



Culinary TRENDSCAPE 2015







Insights for Innovation and Inspiration from Thomas W. Griffiths, CMC

Vice President, Campbell's Culinary & Baking Institute (CCBI)

Last year we published our first-ever **Culinary TrendScape** report, highlighting what Campbell's global team of chefs and bakers see as the most dynamic food trends to watch. The response has been exceptional. The conversations that have taken place over the past year amongst our food industry friends and colleagues have been extremely rewarding.

It has also been quite a thrill to see this trend-monitoring program take on a life of its own here at Campbell. Staying on the pulse of evolving tastes is inspiring our culinary team's day-to-day work, driving us to lead innovation across company-wide business platforms. Most importantly, it is helping us translate trends into mealtime solutions that are meaningful for life's real moments. It's livening up our lunch break conversations, too!

This **2015 Culinary TrendScape** report offers a look at the year's ten most exciting North American trends we've identified, from Filipino Flavors to Chile Peppers. Once again, we've developed a report that reflects our unique point of view, drawing on the expertise of our team, engaging culinary influencers and learning from trusted industry partners.

Just like last year, we took a look at overarching themes—hot topics—that are shaping the ever-changing culinary landscape. The continued cultural transformation of retail markets and restaurants catering to changing consumer tastes is clearly evident throughout this year's report. A deep desire for holistic wellness is bringing increased emphasis on foods that are good for the body and the planet. As expected, bold flavors, global influences and authenticity remain influential.

We're excited to share our top insights—which just might inspire future Campbell products—because we believe today's food landscape is truly extraordinary. We look forward to “talking trends” with you soon.

2015 HOT TOPICS

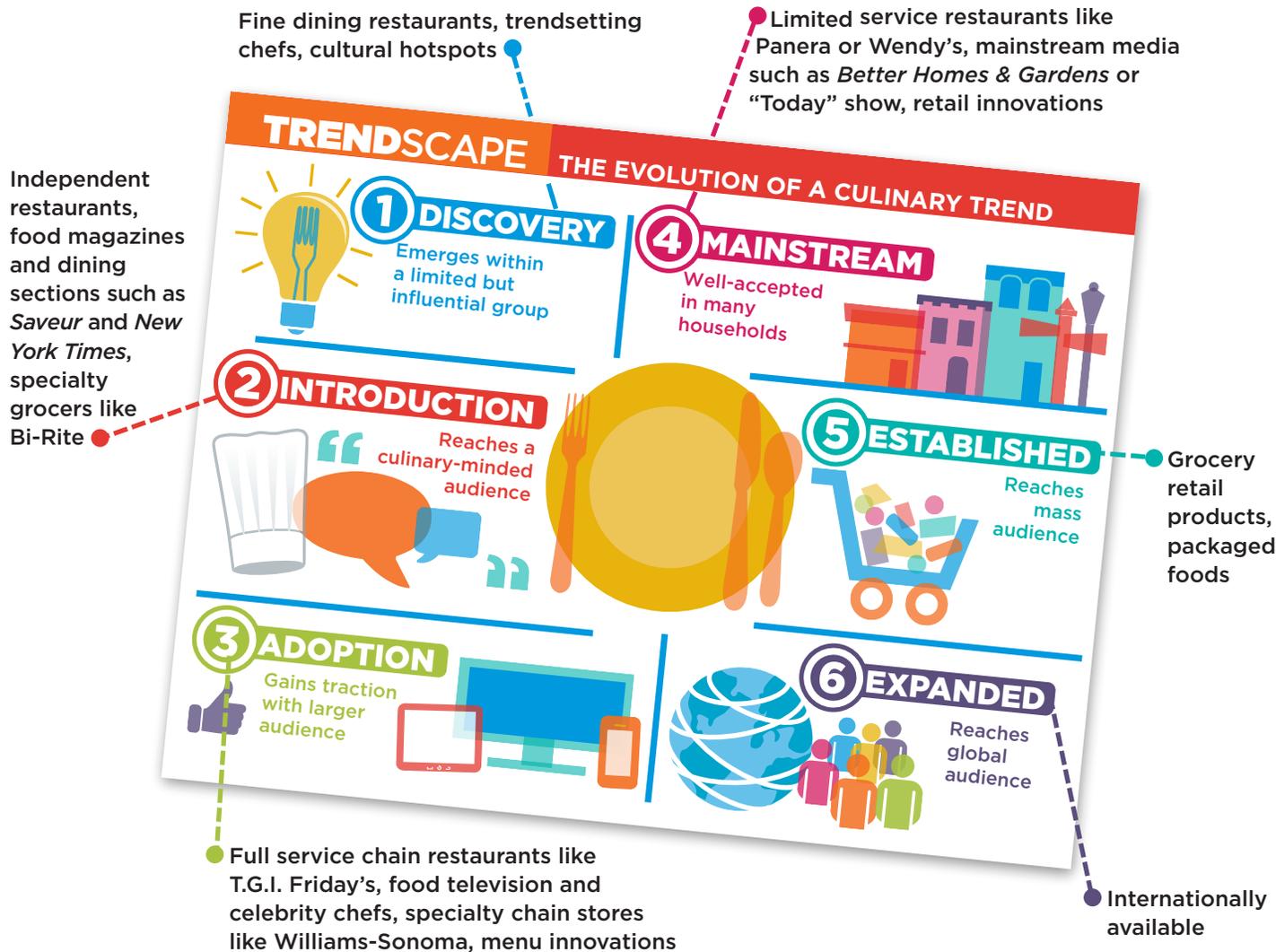
These themes are the driving force behind this year's top trends

- Authenticity**
- Changing Marketplace**
- Conscious Connections**
- Distinctive Flavors**
- Elevated Simplicity**
- Global Fusion**
- Powerhouse Plates**
- Satisfying Snacks**



Culinary TRENDSCAPE

An integrated approach to understanding food trends



How do we choose which trends to follow?

Our methodology taps a wealth of research from our chefs and other professional sources to help identify the most significant emerging trends in food, as well as those that inspire creative thinking and new direction. Then we begin our mapping on the **Culinary TrendScape**, following each trend across distinct stages, as it evolves and expands its reach.

Monitoring and understanding trends is an important part of the research we do at Campbell's Culinary & Baking Institute. It's our way of anticipating what our retail and foodservice customers will want as tastes shift and demographics change, so that we can deliver the next generation of iconic foods and beverages that people love.

TOPTRENDS 2015



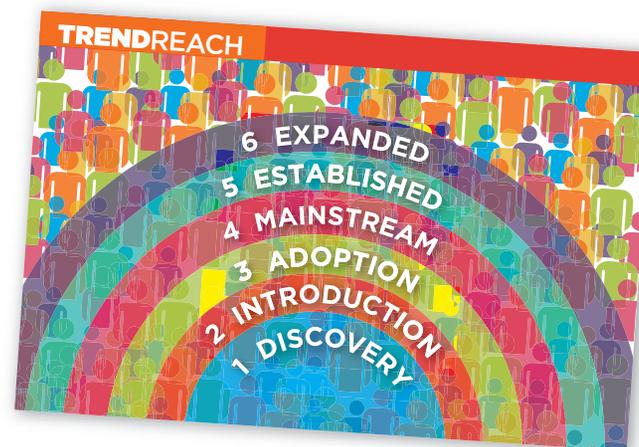
Here's a taste of the year's most dynamic trends. There's so much activity on the Culinary TrendScape, but these are the top trends that whet our appetite and ignite our passion for food. Enjoy!

Tuning in to TrendPoints

In our culinary research, we're continually discovering something new. That's what we love about food. We're inspired not only by what we're eating, but where we're eating it; what we're reading and what we see trending with the public at hotspots across the food landscape. We call these aspects **TrendPoints**. This is how we begin to tune in to the top trends that intrigue us and make us want to know more. Our philosophy is simple: it's all about tracking ideas and connecting the dots—all while keeping our consumer top of mind.

