



ADM GLOBAL CONSUMER TRENDS SERIES
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Culinary Trends Inspire Innovative Eats in EMEA

Unique eating experiences are top of mind for today's consumers, including the reimagining of dishes in convenient formats, revisiting nostalgic favorites through a new lens, exploring the world through flavor and expanding their view on protein.

From the foodservice outlets to market shelves, consumers are intrigued by offerings that allow them to travel through their tastebuds. While consumers will not compromise on taste, they are also more conscious of their own well-being and the planet's. Plus, now more than ever, consumers are open to different protein options, including animal-based, plant-based and novel sources.

"Cuisine continues to advance to meet evolving consumer needs," notes Nathan Schomers, an executive research chef for ADM. "Visionary chefs experiment with techniques and ingredients and apply them in unexpected ways to make their food even more appealing with exciting and unexpected textures, flavors and colors."

As a global leader in nutrition, ADM has identified market and consumer shifts influencing food and beverage development trends, with an emphasis on Europe, Middle East and Africa (EMEA) and what these trends will mean specifically for the culinary space in the months ahead.

Culinary Trends



Trend 1:

A Tapestry of Regional Cuisines

Expanding access to global news and happenings, from international sporting competitions to geopolitical events, can bring the world to our doorstep – and our dinner table. Greater awareness provides more exposure to the traditional and popular cuisines of other regions. This may translate to sub-trends of fusion foods, as well as sweet heat, especially using varietal peppers.

“Global flavors may also gain prominence as the population diversifies within specific areas,” notes Chef Schomers. “In western Europe, for example, we see an influx of Afghan, Syrian, West African and Latin American cuisines, such as Chilean, Venezuelan, Peruvian, Brazilian and Mexican foods.”

This can be seen with dishes like dim sum and Mexican birria popping up in restaurants throughout Europe. Plant-based variations of these cuisines, as well as unique cooking methods and presentations, such as deconstructed empanadas, also bring a sense of excitement to tantalize the taste-buds.

Citrus and fruit-forward flavors from different regions, including East Asia and South America, have



In EMEA, Generation Z are most likely to try out exotic and unusual flavors, followed by millennials.¹

also garnered traction in EMEA. Exotic taste profiles like yuzu, passionfruit and dragon fruit are especially prevalent in beverage products. Kombucha also continues to shine and be used in a variety of foods due to its fermentation adding tartness, as well as associated benefits through prebiotics.



Trend 2:

Premiumisation and Convenience

The increasing consumer desire for premiumisation is not just limited to dining out. Notably, gastronomy is finding a place in the home – with kits available to consumers to try their hand at this premium culinary technique. Consumers also look to premiumisation through ready meals and upmarket canned meals, gravitating to convenient, tailored options with quality ingredients and fascinating flavors. A great example of this is salsa macha – a Mexican-style chili oil made with chopped garlic, nuts and seeds. Served with crunchy black bean chips, it's a delightful savory pairing to deliver satiety and global flavors in a dippable format.

Better-for-you snacks and ready meals, made with wholesome ingredients that feature the benefits of plant protein, fiber and nutrients are designed to satisfy consumers' hunger and cravings, as well as interest in tailored offerings. Further, convenience is key, particularly with younger consumers who frequently eat one-handed to keep pace with their busy lifestyles.

“‘Snackification’ is here to stay, and there is great growth potential for grab-and-go options in grocery aisles that emulate regional snack items,” says Chef Schomers.

One hot item is spicy fried chicken, also known as yan su ji, which is a staple of Taiwan's night

markets. Typically flavored with five-spice powder and tossed with deep-fried Thai basil, this crispy snack is often served as small bites or cutlets for easy portability. Other popular street foods include naan crisps and dip, empanadas, falafel and pizza nuggets. Food on a stick can be another fun way to taste adventurous flavors on the go. For instance, a plant-based lamb kebab with pistachio-mint pesto puts a Mediterranean twist on alternative proteins. Plus, intriguing flavor profiles are also present in ready-to-eat meals and step-by-step meal kits, such as Asian noodle kits, providing additional convenience, along with taste exploration.

