



# THE FUTURE OF FOOD

A VIEW FROM THE EDGE

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PART ONE



CONILL





# FOOD

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## FORWARD

Famed 18th-century French lawyer, epicurean and gastronome Jean Anthelme Brillat-Savarin once said “tell me what you eat, and I’ll tell you who you are.” In many ways, this quote sums up the special relationship people have with food, regardless of when or where they have lived.

Food has played just about every imaginable role over the course of human history. Fuel for sustenance, fodder for social entertainment, trade commodity and economic currency are just some of the many roles food has played in helping shape society.

There are numerous shifts influencing the world of food in the United States today. In addition to ethnic, cultural and economic forces, legislation, sustainability, technology and innovation are all affecting the ways people think about, purchase and ultimately consume their food.

This report examines food through the lens of its importance as a cultural marker. It is the first installment of a three-part series with the objective of identifying leading-edge trends that will ultimately reveal what is next for food in America.







# A VIEW FROM THE EDGE

To gain perspective on what is affecting the state of food in the U.S. and what is about to come, the Conill team measured the pulse from the fringes of food culture. In-depth interviews were conducted with leading experts in food, health and wellness, and companies that are putting their own stamp on food trends:

- \* **Kim Lyons:** Former trainer of The Biggest Loser and owner of Bionic Body Gym
- \* **Dara Mazzie:** Personal trainer and food and nutrition expert
- \* **Dr. Lesley Daspit:** Professor, Anthropology of Food at UCLA
- \* **Aida Mollenkamp:** Chef, food writer and television personality
- \* **Drusilla Rosales:** Nutrition advisor, registered dietitian
- \* **Joy Ahrens:** Leading voice in the farm-to-table movement
- \* **Jessica Hallstrom, M.S., Earth Island Institute:** Non-profit environmental group synonymous with dolphin-safe labeling
- \* **Bay Area-based** company innovating lab-grown meats
- \* **Earthbound Farm Organic:** Innovators in various aspects of organic farming
- \* **Mintel Sr. Food & Drink Analyst:** Billy Roberts
- \* **Mintel Consumer Trends Consultant:** Stacy Bingle



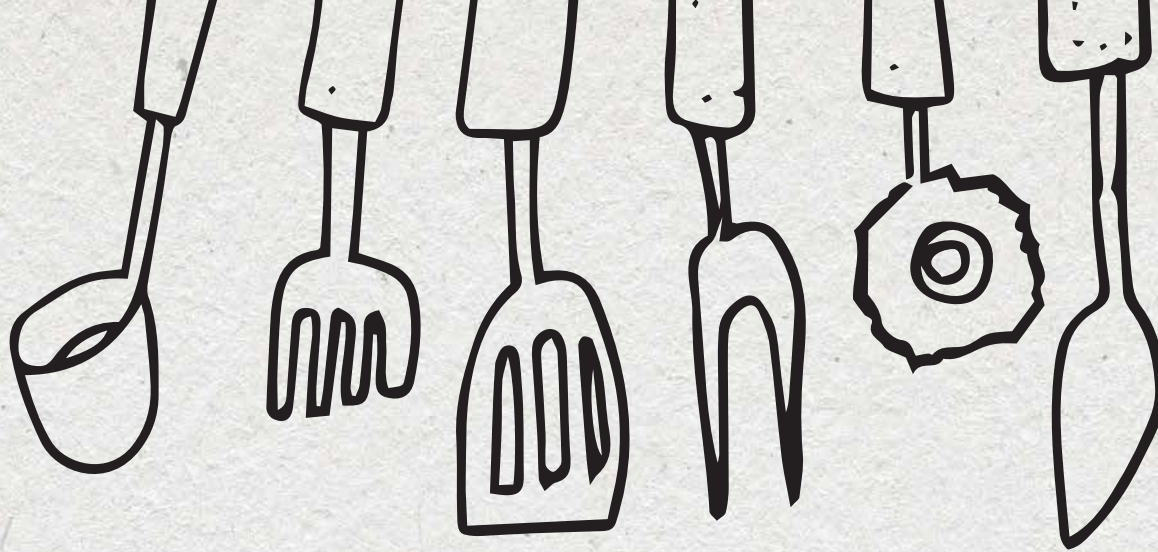


# 14

TRENDS THAT  
ARE RESHAPING  
FOOD AND OUR  
RELATIONSHIP  
TO IT







## FOOD YOUR WAY, BACKSTORY INCLUDED

### #1 FOOD SHOULDN'T BE BORING, IT SHOULD HAVE A STORY

Boring, bland foods are out and more global dishes and ingredients are in. From the “Mexification” of food to the recent “Western European noodle explosion,” a range of global cuisines and cooking styles have made their way into American restaurants and homes, and with them has come people’s desire to know the origins of their food. But being worldly is not enough, consumers also crave food with a backstory; people want to know its purpose, just as much as preparation and ingredients.



