



SYNERGY™
INSPIRING TASTE™

2021 CONSUMER TRENDS



2021 Global Trends



SYNERGY[®]
INSPIRING TASTE™



THE FOOD PHILOSOPHER

For the food philosopher 'family time' is their top priority in life and this is having an impact on their food choices as their children grow up and even become influential consumers themselves.

Food philosophers are most likely to have more disposable income and can afford to make more conscious choices. They are much more aware about how their lifestyle and choices might affect them, their children and the future of the planet.

Key Trends:

- Allergen-free
- Flexitarian
- Clean label 2.0

'I cannot do all the good that the world needs. But the world needs all the good that I can do'

– Jana Stanfield

WHAT'S DOES IT MEAN?

- Consumers becoming increasingly aware of allergens in food
- Manufacturers creating greater visibility on allergen labelling
- Consumers adopting 'allergen-free' diets for health

WHAT'S DRIVING THE TREND?

- Media coverage of severe allergic reactions
- Growing list of registered allergens
- Changes in laws around allergen labelling and what is classed as an allergen
- Increasing awareness of special diets such as FODMAP for intolerances
- Parents with young children seeking products with allergen-friendly claim

PRODUCT LAUNCHES



Free from gluten, wheat, dairy, soy and yeast and suitable for vegans



No added sulphites



Plant-based cold brew, free-from the top 8 major allergens



Vegan ready meal free from all 14 EU registered major allergens

RESTAURANTS BLOGS AND SOCIAL



Seed butter: sunflower or pumpkin, seed butter is the perfect alternative for nut-allergy sufferers

Camel milk
The latest dairy-alternative to sweep Australia and now available in UK ASDA stores



SYNERGY'S OFFERING

- Masking & harmonising flavours for free-from
- Milk & dairy flavours for dairy-free products



37% of consumers avoid an ingredient due to an allergy or intolerance

WHAT DOES IT MEAN?

- Consumers choosing to adopt plant-based diets on a part-time basis
- Vegan and plant-based foods becoming more readily available whether the focus is health or environmental

WHAT'S DRIVING THE TREND?

- Consumers reducing meat consumption for health reasons
- Consumers becoming increasingly concerned about the impact of farming on our planet and animal welfare
- Consumers becoming part-time vegetarians in order to eat more grains, vegetables and legumes
- Traditional meat and dairy brands making waves in the vegan space

PRODUCT LAUNCHES



Super-green plant-based sausages, Heck



Blend of lean beef and beans, Lean & bean



Vegan versions of favourites: vegan Cornish pasty, Greggs vegan sausage roll



Lactofree dairy & oat milk hybrid



This isn't Chicken (but tastes like it!)

RESTAURANTS BLOGS AND SOCIAL



Vegan egg: Wagamama launch dish with worlds first vegan 'egg'

Vegan classics: Pret set to launch vegan versions of top sandwiches including Chuna mayo, hoisin mushroom and the VLT



SYNERGY'S OFFERING

- Vegan-friendly meat flavours; chicken, beef, cured meats
- Umami & kokumi savoury enhancers
- Vegan-friendly dairy flavours; milk, cream, yogurt
- Harmonisers and flavour pairing



25% of UK shoppers are looking to cut down on their meat intake and this rises to 35% in 18-34 year olds

CLEAN LABEL 2.0

- Consumers want to know more about their products than ever before
- ‘Clean eating’ is tipped to be the next ‘healthy’ as it become a lifestyle choice
- Ingredients lists are becoming shorter and more recognisable

WHAT’S DRIVING THE TREND?

- Food scandals
- Consumers around the world lacking trust – need to know more about how, where, when and by whom – “the back story helps to create an element of trust”
- Increased choice – consumers can afford to be choosy
- Many consumers believe ‘natural means healthy’

PRODUCT LAUNCHES



‘Whole strawberries & fresh cream’



‘only 3 ingredients’



‘Nothing added’



‘Pure rosemary extract’



‘Cold-pressed whole fruit’

FASTEST GROWING FLAVOURS

- Unflavoured/Plain +50.00%
- Mango +200.00%
- Vanilla/Vanilla Bourbon/Vanilla Madagascar +50.00%

SYNERGY’S OFFERING

- Clean label extracts and FTNF flavours;
 - Citrus fruits
 - Botanicals & florals
 - Herbs
 - Vanilla extract



38%
of UK respondents agree they trust a product with a shorter ingredient list is better for them than one with a longer one

2021 Global Trends



THE REBALANCER

The rebalancer's life is all about balance, not just making healthy food choices but also looking after their all-round wellbeing. Their main goals in life are to eat well, stay hydrated, keep up their fitness routine and stay stress-free!

