



Trendscape 2024

HARRIS
AND
HAYES

Taste the future

Harris and Hayes' expertise lies in identifying early shifts and developments in global food and beverage culture, as well as the cultural and social behaviours behind them.

Our Trendscape service equips you with a bespoke future forecasting framework, which identifies the most relevant emerging signals and trends and how you can transform them into new business opportunities.

Past clients include Diageo, Innocent, Unilever, M&S, Costa, Vandemoortele and Sainsbury's, with press interviews in The Grocer, The Times, and The Guardian.

www.thefoodconsultants.org



Our approach

IDENTIFY

Collect comprehensive food and drink signals from proprietary research, insight platforms, and all forms of media. Correlated with cultural, social and economic shifts likely to shape these signals and future trends.

CONTEXTUALISE

Work with industry experts, chefs, sommeliers and nutritionists to explore emerging ingredients, culinary techniques and consumer demands. Attend industry events and trade shows to meet innovators, producers and manufacturers.

BUILD

Create a unique Harris and Hayes Directional Framework with targeted macro trends.

Bespoke report includes real world examples that point towards this future with key expressions, products and real world examples

ACTIVATE

Develop collaborative workshops, webinars and presentations that activate the directional framework and macro trends within the client's ongoing strategy.

TRACK

Monitor ongoing trends and cultural shifts. Track changes in purchasing behaviour, restaurants, and all social media, as well as pioneering tech and sustainability innovation.

How it works for you

01

Trendscape 2024

Dynamic report that asserts your authority as a category leader in food and drink forecasting.

02

Collaborative Workshop

An immersive exploration of the Trendscape framework, and its application to your business strategy.

03

Ongoing Consultancy

Support client as they execute Trendscape findings at a category and cross-business level.

Phase 1: Trendscape 2024

Objective: Assert your authority in food and drink, and scope out the most exciting trends relevant to your business.

Deliverable: A dynamic and informative directional framework including:

- A strategic breakdown of Trendscape macro trends.
- The relevant cultural drivers and contextual shifts.
- Key sub-trends within each macro trend.
- Product, concept and industry examples illustrating where it's showing up best.
- Future predictions demonstrating where these innovations sit on a Trend Curve and how they intersect with your business.
- The flavours, cuisines and ingredients linking back to each trend.



Phase 2: Collaborative Workshop

Objective: Introduce your team to Trendscape findings, challenge your NPD and innovation pipelines, and ideate most relevant workstreams.

Deliverable: An immersive workshop, webinar or presentation of the Trendscape directional framework and its application to your business. Depending on the scale of workshop, it could include:

- **A collaborative pre-planning session** to agree agenda, structure the event and ensure it meets your internal objectives.
- **An engaging presentation of your bespoke Trendscape framework**, through skilful immersion and ideation activities and a range of medium including expert videos, tastings and visual expressions.
- **Expert facilitation**
- **Follow-up materials and outputs**, organised into category workstreams and action points.



Nothing tastes better than trends in action



Harris and Hayes flavour trends tour are a powerful tool to accelerate creative strategic thinking. A bespoke city tour immerses your team in the lived experience of flavours and formats to revitalise and expand their approach.

We have conducted tours in London, Milan, Paris and New York, introducing our clients to the most inspiring chefs, concepts and products on the market. Each tour location embodies a core pillar of the Trendscape framework, including exclusive conversations with gamechangers and industry challengers.

We would propose interspersing a collaborative workshop with a half-day tour across two days in a city of your choice:

- Day 1: Introduce Trendscape report and half-day tour
- Day 2: Trendscape ideation workshop

Phase 3: Ongoing consultancy

Objective: Support client as they execute Trendscape findings at a category and cross-business level.

Deliverables: We would work on a project or retainer basis to:

- **Inform near-to-far concept mapping**, product development plans and workstreams
- **Train marketing and other teams** in Trendscape findings.
- **Develop Trendscape communication campaign**, including creating engaging cross-platform content for social media and online platforms.
- **Support putting Trendscape findings into bespoke quant research.**
- **Provide quarterly or biannual updates** to the Trendscape framework, including signals or expressions of the trends as they emerge.
- **Facilitate collaborations** with changemakers, entrepreneurs and masters of flavour to continually push expectations and NPD.



**Case
studies**



Client: Diageo (Global)

Project: Supplied trends and insights across the chocolate, dessert, cocktail and ice cream categories. Developed stimulus and ran a successful session for a Baileys NPD ideation workshop.

