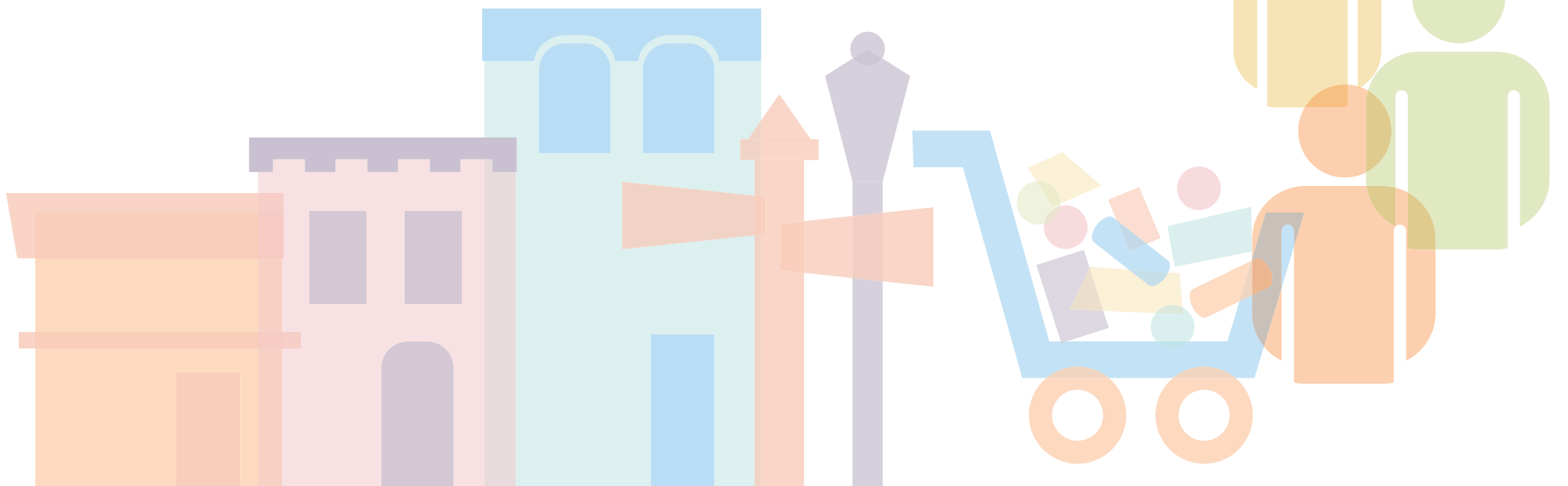
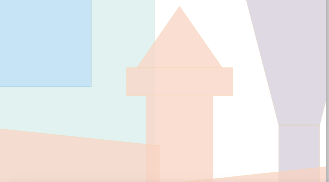




Culinary **TRENDSCAPE** 2014





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

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

Tracking the ebb and flow of North American food trends can be a daunting task, even for a seasoned culinary professional, which is why we take a team approach to monitoring food trends. We begin with our most valued resource—culinary intuition. We draw first on the expertise of our global team of chefs and bakers and the inspiration that they find in culinary tours, literature and many other sources including our trusted industry partners.

This year we have taken our collective ideas and compiled our first-ever **CCBI Culinary TrendScape** report, which highlights what we see as the trends to watch—the foods that excite our palettes and our imagination. Some of these trends may inspire future Campbell products, while some may not. Either way, we think it's important to stay on the pulse of what people are eating and how their tastes are evolving as a result of global influences.

This 2014 Culinary TrendScape report offers our unique point of view on what we've identified as the ten most dynamic food trends to watch, from Brazilian Cuisine to Bolder Burgers. We also look at overarching themes—hot topics—that have risen to the top in the marketplace.

Some themes, like authenticity and interest in a balanced lifestyle, have been hot topics the past few years and remain influential in this year's TrendScape. There's increased emphasis on fruits and vegetables at the center of the plate this year, as well. Our chefs are always eager to explore new cuisines and get creative in the kitchen, so emerging themes like global fusion and the cuisines of South America have been especially exciting to follow.

We share these insights with you today because we see culinary innovation as an industry-wide goal and we hope you gain as much inspiration from the TrendScape as we do.

