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# 2023 Food & Drink Trends

## August 2023



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Food & Drink Trends / August 2023

## 2023 Food & Drink Trends: North America

*High costs of living in the US and Canada make escapism and versatility key in 2023. Economic recovery will bring interest in value-added and resourceful products.*

### Now: focus on treats, versatility and simplicity



In the next 12 months, as inflation continues to complicate purchases and rumors of recession swirl, North American consumers will be looking for treats, easy meal recommendations and streamlined communication.



### Next: value-added products will shine



As the US and Canadian economies recover in the next two to five years, consumers with renewed buying power will be more open to food and drink that offer additional value. Brands can explore emerging trends for products that are nutritious and filling, help people focus and respect precious water resources.

### Future: find inspiration near and far



Companies preparing for opportunities in five or more years from now can seek inspiration for food and drink from the changing conditions on Earth, while also looking for new opportunities in outer space.



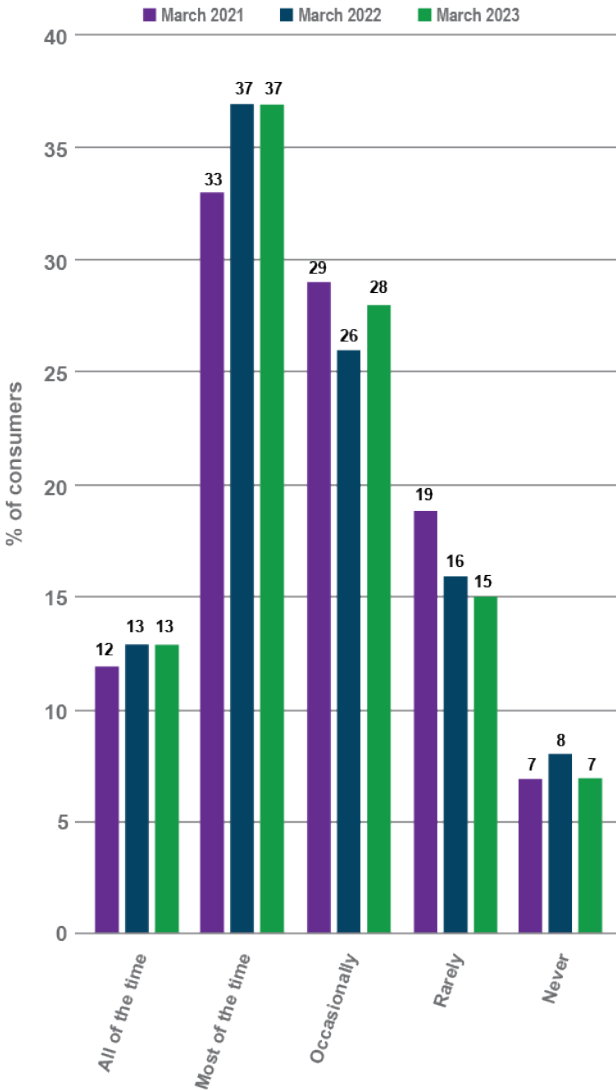


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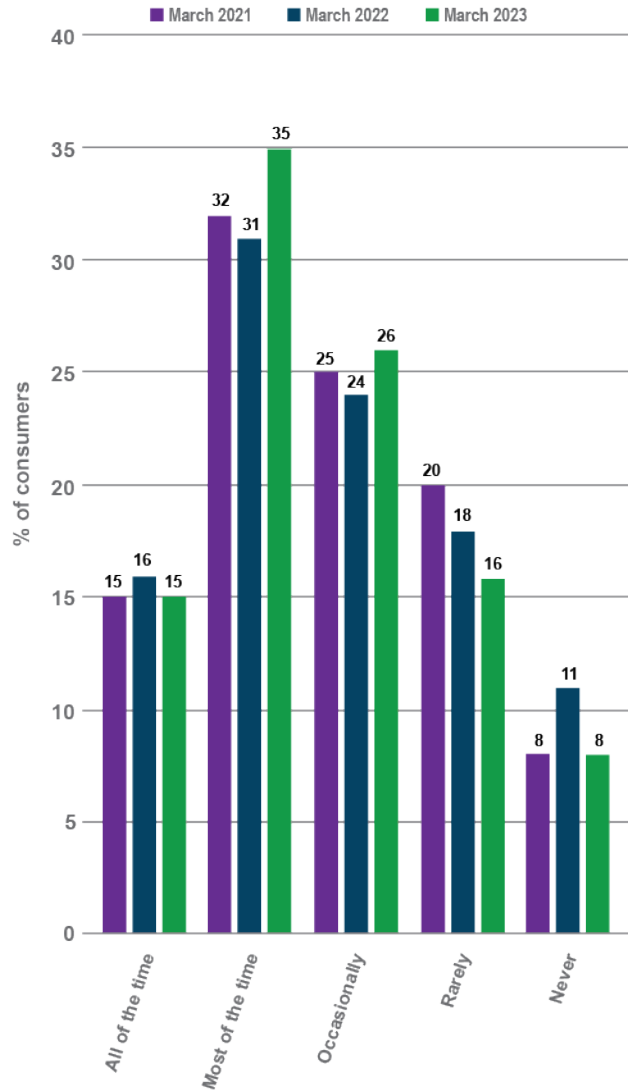
### Inflation has increased North Americans' focus on their grocery budgets

Sticking to a budget is a habit for Canadian and US consumers, especially after cost of living increases began in March 2022. Value is now a top consideration when shopping.

**Canada: food Tracker – frequency of food behaviors – stick to a set budget for groceries, 2021-23\***



**US: food Tracker – frequency of food behaviors – stick to a set budget for groceries, 2021-23\***



\* taken from Mintel's Global Consumer

Base: Canada, US 1,000 internet users aged 18+ in each market in each time period

Source: Kantar Profiles/Mintel, March 2021, March 2022, March 2023



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Source: Mintel Global New Products Database (GNPD)





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## Three trends to prepare for as North American economies recover in the next two to five years