Consumers in Africa (80%), Middle East (73%) and Europe (53%) say they are interested in foods and drinks that are customized to meet their individual nutritional needs.²



50%

of UK consumers agree that cooking a meal using premium products is as much of a treat as eating out in a restaurant.³



Trend 3:

Classic Comforts with a Modern Twist

Ongoing uncertainty and turbulent living conditions strain consumers' holistic well-being, affecting everything from sleep habits and energy levels to mood. With 50% of European consumers planning to improve their mental well-being over the next 12 months, people are increasingly seeking moments of small indulgence offering reward and escapism⁴.

Chef Schomers concurs: "Food is extremely emotional. It has the power to bring you back to a special moment in time, and place, providing nourishment for both the body and the mind."

Classic cooking techniques with an innovative use of flavor, texture and format can help meet consumer desire for an experimental food journey. Chef Schomers notes, "Generally, people have positive eating experiences with familiar flavors that bring them back to their childhood or a fond moment in time, building up a sense of comfort and reassurance."

For example, dishes with recognizable flavors that have a non-traditional presentation intrigue consumers and stand out on social media, like a

vibrant yellow margherita pizza with pinsa-style dough. On the flip side, familiar formats with distinct flavor profiles, such as a vegan muffin with timut pepper flavored icing, also entice consumers. Emerging now is black garlic, which has a sweet, tangy and rich flavor with a molasses-like texture, elevating marinades, sauces and dressings. Marinades are also excellent for bringing in twists that champion the familiar with the new, such as gochujang-marinated chicken with mojo sauce for both a Korean and Latin flair served in a warm, comforting dish.

When asked why they enjoy nostalgic/traditional flavors in foods, consumers in EMEA stated¹:

- the flavors remind them of simpler times (76%).
- the flavors evoke moments of comfort and escapism (74%).
- they know and trust these flavors (73%)



Trend 4:

Plant-Forward Future

New and novel developments in the alternative protein space is imperative, as the food industry explores new ways to feed a growing population in a sustainable manner. On top of that, our research finds that nearly half of consumers in both the U.K. and Germany consider themselves flexitarians focused on trying to consume more plant-based foods while also incorporating animal-based and other alternative proteins into their diets⁵.

“The average person is seeking foods that have nutritional value and are enjoyable to share with family and friends,” notes Chef Schomers. “Therefore, we need to provide appealing, flavorful products to entice consumers to purchase the plant-forward option. It has to look, smell and taste delicious.”



In the U.K., 23% of plant-forward consumers – defined as flexitarians, vegetarians and vegans – have not tried but are interested in trying alternative fish⁵. Similarly in Germany, 20% of plant-forward consumers have not tried but are interested in trying alternative fish⁵. Brands can encourage these curious consumers with a new wave of seafood alternatives.

Clean-tasting and neutral-colored soy or pea textured proteins are used to develop the distinctive bite and chew of flaky fish. Vegan seafood-type flavors also help replicate authentic aroma and taste profiles that aren’t overly “fishy.” Likewise, plant-forward burgers or whole muscle-like steak alternatives are more enticing with flavor notes that mimic the characteristics of grass-fed beef. The use of beans and pulses in plant-based dishes – which is common in Asia, West Africa and Latin America – is also garnering more attention, creating multisensorial experiences with desirable tastes and textures. Fermented black beans, for example, can be used in plant-forward culinary creations for added umami, as well as fiber, protein and associated potential digestive support.

On the horizon, we see meat and seafood alternatives that will meet or even exceed consumer expectations for nutritional content. These next-generation products could have fewer calories from fat, higher protein content, and may also include prebiotics, probiotics and postbiotics that can support satiety, gut health and overall well-being.



Developing Next-Level Solutions

Chefs, innovators at heart, dedicate themselves to bring culinary excellence to the customer experience. Modern consumers have elevated expectations for the foods they eat and the companies that produce them.

Whether perfecting the sensory elements of a plant-based steak, discovering microbial strains that unlock the potential of the gut microbiome or finding the perfect combination of thrilling flavors to travel the world, ADM helps develop next-generation concepts that solve food challenges of today and tomorrow.



¹ FMCG Gurus, *Flavors, Colors, Textures in EMEA*, 2023

² FMCG Gurus, *Personalized Nutrition: New Opportunities When Targeting Health-Conscious Consumers*, 2021

³ Mintel, *UK Attitudes Towards Cooking in the Home Market Report*, 2023

⁴ FMCG Gurus, *Top 10 Trends for 2023*

⁵ ADM Outside VoiceSM, *Global Plant-Based Proteins Consumer Report*, 2023