2014 HOT TOPICS

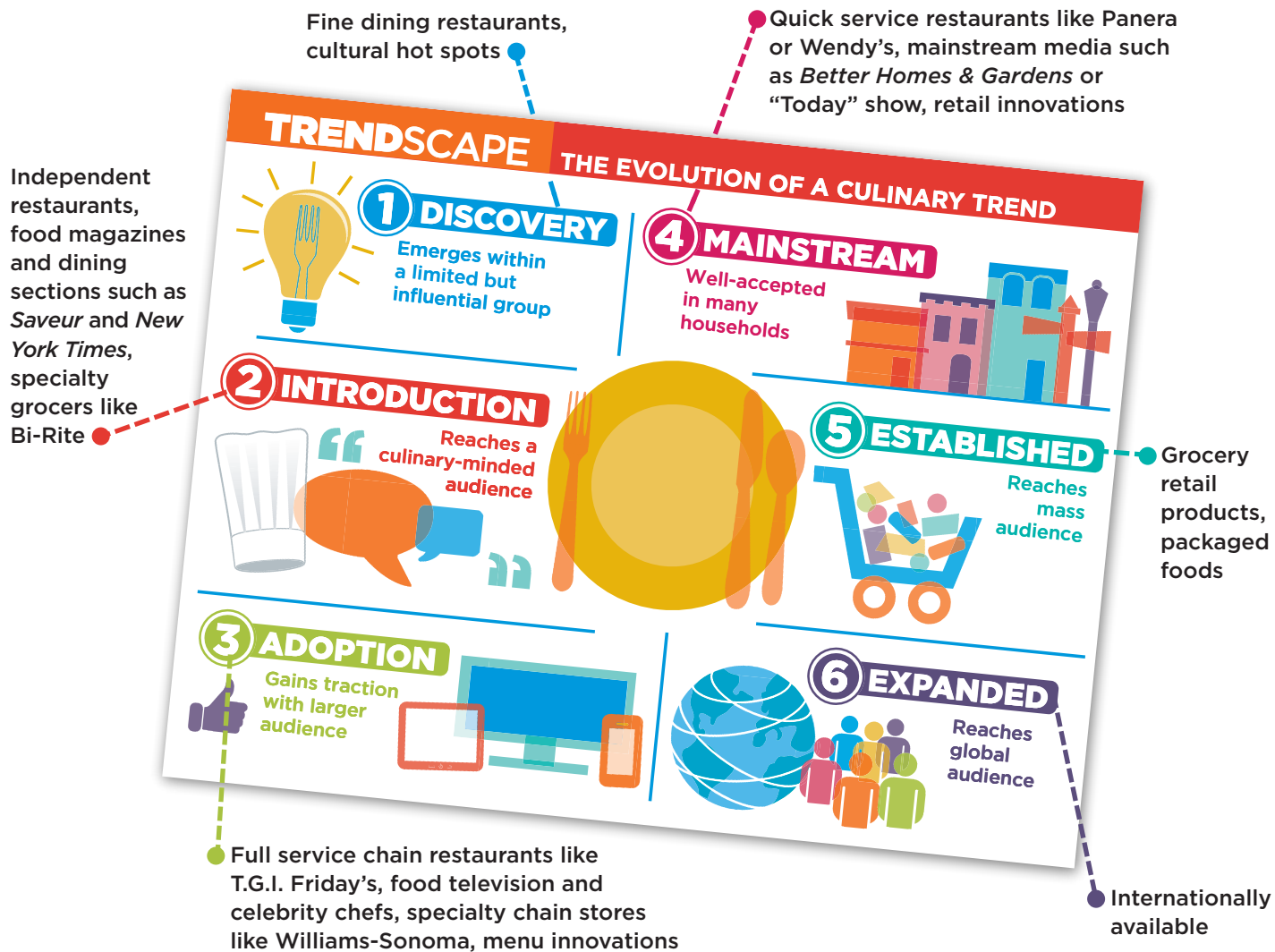
These themes are the driving force behind this year's top trends

Authenticity • A Balanced Lifestyle • Distinctive Flavors • Exploring South America • Global Fusion • More Fruits & Veggies • New American • New Proteins



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 **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 2014

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!