Savoury chocolate

Chocolate flavours expand into savoury notes with miso, soy sauce and basil complimenting cacao's natural sweetness. Savoury also carries connotations of being healthier than sweet indulgence:

- **Four stigma** mushroom chocolate has cep powder as an umami-packed active ingredient
- **Theo and Philo** Chocolates in the Philippines make an adobo milk chocolate bar, with soy sauce and black sesame.
- **Hotel Chocolat** chocolate pesto made with rough-chopped basil, pine nuts, Italian cheese and nutty roast cocoa nibs



Four Stigma



Hotel Chocolat



Theo and Philo

Chocolate

Super Slushies

Cocktail slushies are becoming more and more turbocharged and inventive and we're seeing a broader range available 'on-tap.'

- Caribbean oasis **Miss Lily's** are famous for their super strength Frozen Dark & Stormy.
- One of the most celebrated slushies of 2018 was the Frozen Mai Tai at **The Dawson**, Chicago.
- Frose has been overtaken by new concoctions such as Freisling (Peach infused vodka + Reising) and **Artic Wine Cooler** (Grand Marnier, apricot liqueur + orange).
- High-tech slushie machines are big news when the temperature soars. **Smitten Kitchen** have written a recipe for a boozy bourbon slush punch.



Smitten Kitchen



Miss Lily's



Artic Wine Cooler



The Dawson

Cocktails

Client: Canvas8 (Global)

Project: Supporting Canvas8 as external industry insight consultants since 2020. We write detailed trend reports on category and consumer trends, and provide expert interviews across the platform.

CANVAS8

REPORT | 14 Apr 21

HOW A DESIRE FOR NEWNESS IS SHAKING UP SPIRITS

Established players in the spirits segment are being challenged by newcomers that are defying the rules of the game by reevaluating terroir, developing new processes, and even forging their own category-disruptive descriptors. But can these innovators go from niche to mainstream?

Location [United Kingdom](#)

CANVAS8

REPORT | 24 Jun 21

WHY ARE AT-HOME COOKS SEEKING INNOVATION?

Lockdowns led many people to use food as a route to new experiences during the pandemic. But amid growing demand for fresher, more convenient, and sustainable products, brands face a challenge in delivering innovation beyond gimmicks. So, how can they keep Britons experimenting in the kitchen?

Location [United Kingdom](#)

How are gut feelings changing digestive health?

REPORT | 4 Jan 2022

The days when just eating a bowl of granola counted as good gut health are long gone. The global market for digestive health products is growing rapidly, but given that it's a complex topic informed as much by pseudoscience as by rigorous research, how are people making sense of the category?

AUTHORS

Lisa Harris

Alexandra Hayes

LOCATIONS:
UNITED STATES

SECTORS:
EATING AND DRINKING



Why does Gen Z love canned goods?

REPORT | 2 Mar 2023

In the face of economic crisis and climate change, Gen Zers are turning to canned food to save on their weekly shop. Driven by an appetite for novel food experiences and sustainable everyday products, they're embracing TikTok-ready canned brands that deliver flavor, authenticity, and values.

AUTHORS

Lisa Harris

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LOCATIONS:
UNITED STATES

GENERATIONS:
GEN Z (BORN
1997-2010)

SECTORS:
EATING AND DRINKING
GENERAL FOOD



Client: Vandemoortele (Europe)

Project: We've hosted the Board and Executive teams in Milan, London and Paris for 'The Future of Bread and Bakery' trends symposiums and safaris. Organised food tours, guest panels with expert speakers and tasting sessions as part of their innovation pipeline.



THE TRENDS



Declining food-to-go

The pandemic forced declining city commuter numbers and destabilised consumption schedules. It created new at-home occasions and more unpredictable consumer behaviour. These short-term responses will become long-term shifts with increased delivery and Ecommerce.

74% of companies plan to permanently shift to remote working



Real value

Loyalty apps, reward and subscription schemes increase engagement in turbulent times and drive repeat purchase of 'everyday' baked goods. Value has been redefined as consumers seek genuine low prices or premium products with proven benefits.

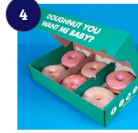
86% of consumers will pay more for a better customer experience



Health

Bakery will always be an indulgent category, but there's huge opportunity for vegan or plant-based upgrades and genuinely nutritious and functional NPD. British HFSS regulations will restrict promotion of unhealthy products in 2022.