*“Consumers are playing close attention to the products that they purchase, and this includes not only the ingredients but where these come from and how sustainable they are.”*

– Jessica Hallstrom, M.S., Food Scientist at Earth Island





## #2 TECH + FOOD = EXPERIENCE

Sometimes the best food stories are those personalized to your own experience, and that is exactly one of the key benefits that is being afforded by the latest technological gadgets and social media in the food space. Technology, like apps and visual platforms such as YouTube and Pinterest, is being used as a means to enhance, simplify and tailor people's food experiences, as well as to offer consumers an easier way to learn about cooking. Wearable technology and the Internet of Things are working together to help people monitor their eating habits. One example currently in development is a high-tech necklace called AutoDietary, which can track calorie intake by "listening" to the sounds of foods as they are chewed.

## FOOD RX

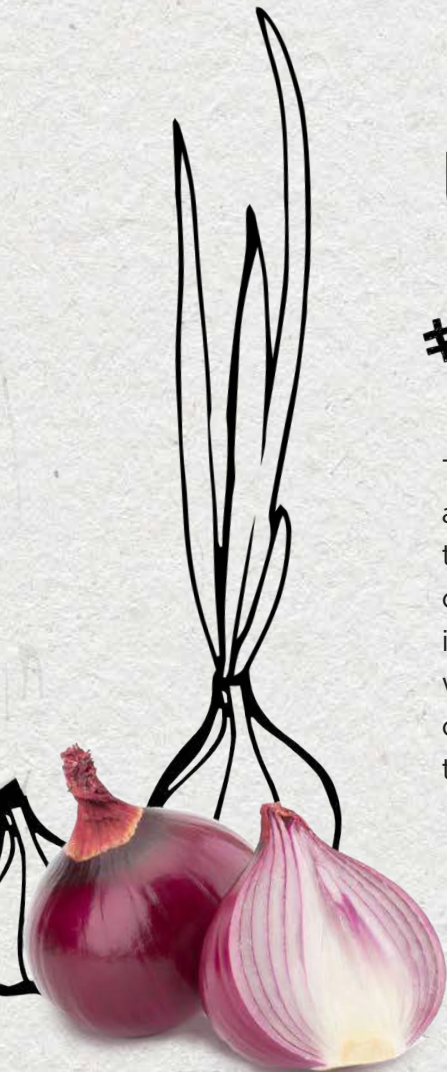
### #3 MAXIMIZING FOOD'S POTENTIAL

Today's more wellness-conscious consumers want to take advantage of food's maximum health benefits. To this end, they are becoming more knowledgeable about the nutritional composition of fruits, vegetables, meats or other ingredients in every aspect of what they consume, in order to have a more well-rounded diet. People are also becoming more aware of the best ways to prepare and cook their food in order to get the most out of what they eat.



*"There is a difference between food and fillers.  
Today we eat fillers, not real food."*

- Dara Mazzie, personal training and food and nutrition expert





## #4 FOOD & FITNESS BLEND

One of the fastest-growing trends is the recent shift in focus from diet and size to long-term health and wellness. Food and nutrition are blending into a growing ecosystem that is being created by the merging of food and fitness. In this new ecosystem, personal trainers are shifting to become health and lifestyle coaches, many of whom offer grocery tours to educate people on how to eat and what to buy. New areas of interest are also being elevated in this blend, including topics like protein timing, which involves determining how much protein one should consume, how to split it up through the day and how to leverage it so as to minimize muscle loss as people age.