Whilst they follow a strict diet and fitness routine on weekdays they are not afraid to occasionally indulge on the weekends, they have worked hard and deserve it!

Key Trends:

- The power of veg
- Positive nutrition
- Cutting back

*'It is health that is real wealth,
not pieces of gold and silver'*

- Mahatma Gandhi

WHAT'S DOES IT MEAN?

- Plant-based ingredients are becoming the hero in food and drink as consumers look for natural products to fit their lifestyle
- Whilst plant-based is on the rise, it not just about veganism as chefs across the UK celebrate the humble vegetable!

WHAT'S DRIVING THE TREND?

- The rise of veganism – consumers becoming more aware of and accustomed to the flavour of various plant-based ingredients
- The natural sweetness of vegetables being used to facilitate sugar reduction
- Bright and bold vegetables making products more grammable!
- Vegetables being used as a way to add fibre to products

PRODUCT LAUNCHES



Layers of brightly coloured vegetables for the perfect centrepiece



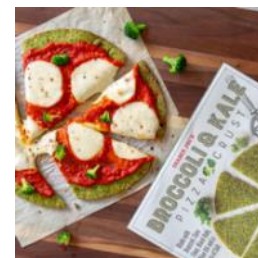
Crisps naturally coloured with vegetables



Avocado ice cream



Drink your veggies



Broccoli & kale pizza crusts

EVERYONE'S TALKING ABOUT



Veggies for dessert: A wave of inventive chefs are embracing vegetables in a range of new innovative desserts

Hidden veg: A new wave of recipe inspiration for parents who want to sneak more veg into kids' diets



SYNERGY'S OFFERING

- Masking & harmonising flavours
- Cheese and dairy flavour pairings
- Fruit flavour pairing
- Botanical & herbal extracts



In 2018, 20% of food and drink spend in the US was on plant-based products

WHAT'S DOES IT MEAN?

- Fad diets are out and fact-based scientific health is in!
- Consumers are now more clued up about their health and wellbeing than ever and are increasingly demanding products with additional benefits with promises to balance gut bacteria, build muscle and even help you live longer!

WHAT'S DRIVING THE TREND?

- Busy lifestyles and the odd 'slip' on the diet plan is driving an increase in 'permissible' products
- Consumers using social media influencers to educate themselves about the next big health trend from protein to gut health
- Consumers constantly on-the-go who want to maintain their healthy diet out of home by choosing nutritionally enriched foods

PRODUCT LAUNCHES



Supergut porridge with 3x more fibre than standard oats



Boost protein through condiments for veggies



On-the-go breakfast probiotics

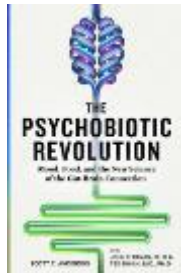


Live sauerkraut rich in probiotics



Grass-fed beef protein snacks

EVERYONE'S TALKING ABOUT



Psychobiotics: consumers becoming increasingly educated on gut health and the link between the gut and the brain

Insect protein: Consumers are becoming more open to the use of insect protein and it's slowly making it's way into product launches



SYNERGY'S OFFERING

- Protein flavour-pairing
- Flavours & extracts for fermented products
- Masking flavours



47% of UK parents agree that it is hard to find healthy food products aimed at children

WHAT'S DOES IT MEAN?

- The childhood obesity crisis has reached critical point, governments are beginning to introduce recommendations to cut sugar, fat and salt in foods
- The age of the sober-curious – not drinking is no longer a sign of pregnancy or not knowing how to have a good time!

WHAT'S DRIVING THE TREND?