73% of consumers believe that a cake can be healthy and delicious.



Omnichannel

Bakeries must reach customers where they are most often with a flexible, multi-channel model. This includes online sales, instant delivery, pre-order, click and collect, drive-thru, and in-store. Production methods must flex to suit multi-distribution channels.

In 2020, multichannel retailers performed better than online-only stores with growth of 57% vs 9%.



Next generation ISB

Increased bake-off from frozen and declining from-scratch is the future of ISB at the value-end of the market. Bakeries are staffed by multiskilled employees rather than specialists. Flexible production schedules meet new consumer habits and serve trends quickly.

15% loss in ISB sales values (Feb 2021)



Client: SNOG (UK)

Project: Revitalised Beltane & Pop ice-cream menu with innovative overarching concepts and flavour pairing strategy. Developed individual sundaes which were rolled out across Westfield store.

SOFT SERVE

Beetroot & Orange Blossom

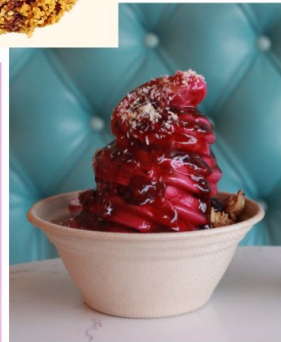
Earthy meets floral for a bright and sophisticated serve

SOFT SERVE: Baby beet (or Candy Beet). Eye-catchingly vibrant with a sweet and slightly peppery flavour.

SAUCE: Orange blossom caramel. A decadent pouring caramel, with orange blossom water to add a floral edge.

TOPPING: Blackcurrant dust. Freeze-dried blackcurrant powder for that black-on-black (or purple-on-purple) effect.

SHARD: Ginger-Rye Cookie. Multi textured, crisp ginger biscuit with earth-nutty, smoky, caramel notes.



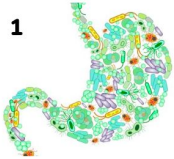
...power pairings

Client: Ardo (Europe)

Project: We hosted Ardo family shareholders for a London safari and expert session focused on future opportunities in produce. Including a bespoke trends report, food tours and expert panel session.

future directives

1



FUTURE WELLBEING

Nuanced understanding of health including eating 30+ plants a week. Brands are increasingly educators as consumers seek holistic offerings including personalised health plans and activated ingredients for gut health. A radical approach is needed to tackle the UK health crisis.

2



HOLISTIC CONVENIENCE

More than just saving time, brands save consumers' health, mental load and money. They want you to do the thinking, saving and planning for them. Increase in snackification of veg, rise of restaurant quality food at home via the air fryer, and modular meal kits are all examples of this new era of convenience.

3



COMMUNICATING FLAVOUR

Consumers seek visual flavour cues as drivers to purchase. Review branding and packaging and embrace the natural rainbow of plant-based foods to convey the integrity and health benefits of produce. Regenerative practices, and a more circular approach, inherently prioritise flavour and nutrition.

4



DISCOVERY

Stretch expectations of frozen produce with new varieties and added-value mixes of fruit, veg, herbs, pulses etc. that offer a 'Helping Hand', are 'Mostly Done' or 'Done for Me.' Convey excitement and quality through packaging, including flexible and innovative formats that suit emerging lifestyles.

expert session

Our panel session invites two experts to share their professional experience and thoughts on future food, answering your category-related questions. Both are pushing the plant-based agenda in different ways through their work in produce and food development, and the session will be particularly inspiring in terms of evolving diets, new varieties, radical flavour and sustainability.

Nick Saltmarsh, Hodmedod's

Hodmedod's is working to increase diversity on farms and in the food we eat. The brand was launched in 2012 from the realisation that fava beans were grown but little eaten in the UK, even though they're a deliciously nutritious food that can help build healthy soils and benefit farming systems. Bringing the beans back into British kitchens proved the catalyst to building a network of farmers diversifying arable rotations with forgotten and novel pulses, grains and seeds, including carlin peas, naked barley, quinoa, chia and camelina. Hodmedod's now works with over 30 different crops to produce a diverse range of over 100 plant-based whole foods.

nick@hodmedods.co.uk



Further examples of work can be found [here](#).

Get in touch



To find out more about about Trendscape or discuss upcoming projects

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www.thefoodconsultants.org