Our focus on population reach

Understanding the size of the audience exposed to a food trend helps us determine its **TrendReach**. Looking at TrendPoints within the six stages helps us track the trend's evolution and influence, from buzz to universal appeal.



FILIPINO FLAVORS

BREAD REVIVAL

SEAFOOD AWARENESS

EATING WITH PURPOSE

FOOD IS FUN

MIDWESTERN ROOTS

FAST-CASUAL EFFECT

TEA TIME

REGIONAL BARBECUE

CHILE PEPPERS

FILIPINO FLAVORS

1 DISCOVERY



Halo-halo is a layered dessert with shaved ice.

The cuisine hailing from this Southeast Asian archipelago of over 7,000 islands has gone from a blip on our gastronomic radar to a fast-track trend. Filipino-American chefs like King Phojanakong, a member of our Chefs' Council, are fueling our growing infatuation with Southeast Asian food by introducing us to the bold flavors of home-cooked adobos, lechon pork roasts, noodles, lumpia spring rolls and halo-halo shaved ice.

A history of colonialism—along with Filipinos' indisputable love for food—has shaped the cuisine. It's **Global Fusion** at its best, full of sharp, **Distinctive Flavors** that blend native, Spanish, Malaysian, Chinese and American traditions. Vinegar, garlic, soy sauce, fish sauce, calamansi lime, tamarind, bay leaf, annatto and smoked paprika are just a few mainstays of an eclectic Filipino pantry that our team is eager to explore.

Whole grilled orata fish is a modern take on tradition.



- **Datassential** – Report: Inception Stage, Filipino Cuisine (TIPS, 2014)



- **Kuma Inn, NYC** – Modern Filipino restaurant serving Tita Em's Chicken Wing Adobo
- **Milkfish, New Orleans** – Modern Filipino restaurant serving Pancit Malaban Noodles
- **Qui, Austin** – Globally-influenced fine dining restaurant serving Lechon in Dinugan Sauce with Coconut Vinegar Jam



- **The Adobo Road Cookbook** – By Marvin Gapultos (2013)
- **Flavor & The Menu Magazine** – Article: Filipino Phenomenon (2014)
- **7,000 Islands: A Food Portrait of the Philippines** – Cookbook by Yasmin Newman (2014)



- **Jeepney, NYC** – Modern Filipino restaurant offering traditional Kamayan feast
- **Max's Restaurant, Glendale, CA** – Filipino restaurant chain with locations in N. America
- **Phil Am Food, Jersey City, NJ** – Grocery serving Filipino-American community
- **The Salo Project** – Pop-up dinners featuring regional Filipino food



Adobo: A Taste of Home

Adobo, the emblematic dish of the Philippines, is an endlessly adaptable one-pot wonder that refers to both a cooking style and a vinegar-based sauce. Made with pantry staples including sugarcane (or rice) vinegar, soy sauce, garlic, bay leaves and black peppercorns, it's not to be confused with Mexican-style adobo. The Filipino version is **unique to the Philippines** and said to predate colonial Spanish rule, though varied multi-cultural influences have made it the dish we enjoy today.

It's traditionally made with chicken or pork stewed slowly in a simple simmer sauce, resulting in tender meat and **remarkably**

complex flavors that are balanced to each cook's liking. Indeed, there are as many styles of adobo as there are aunties in the Philippines. There are saucy versions as well as dry versions reduced until the sauce evaporates and the chicken skin becomes crisp and lightly browned.

Chef King Phojanakong's Chicken Adobo favors the saucy rendition and includes coconut milk, a variation that adds a little richness and regional flair. Rice is always at the Filipino table—oftentimes as *sinangag* (garlic fried rice)—and is usually served alongside adobo.

Chef King Phojanakong dishes up pork belly adobo at his Brooklyn restaurant, Umi Nom.



Chicken Adobo

By King Phojanakong **Serves 4**

Ingredients

- 1 whole chicken, cut into pieces (about 3 pounds)
- 8 garlic cloves, crushed
- 1 tablespoon whole black peppercorns
- 5 bay leaves
- 1 cup rice vinegar (or sugar cane vinegar)
- 3/4 cup soy sauce
- 3/4 cup water
- 1/4 cup coconut milk (optional)

Instructions

- 1** Combine all ingredients except coconut milk in a large bowl and let marinate for 30 minutes.
- 2** Place the chicken skin side down in a large nonstick skillet, and pour the marinade over the chicken. Bring to a low boil over medium-high heat. Cover, lower heat to a simmer and cook for about 40 minutes, turning the pieces occasionally, until chicken is cooked through.
- 3** Uncover and continue to cook until the sauce thickens slightly, about 5 minutes. If desired, stir coconut milk into the sauce for a rich and creamy finish. Serve the chicken and sauce over rice.



BREAD REVIVAL

2 INTRODUCTION

A new wave of bakers is reviving the artisanal bread movement with a renewed focus on slow fermentation, natural leavens and alternative grains. Bakeries from coast to coast like Farm & Sparrow in Asheville, North Carolina, are turning out extraordinarily rustic loaves of rye, spelt and emmer that our ancestors would have recognized as the staff of life.

As distinctive and nuanced as the baker who kneads them, these breads are equally inspired by modern baking smarts as they are by Old World craftsmanship.

We've noticed an emphasis on good bread at restaurants, too. Breadbaskets and bread courses featuring chefs' signature rolls and house-made butter have become a major menu offering, and artisanal toast is the latest affirmation that **Elevated Simplicity** has round-the-clock appeal.



Fresh loaves from our favorite bread bakeries

TRENDSCAPE

1



- **Datassential** - Report: *Inception Stage, German Cuisine* (TIPS, 2012)
- **Datassential** - Report: *Inception Stage, Artisanal Toast* (TIPS, 2014)



- **Black Seed Bagels, NYC** - Artisan bakery serving *Hand-Rolled Pumpernickel Bagels*



- **Lucky Peach Magazine** - Recipe: *Rhonda Crosson's Vollkornbrot Rye* (2012)
- **Pacific Standard Magazine** - Article: *A Toast Story* (2014)



- **Gugelhupf Bakery, Durham, NC** - Artisan bakery serving *German Bauernbrot*
- **Hot Bread Kitchen, NYC** - Entrepreneurial bakery serving *Grindstone Rye*
- **Nordic Breads, Long Island City, NY** - Artisan bakery serving *Finnish Ruis*

2



- **Fox and Lion Bread, San Francisco** - Artisan bakery serving *Four Grain Batard with Rye, Spelt, Barley*
- **Hinoki & The Bird, Los Angeles** - Fine dining restaurant serving *Lobster Roll on Black Brioche Bun*
- **Isis Bakery, Lenexa, KS** - Artisan bakery serving *Sprouted Quinoa-Kamut Hearth Bread*
- **Sqirl, Los Angeles** - Independent restaurant serving *Burnt Brioche Toast with House Ricotta and Seasonal Jam*

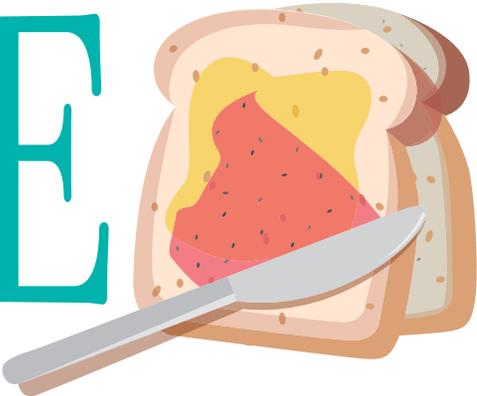


- **Bon Appétit Magazine** - Article: *Bread Baskets Getting Upgraded at Restaurants* (2013)
- **Bread Revolution** - Cookbook by Peter Reinhart (2014)
- **NY Times** - Article: *Against the Grain* (2014)
- **TastingTable.com** - Article: *Up Your Baking Game with Fresh Flour* (2014)



- **Bob's Red Mill** - Whole-grain supplier offering *Organic Spelt Flour*

BREAD on the RISE



Much to the delight of bread fanatics who have eagerly awaited a carb revival, specialty bread bakeries including Breads Bakery in New York City and Josey Baker Bread in San Francisco are setting up shop even as a gluten-free countertrend firmly establishes itself on the **Culinary TrendScape**.