- Government putting sugar in the spotlight with various campaigns
- Increasing availability of health information via labelling (traffic light system) and online means consumers are better informed to make healthy choices
- Rise of social media – consumers thinking more about the repercussions of their drinking habits!
- Mindful consumption – younger consumers feeling the burden of responsibility to eat and drink better

PRODUCT LAUNCHES



Aecorn – the UK's first alcohol-free aperitifs



Sugar replaced with sweeteners and fibres for more 'mindful eating'



55% less sugar than your average biscuit in the UK



Doughnut chips, Krispy Kreme – all the taste with less calories



BFY ice cream brand Oppo venture into desserts

EVERYONE'S TALKING ABOUT



Alcohol-free spirits: Brands like Seedlip are leading the way with non-alcoholic spirits and mixologists are putting more effort into mocktails than ever before

The rise of savoury: Traditionally sweet categories move to savoury flavours to remove the need for added sugar

SYNERGY'S OFFERING

- Taste modulation platform; solutions for sugar, fat & salt reduction
- Alcohol flavours
- Sweet flavours; honey, maple, date
- Building indulgence with dairy flavours



52% of Brits say that booze-free beers have become socially acceptable.



THE GAME CHANGER

The Game Changer is not one for playing by the rules, particularly when it comes to food or drink!

Innovation is key for engaging our Game Changer and whilst health is important, it shouldn't come at the expense of fun!

There's no room for complacency with our Gamer Changer – they're brand loyal to a degree, but if your standards slip there's always a new brand ready to take your place!

Key Trends:

- Blurring the lines
- Bright & bold
- The craft movement

*'If you're not moving forward,
you're moving backwards'*

- Mikhail Gorbachev

WHAT'S DOES IT MEAN?

- Continued emphasis on colours and visuals in products
- Novel flavours to pair with specific colours
- Multi-layered & multi-coloured products
- Themed products to tie in with global events

WHAT'S DRIVING THE TREND?

- More consumers are looking to social media for food ideas and inspiration where visuals are key
- Consumers are looking for a sense of fun in certain products, particularly in indulgent/treat items or as a break from healthier or more 'natural' options which they may consume on a daily basis.

PRODUCT LAUNCHES



Co-branded confection flavoured nutrition shake



Raspberry, cacao & vanilla stout



Mayonnaise cupcakes



Unicorn rainbow sprinkles



Cold pressed black (charcoal) lemonade

EVERYONE'S TALKING ABOUT



"Comedian" – a banana taped to a wall recently sold for \$120,000 at Art Basel and was promptly eaten by the buyer.
Pomme Granny Smith: A hyper realistic apple pastry with granny smith and dill compote



SYNERGY'S OFFERING

- Classic confectionery flavours (e.g. parma violets, lemon sherbet)
- Fantasy flavours
- Colour-themed flavours



49% of consumers learn about food through social networks, emphasising the importance of looking good online!

WHAT'S DOES IT MEAN?

- Alcohol flavours being used across multiple categories
- Sweet & savoury and sweet & spicy blurring within products
- Classic / nostalgic flavours being transferred into new categories
- Fantasy flavours

WHAT'S DRIVING THE TREND?

- Consumers are increasingly looking for products which can break the monotony and impart a little bit of fun into their day
- Consumers are always on the lookout for new flavours, formats and product types
- Consumers like to see their favourite flavours transported into other, novel product categories

PRODUCT LAUNCHES



Savoury cereal bars



Nostalgic chocolate reimagined



Savoury yogurt



Dessert-inspired liqueurs



Confection with beverage flavour

RESTAURANTS BLOGS AND SOCIAL



The cronut: The original hybrid between a doughnut and a croissant is still as popular as ever

Dessert hummus: Turns snacking on its head!



SYNERGY'S OFFERING

- Dessert-inspired flavours
- Heat & spice flavours and seasonings
- Alcohol flavours
- Confectionery flavours



60% of consumers say they would be interested in buying discontinued brands from their childhood

WHAT'S DOES IT MEAN?

- Craft brands are chipping away at multinational's market shares across almost all categories
- Consumers expect premium food and drink experiences
- Big brands are buying craft brands or launching their own craft products

WHAT'S DRIVING THE TREND?