*"Exercise is crossing into food so much - they (people) are going to the gym, but they are getting fatter. Food is everywhere. It has flipped from being scarce and nutritious to food everywhere, but less nutrition in it."*

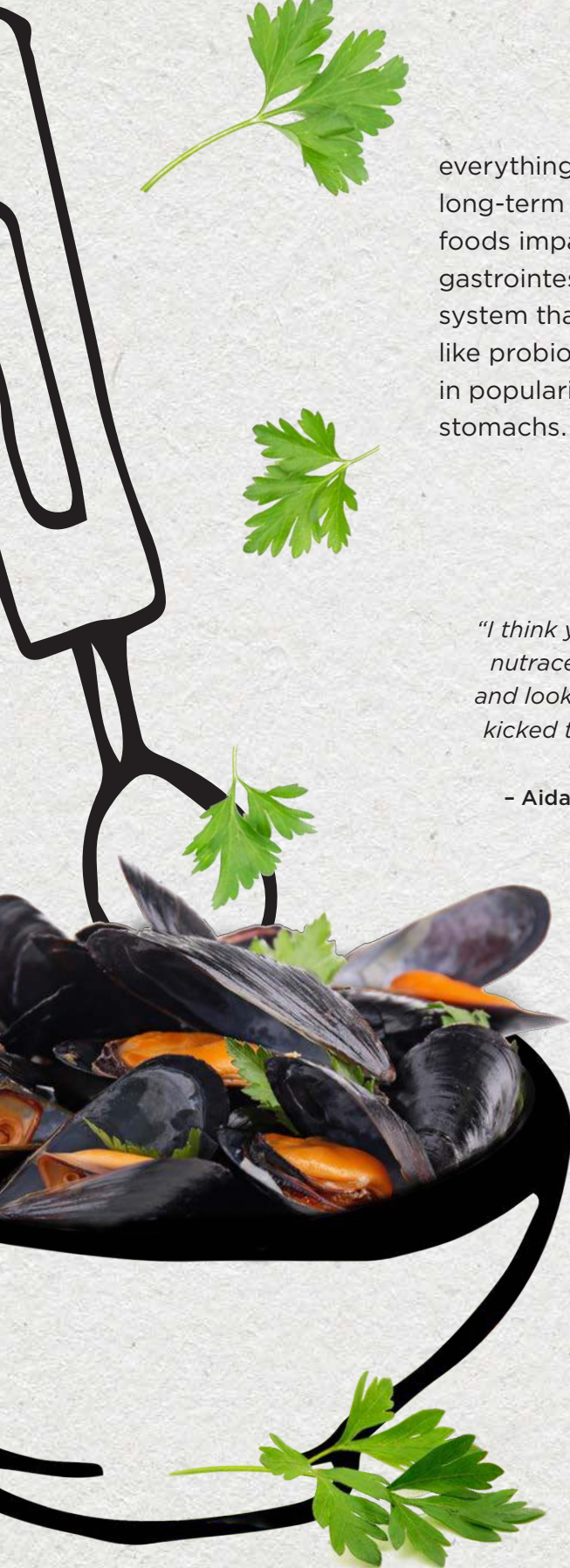
**- Kim Lyons: Former trainer of The Biggest Loser and owner of Bionic Body Gym**

## #5 GUT HEALTH

Guts are in these days, but in a good way. Gut health is increasingly being seen as the connection to all other body functions and central to overall health, including mental health. Consumers are turning to the nutraceutical route by using food as a replacement for medicine to combat







everything from inflammation to toxins in order to promote long-term health and wellness. They're even considering how foods impact their brains — recent studies have found that gastrointestinal distress may trigger signals via the nervous system that result in mood changes. Products and processes like probiotics, fermentation and kombucha are growing in popularity as consumers seek to cure their ills via their stomachs.



*"I think you'll also see food going more and more the way of the nutraceutical trend - people are steering away from medicine and looking to food as a supplement... kombucha and probiotics kicked this trend off, and a lot of small companies have started to sprout up and will likely take off."*

- Aida Mollenkamp, chef, food writer and television personality

## RESPONSIBLE EDIBLES

### #6 CLIMATE AND LABOR IMPACTING WHAT WE EAT

Changing climate patterns and the restrictions associated with those changes are impacting what we eat. Tighter water restrictions and conservation efforts are driving changes in farming patterns, in some cases leading to a resurgence of irrigation-free dry farming in some of the country's largest agricultural centers.