BRAZILIAN CUISINE

FOOD WASTE AWARENESS

FERMENTATION

NEW JEWISH DELI

FRESH JUICES

SOPHISTICATED SWEETS

YOGURT GOES SAVORY

**BEVERAGE-INSPIRED
FLAVORS**

REGIONAL MEXICAN

BOLDER BURGERS

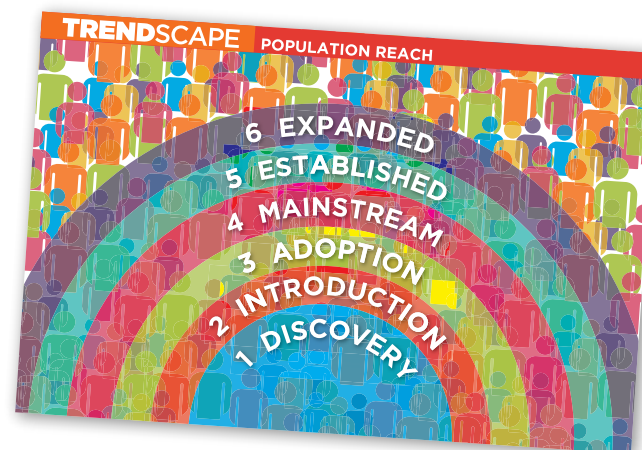


Tuning in to TrendPoints

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

Food trends usually—but not always—begin in fine dining and eventually expand into groceries and quick service restaurants. Looking for distinct **TrendPoints** within the six stages helps us track each trend's evolution, from buzz to universal appeal.



BRAZILIAN CUISINE

1 DISCOVERY



Chef David Landers took an intensive culture and cuisine class in Brazil and was impressed by Bahian dishes like this Moqueca seafood stew flavored with dendê (palm oil) and coconut milk.

Portuguese and African culinary influences reflected in ingredients like manioc/yuca root—the country's staple starch. Though Feijoada Completa reigns supreme as the national dish, it is just one of the many great dishes of Brazilian cuisine. This rich stew of beans and smoked meats is served with rice and sautéed collard greens, and topped with toasted manioc flour known as farofa.

The flavorful seafood stews, grilling techniques and unusual ingredients of Brazil will no doubt be thrust into the culinary spotlight when Rio de Janeiro plays host to the upcoming 2014 World Cup and 2016 Summer Olympic Games.

Exploring South America is an emerging culinary macro-trend, and Brazil's rainforests, coastline and lively urban centers are poised to provide a veritable treasure trove of menu inspiration beyond the already familiar churrascaria steakhouse and Amazonian açaí berry.

On a recent visit our chefs were inspired by the blend of native,

TRENDSCAPE

1



- **Datassential** – Brazilian Cuisine
- **Firmenich** – Market Research



- **Giraffas, Miami** – Stroganoff
- **Ipanema, NYC** – Feijoada Completa
- **La Sirena Clandestina, Chicago** – Moqueca Seafood Stew
- **Muqueca, Cambridge, MA** – Shrimp Bobó
- **Ta Bom Food Truck, Los Angeles** – Stroganoff and Beef Pastel



- **Alex Atala** – D.O.M.: Rediscovering Brazilian Ingredients
- **Gourmet Live** – [The Brazil Issue](#)
- **Lucky Peach** – The World's Most Dangerous Chicken
- **No Reservations** – [Rio de Janeiro](#)



- **Chima Brazilian Steakhouse, Philadelphia** – Grilled Picanha
- **FIFA World Cup – 2014, Rio de Janeiro**
- **Summer Olympic Games – 2016, Rio de Janeiro**

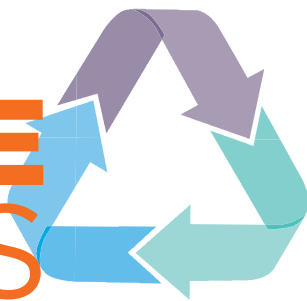


Caipirinha cocktail made with cachaça sugarcane spirit



Feijoada Completa, Brazil's national dish

FOOD WASTE AWARENESS



1 DISCOVERY



Kitchen compost bucket

Mintel reports that nearly 40 percent of food produced in the U.S. goes uneaten and this unfortunate truth affects the bottom line for both businesses and households. People seeking a more **Balanced Lifestyle** are becoming aware of this global issue and are learning what they can do to cut down on unnecessary food waste.



"Root to Stalk Cooking" by Tara Duggan

Practical suggestions like learning to shop wisely and understanding expiration dates are becoming a regular part of the foodie dialogue. Related topics we see emerging on the TrendScape at Stage 1 include buying imperfect produce, serving smaller portions, repurposing leftovers and cooking from root-to-stalk and nose-to-tail.