Upscale restaurants like Range in Washington, D.C., and Manresa in Los Gatos, California, are focusing their attention on **in-house bread**

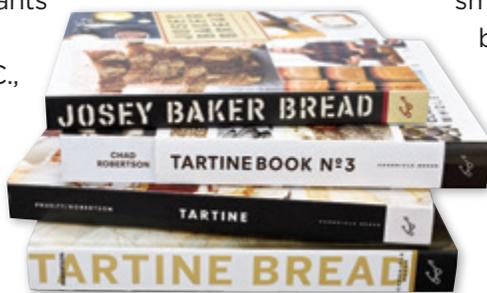
programs, complete with signature breadbaskets and savory, house-made spreads.

Meanwhile, independent casual dining restaurants are busy

fueling **the latest food craze: toast**. That's right. A thick slice of good quality sandwich bread, toasted to order, and topped simply has become its own menu category. At Isis Bakery in Kansas City you can ask for it at the counter, and at The Mill in San Francisco, we've seen it lovingly smeared with small-batch almond butter.

Bakers such as Chad Robertson from San Francisco's Tartine and Zachary Golfer from Bien Cuit

in Brooklyn are leading the revival at bread bakeries, applying a rigor to their craft that builds on the brioches, baguettes and boules we've come to enjoy as a result of the 1990's



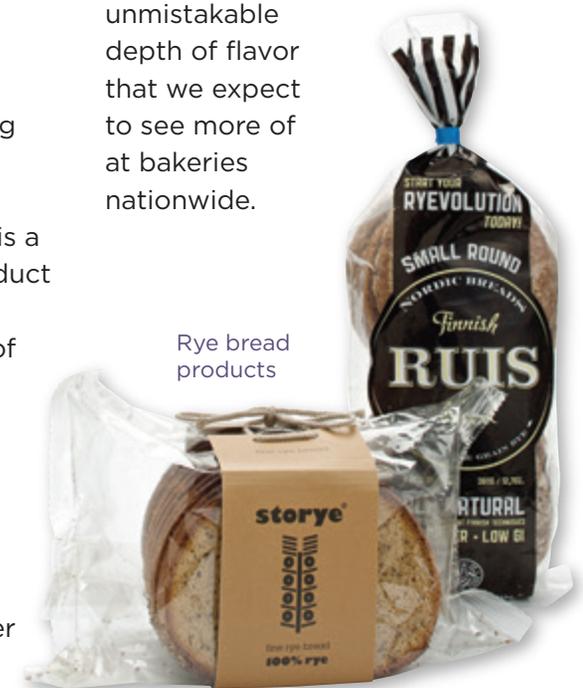
Recently published bread cookbooks

artisanal movement in the U.S. from such institutions as Bread Alone in Upstate New York and Acme Bread in San Francisco. With one eye on tradition and another to the future, they are making advances, inviting collaboration with scientists, farmers and millers, and relying more and more on wild yeast, high hydration and expanded fermentation times. The result is a fresh and distinctive local product that *The New York Times* says conjures the "baker's version of terroir."

Indeed, this **modern style of Old World baking** coaxes flavor and personality out of freshly milled grains that are new to the baker's arsenal, such as heritage kamut, emmer and einkorn, and non-wheat alternatives like quinoa.

This new wave of artisanal bread is also introducing consumers to German and Nordic rye styles, like dense vollkornbrot and ruis, and overall earthier loaves with an unmistakable depth of flavor that we expect to see more of at bakeries nationwide.

Rye bread products



SEAFOOD AWARENESS

2 INTRODUCTION

Organizations like the Marine Stewardship Council are getting the message out to the masses about sustainable seafood choices, directing people to make informed, **Conscious Choices** through helpful guides and eco-labeling.



However, despite these fundamental and pioneering efforts toward responsible consumption, experts say the movement has a long way to go before we can call it a seafood success story.

Chefs, fishermen and activists still concerned about depleted fish populations and inefficient trade practices are taking the lead, raising renewed awareness around the issue.

As a result, many hallmarks of the farm-to-table movement are beginning to impact the seafood industry, including a focus on the people and places that make the sea's bounty available. On the culinary front, a fin-to-tail ethos has emerged at restaurants, as we're seeing whole fish and an even wider variety of species gaining acceptance at the table.

TRENDSCAPE



- **Datassential** - Report: *Inception Stage, Fin to Tail (TIPS, 2014)*
- **National Restaurant Association** - [Culinary Forecast: Locally sourced meats and seafood \(2014\)](#)



- **Lucky Peach Magazine** - Issue: *The Seashore (2014)*



- **Chefs Collaborative** - Chef organization hosting *Trash Fish Dinners*
- **Kindai Tuna** - Farm-raised bluefin tuna from Japan



- **Miya's Sushi, New Haven, CT** - Independent restaurant serving invasive *Lionfish Sashimi*
- **Pok Pok, Portland, OR** - Independent upscale Thai restaurant serving *Whole Fried Porgy*
- **RM Seafood, Las Vegas** - Fine dining restaurant from seafood advocate Rick Moonen serving *Sustainable Catch of the Day*



- **American Catch: The Fight for Our Local Seafood** - By Paul Greenberg (2014)
- **Bloomberg Businessweek** - Article: [Why Whole Foods Wants You to Eat This Amazonian Fish \(2014\)](#)
- **NPR Radio** - Segment: [Why the Cod on Cape Cod Now Comes from Iceland \(2014\)](#)
- **NY Times** - Article: [Cooking with the Locals, Going Wild for American Shrimp \(2014\)](#)
- **Saveur Magazine** - Article: [Forgotten Fish, Sardines \(2014\)](#)

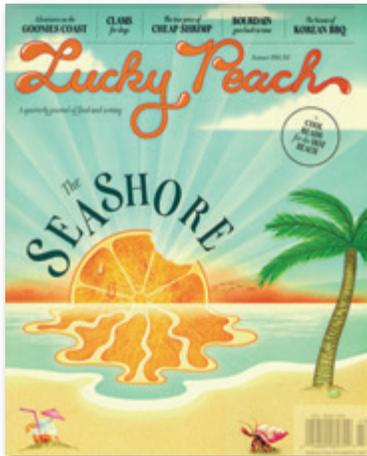


- **Hog Island Oyster Co., San Francisco** - Oyster farm selling shellfish at *Ferry Plaza farmers' market*
- **Tuna Harbor Dockside Market, San Diego** - Open-air fish market connecting fishermen directly to consumers

a new wave of sustainable SEAFOOD



Oceans cover more than 70 percent of the planet, yet we remain comfortable eating just a handful of the 230,000 species of marine life. This has led some varieties to the brink of collapse due to overharvesting. And, despite the fact that the U.S. has access to 2.8 billion acres of ocean and 94,000 miles of coast, 91 percent of seafood eaten here is imported. Interest in sustainable fishing has been recently rekindled by author Paul Greenberg and by campaigns like Slow Fish by Slow Food



International, among others, who are pushing for further examination of **what we harvest** and **how it makes its way from sea to table**.

Enterprising fisheries are taking matters into their own hands, working with chefs to influence change at a local level. Co-op initiatives like Dock to Dish in Montauk, New York, and community-supported fisheries like Community Seafood in Santa Barbara, are cropping up as **alternative sources** for sustainable fish. Because the emphasis is on keeping the local bounty local, cooks must be adaptable to the catch of the day. That means replacing depleted Atlantic cod with dogfish or pollock,

or trying something entirely new like sea robin, which is unintentionally caught by-catch.