### #1 Savvy Sustenance:

Brands will be best-placed to focus on trusted, simple nutrition and satiety messages that have broad consumer understanding, including carbohydrates for energy or protein for muscle health.



**Second Nature Immunity Defense Smart Mix Snack** is a blend of dried fruit, nuts, seeds and chocolatey drops. It is said to have 4g of protein, be a good fiber source and contain ALA omega-3 fatty acids and antioxidant vitamins E and C (US).



**Mindright Brain Food Blueberry Almond Good Mood Superfood** is made with a +Happy Brain Blend that includes ashwagandha for calm, ginseng for mood, cordyceps for energy and MCT for brain fuel. It has 10g of protein (US).

### #2 Stay Sharp:

Help tired and stressed consumers improve their mental performance. After several stressful years, fatigued consumers will be even more in need of assistance to stay focused and be productive. In 2022, half of US consumers found it hard to concentrate at times. Whether at work or when enjoying hobbies like playing video games, consumers will be open to functional food and drink that claims to boost focus and productivity.

### #3 The Worth of Water:

More severe water emergencies will increase consumer attention on water stewardship. As the realities of the planet's stressed water resources become ever more apparent, responsible water use will be a critical message. Reports of increasingly dangerous droughts, floods and contaminated tap water will continue to direct consumer attention toward water. It is these more-frequent water emergencies that will increase the need for categories and services that require less water during production, distribution and end-use by consumers.



**Biosteel Sport Greens Superfood Powder** contains desalinated inland sea water (Canada)



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## Food & Drink Flavor Trends 2023

*Pleasure, exploration, familiarity, wellbeing and sustainability all offer opportunities for flavor development and innovation in the food and drink category.*

### Better-for-you flavor innovations: what's new in 2023?

#### Where we are

The COVID-19 pandemic significantly impacted consumers' attitudes towards health and wellbeing and their approaches to managing wellness.