A growing number of households are composting through sanitation programs in progressive cities like Seattle and San Francisco, where zero-waste policies reduce the amount of food sent to landfills. For mindful people and independent restaurant owners, embracing this "final frontier" of recycling is becoming just as important as making ethically responsible food purchases.

1



- **Food Waste Reduction Alliance - Industry Partner**
- **Mintel** - Market Research
- **USDA** - [U.S. Food Waste Challenge](#)



- **Animal, Los Angeles** - Pig Tails 'Buffalo Style' with Celery, Ranch
- **Moto, Chicago** - Composting food scraps to create organic fertilizer



- **PBS NewsHour** - [San Fran on Track to Become Zero-Waste City](#)
- **Reuters Health** - [Simple Awareness Reduces College Food Waste](#)



- **Momofuku MilkBar** - Compost Cookie Mix
- **Sur La Table** - OXO Compost Bin



- **NYC Dept. of Sanitation** - Organics Collection Pilot Program



The Food Bank of South Jersey's Just Peachy Salsa was created by Campbell to raise funds for the community and diverts imperfect local peaches from landfills.

FERMENTATION

2 INTRODUCTION

We identified this trend last year and it continues to excite our team. The appeal of enzyme-enhanced foods, a growing appetite for tart and intense flavors, and chefs' interest in the chemistry behind umami flavors all converge in this powerful culinary movement.

There are many **Distinctive Flavors** to explore when it comes to this ancient method of food preservation. We're seeing everything on the TrendScape from fermented beverages like kombucha tea and sour beer to craft vinegars, to Korean kimchi and gochujang, to Japanese salt koji, to foods with "funky" fermentation flavors like super dry-aged steaks.



Korean kimchi is traditionally made by fermenting cabbage with seasonings such as scallions, ginger and spices.

TRENDSCAPE

1



- **Firmenich** - Market Research
- **Mintel** - Market Research



- **Bar Tartine, San Francisco** - Beef Tartare on Koji Toast with Bottarga
- **Casa Mono, NYC** - Cod Cheeks Pil Pil with Pickled Chillies and Black Garlic
- **Eleven Madison Park, NYC** - Tasting Menu with Dry Aged Beef
- **The Publican, Chicago** - 2001 Vintage Oak Barrel Aged Pu-erh Tea



- **Momofuku, NYC** - Culinary Lab
- **Nordic Food Lab, Denmark** - With Noma Restaurant

2



- **Baco Mercat, Los Angeles** - Sweet and Sour Vinegar Sodas
- **State Bird Provisions, San Francisco** - Sourdough, Sauerkraut, Pecorino & Ricotta Pancakes

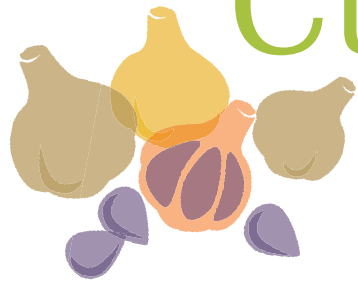


- **Bon Appétit** - [The Dry-Aged Beef Renaissance](#)
- **The New Yorker** - [The Umami Project](#)
- **NPR** - [Why You Shouldn't Wrinkle Your Nose at Fermentation](#)
- **Slate** - [More Sour to You](#)



- **Frieda's** - Black Garlic
- **Tavern Vinegar Co.** - Craft Beer Vinegar
- **Vinki** - Apple Cider Vinegar Juice

Traditional Appeal of



Cultured, Cured & Fermented Foods

Craveable condiments like artisan pickles and Korean kimchi have gone mainstream in their own right over recent

years, and it seems people have gone crazy for all things pickled and jarred, from okra to blueberries. What many are beginning

to understand is that foods we know and love in North America—like bread, cheese, wine, beer, coffee and chocolate—are fermented products, and the microbial transformation of ingredients contributes to the unique flavors

that are at the heart of many cuisines.

Brought on by the interest in reviving Old World traditions and do-it-yourself ethics, bold flavors are the essence of this overall Stage 2 trend. Fermented foods are found in nearly all food cultures, and European classics like sauerkraut are being rediscovered. Authentic Asian traditions have bubbled to the top of this year's trend list, as well. These include Korean gochujang chili sauce, Japanese salt koji (a starter of grains cultured with koji mold) and fermented black garlic.

We're seeing that pickle-like, mouth-puckering bite arise in the most unexpected of places. Fizzy kombucha tea and kefir

come to mind when thinking of trendy fermented beverages, but elixirs made from fruit and vinegar are also making their way to the drink menu. **Pok Pok** restaurant in Portland, Oregon has popularized tart drinks with its bottled Som Tamarind Drinking Vinegar.