Chefs are becoming fish-obsessed as they work to leverage the ocean's bounty mindfully. A **fin-to-tail mentality** is taking hold at restaurants like Toro in New York City, where local striped bass is on the menu as delectable parts—head, collar, tail and bones. Sushi

restaurants like Tataki in San Francisco are taking the pledge to exclusively serve sustainable fish, and there's an overall push to move beyond the salmon and shrimp comfort zone toward atypical varieties like bluefish and Pacific spot prawns.

Without doubt, a collective love for sustainable seafood is being felt on the **Culinary TrendScape**. Fishmongers are poised to become the new artisanal butcher. Caviar and seafood terrines are suddenly hip. Abundant fishy fish like sardines and mackerel are making a comeback, as are oyster bars. The deeper dive toward seafood sustainability is proving to have a delicious effect on cuisine, and there's much more for us to explore.



Anchovies

EATING WITH PURPOSE

3 ADOPTION

People are increasingly turning to food for wellness, paying more attention to what's on the plate and why it's good for them. As a result, foods with superfood status, like quinoa and goji berries, are showing up in a myriad of products, offering a value-added boost to beverages and snacks. We're starting to see more **Powerhouse Plates** at restaurants as well, in dishes layered with thoughtfully selected foods that promise satisfying, optimized nutrition.

This interest in nutrient-packed meals is giving way to a modern style of healthy cooking that Bon Appétit magazine has identified as "The New Healthy." As the health and wellness movement expands its reach, we expect this delicious and nutritious trend to quickly advance to Stage 4 and beyond on the **Culinary TrendScape**.



Layers of nutritious ingredients like kale and sweet potatoes "power-up" a traditional salad.

TRENDSCAPE



- **CDC Preventing Chronic Disease – Study:** [Defining Powerhouse Fruits & Vegetables \(2014\)](#)
- **Mintel – Article:** [Superfood Ingredients Can Spice Up Traditional Favorites \(2014\)](#)

1



- **Vital Vegetables – Research program** investigating naturally nutrient-dense produce



- **Feel Food, NYC – Independent cafe** serving Porridge with Oats, Almond Meal and Hemp Seeds
- **Powerplant Superfood Café, Los Angeles – Independent café** serving Superfood Salad with Sunflower Sprouts, Nut Seed Crumble and Goldenberry Dust

2



- **Goop.com – Article:** [Make Superfoods \(2013\)](#) by Gwyneth Paltrow
- **LA Times – Article:** [Move Over Acai, Latest Superfruits Aim to Make Nutritional Mark \(2014\)](#)
- **National Geographic Foods for Health –** By Barton Seaver and P.K. Newby



- **Vosges Haut-Chocolate – Super Dark Chocolate Bars** featuring superfood ingredients



- **Egg Harbor Café – Midscale restaurant** serving Quinoa Breakfast Bowl with Almond Milk, Goji Berries, Chia Seeds
- **Lyfe Kitchen – Fast-casual restaurant** serving Quinoa Buttermilk Pancakes with Greek Yogurt
- **True Food Kitchen – Casual dining restaurant** serving Steelhead Salmon with Arugula, Watercress and Freekeh

3



- **Feel Good Food – Cookbook** by Food Network star Giada DeLaurentiis (2013)



- **Chia Pod – Bircher Muesli** with Apple & Acai
- **Nativas Naturals – Cacao Goji Power Snacks**
- **SuperEats – Kale and Chia Chips**



Healthy eating is no longer about what you *don't* eat. It's about what you *do* eat. It's about incorporating **optimal foods** into your routine and making mindful food choices that are more than just better-for-you. Today's healthy options promise to deliver what's *best* for you.

This **desire to eat smarter**—for peak wellness and energy—has spurred interest in nutrient-dense ingredients like kale and quinoa, so-called

superfoods touted as wellness boosters. Supergreens, supergrains and superseeds now join the superfruits category as signifiers of wellness-promoting foods, and new products like Quinoa Granola from Lotus Fine Foods and Quinn's Kale and Sea Salt Popcorn are catching the attention of health-conscious consumers.

Creative chefs are beginning to give this supercharged approach serious culinary consideration, and they're

finding that many of these highly nutritious foods can also be **super in the kitchen**: endlessly versatile, flavorful and easy to enjoy. We first saw this trend emerging in two of our 2014 trends, Juicing and Yogurt Goes Savory. Now, restaurants like Lyfe Kitchen, True Food and Veggie Grill are becoming a force of their own, offering a modern style of cuisine that integrates holistic health with culinary smarts. Layered bowl formats—porridge, grain salads and hearty soups—are emerging as the quintessential wellness meal, representing a streamlined, one-plate approach to healthy eating.

This cuisine trend is as much about value as health, offering super-sized nutritional impact that provides an **upgraded food**

experience. As research continues on foods marketed as having powerhouse status, consumers seeking more bang for their nutritional buck will appreciate that findings indicate many accessible ingredients are just as vitamin- and nutrient-packed as the spate of exotic new superfoods entering the market.



Everyday Foods for Health & Wellness

Almonds, Avocado, Berries, Broccoli, Dark Leafy Greens, Lentils, Oats, Sardines, Sweet Potatoes, Watercress, Whole Barley, Yogurt

FOOD IS FUN

3 ADOPTION

As foodie culture moves beyond television programming and into daily life, many are approaching cooking and food shopping with a new agenda: enjoyment. Fun and experiential learning are at the heart of this cultural trend, whether it's taking a tour at a craft brewery, trying out a new culinary technique or seeking out splurge-worthy ingredients for a new recipe.



A growing number of enthusiastic home cooks are finding inspiration within the **Changing Marketplace**, at fashionable food halls, markets and festivals that feed their appetite for fun. Convenience is a factor, too. Meal kits, subscription delivery services and cooking classes at supermarkets are making it easier for households to shift that mealtime mindset from chore to explore.

Our chefs love Eataly, the Italian-themed food hall and megastore.

TRENDSCAPE



- **Mintel** - Report: *Cooking Enthusiasts U.S. (2013)*

1



- **Chelsea Market, NYC** - Food lover's market and tourist destination
- **Santa Monica Farmer's Market, Los Angeles** - Pioneering farmers' market
- **West Side Market, Cleveland** - Food market since 1840's



- **Dîner en Blanc** - Pop-up dinners in public spaces
- **Santa Monica Museum of Art, Los Angeles** - *Wolvesmouth Dinner Series Project*



- **Bon Appétit Magazine** - Article: *Five Best Food Halls in America (2013)*
- **NY Times** - Article: *Do the Dinner Kits Deliver? (2013)*

2



- **Farmer's Fridge, Chicago** - Health-focused vending machine
- **Krog Street Market, Atlanta** - Food hall featuring stalls, restaurants, retailers
- **NatureBox** - Snack subscription delivery service



- **HyVee's Market Grille, Urbandale, IA** - Full service restaurant in supermarket

3



- **Details Magazine** - Article: *Trend Predictions, Food is the New Theater (2014)*
- **Diners, Drive-Ins and Dives** - *Guy Fieri's Food Network show*
- **Parade Magazine** - Article: *Supermarkets, The New Culinary Schools (2013)*
- **Parts Unknown** - *Anthony Bourdain's CNN Travel and Food Show*



- **Fresh Direct** - *Smart & Simple Meal Kits via grocery delivery service*
- **Publix's Aprons Cooking School, Orlando** - *In-store culinary classroom*

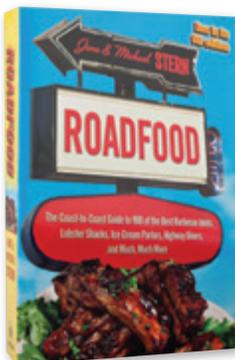


ENGAGING MARKET OPTIONS

Delight & Deliver

Though interest in food culture has been growing steadily for a decade, we're seeing a compelling shift in people's attitude toward cooking and food shopping. More than ever, people are rolling up their sleeves and stepping into the kitchen, immersing themselves in food not because they have to do it, but because they find it relaxing and rewarding.

