



Culinary Tides

• *looking past the breakers...*

*How to Use Strategic Thinking to Navigate
Health, Wellness, & Sustainability Trends*

Culinary Tides, Inc.

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Toxicologist, Chef, Dietitian



What We Do ...

We help food industry partners navigate trends by revealing relevant patterns so they can create meaningful products that connect with customers

Who We Work With:

All food industry segments including Food Service, Retail, Commodity Boards, & Ingredient Suppliers



- Our team looks for patterns in Chaos to aid strategy
- We specialize in foretelling a trend's birth and forecasting its trajectory, personality , & longevity
- Our forecast results are used to create
 - Entrance
 - Navigation
 - Exit strategies

Where We Fit ...

With your Forecasting Department:

- ✓ Strategy, Marketing, Consumer Insights

We work with the team responsible for pushing trend information out to other groups



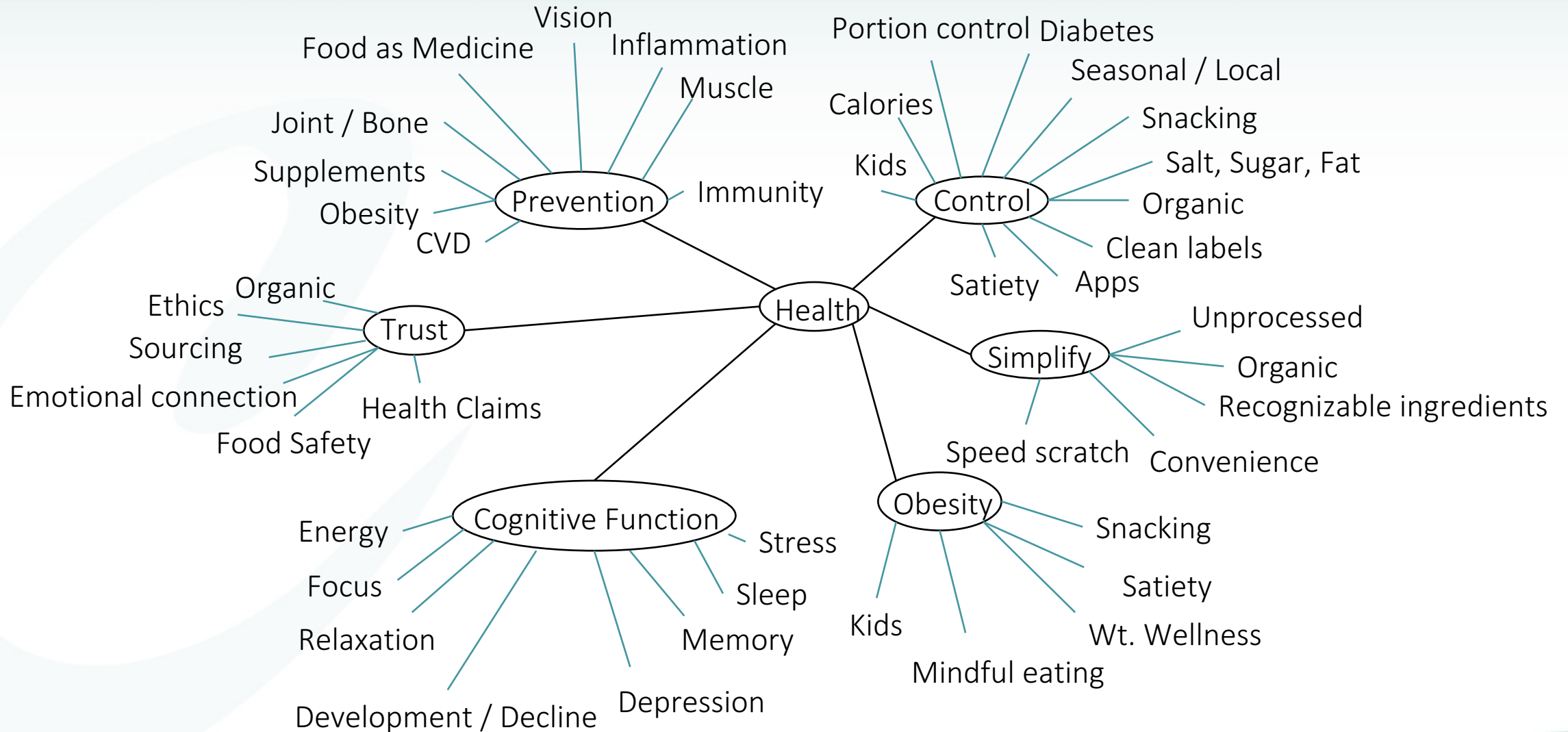
Health & Wellness





Drivers

Health Trends





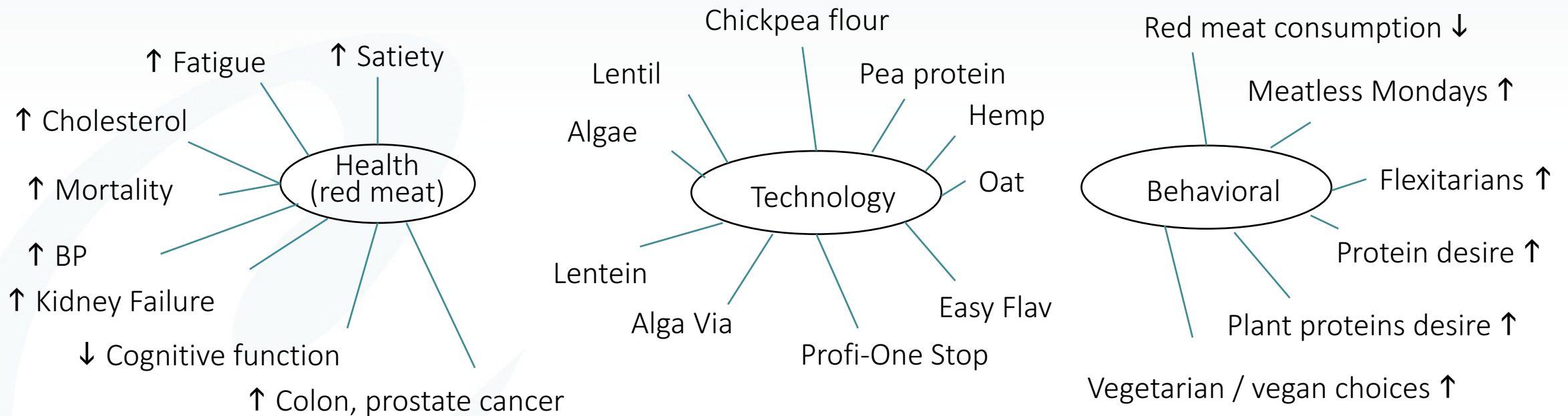
Ally

Protein (Animal / Plant Infighting)

Birth Pattern: Courier

Parents

→ Diet Industry



- **Innova** - Globally, products making a plant-based claim increased 62% from 2013-17
- **Zion Marketing** - Global plant-based meat market will reach \$21.2 billion by 2025
- **PBF** - Plant based meat sales increased 24% in 2018, topping \$670 million
- **DuPont** - 96% attributed their motivation for eating non-animal-based proteins to the overall health halo