As a result, crops that were once not financially viable due to high labor costs or because they were water-intensive, are now becoming the focus of many farmers, who are benefiting from increased automation (which has reduced labor costs) and greater innovations in water conservation.

## #7 RESPONSIBLE EATING

Consumers are taking the minimization of waste to heart as they increasingly feel a sense of responsibility to eat “smarter.” Beyond eating healthy, people have a general concern for the impact that the production, consumption and disposal of food has on other humans, the environment and animals. They are looking to companies to adjust their waste footprints, and many grocers and restaurants are responding by opening waste-free kitchens. KFC, for example, has developed edible coffee cups made from chocolate, while France as a nation is urging shoppers to buy and eat ugly fruits and vegetables.



*“One of the problems with industrial agriculture is our heavy reliance on industrial-raised livestock and extreme weather events; our food system is part of this larger problem.”*

- Dr. Lesley Daspit, Professor, Anthropology of Food at UCLA





## #8 DEMOCRATIZING NUTRITION

For years, people have viewed Genetically Modified Organisms (GMOs) with a suspicious eye as reports in the media have given them a bad rap. However, a countercurrent has started to emerge around the belief that GMOs can be good for human health, deliver faster and greater yields, and lower the associated costs of certain foods (e.g., farm-raised salmon). Additionally, lower-cost proteins and alternatives like cricket flour are helping to democratize nutrition as greater numbers of people are able to access higher-quality foods at more affordable prices.

## #9 HONEST LABELING

Concerns over misleading claims or lack of transparency in labeling have led to heightened activism over honesty in labeling. Stamp overload and the surge in “organic” labeling is giving way to the belief that terms like “natural” or “healthy” are being used purely for marketing purposes. As a result, regulating authorities and manufacturers are being taken to task, pushing them to better label products, or at the very least, make labeling more transparent. Such was the case with the 2016 passage of the new GMO labeling law, following a drawn-out battle between the food industry and pro-labeling groups. The law requires the labeling of food containing genetically modified ingredients.



*“People are looking to Europe and Australia as the leaders in clean food – they keep their food very transparent, unlike here in the U.S.”*

**Aida Mollenkamp, chef, food writer and television personality**







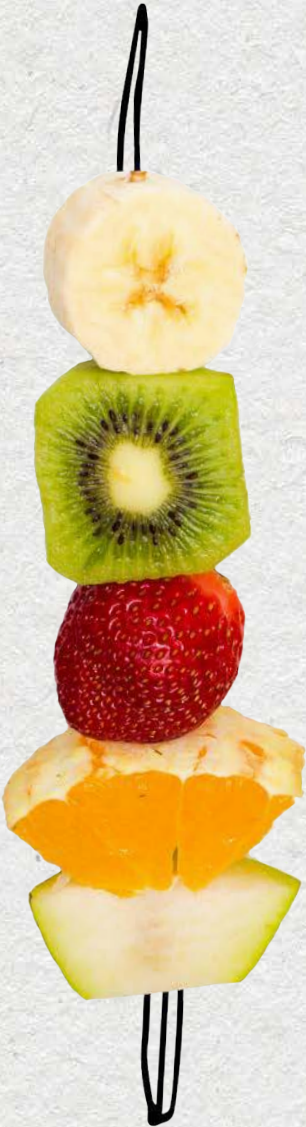
# EATING AS A WAY OF LIFE

## #10 RISE OF FOOD DETECTIVES

The rise of “mystery” illnesses and modern diseases like the intestinal pathogen E. coli, the contagious and antibiotic-resistant staph bacteria MRSA or the fatal neurodegenerative disease Mad Cow Disease, as well as food sensitivities like Irritable Bowel Syndrome (IBS), have pushed many to re-evaluate how to eat and to be more meticulous about what they eat. American shoppers have gone from being consumers to food detectives, who instead of just watching food categories and calories, are now looking deeper into ingredients and approaching eating as a way of life. This healthy appetite for inquiry is leading them to be on the lookout for suspicious ingredients, call into question what they see as fillers or poor ingredients versus real food, and to gravitate towards foods with ingredients that they can pronounce and that are used in the proper manner.