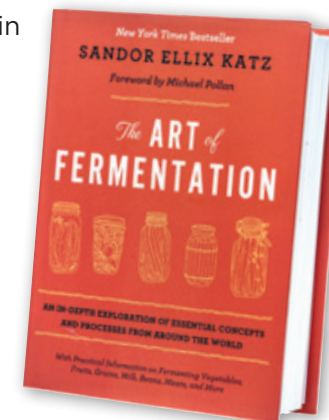
Shrubs, the 18th century equivalent to soda syrups, are hitting the bar scene in cocktails like the Strawberry Rosé Vinegar Shrub at **Shed** in California. Fine dining chefs are pushing the tart spectrum in the kitchen as well, by featuring house-made and craft vinegars on their menus.

Sandor Katz's tome "The Art of

Fermentation" has sparked dialogue in forward-thinking restaurant kitchens such as **Momofuku** and **Noma**, where umami-driven flavors are being studied in their respective culinary research labs. We're simultaneously seeing fine dining chefs resurrect dry-aging methods for meats as a Charcuterie 2.0 trend that explores an earthier, "funkier" element of fermentation.

Traditional foods like these have been enjoying the spotlight, but there is still so much to explore within this far-reaching trend.

"The Art of Fermentation" by Sandor Katz



NEW JEWISH DELI

2 INTRODUCTION

In the current Culinary TrendScape, there's no doubt that what's old is new again. We're seeing this theme in action at Kosher-style delis like Mile End in Brooklyn and Wise Sons in San Francisco, where diner-inspired traditions of yesteryear are being honored with a heightened attention to detail and craftsmanship.

These next generation delis aim to preserve **Authentic** Montreal- and New York-style Jewish comfort foods like sliced pastrami on seeded rye bread, matzo ball soup, half-sour pickles and smoked

fish platters. While their menus are firmly rooted in tradition, modern twists like vegetarian options, sustainably-sourced ingredients and even Jewish-Asian **Global Fusion** are the freshest ideas to hit this revived deli scene.



Sliced pastrami on seeded rye sandwich bread

TRENDSCAPE



- **Datassential** - German Cuisine
- **Technomic** - Market Research

1



- **DGS Delicatessen, DC** - Brisket-Stuffed Cabbage
- **General Muir, Atlanta** - Smoked Trout Salad, Horseradish Vinaigrette
- **Mile End Deli, Brooklyn** - Smoked Meat Poutine
- **Rye Deli, Minneapolis** - Fried Kreplach Dumplings
- **Wise Sons, San Francisco** - Smoked Trumpet Mushroom Reuben



- **Katz's Deli, NYC** - Pastrami Sandwich
- **Schwartz's, Montreal** - Smoked Meat Sandwich



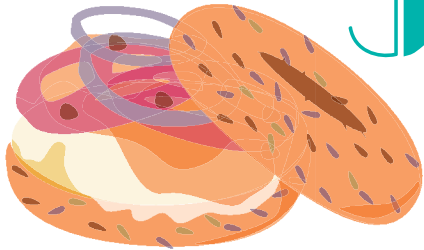
- **Mission Chinese, San Francisco** - Kung Pao Pastrami
- **Neal's Deli, Carrboro, NC** - Pastrami on Rye with Mustard

2



- **Bon Appétit** - [Best New Jewish Delis in America](#)
- **Saveur** - [Roots of the Deli](#)

New JEWISH DELIS Revive TRADITIONAL FARE



A new wave of Jewish delicatessens is saving this once flourishing cultural institution from near extinction. Like the revival of artisanal butcher shops, this trend is all about preserving the past, celebrating North American heritage and making it relevant to today's consumer by infusing it with a modern sensibility.

These New Jewish Delis, as coined by **Bon Appétit** magazine, are reviving diner favorites like potato latkes (pancakes) and matzo ball soup, which were introduced in the U.S. in the early 1900's when New York City saw a boom in family-centric eateries that featured the varied regional



Recently published cookbooks

specialties of Jewish-American immigrants. Traditional dishes like Romanian beef pastramă and Polish bajgiel evolved over the years into some of the city's most iconic foods, like the pastrami-on-rye sandwich and breakfast bagel.