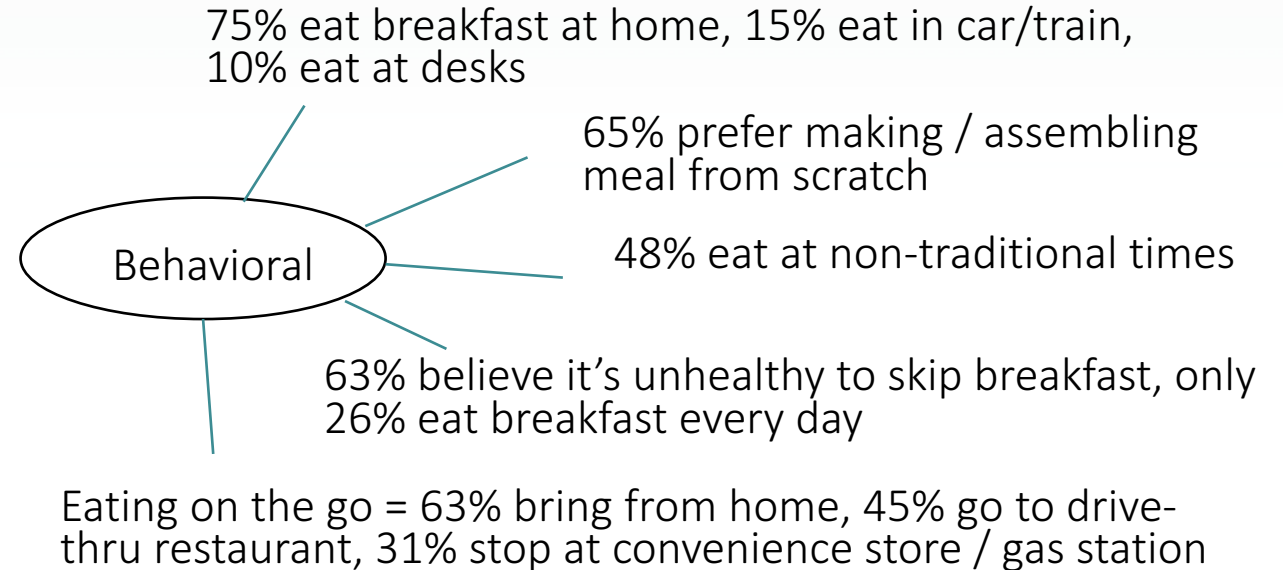
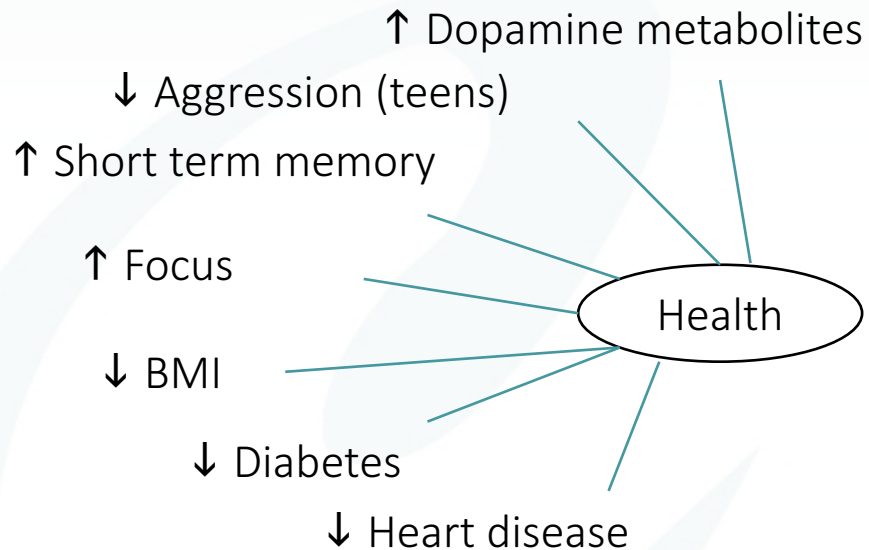


