starch, Contains less than 2% of Baking Powder (sodium acid pyrophosphate, sodium bicarbonate, corn starch, monocalcium phosphate), Dehydrated Garlic, Dehydrated Onion, Carrot Extractives (colour), Turmeric Extractive (colour), Salt, Transglutaminase

Standard egg 1 INGREDIENT

Ingredients: 100% Liquid Egg Whites
CONTAINS: Eggs

Dried whole egg powder 2 INGREDIENTS

Ingredients: Whole eggs, less than 2% sodium silicoaluminate as an anti-caking agent
CONTAINS: Eggs

As the demand for clean label grows, so will the market for clean label additives.



Source: Spoonshot

Processed food is still processed food, no matter what the protein is

- Extend budget by blending?
- Move to more sustainable animal proteins
- Consumers may trade up to labels like grass-fed, CRSB Certified
- Eat less but “better” and more expensive, more DTC relationships built during COVID



Plant-Based 3.0: Lessitarianism



- 47% of Canadians looking to reduce meat consumption compared to 7% of populations who are vegetarian/vegan
- Manitoba's BUMP
- Blended products in milk being tested
- Different way for doing flexitarianism for best of both worlds!
- Can you “mylk” it?





Cultivating Your Inner Garden:

Eating for Gut Health Goes Mainstream



Cultivating Your Inner Garden: Eating for Gut Health Goes Mainstream

Gut Intelligence Test™

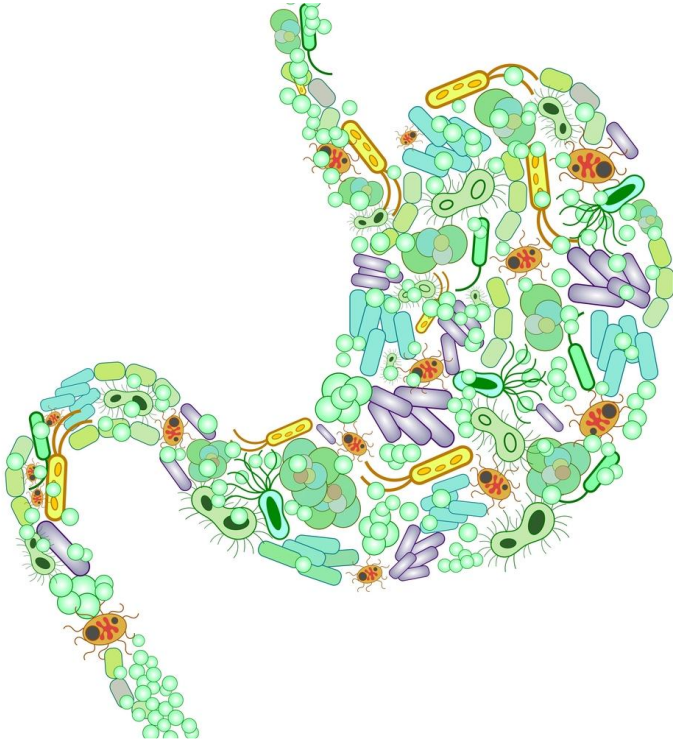
At-home gut health test



- Gut health goes way beyond the gut
- Interest in gut microbiome & how it interacts with wellness will grow as will demand for products to optimize it



Cultivating Your Inner Garden: Eating for Gut Health Goes Mainstream



Probiotics, prebiotics, and now postbiotics

- Consumer awareness growing
- Fermented vegetables, fruit shrubs
- Allows us to eat with seasons



Blurring the Lines:

Foodservice Models
Get Increasingly
Hybridized



Blurring the Lines:

Foodservice Models Get Increasingly Hybridized



No one staying in lane

- “Growcer”
- Restaurant bodegas
- More made-to-order sandwich options at supermarket deli counter, more gourmet & global options

Vertically integrating supply chains

- Costco & poultry processing plant
- Retailers hiring ships

What complementary goods & services would make your customer’s life better?



Closing the Loop:

Self-contained food systems are the future



Closing the Loop:

Self-contained food systems are the future



Expect more “co-opetition” across food supply chain to solve common problems

- Food loss and waste reduction
- Tapping new sources for drinking water to combat drought

The easiest way to divert food from the waste stream: eat it



Closing the Loop:

Self-contained food systems are the future



- Already see closed-loop systems in restaurants growing their own food and finding a use for everything
- 60% of Canadians are interested in purchasing upcycled products
- What sources for local produce and ingredients exist that you can transform into mutually beneficial partnerships?





What's Good for Me is Good for Fido:

The Humanization of
our Pets

Bonus



What's Good for Me is Good for Fido:

The Humanization of our Pets

Line blurring between human and pet category

- Ben & Jerry's Doggie Desserts
- Lots of other CPG companies own pet food divisions
- Think about applying same trends to pet category



Now, you can promote gut health and immune support with Purina ONE with Microbiome Balance™. Natural prebiotic fiber goes to work inside the dog microbiome, balancing the bacteria in his gut to help keep him healthy and happy. Purina ONE dry dog food is natural, with added vitamins, minerals & nutrients.



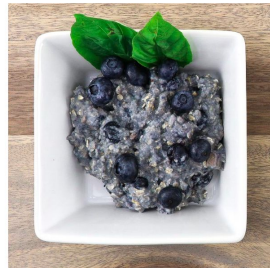
What's Good for Me is Good for Fido:

The Humanization of our Pets



Your Pet Nutrition Experts.

Tom Sawyer's team of veterinarians, pet nutritionists, food scientists, chefs, nutraceutical partners and farmers work together for your pet's health and happiness. Our high quality meals and broths promote positive pet health outcomes to help reduce future vet bills and promote pet vitality.



Huge carbon pawprint

- Millennials & Gen Z want products that align with their values - opportunity for alternate proteins?
- Only 13% of dog owners exclusively feed their dog kibble
- What human trends can you leverage by extending it to four-footed family members?



What Nourish Can Do For You

Nourish has offices in Canada, but we work for clients globally. We do sector-specific trend reports as well as offer the following services:



Research

We continuously analyze industry trends and conduct qualitative and quantitative research, applying insight to action and increasing your chance of success.



Test Kitchen

Led by our professional chef, recipe and flavour profile development are among our unique specialties.



Video & Photography

Mouth-watering images created in our spacious and versatile in-house studio will put your product's best foot forward.



Branding

From brand persona to mission and vision to logos and more, we'll work with you to shape your brand's identity.



Packaging

Our shopper and industry knowledge, coupled with design expertise, gets your product onto shelves, into carts, and into hearts.



PR & Influencer Marketing

When it's time to get the word out, we know how, when, and where to place your message to reach your audience most effectively.



Events & Sampling

Pop-ups, food trucks, trade show booths and more; no matter the event, we can guide you from planning to execution and help you make valuable connections.



Multicultural

We don't see cultural barriers; we see new audiences waiting for someone to connect with them on their terms.



Digital Services

Unlock the power of thumb-stopping, click-worthy websites, social media, and digital ads crafted with data-driven insights to win hearts, minds, and screen time.



Integrated Advertising

With consistent, impactful messaging across a variety of channels, from traditional to new media, we move consumers along the path to purchase.





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