Mintel now categorizes nearly half of its respondents as cooking enthusiasts. These food lovers—both men and women—are the types who cook at home to unwind at the end of a long workday. On the weekends, they are in pursuit of **unique food experiences**, whether it's through Anthony Bourdain-inspired culinary travel or a day at the Smorgasburg



"Roadfood"
by Jane and Michael Stern

food festival in Brooklyn. They seek out memorable tasting-menu experiences and plan weekend outings to a farm or market to discover what's in season. Their food adventures are chronicled and shared via mobile apps like Foodspotting.

For passionate home cooks looking to food for fun, there's never been a better time to get out and explore with friends or family. Well-curated selections, specialty purveyor counters and old-fashioned customer service are drawing both tourists and locals to new foodie venues across the **Culinary**



Food-filled adventures are captured and shared online with fellow food lovers.

TrendScape. The USDA reports that farmers' markets have continued to rise in popularity, with over 8,000 currently listed in the organization's directory. Historic North American food markets like Philadelphia's

Reading Terminal Market and Grand Central Market in Los Angeles are being revitalized, bringing them on par with theme park-like food halls such as Eataly, a superstore chain co-owned by Chef Mario Batali that opened its first U.S. location in 2010.

Vendors of all sizes are responding to the call for more **engaging formats and services**. Wegmans and Giant are opening in-store cooking schools to build community and develop cooking skills. FreshDirect

and Blue Apron provide gourmet meal kits that offer a sweet spot between from-scratch and convenience cooking. Box subscription delivery services like Carnivore Club and novel vending options like Sprinkles cupcake ATM machines are right on target when it comes to this trend, delivering the goods alongside a hefty dose of delight.



Blue Apron's do-it-yourself meal kits

MIDWESTERN ROOTS

3 ADOPTION



The elemental connection between farm, table and community is alive and well in kitchens across the Heartland, spanning from Minnesota to Missouri and Kansas to Michigan. It's this **Authentic**, honest, homegrown approach to food that has many looking to the center states for culinary inspiration.

Our favorite all-American comfort foods—shareable, one-pan wonders like meatloaf, pot pies and casseroles—originally hailed from Midwestern cooks influenced by their German and Nordic roots. Though the region's rich legacy and agricultural bounty remain at the heart of the cuisine, a new crop of chefs, farmers and producers are painting Midwestern fare in a way that's less about retro and more about real food experiences.

TRENDSCAPE



- **Al Johnson's, Sister Bay, WI** - Authentic Swedish family-owned restaurant serving Pickled Herring and Walleye Sandwich
- **Iowa State Fair, Des Moines, IA** - Agricultural exposition since 1850's
- **National Cherry Festival, Traverse City, MI** - Parade and events celebrating cherries since 1920's
- **Stroud's, Kansas City, MO** - Local restaurant serving Pan-Fried Chicken Dinners since 1940's

1



- **The Boiler Room, Omaha, NE** - Independent upscale restaurant showcasing local growers and artisans
- **The Butterfly, NYC** - Independent supper club serving Wisconsin-inspired cuisine
- **Corner Table, Minneapolis, MN** - Independent upscale restaurant serving Bologna Sandwich on Brioche with Mustard Aioli

2



- **Condé Nast Traveler Magazine** - Article: [Detroit's Most Exciting Food Destination \(2014\)](#)
- **Fried Walleye and Cherry Pie: Midwestern Writers on Food** - Book edited by Peggy Wolff (2013)
- **NY Times** - Article: [The Casserole Catches Up \(2014\)](#)
- **Saveur Magazine** - Issue: [America's Heartland \(2013\)](#)



- **La Quercia, Norwalk, Iowa** - Hand-crafted cured meats

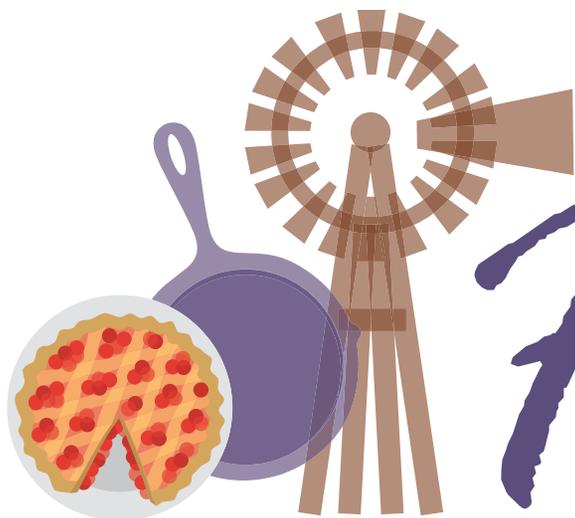


- **Chicago Magazine** - Article: [Midwestern Food is the Most American Food \(2014\)](#)
- **The Pioneer Woman Cooks: Foods from My Frontier** - Cookbook by Food Network personality Ree Drummond

3



- **Williams-Sonoma** - Lodge Camping Dutch Oven and Tripod



Rediscovering the Heartland

Great Lakes fishing, family farming, hunting, gardening and pickling are integral elements of Midwestern life, and perhaps it's this no-nonsense approach to food that has kept the region under the trend radar for so long. Reconnecting with Heartland foodways has recently become a topic of media interest, and our chefs agree there's genuine appeal in a mindset that's so unpretentiously farm-to-table.

Minnesota native and Food Network host Amy Thielen has emerged as the region's most prominent champion, bringing attention to the unique culinary delights and traditions of the Midwest on the television series Heartland Cooking. Her **ingredient-driven** recipes speak to the

straightforward, homegrown qualities that define Midwestern cooking. Casseroles, dips, mashed potatoes, chicken-fried steak, hand-wrapped confections and cherry pie—all hailing from the Midwest—seem **quintessentially American**, while other dishes, like pierogi, wiener schnitzel and chicken paprikash hint at the region's **Old World roots**.



"The New Midwestern Table"
by Amy Thielen

Chef Lenny Russo has been serving regional dishes in a fine dining context at Heartland Restaurant in St. Paul for many years, and now newcomers are following suit. Restaurants like Rye in Kansas City, Haute Dish in Minneapolis and Senate

in Cincinnati are integrating **heritage ingredients** like kohlrabi, cheese curds and artisan bologna into their menus.

Chefs like Paul Berglund of The Bachelor Farmer in Minneapolis are serving dishes that honor their Nordic heritage. At The Old Fashioned in Madison, you can even find a fresh take on the Friday night fish fry.

The food revolution that swept Portland, Brooklyn and Charleston has also swept through the Midwestern states, though enviable farmers' markets like those in Madison have been inspiring cooks for years. Enthusiastic entrepreneurs at Death's Door Spirits, Jeni's

Splendid Ice Creams and Underground Meat Collective are leading the **artisan movement** in cities from Columbus to Detroit. We expect to see more



interest in distinctive Midwestern specialty products and heritage dishes like booya stew, wild rice casseroles and blue-ribbon pies as this roots cooking trend extends its influence.



Lake trout

FAST-CASUAL EFFECT

4 MAINSTREAM



With an 11 percent increase in 2013 sales reported by Technomic, fast-casuals are proving they are well

aligned to meet the needs of today's customer. As a subset of limited-service restaurants, fast-casuals like Chipotle offer a gourmet experience at a lower price than casual dining restaurants, at about \$8.50 to \$12 per check average. Speedy service, upscale ambiance, premium ingredients and better-for-you menu cues offer **Elevated Simplicity** and overall value to customers attracted to this hybrid restaurant category.

As a result of fast-casual success, fast food is getting fancier and casual dining is becoming more relaxed. Quick service restaurants like Arby's are tweaking their marketing and décor to appear more upscale. Brands including Taco Bell (U.S. Taco Co. and Urban Taproom) and Uno's Pizzeria (Uno Fresco) are launching fast-casual concepts to take advantage of the segment's growth. Design-your-own pizza restaurants, like Blaze Pizza, are the newest concepts to offer that signature fast-casual ingredient: a customized experience.