Consumers have increasingly taken a more holistic approach to both their physical and mental wellbeing, looking for food and drink products that will deliver on functional attributes without compromising on taste.

#### What's next

In inflationary times, consumers will be more mindful about food and drink purchases. They will look for products that clearly identify health benefits via simple on-pack messages.

Mintel's 2023 Global Food and Drink Trend **Minimalist Messaging** emphasizes the importance of clear and simple communication.

As shown in the 2023 Food & Drink Trend **Staying Sharp**, a heightened focus on mental performance opens new opportunities for food and drink products that are seen to address cognitive capacity, optimize brain function and help manage stress levels.

### Healthy, yet indulgent, brands can deliver on both attributes:

As consumers continue to strive to lead healthier lifestyles, they want to achieve their health and wellbeing goals more seamlessly. Products that deliver health benefits but taste indulgent have strong opportunities to resonate with busy consumers. For instance, 68% of Italian consumers claim they would be interested in trying chocolate with added vitamins/minerals. The US start-up Sourse offers a range of vitamin-, mineral-, botanical- and nootropic-fortified chocolate treats that can deliver functional benefits in a fun and delicious format.

**"Gut healthy dessert" Lemon Coconut Gut Healthy Blondie.** Made with lemon, coconut, almond flour, avocado oil, coconut sugar and egg. Packed with probiotics and prebiotics. "A gut-healthy dessert brand for the modern sweet tooth" (US).



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Source: Mintel Global New Products Database (GNPD)





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### Pleasure- and escapism-themed flavor innovations: what's new in 2023?

#### Where we are

Restrictions imposed by the pandemic reduced consumers' ability to travel, eat out and socialize, forcing them to spend more time at home. These limitations had a tremendous impact on mental wellbeing and overall satisfaction with life.

This dissatisfaction created opportunities for brands to use flavors to deliver moments of escapism.

#### What's next

Mindful indulgence innovations are being taken to another level, with emphasis shifting to establish indulgent products as necessary coping mechanisms rather than guilty pleasures mediated by health reassurances.

Mintel's 2023 Global Food & Drink Trend **UngUILTY Pleasures** indicates that the guilt element of indulgent launches can alienate health-minded consumers. Repositioning as permissible or even necessary self-indulgence can be achieved through flavor.

#### LESS RESTRICTIONS

**34%** of US consumers enjoy more indulgent options as part of following less restrictive eating patterns

#### DON'T COUNT CALORIES

**41%** of US consumers agree that counting calories has a negative effect on mental health

Vegan or plant-based brands should look to meet consumers' need for unguilty indulgence and engage on an emotional level.

This can be achieved by incorporating various indulgent ingredients and flavors, such as fudge, honeycomb or biscuit crumbs. On-pack communication emphasizing pleasurable experiences can also offer a point of differentiation and position a product as offering unrestricted pleasure and joy. Moreover, emphasis on flavor and texture as important parts of product enjoyment can offer consumers more positive associations.



**Tender, bold, tasty – Krave Smoked Chipotle Plant-Based Jerky** is made from peas and fava beans and

offers the tender texture and bold taste you would expect from Krave products. Slow-roasted chipotle brings the perfect balance of spice and smokiness (US).