Ally Breakfast

Birth Pattern: Fusion

Parents

→ Clinical health research
→ Economic recovery

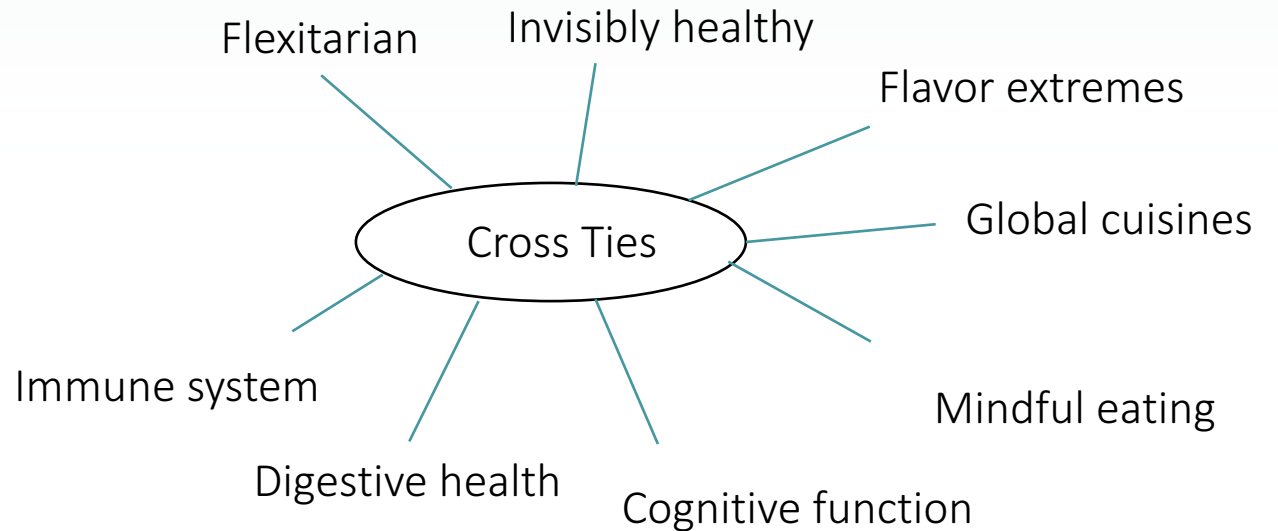


- **Toluna** – 63% of frequent travelers eat breakfast at least 3+ days per week, compared to 45% of infrequent travelers
- **Pkg Facts** - households headed by adults aged 25 and younger are 26% more likely to eat breakfast entrees/sandwiches
- **Hilton** - 80% believe breakfast is most important meal & a shared breakfast can set tone for the day, 56% skip breakfast more than any other meal

Ally

Fermented Foods

Birth Pattern: Fusion



Technomics - the word fermented on restaurant menus increased 21% between 2015 and 2016

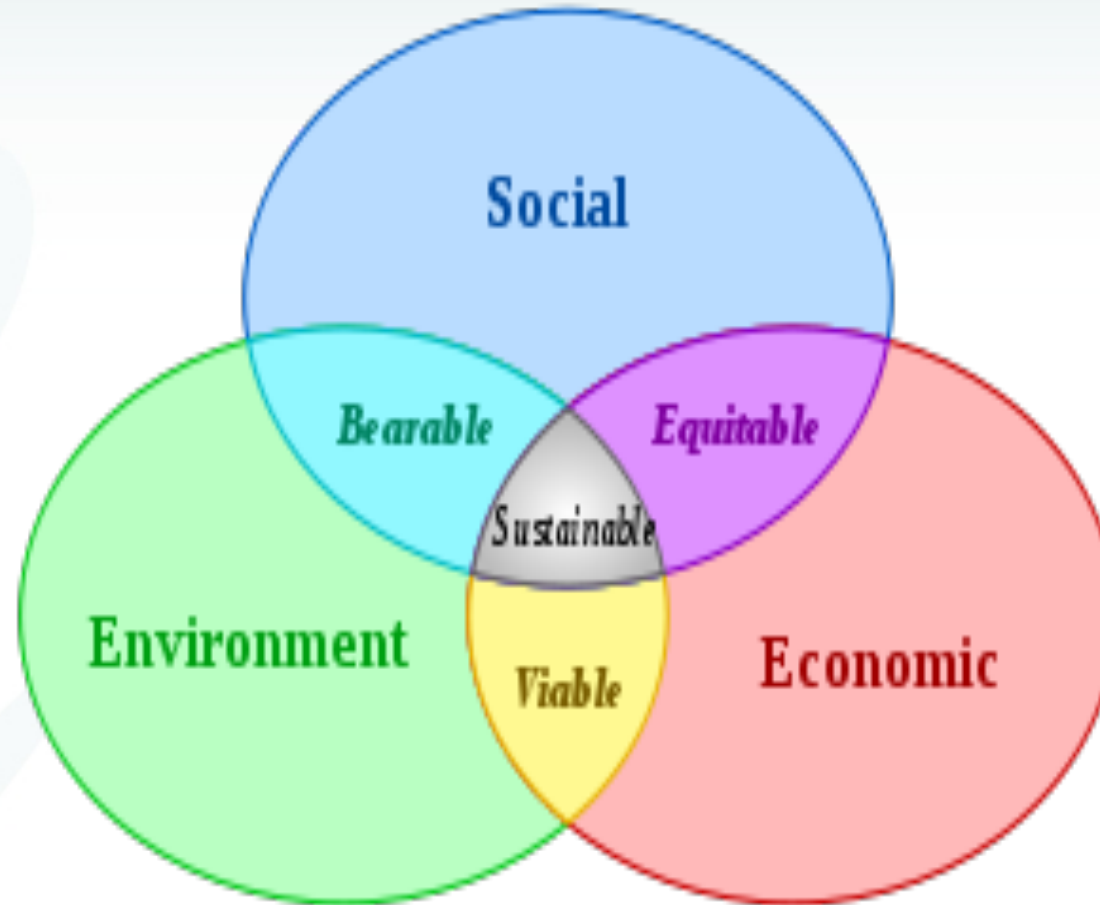
Innova - 18% average annual growth of food and beverage launches with fermented claim from 2013-2017