- Consumers are starting to either tire of global brands or reject them outright – Coca Cola has been around for 132 years – people are bound to start getting tired of it!
- Millennials are choosing to spend their money on rarer, but more premium treats – e.g. one or two craft IPAs, rather than four cans of Fosters
- More craft listings in retailers driving innovation

PRODUCT LAUNCHES



"Small batch" dry gin



Raspberry craft brewed kombucha



Premium chicken tikka ready meal for 2



Farfalle squid ink artisanal pasta



Handmade white chocolate honeycomb

EVERYONE'S TALKING ABOUT



Non-alcoholic spirits: Seedlip have continued to disrupt the craft market, adding to their range with a "nogroni"
The Pished Fish: Online retailers selling highly premium, alcohol-infused salmon



SYNERGY'S OFFERING

- Multi-flavours & flavour layering
- Trending profiles
- Clean-label extracts



57% of craft alcohol buyers consider a 'unique flavour' to be the most important purchasing factor. This is compared to 30% for non-craft buyers

2021 Global Trends



THE GLOBETROTTER

Always on the go, The Globetrotter is not one for standing still, and so neither do their tastebuds. These intrepid explorers are always on the look out for the latest cuisine trends, broadening their culinary horizons through a mixture of travel, street food exposure and authentic blogs.

The Globetrotter is your perfect restaurant travel companion, just don't let them catch you ordering a Tikka Masala!

Key Trends:

- Japanese
- Italian

'Travel makes one modest, you see what a tiny place you occupy in the world'

- Gustave Flaubert

WHAT'S DOES IT MEAN?

- Spotlight on Japanese cuisine in the run up to, and throughout the Olympics
- Interest in the region will continue well beyond 2020 – as with previous global sporting events, we will see certain flavours become core off the back of the event

WHAT'S DRIVING THE TREND?

- The number of tourists to Japan has increased significantly over the past decade, including an 8.7% y-o-y rise taking the total number of foreign visitors in 2018 to 31.2 million
- Interest in Japanese food has been growing for a number of years, but with the Olympics we expect interest to be amplified and to last well beyond the end of the Olympics

PRODUCT LAUNCHES



Authentic Japanese carbonated drink



Chicken katsu & yakisoba ready meal



Japanese Toki whisky



Matcha tea with cranberry & lime



Wafer fingers with matcha green tea



Hokkaido shio instant ramen

RESTAURANTS BLOGS AND SOCIAL



Japanese 'dude' food:
Think sashimi pizzas and wagyu beef burgers!
Christmas BAObles: Bao in colourful Christmas themed shapes – perfect for hanging on your tree!



SYNERGY'S OFFERING

- Shichimi Togarashi (Japanese 7 spice)
- Toasted sesame
- Cherry blossom
- Matcha
- Yakisoba
- Teriyaki
- Yuzu



26% of consumers have eaten Japanese in the last month, and a further 43% would be interested in eating Japanese

WHAT'S DOES IT MEAN?

- Updated classics – bringing tried and tested Italian dishes into the 2020s
- More premium offerings in retail – wood fired pizzas, fresh chilled pasta, premium indulgent desserts

WHAT'S DRIVING THE TREND?

- Italian dishes are timeless classics which offer something for everyone – from the fussiest of eaters to the most adventurous
- Jamie Oliver has been pushing Italian throughout 2019 – his is the most viewed food website in the world (10m visitors per month) meaning that what he's talking about is what the world is talking about!
- The continued growth of more premium casual Italian dining (Pizza express excluded) has risen the profile of traditional Neapolitan pizza – e.g. Franco Manca, Pizza Pilgrims

PRODUCT LAUNCHES



Italian Gelato,
Unilever



Classic Italian Panettone,
various UK supermarkets



Goats cheese and
caramelised onion fiorelli



Chicken and smoked
pancetta tortelloni



Wood-fired pizza with
Italian flour

EVERYONE'S TALKING ABOUT



Jamie cooks Italy: Jamie Oliver revisits Italy to discover classic recipes passed down through generations

Dolcetta, London: Have recently launched the UK's first vegan cannoli.



SYNERGY'S OFFERING

- Panettone
- Citrus flavours
- Mascarpone
- Tiramisu
- Tomato based cuisine pastes
- Authentic Italian flavours (Synergy Italy)



Italian restaurants are the UK's top restaurant choice, with 19% of consumers saying it is their favourite restaurant type

2021 Global Trends



THE LIFE HACKER

The life hacker is always on the look out for innovation particularly if it can save them time! This typically young millennial is always busy balancing their work schedules, gym classes and social activities, meaning convenience is key and but with a greater expectation surrounding the nutritional benefits and taste of these offerings, alongside their Instagram worthiness of course! They look for meals that could be eaten anywhere from their desk to their evening commute with a personalised edge.