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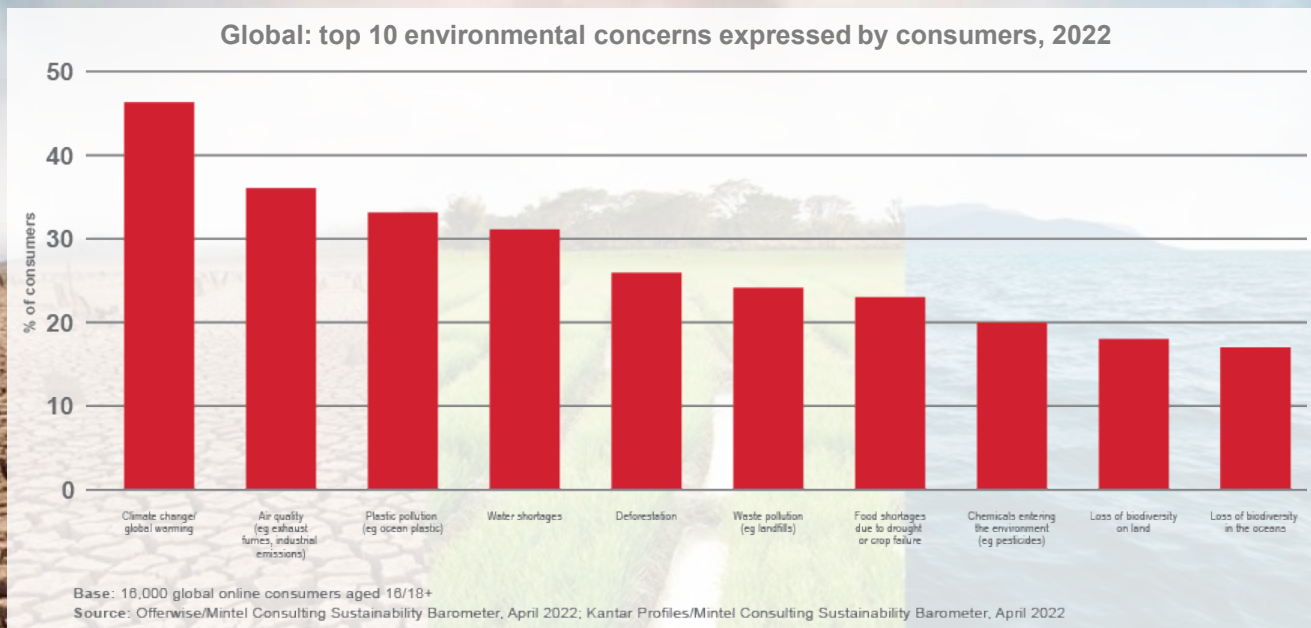
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### Consumers express their worries about a range of environmental concerns



### The challenge of sustainable flavor innovations: what's new in 2023?

#### Where we are

Concerns about sustainability and the environmental impact of the food and drink industry are encouraging brands to act fast and utilize various sustainability practices to offer tasty, high-quality and (more-) healthy food and drink products.

#### What's next

Sustainability issues are becoming more tangible, requiring urgent action. Whether it is helping consumers endure heat waves, sub-zero temperatures and disastrous weather events – as per Mintel's 2023 Global Food and Drink Trend **Weatherproofed Provisions** – or developing product solutions that are more resourceful and respectful towards the environment and water usage in particular – as detailed in Mintel's 2023 Global Food and Drink Trend **The Worth of Water** – brands still need to remember the importance of flavor and make sustainable choices accordingly.