SPINS - retail sales of refrigerated kombucha and other fermented beverages rose 37.4% to \$556m in 2017

Research & Markets - global fermented foods & drinks market grew 7% in 2017

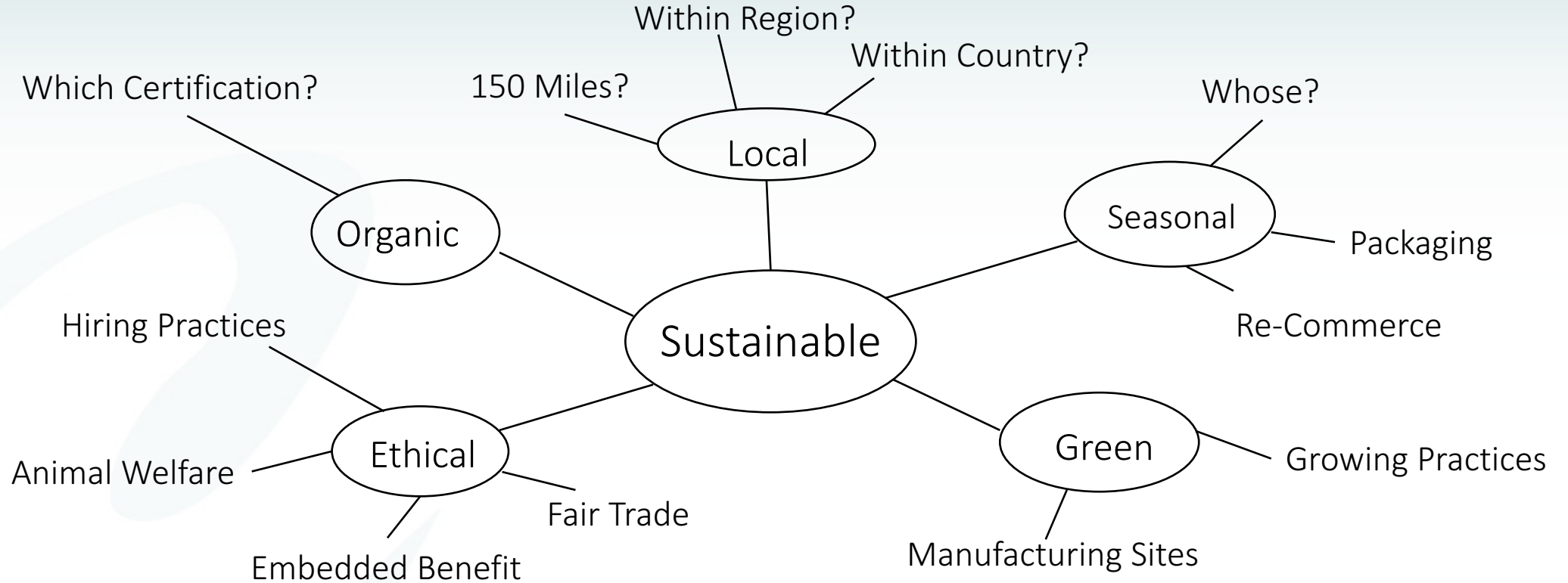


Sustainability





Sustainability Landscape



Cargill - 50% of Gen Y changed eating habits for sustainability reasons in 2018 vs 19% of older respondents

Cargill - 80% said the way an animal is raised is important, 50% were willing to pay more

CSG – 50% of Gen Z would pay more for a sustainable product, vs 47% of general population, 33% will pay 25% more

Nielsen - 73% of global consumers would change consumption habits to reduce impact on the environment



Combating Fatigue

Out

IN

- Generic “green” label statements → • Explain *why* product has green claim on label – educate the consumer
- Marketing how a sustainability practice helps your company → • Marketing how a sustainability practice helps the consumer
- Promoting how your company’s sustainability efforts helps the environment / community → • Empower consumers – give them the control over bettering their environment / community by using your products

You are **not the hero in consumer’s lives,
you are their guide - so **they** can become the hero in their own lives*



Thank You!

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