Though over 1,500 delis existed during their golden age, just a few dozen exist now, as **David Sax** has chronicled in his book "Save the Deli." It's a layered history of culture and cuisine that is being resurrected—and literally reimaged—by New Jewish Deli chefs who meticulously recreate authentic, stick-to-your-ribs comfort foods

that their grandparents yearned for and that they themselves

may have never experienced in traditional form.

At contemporary delis like **Rye** in Minneapolis and **Kenny & Zuke** in Portland, Oregon, it's all about capturing the essence of the cuisine through fresh, handcrafted foods. The classic deli menu is recreated with house-made pickles, smoked meats, hearty sandwiches, cured fish, grainy mustards, artisan breads and authentic touches like schmaltz (rendered chicken fat). Portion sizes are average (with options to upsize) in comparison to the sky-high sandwiches you'll find at the legendary **Katz's Deli** in New York City.

While the focus is on authenticity, menus are revisited seasonally and vegetarian options stay true to the cuisine.



Our chefs love the fusion-style brisket soup with matzo balls and kimchi at Cheu Noodle Bar in Philadelphia.

Mash-ups of Jewish classics and Chinese takeout are becoming trendy as well, and offer a refresh on the fusion concept. Even with the modern twists, this tasty trend is rooted in tradition and the end result is good quality comfort food that would make any grandmother proud.

FRESH JUICES

3 ADOPTION



Health-conscious individuals are embracing juicing as a stylish way to refresh and recharge at all times of day. The resolute “green juice” is gaining in popularity as a trendy morning pick-me-up, and premium juices of all colors are being adopted as an upscale snack between meals.

Added ingredients like turmeric, cayenne, aloe vera, Peruvian maca root and cacao nib are just a few of the culinary touches consumers are drawn to for both their flavor and suggested wellness claims in juices that tout “raw” (non-heated) properties. It’s all part of the **More**

Fruits & Veggies theme we’re seeing this year, driven by rising consumer interest in farm-fresh produce, savory flavor profiles and enticing, better-for-you beverages.

TRENDSCAPE

Professional



- **Firmenich** - Market Research
- **Mintel** - Market Research

1

Restaurant



- **Juice Press, NYC** - Dr. Green Juice
- **Organic Avenue, NYC** - Aloe & Turmeric Boosters
- **Pressed Juicery, Los Angeles** - Detox 5-Day Juice Cleanse

Culture & Cuisine



- **Jay Kordich** - *The Juiceman’s Power of Juicing Book*
- **Tom Woloshyn** - *The Complete Master Cleanse Book*

Professional



- **Barron’s** - [Big Business in Fresh Green Juices](#)
- **Meredith Corporation** - *All Recipes.com Survey*

2

Media



- **Goop.com** - [Organic Avenue Interview](#)
- **LA Times** - [Cold-Pressed Juice Hot in LA](#)

Marketplace



- **Sur La Table** - *Vitamix Pro 200 Blender*
- **Williams-Sonoma** - *Breville Juice Fountain*

Restaurant



- **Booster Juice** - *Green Hornet*
- **Jamba Juice** - *Crisp Apple Energy Drink*

3

Media



- **Gwyneth Paltrow** - *It’s All Good Cookbook*
- **The Martha Stewart Show** - *Martha’s Green Juice*
- **Wall Street Journal** - [Juicers Invade Kitchen Counters](#)

Marketplace



- **BluePrintJuice** - *Kale Juice*
- **Evolution Fresh** - *Essential Greens*
- **Suja** - *Master Cleanse Lemon Juice*



the Fresh Face of JUICE

Upscale, urban juice bars including **Organic Avenue** in New York City and **Pressed Juicery** in Los Angeles have gained a cult following amongst celebrities and star athletes, such as **Gwyneth Paltrow** and **Mark Teixeira**, who are recommending premium, fresh juices an essential part of health conscious people's diets.

What's new about juices other than the celebrity hype? For one, green juice is on the rise. Packed with nutrient-dense veggies like kale and unexpected

elements like parsley and garlic, green juices are being adopted as the latest fashionable health tonic. Chef-owned juice bars **Creative Juice** in New York City and **Harvest Juicery** in Chicago also play with gourmet touches such as fennel, jicama, fig, juniper berry and tarragon, which may be added for function and flavor. Bottled booster shots featuring spirulina (blue-green algae), Peruvian maca root and sea buckthorn berries are the newest ingredient innovations to hit the scene, and are poised to build on the healthy halo that already surrounds juicing.