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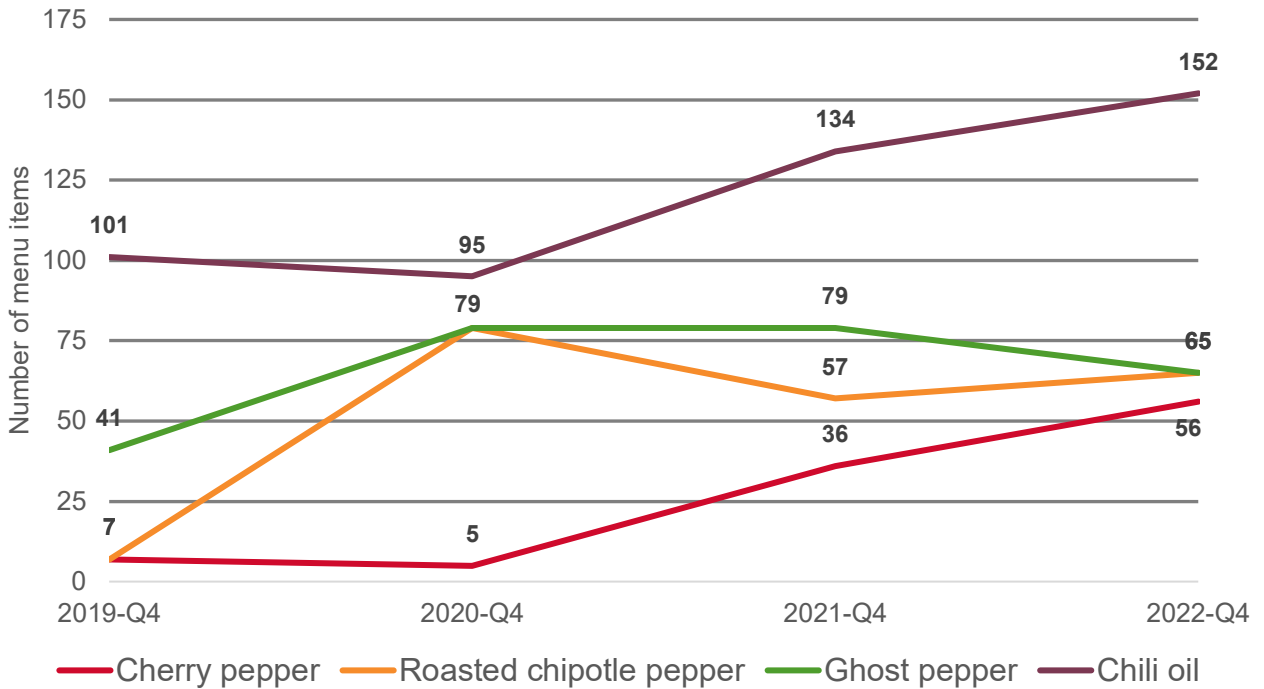
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## US menus: growing flavors & ingredients

**Spicy flavors on the menu:** Spicy flavors also remained stable on US menus, declining 1% over Q4 2019-Q4 2022. Ghost peppers have become a popular flavor in QSR menu launches, but are unlikely to be one that consumers routinely seek. Instead, ghost pepper-flavored LTOs offer a temporary sense of adventure and novelty, as seen in a decline on permanent menus (-11% from Q4 2021 to Q4 2022). Still, consumers will continue to try more innovative menu items, and operators are increasingly innovating with ingredients like chili oil and a variety of peppers to add heat elements that consumers can easily opt out of.