TRENDSCAPE

	<ul style="list-style-type: none"> • Datassential – Report: Proliferation Stage, Chain Response to Fast-Casual; Adoption Stage, Chef Casual (TIPS, 2013) • Technomic – Report: The Future of Limited-Service Restaurants (2013) 	1
	<ul style="list-style-type: none"> • Digg Inn Seasonal Market, NYC – Health-focused fast-casual regional restaurant chain • Protein Bar, Chicago – Health-focused fast-casual regional restaurant chain • Tender Greens, Culver City, CA – Health-focused fast-casual regional restaurant chain 	2
	<ul style="list-style-type: none"> • NY Times – Article: Hold the Regret? Fast Food Seeks Virtuous Side (2014) 	
	<ul style="list-style-type: none"> • Hudson Eats, NYC – Fast-casual food court 	
	<ul style="list-style-type: none"> • Pizza Cucinova, Columbus, OH – Sbarro's fast-casual pizza spinoff brand 	3
	<ul style="list-style-type: none"> • Cooking Light Magazine – Article: Top Trends, Fast Food Gets Healthy (2014) • Forbes Magazine – Article: How the Fast Casual Segment is Gaining Market Share (2014) 	
	<ul style="list-style-type: none"> • Garbanzo Mediterranean Grill – Fast-casual Mediterranean restaurant • McDonald's – Quick service restaurant testing customized burgers ordered via in-store tablet • Pizza Hut – Casual dining restaurant now offering Pizza by the Slice • Red Robin Burger Works – Fast-casual spinoff brand by Red Robin Gourmet Burgers • Smashburger – High-growth fast-casual burger restaurant with locations overseas 	4
	<ul style="list-style-type: none"> • The Pub at Wegmans, Allentown, PA – Full-service restaurant and bar in supermarket 	



ON-TREND CONCEPTS EVOLVE

We're seeing inspiring innovations taking place within the restaurant industry, driven by increasing consumer demand for memorable, high-quality culinary experiences that still provide bang for the buck. Here are just a few of the on-trend concepts we're most intrigued by this year.

Chef Casual

Fine dining chefs like Bobby



Flay are opening fast-casual concepts, bringing affordable, culinary-driven menus to the masses. Flay has branded his own better burger chain, Bobby's Burger Palace, bringing his trademark grill mastery to malls and college campuses throughout the East Coast.



Fresh & Fast

Chipotle's highly profitable

fresh-Mex concept has made it an emblem of the fast-casual segment. The chain experienced 18 percent net income growth in 2013, as reported by Nation's Restaurant News, and its latest innovation includes the addition of Tofu Sofritas to the menu.

Ethnic Options

Middle Eastern-inspired

specialty concepts like Hummus & Pita Co. and Garbanzo Mediterranean Grill are building on fast-casual ideals, with fresh and premium ingredient cues that imply a healthy, wholesome dining experience.



Upscale Spinoffs

Flatbreads, salads and rice bowls are

available at KFC's test concept in Louisville, KFC eleven—an emblematic instance of quick service's entry into the fast-casual arena. The spinoff brand features many fast-casual elements, including modern décor and an on-trend menu.



Fast & Focused

Like many fast-casuals, The Melt

has a hyper-focused menu. Their innovative online ordering system allows customers to place their gourmet grilled cheese orders online in advance, so they can skip the line and scan the code when they're ready for the order to be filled.

Artisan Pizza

A new guard of fast-casual pizza joints like Pizza Rev serve up custom-crafted, oven-fired personal pizza in just minutes. Customers choose their own dough, sauce, cheese and toppings at growing concepts that are honed in on the customizable nature of the category.



Veggie-Powered

Eco-friendly chains like Sweetgreen are putting a modern twist on the salad

bar with local ingredients, seasonal specials, signature salads and build-your-own options. Founded by Georgetown University students in 2007, this fast-casual is one of many health-focused concepts hitting the scene.

A Fresh Take

Some quick service stalwarts, like Wendy's, are undergoing a fast-casual makeover in an effort to establish themselves as a higher-end option. In particular, Wendy's is making inroads with remodeled restaurants and revamped menu options like its freshly made Strawberry Fields chicken salad.



TEATIME

4 MAINSTREAM

In a mug or on ice, tea is proving to be an all-encompassing trend with staying power due to its unparalleled versatility, healthful halo and inviting element of **Elevated Simplicity**. It's being used creatively to suit an array of palates and occasions, from ready-to go caffeine boosts, to **Satisfying Snacks**, to mood-soothing elixirs.

Last year our Beverage-Inspired Flavors trend signaled that matcha and chai were being used as ingredients in the kitchen and bar, and this year chamomile and jasmine are filling the **Culinary TrendScape** as well. The tea trend appears to be hitting a wider audience now that modern tea cafes like Starbucks-owned Teavana are offering curious customers the chance to explore the culture and craft of tea.



A pot of Chinese Laoshan tea

TRENDSCAPE



- **Mintel** - Report: *Teas and RTD Teas U.S. (2013)*



- **Mandarin Oriental Tea Lounge, Las Vegas** - *Luxury hotel restaurant offering Chinese Gong Fu Cha Service*



- **Smithsonian Museum** - *Exhibit: Chigusa and the Art of Tea*



- **Public Restaurant, NYC** - *Fine dining restaurant serving Tea-Smoked Salmon with Poached Eggs on Toasted Multi-Grain with Yuzu Hollandaise*
- **Verdant Tea Tasting Room, Minneapolis** - *Modern teahouse serving Kombucha Float*



- **Culinary Tea** - *Cookbook by Cynthia Gold and Lisé Stern*
- **NY Times** - *Article: Tea Bars, A New Kind of Watering Hole (2014)*
- **SeriousEats.com** - *Recipe: Chamomile Pound Cake (2013)*



- **Sur La Table** - *Specialty cookware store selling Breville Gourmet Tea Brewer*
- **Tea-rrific Ice Cream** - *Tea-infused ice cream in London Mist*



- **Argo Tea Café** - *Chain cafe serving Jasmine Tea-Mosa with Sparkling Orange Juice*
- **Outback Steak House** - *Casual dining restaurant serving Mango Iced Tea*



- **Qi** - *Black Tea Liqueur*
- **Runa** - *Unsweetened Guava Guayusa Tea*



- **Panera** - *Bakery-cafe serving Açai Berry Iced Tea*
- **Starbucks** - *Bakery-cafe serving Teavana Oprah Chai Tea Latte*



- **Martha Stewart Living Magazine** - *Recipe: Chamomile-Peach Tarts (2014)*
- **Better Homes & Gardens Magazine** - *Recipe: Tea-Marinated Salmon (2014)*



- **Bolthouse Farms** - *Ready-to-drink refrigerated Vanilla Chai Tea*
- **Trader Joe's** - *Green Tea Latte Mix*
- **Yogi Tea** - *Vanilla Spice Perfect Energy Tea*



Taste FOR TEA

Tea's popularity has skyrocketed, and everything from iced teas to tea lattes to kombucha are showing up this year. Many macro-trends are converging to make tea light up on the **Culinary TrendScape**, including **distinctive flavor profiles**, upscale appeal and implied wellness benefits.

From the warm notes of Indian masala chai to the floral tones of African roibos, the wide world of tea is brimming with global personality. With so many unique styles to discover, it is no wonder tea—like craft beer and coffee—is showing the potential to appeal to people interested in its origin, production, taste and cultural history.



Verdant Tea's Minneapolis tea bar

Companies including Rare Tea Cellar in Chicago, Bellocq Tea Atelier in Brooklyn and Steven Smith Teamaker in Portland, Oregon are leading the U.S. tea revolution with their unique, handcrafted blends. Operators like Samovar Tea Lounge in San Francisco and Starbucks-owned Teavana are capitalizing on the growing awareness around **global tea culture**, with the opening of tea bars that invite a tranquil afternoon break with a cup of tea in hand.