The "raw" (non-heated) and natural positioning of fresh juice attracts those who are looking for more than just basic nutrition. Health-conscious people of all ages are drawn to the supposed wellness claims that surround juicing, which include weight loss, detox, and boosted immunity and energy. Based on these claims,

celebrities like **Martha Stewart** recommend fresh juices—whether bottled or homemade with a juicer or blender—as part of a healthful morning routine.

Expect to see this trend hit the mainstream this year as bigger players like **Starbucks's Evolution Fresh** and **Hain Celestial's**

BluePrint Juice bring the luxe juice craze to the masses through a no-heat, cold-pressed technology called high-pressure processing (HPP). Like pasteurization, this method supposedly treats the product for harmful bacteria that can lurk in unprocessed juices.

We anticipate the fresh juice trend will continue as mass appeal and access grows. From energy shots, to diet regimens, to artisanal cocktail mixers, to green juice popsicles, you can expect to find more than just refreshment in this new wave of fresh juice products.

Bolthouse Farms® Daily Greens juice beverage was inspired by the one-a-day juice trend.



SOPHISTICATED SWEETS

3 ADOPTION

Dressed-up comfort desserts are gaining in popularity with adults because they are simultaneously familiar and unique. **Distinctive Flavors** from savory spices, elegant botanicals and fresh fruits give doughnuts, chocolate truffles, popcorn and other treats the chance to stand out above their classic counterparts.

This trend is about much more than just a sugar fix and it's reaching a frenzied pace in the frozen dessert category. Beet-pistachio and olive oil ice creams, corn and bay leaf sherbets, and pickled fruit sorbets are unmistakably intended for a grown up palate.

We've noticed that fine dining and upscale chefs are having fun with this trend, too, at restaurants like Joël Robuchon in Las Vegas (banana cotton candy) and The Dutch in New York City (layer cake with black pepper icing).



TRENDSCAPE



- **Datassential** - *Retro Desserts*
- **Fancy Food Show** - *2013 Sofi Awards*

1



- **CraftBar, NYC** - *Sundae with Roasted Corn Ice Cream, Blueberry Compote, Caramel Corn*



- **2 Sparrows, Chicago** - *Strawberry & Balsamic Pop Tarts*
- **Gourdough's, Austin** - *Slow Burn Doughnut with Habanero Pepper Jelly and Cream Cheese*
- **Humphry Slocombe, San Francisco** - *Szechuan Strawberry Sorbet*
- **Lil' Pop Shop, Philadelphia** - *Pineapple Basil Ice Pop*
- **Voodoo Doughnut, Portland** - *Bacon Maple Bar Doughnut*

2



- **Food & Wine** - *Recipe: Goat Cheese Cakes with Rosemary, Lavender Honey*
- **Joy the Baker Blog** - *Ritz Cracker Ice Cream Sandwiches*



- **479° Popcorn** - *Chipotle Caramel & Pumpkin Seeds*
- **Dancing Deer Baking Co.** - *Kalamata Olive and Fig Shortbread Cookies*
- **Liddabit Sweets** - *Barley-Honey Lollipops*
- **Raaka Chocolate** - *Black Coffee Bar*
- **The Tea Room** - *Chamomile & Honey White Chocolate Fusion Bar*
- **Valerie Confections** - *Smoke & Spice Truffles with Chiles and Paprika*



- **The Cheesecake Factory** - *Twisted Salted Caramel Pretzel Milkshake with Vodka*
- **T.G.I. Friday's** - *Tennessee Whiskey Cake*

3



- **Food Network Magazine** - *Recipe: Strawberry Pretzel Trifles*



- **Ben & Jerry's** - *Late Night Snack with Salty Caramel Swirl, Fudge-Covered Potato Chips*
- **H-E-B Central Market** - *Sea Salted Truffle Brownie Mix*
- **Williams-Sonoma** - *Spiced Pumpkin Seed Brittle with Ale*

Retro Sweets

find their edge



Classic desserts like pies and doughnuts hit the TrendScape last year, offering a dose of nostalgic, satisfying flavors that appeal to both kids and adults. This established retro desserts trend is merging with another food trend we're following—offbeat combinations and intense flavors. The delicious results of this intersection are sophisticated sweets that borrow from the savory pantry and spice cabinet for inspiration.