Key Trends:

- On-the-go
- Complete nutrition
- Personalisation

'Time is money'

- Benjamin Franklin

WHAT'S DOES IT MEAN?

- Meals that traditionally where eaten around the table are now in easy to pick up formats that you can enjoy where & whenever.
- New innovation and flavour surrounding meals are a requirement as settling for a traditional sandwich won't always cut it for todays Life Hacker consumer.

WHAT'S DRIVING THE TREND?

- An increasingly busy lifestyle means more and more people are opting for on-the-go.
- The growth in the fourth meal (An article from the guardian estimated that Britain's snack 8.3 times a week.)
- A rise in accessibility to vegan/veggie options as Mintel's Attitudes towards Lunch Out Of Home Report, UK June 2019 reported 48% of consumers avoid eating meat for at least one lunchtime meal a week and 67% feel it is important lunch accounts towards their five a day.

PRODUCT LAUNCHES



Purable smoothie Bowl
France



Crunchy Nut,
On- The- go
Granola Pot

Just
add
water



BOL Keralan
Coconut Curry Veg Pot



Campbells Sipping
Soup, America



Eat from Defrost
Pizza Denmark

RECIPES, BLOGS AND SOCIAL



Jamie Oliver:
Rainbow salad wrap featured in the On-the-go section of his website.

Starbucks :
Has been consistently adding vegan options to its take-out food menu like their Vegan all day breakfast burrito.



SYNERGY'S OFFERING

- Authentic culinary pastes based on the latest cuisine trends
- Cheese and dairy flavour portfolio



The grocer reported 'Deskfasting' making up 12% of breakfast eating occasions. According to the 76% of Brits now buy lunch out for an everyday occasion. There are even eat from defrost dinners designed to be taken on the go.

WHAT'S DOES IT MEAN?

Consumers are looking for products to replace a meal or even their entire diet which will allow them to achieve 'complete nutrition' i.e. providing them with all the essential vitamins and minerals alongside the macronutrients.

WHAT'S DRIVING THE TREND?

- Huel, soylent and feed breaking boundaries
- Busy lifestyles that buy into the convenient nature
- The concern around food wastes contribution to the environment.
- Consumers that are focused on health or sports performance.

PRODUCT LAUNCHES



'Nutri-Genetix'



Nourished Vitamins



HUEL Granola



Feed.

RESTAURANTS BLOGS AND SOCIAL



Gamechangers:

A recent documentary focused on the benefits of the vegan diet for sports performance has made waves in the world of sports nutrition.

SYNERGY'S OFFERING

- Flavour harmonising
- Flavour masking
- Flavour pairing expertise



A Mintel report on meal replacers found that vegan ranges have expanded by 7% in the last 3 years.

WHAT'S DOES IT MEAN?

Modern consumers are wanting to make connections with their food
 This could be through transparency of the ingredients lists or knowing where the ingredients come from or it could be foods that involve some form of participation for a fully immersive experience

WHAT'S DRIVING THE TREND?

- The expansion of online and mobile shopping has lead to a new era of personalisation.
- Crowdsourcing ideas gaining popularity. (Crisps)
- People want to 'tell stories' to make food their own and talk about it.
- It allows for nutritional control and food suited for specific dietary needs.
- Guess the flavour trend

PRODUCT LAUNCHES



At Home Yoghurt Maker,
 Plant based or dairy



Mystery Oreos



Quality Street BYO



Recipe Boxes

RESTAURANTS BLOGS AND SOCIAL



Kellogg's Kitchen Creations: Available on Deliveroo, everything from cheesy cornflake bites to sweet waffles, shakes and vegan hotdogs.

KitKat Chocolatory: Consumers can choose from a range of 14 ingredients and 4 different types of chocolate to create their perfect Kitkat



TRENDING FLAVOURS & INGREDIENTS

- Fantasy flavours
- Clean-label pastes, extracts and natural flavours



60% of UK cereal eaters like to add extra ingredients to breakfast cereal



THE FOOD PHILOSOPHER



THE REBALANCER



THE GAME CHANGER



THE GLOBETROTTER



THE LIFE HACKER

CHERRY BLOSSOM



WHITE TEA



TOASTED SESAME



MASCARPONE



CHARGRILL





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