**US: spicy flavors on menus, Q4 2019-Q4 2022**



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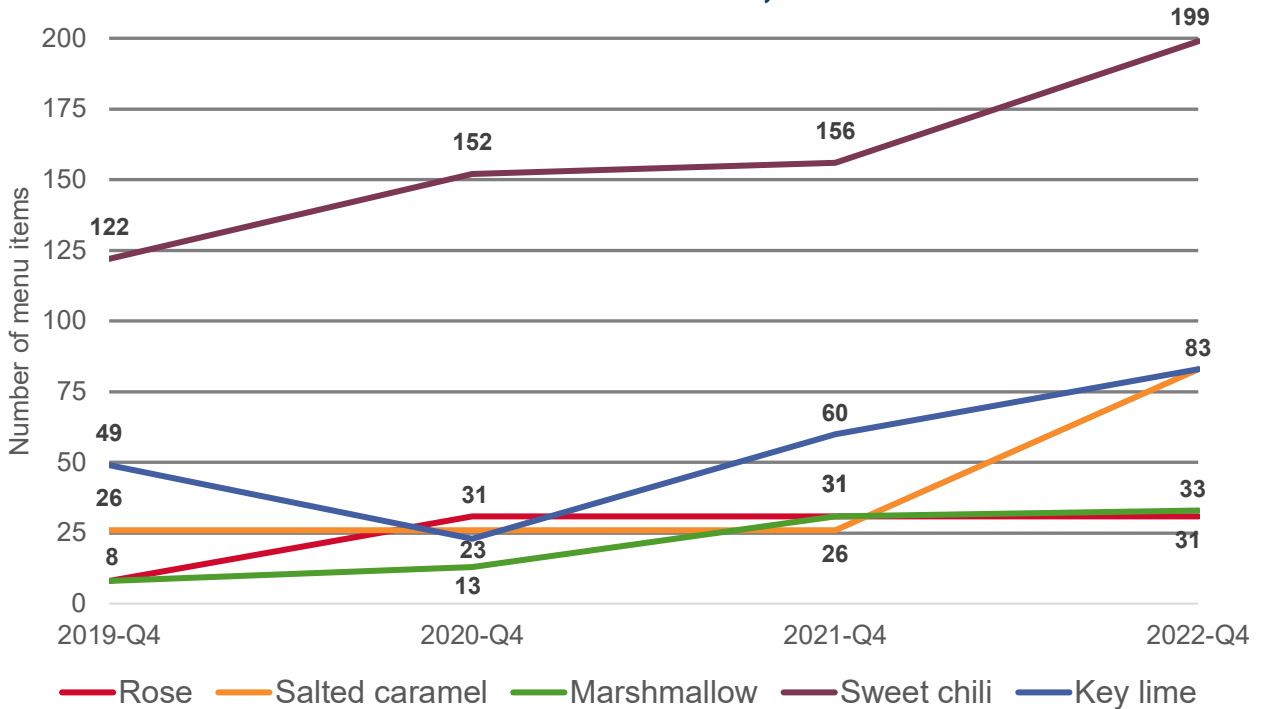
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# US menus: growing flavors & ingredients



**Sweet flavors on the menu:** Sweet flavors declined 11% from Q4 2019-Q4 2022, yet their application in savory and spicy dishes remains strong. In particular, operators are incorporating sweet, fruity flavors like key lime to add complexity and elevate menu items instead of using more traditional lemon or lime. Layers of sweet flavors also make a great addition to spicier menu items: hot honey grew directionally in the past year after declining over 2020 and 2021.

**US: sweet flavors on US menus, Q4 2019-Q4 2022**



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# Citrus flavors offer low-risk innovation opportunities

**Brands can offer risk-averse consumers permissible adventure through the use of different citrus flavors.**

### Play on orange's popularity

Manufacturers looking to introduce low-risk flavor innovation would be wise to begin with the orange. Oranges are ubiquitous across the world, and orange is the top flavor globally when it comes to juice drinks launched in the past three years. Brands can tap into this familiarity and popularity to expand the types of oranges they use in new products. Blood orange, for example, has begun to appear in new products, from **candy** to **juice** to **cider**. What's more, blood orange has become popular in **beauty and personal care** as well.

In addition, bitter orange notes also have potential. In the past few years, the world has embraced **spritz culture**, with Aperol and other bitter orange liquors gaining popularity as a way for consumers to treat themselves. Bitter orange notes, such as those found in **Belvoir Farm's Botanical Soda Bitter Orange Spritz**, can inspire future innovation.



**California Pizza Kitchen Citrus Poppyseed Dressing** is now available, and retails in a 12-fl. oz. pack.

- Where creative flavors collide
- Blending sweet, citrus flavors to inspire the taste buds



### Limes and lemons have much more to offer

Lime and lemon are familiar to consumers across food and drink. Because of this familiarity, local and regional varieties can offer consumers a comfortable but more-exciting citrus experience. Just within lemons, for example, Italy alone offers a range of opportunities for inclusion in products, including Sicilian, Etna, Sorrento and Femminello lemons. Citrus hybrids such as calamansi are also good bets, as they combine the flavors of lemon, lime and sometimes orange, making them familiar and approachable yet exotic and new.