Restaurants from high to low, including L'Espalier in Boston, Bee & Tea in Chicago and chain Panda

Express are making specialty teas a **menu highlight**, while creative chefs and product developers continue to experiment with it as an ingredient. Matcha spice mixes, tea-brined and tea-smoked meats, tea vinaigrettes, tea-poached fruits and tea-based cocktail mixers are appearing in restaurants, specialty shops and magazines.

Without doubt, tea's popularity is aided by its supposed **functional benefits**, which vary greatly across the botanical spectrum. Its long-time association as a medicinal and mood-altering product appeal to many, as does the energy-boosting quality of some caffeinated blends. In fact, Mintel reports that three quarters of consumers aged 18 to 24 agree



On-trend tea products

tea is better for you than coffee, indicating a bright future for tea amongst young people. Campbell's own **V8 V-Fusion[®] +Energy** beverage is powered with natural green tea extract. Reading the leaves into 2016, our own team sees the taste for this versatile beverage growing across all demographics and dayparts.

REGIONAL BARBECUE



5 ESTABLISHED



Carolina-style pulled pork sandwich

From the vinegary, whole-hog barbecue of Eastern North Carolina to the sliced beef brisket of Central Texas, variables of meat, wood, sauce and sides create an endless array of **Authentic** regional barbecue specialties. It's these distinct styles, flavors and traditions—handed down through community ties via legendary pitmasters—that are showing up all over the **Culinary TrendScape**, firmly establishing this

quintessential Americana food experience as a Stage 5 trend.

With growing interest in all things local, it's no wonder the rural joints that made these smoked meats and unique sauces famous have become beacons of barbecue lore. Now, BBQ-loving culture is spreading to urban centers, as chefs like Bill Durney of Hometown Barbecue in Brooklyn and Dennis Lee of Smokestack in San Francisco introduce regional-inspired barbecue styles to a broader market. It's undeniable that these regional styles and flavors will continue to satisfy the masses as this trend extends into consumer packaged goods and begins to reach a global audience.



Arthur Bryant's in Kansas City

TRENDSCAPE

- | | | |
|--|--|----------|
| | <ul style="list-style-type: none"> • Kruez Market, Lockhart, TX – Independent restaurant serving Texas barbecue and sausage since early 1900's • Lexington BBQ, Lexington, NC – Independent restaurant serving Western North Carolina-style barbecue since 1962 | 1 |
| | <ul style="list-style-type: none"> • 4505 Burgers & BBQ, San Francisco – Independent restaurant serving smoked meat by the pound • Peckinpah, Vancouver – Independent restaurant serving Eastern North Carolina-style barbecue | 2 |
| | <ul style="list-style-type: none"> • Saveur Magazine – Issue: <i>BBQ Nation</i> (2011) • Steven Raichlen's Barbecue Bible Blog – Article: <i>8 Must-Try Regional BBQ Sauces</i> (2013) | |
| | <ul style="list-style-type: none"> • Kansas City Barbecue Society – Organization promoting regional barbecue • Southern Foodways Alliance – Southern BBQ Trail oral history project | |
| | <ul style="list-style-type: none"> • Bobby's Burger Palace – Fast-casual restaurant serving Carolina Burger with Mustard BBQ Sauce • Dickey's Barbecue Pit – Fast-casual restaurant chain serving Texas-style barbecue | 3 |
| | <ul style="list-style-type: none"> • Grand Lux Cafe – Casual dining restaurant serving Carolina BBQ Sandwich • Sticky Fingers Smokehouse – Casual dining restaurant serving Carolina-style barbecue | |
| | <ul style="list-style-type: none"> • Lillie's Barbecue Sauces & Rubs – Ivory Alabama-style barbecue sauce • Trader Joe's – Carolina Gold Barbecue Sauce | |
| | <ul style="list-style-type: none"> • Arby's – Quick service restaurant serving Smokehouse Brisket Sandwich • Carl's Jr./Hardee's – Quick service restaurant offering Texas BBQ Thickburger | 4 |
| | <ul style="list-style-type: none"> • Papa John's – Quick service restaurant serving Spicy Pulled Pork Pizza • Wendy's – Quick service restaurant serving Pulled Pork Sandwich | |
| | <ul style="list-style-type: none"> • USA Today – Article: <i>Regional BBQ, What to Try Where</i> (2013) | |
| | <ul style="list-style-type: none"> • PopCorners – Memphis BBQ Popped Whole Grains | |
| | <ul style="list-style-type: none"> • Bull's Eye – Carolina, Kansas City, Memphis and Texas BBQ Sauces • Campbell's – Southern BBQ Slow Cooker Sauces • Jimmy Dean – Pulled Pork with BBQ Sauce on Buttermilk Biscuit • Lay's – Tangy Carolina BBQ Potato Chips | 5 |

CHILE PEPPERS



6 EXPANDED



Campbell Chef Todd Lyons's spicy Sriracha chicken wings.

Now that Thai-style Sriracha hot sauce has gone mainstream, it seems chile obsession has finally reached critical mass across the globe. People everywhere are turning to unfamiliar peppers and hot sauces for a bold, global-inspired kick that can range from mild to mind-altering.

In North America, we've built our heat tolerance with jalapeño, chipotle and habanero peppers, which are packing a fiery punch this year in unexpected categories like cocktails.

According to Technomic, these varieties are leading the 26 percent increase of chile appearances on menus over the past five years.

However, the demand for spicy isn't just about heat. It's also about a complex layering of **Distinctive Flavors** that play on the pepper's unique characteristics. Cultural context factors in, too, as enthusiastic palates look to faraway lands for flavorful accents that amp up everyday cuisine. Here at Campbell, we're looking to Korea, Peru, Africa and Turkey for inspiration, while our chefs at Arnott's in Australia are exploring the chiles of Mexico.

Pace® Mango & Habanero Fire Salsa was inspired by this fiery trend.



TRENDSCAPE

- | | | |
|-------------------|---|---|
| Professional | • McCormick Flavor Forecast - Trend: Chiles Obsession (2014) | 1 |
| Restaurant | • Momofuku Ssam Bar, NYC - Fine dining restaurant serving Buffalo Chicken Bun | 2 |
| Culture & Cuisine | • Puckerbutt Pepper Company - Developed the Carolina Reaper, hottest pepper on Scoville scale | |
| Restaurant | • Gourdough's Doughnuts, Austin - Specialty bakery offering Slow Burn Habanero Jelly Doughnut | 3 |
| Media | • Food & Wine Magazine - Recipe: Chicken Wings with Angry Sauce | |
| Marketplace | • Mother-in-Law's Kimchi - Korean Gochujang Paste collection | 4 |
| Restaurant | • Buffalo Wild Wings - Casual dining restaurant serving Traditional Wings with Blazin' Hot Sauce | |
| Restaurant | • Cheesecake Factory - Casual dining restaurant serving Ahi Carpaccio with Wasabi Pesto, Creamy Avocado, Togarashi Aioli | 5 |
| Marketplace | • Prometheus Springs - Grapefruit Cayenne beverage | |
| Marketplace | • Williams-Sonoma - Tacolicious Guajillo Braising Sauce | 6 |
| Restaurant | • Bruegger's Bagels - Fast-casual restaurant serving Sriracha Egg Sandwich | |
| Restaurant | • Habit Burger Grill - Fast-casual restaurant serving Hatch Green Chile Charburger | 6 |
| Media | • CampbellsKitchen.com - Recipe: Slow Cooker Chipotle Chili | |
| Media | • Good Housekeeping Magazine - Article: Hot Sauce Taste Test (2014) | 5 |
| Marketplace | • Kind - Strong & Kind: Thai Sweet Chili Almond Protein Bar | |
| Marketplace | • Marcela Valladolid - Ready-to-Cook Ancho Chipotle Chicken | 5 |
| Marketplace | • Stubb's - Hatch Chile Cookin' Sauce | |
| Restaurant | • Subway - Quick service restaurant offering Fiery Footlong Collection | 5 |
| Marketplace | • Bumble Bee - Albacore Tuna with Jalapeños and Olive Oil | |
| Marketplace | • Chex Mix - Xtreme Snack Mix in Sweet & Spicy Sriracha | 6 |
| Restaurant | • McDonald's, United Kingdom - Quick service restaurant serving Sweet Chilli Crispy Chicken Wrap | |
| Restaurant | • Tim Horton's, United Arab Emirates - Quick service restaurant serving Chipotle Turkey Panini | 6 |
| Marketplace | • Huy Fong Foods, International - Sriracha Sauce | |
| Marketplace | • McIlhenny Company, International - Tabasco Pepper Sauce | 6 |
| Marketplace | • Huy Fong Foods, International - Sriracha Sauce | |

LAST YEAR'S TOPTRENDS

From Brazilian Cuisine to Bolder Burgers, the top food trends we identified in our 2014 report continue to impact the **Culinary TrendScape**. Some are making moves as they expand their reach to a broader audience, while others continue to enjoy the spotlight at a steady pace. Here's a look at where they are now.