## #11 ALTERNATIVE NATION

Changing food dynamics are not necessarily leading to wholesale changes in food-related consumption habits. Instead, alternative ingredients and products are being chosen in lieu of traditional ones. This is exposing an underlying desire for more wholesome benefits from foods in the same or adjacent food groups. For example, almond flour in lieu of white flour or “cultured meat” grown in labs from animal stem cells in lieu of mass-produced red meat. Additionally, many subsets of these alternatives are popping up in response, such as coconut powders and pills that are building on the popularity of coconut water.





## #12 FAT IS BACK

Fatigue over the hype of low-fat, low-calorie, low-carb, or high-protein diets has set in and it has led many to adopt a more holistic understanding of eating – one where fat is seen as a good thing and an integral part of one's diet. Perceptions of fats as being bad are rapidly changing. The nuances surrounding saturated fats, such as those found in dairy versus those found in meat products, are shifting and making shoppers less afraid of high-calorie and high-fat choices. This is in part because saturated fats are now viewed as healthy fats, as opposed to bad fats.

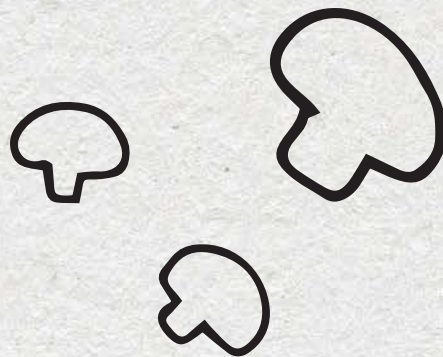
## #13 YOU DO IT FOR ME

Eating has certainly become a way of life, but not everyone has moved to change their food-related habits. The burden of change is being shifted to producers as expectations are increasingly placed on them to find better solutions to the food products they provide. In essence, what is changing is not consumers' behavior, but instead how providers meet these changing needs.

*"In 10 years I think that the food industry will take great leaps toward satisfying educated and informed consumers' demands for cleaner labels and more ethically produced food."*

– Jessica Hallstrom, M.S., Food Scientist at Earth Island





# #14

## DISTRUST IN BIG BRANDS, COMPANIES AND GOVERNMENT WHEN IT COMES TO FOOD

Food has entered the realm of political discourse as many see food as political propaganda and the object of financial gain for companies; consumers are even questioning the food pyramid itself.

Controversies like the widespread use of fake and adulterated olive oil, Monsanto's link to genetically modified organisms or dairy farmers' use of growth hormones have led many to question the health, safety and integrity of many food products. Many companies are responding by pledging to better their products and remove artificial ingredients.



*"The big food industry doesn't care if it's healthy or not, the big people that decide if it's okay to put in (an ingredient) or not are the ones who make money. The food pyramid is a joke."*

**-Dara Mazzie, personal training and food and nutrition expert**





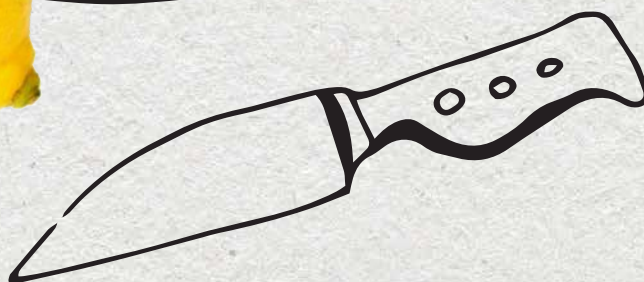
# { TAKEAWAYS }

## FOOD WITH PURPOSE

Food consumption has become a highly purpose-driven activity in which the values of the persons eating it and companies producing it are just as important as the food product itself. Producers that tailor food experiences, whether it is through using technology or telling relevant stories driven by compelling value systems, will likely better connect with consumers looking to also align with a food's social purpose, rather than just its preparation and basic ingredients.