ON THE MOVE



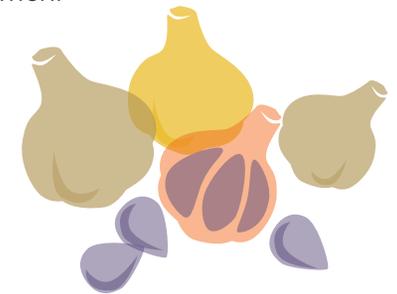
We're tracking a subtle—but significant—cultural shift at the consumer level, **advancing awareness** of the global impact of food waste to Stage 3. Reducing waste through practical, root-to-stalk cooking picked up significant momentum this year, with ingredients like broccoli stalks, chard stems and celery leaves appearing in media outlets like *Food Network Magazine*. Fin-to-tail cooking is gaining traction now, too, as is noted on page 8.



FERMENTATION

Fermented foods that carry the **depth of flavor** people are looking for continue to trend upward on the **Culinary TrendScape**.

Vinegar pots, fermenting crocks and kimchi-making kits have hit the shelves at specialty shops like Williams-Sonoma, signaling that—like craft beer—there's growing interest in the art (and enjoyment) of this ancient method of food preservation.



JUICING

Premium juices packed with nutrient-dense veggies have been embraced by **health-conscious people of all ages**. While a handful of health-focused fast-casual restaurants have added fresh juices to their menus, we've yet to see carrot and other vegetable juices make the leap onto mainstream dining menus. At Campbell, we've found inspiration in

this refreshing trend and launched beverage offerings under the **V8®** brand, including Carrot Mango and Purple Power vegetable blends.



V8® Purple Power Vegetable Blend with a hint of fruit

BEVERAGE-INSPIRED FLAVORS

5 ESTABLISHED
4 MAINSTREAM

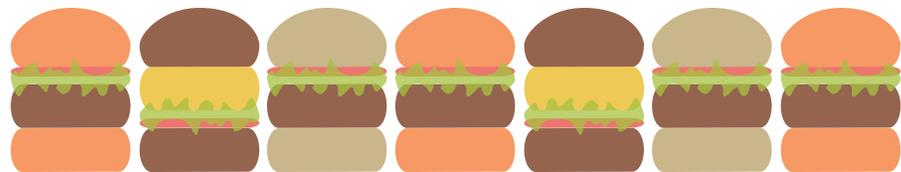
This fast-track trend has maintained momentum since last year, having made appearances on menus ranging from Denny's, to Carl's Jr., to Popeye's Louisiana Kitchen. **Bourbon, craft beer** and **matcha green tea** are the hottest examples to date, and we're seeing a variety of tea flavors debut in the kitchen and at the bar, as noted on page 18. Cafe-inspired flavors like **cold-brew iced coffee** are the latest iteration of this flavorful trend.



Campbell's® Chunky™ Bourbon & Brown Sugar Baked Beans



Restaurant



BOLDER BURGERS

6 EXPANDED
5 ESTABLISHED

The quest for the ultimate burger continues, and it's evolving into a worldwide phenomenon at restaurants like Wild Burger in Toronto and PNY in Paris. No matter your locale, bolder burgers are still **all about the toppings**—which now include smoked brisket and mashed potatoes—though this year we're also seeing a focus on the patty at restaurants like Graffiti in New York City and Slater's 50/50 in Southern California.



Restaurant

STEADY STATE

BRAZILIAN CUISINE

1 DISCOVERY

Last year we reported on the emergence of this South American cuisine on the heels of the 2014 World Cup in Brazil. Though this remains a Stage 1 trend, we are seeing more examples appear, including **coxinha croquettes** from São Paulo at Smorgasburg market in Brooklyn. We anticipate Brazilian cuisine will continue to build momentum as we approach the 2016 Summer Olympics in Rio de Janeiro.



Marketplace

NEW JEWISH DELI

Artisanal **bagels** and **bialys**, chocolate **babka** cake, **schmaltz** (rendered chicken fat) **fries** and **pastrami egg rolls** are just a few of the upgraded—and inventive—Old World treats coming out of the revived deli scene this year. As *The New York Times* reports, the movement is

2 INTRODUCTION



Media

building momentum among young chefs at the independent restaurant level and ushering Jewish-American comfort foods into a new era.

SOPHISTICATED SWEETS

3 ADOPTION

Chefs are now taking the sophisticated sweets concept a step beyond maple bacon and salted caramel. Untraditional elements like beets, fennel, miso, goat cheese and black pepper are invading cutting-edge dessert menus, bringing **savory nuances**



Media to the forefront of this year's dessert scene.



According to *Flavor & The Menu* magazine, a rise in snacking is influencing dessert size and subtle sophistication as adults increasingly look for **small, satisfying treats** in the mid-morning and afternoon hours.

YOGURT GOES SAVORY

3 ADOPTION

Yogurt has made its mark on the culinary scene, as it has increased ten percent in dinner entrees over the past year according to Technomic. Chefs are fully embracing it as an ubiquitous go-to for dressing up veggies, meats and greens—whether **spiced, smoked, whipped** or **strained**.

Savory flavors like pumpkin, beet and cucumber are making their way into spoonable yogurt this year as well, in products including Chef Dan Barber's Blue Hill Yogurt.



Bolthouse Farms® Greek Yogurt Dressing

REGIONAL MEXICAN

4 MAINSTREAM

It's **Mexico City** that has our attention this year. Young chefs there are celebrating their

Media region's culinary heritage with an innovative spirit, inspiring a playful fusion style *USA Today* refers to as **Next-Mex**—the modern metamorphosis of Mexican cuisine. It's showing up in boldly flavored products like our versatile, Latin-inspired condensed soups, and at fun-filled taco restaurants like U.S.



Taco Co. in Huntington Beach, California, and Big & Little's Restaurant in Chicago.



Campbell's® Latin-Inspired Creamy Poblano and Queso Condensed Soup

A LOOK BACK

TOPTRENDS 2013

- Coffee Culture
- Craft Brewing
- Haute Doughnuts
- Korean Cuisine
- New Asian Cuisine
- Vegetables



ABOUT US

Campbell's Culinary & Baking Institute (CCBI) is a global network of highly trained chefs, bakers and culinary professionals who drive a passion for food within Campbell Soup Company. We share this love of the culinary arts with our colleagues, consumers, customers, the industry and the community. Our team's vast expertise and multifaceted knowledge make us the culinary authority here at Campbell.

CONTACT US

Contact us to learn more about this year's top trends and our **Culinary TrendScape** program.

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HUNGRY for More?

Ask us about our upcoming healthy beverage and snack-focused trend reports, which provide inspiration for our culinary teams across Campbell brands including *Bolthouse Farms*®, *V8*®, *Arnott's*® and *Pepperidge Farm*®.



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