## FOOD IS NOW A PLATFORM

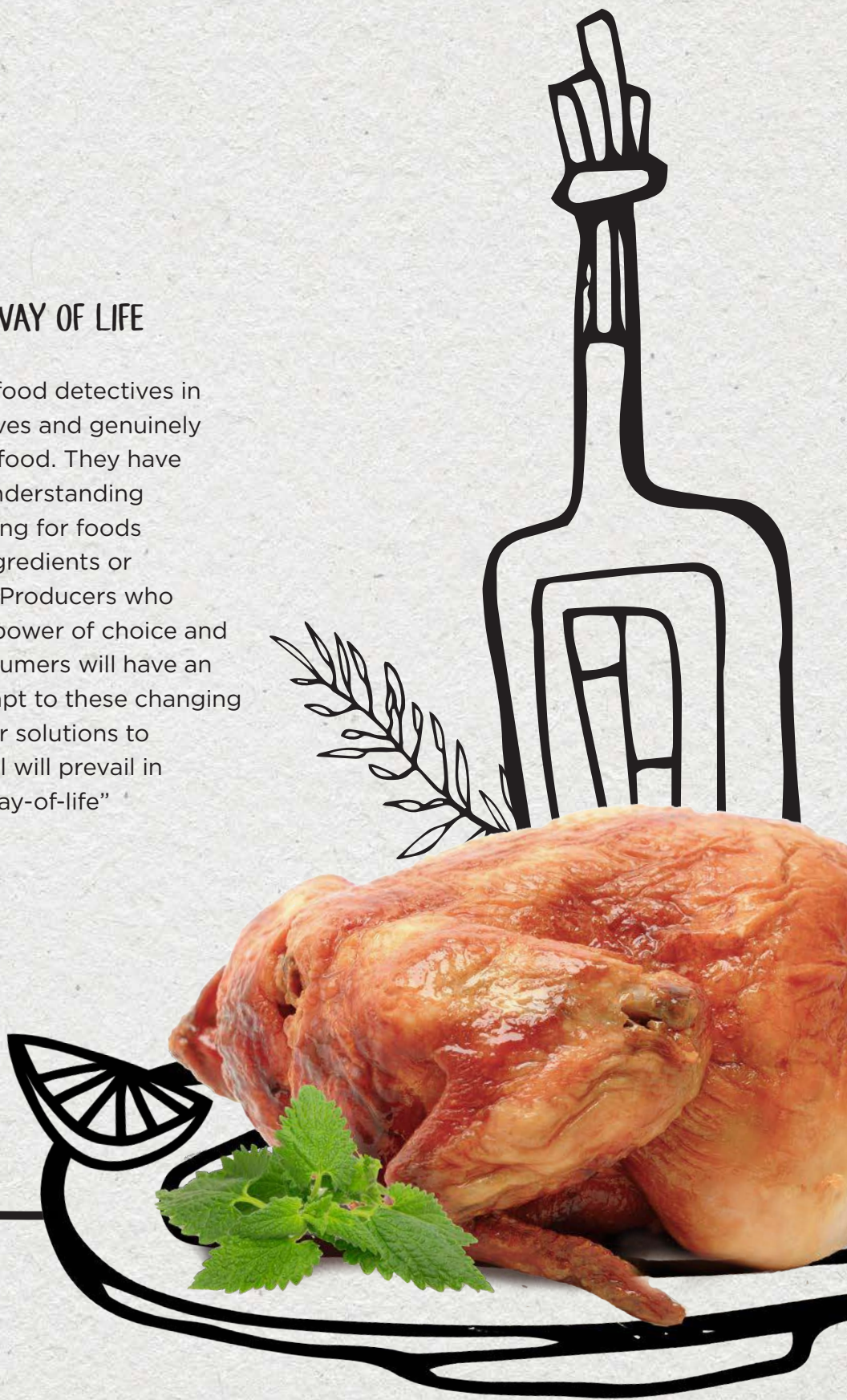
Food has spawned an ecosystem that cuts across nutrition, fitness and activism. Consumers have given food a voice, and they aren't shy about pushing for greater responsibility in manufacturing, labeling, and serving for consumption. Companies that see food's potential as both a lifestyle and social platform, rather than just viewing it as a commodity, will go a long way in tapping into consumers' growing sense of responsibility, transparency, as well as their desire to unlock food's maximum health benefits.





## EATING AS A HOLISTIC WAY OF LIFE

Consumers have become food detectives in search of healthy alternatives and genuinely wholesome benefits from food. They have adopted a more holistic understanding of eating and are not settling for foods with suspicious or poor ingredients or manufacturing processes. Producers who truly understand that the power of choice and inquiry has shifted to consumers will have an advantage. Those that adapt to these changing behaviors by finding better solutions to the food products they sell will prevail in this evolving “food-as-a-way-of-life” landscape.







The next report in this series will explore  
the real-world impact these trends have  
in the lives of consumers.

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