As surprising as it is to see savory or tart flavors on a dessert menu, there is culinary logic at play. Savory ingredients can complement and balance sweet elements, in the way that a pinch of salt brightens a cookie recipe. In fact, we've witnessed the mainstreaming of salty-sweet

flavor combinations in iterations like **Burger King's** bacon-topped ice cream sundae. The Sophisticated Sweets trend takes this idea a step further—leveraging ingredients unfamiliar to the pastry kitchen to create untapped flavor combos designed to turn adult heads.

To see this trend in action, look to artisan, handcrafted ice cream. It has become the preferred base for shockingly-fun combinations, like the sesame-kumquat-pumpkin ice cream at **OddFellows** in Brooklyn, and the beer and rosemary nuts ice cream at **Jeni's Splendid** in Columbus. Ice pops are growing up, too, having progressed quickly on the TrendScape from twin-pops,

to artisan pops, to spiked versions served at the bar.

Our favorite example of this trend can be found at specialty doughnut shops across the country. The **Doughnut Plant** in New York City, **Voodoo Doughnut** in Portland, **Dynamo Donut** in San Francisco and **Gourdough's** in Austin are topping their signature dough with amazingly-sophisticated ingredients like grilled strawberries, candied hibiscus and jalapeño jelly.

Out-of-the-box flavor combinations are attractive to savvy foodies looking for new taste experiences that speak to their own creative impulses. Seeing fruits used in an unusual way, like in **Tumbador Chocolate's** Lime-Sesame Bonbons, can be refreshing without appearing too unusual.

More extreme dessert flavorings like habanero offset bitter chocolate or burnt caramel; botanical notes round out overly sweet elements like white chocolate; fragrant herbs like basil and rosemary replace mint; and trendy spirits like absinthe and mezcal add a unique, complex profile all their own.



Our team can't get enough of the 'fancy' doughnuts at Federal Donuts in Philadelphia.

YOGURT GOES SAVORY

3 ADOPTION

Tangy, strained yogurt is no longer just for breakfast or dessert. It's showing up as an ingredient in savory, non-spoonable applications like condiments, sauces, dips, snacks and baked goods. Expect to see more Mediterranean and Indian influences at fast casual restaurants with this Stage 3 trend—like creamy Greek tzatziki and Indian raita sauces—as well as unique fine dining interpretations featuring house-made yogurt in entrées.

Yogurt's wholesome image is broadening in appeal, too. Granola-lovers seeking a **Balanced Lifestyle** continue to drive sales, though its newest fans include young men and parents exploring savory **New Protein** options.



Greek tzatziki dip and flatbread

TRENDSCAPE



- **Center for Culinary Development** – Market Research
- **Symrise** – Market Research

1



- **DGS Delicatessen, DC** – Pea Soup with Smoked Salmon Tartare, Black Sesame Yogurt
- **Local Mission Eatery, San Francisco** – Greens, Herbs with Our Yogurt, Blackberries, Cheese
- **Michael's Genuine, Miami** – Grilled Lamb with Peach, Cucumber, Chocolate Mint, Greek Yogurt



- **Food Business News** – [Greek Yogurt Inspires New Products](#)
- **Nation's Restaurant News** – [Top Ten at 2013 NRA Show: Greek Yogurt 2.0](#)

2



- **Chobani Soho, NYC** – Mango & Avocado Yogurt Bowl with Jalapeño, Cilantro, Lime



- **Bon Appétit** – [2013 Top Trends: The Next DIY Staple—Yogurt](#)
- **Food & Wine Recipe** – Carrots with Caraway Yogurt and Wheat Berries
- **Food & Wine Recipe** – Perfectly Flaky Butter-Yogurt Pie Dough



- **The Counter** – Angus Burger with Tzatziki Sauce
- **SweetGreen** – Santorini Salad with Cucumber Basil Yogurt Dressing



- **Bolthouse Farms** – Classic Ranch Yogurt Dressing
- **Dannon** – Oikos Dips French Onion Greek Yogurt Dip
- **Plum Organics** – Mighty 4 Sweet Potato Blueberry Millet Greek Yogurt Essential Nutrition Blend
- **Powerful Yogurt** – Blueberry & Açai
- **Sof'ella** – Greek Yogurt & Honey Pound Cake Mix
- **Walgreen's** – Good & Delish Probiotic Greek Yogurt Covered Pretzel Bites

3



- **Crate & Barrel** – Cuisinart Yogurt Maker
- **Urban Cheesecraft** – D.I.Y. Probiotic Kit

Yogurt

Moves Out of the Cup, Into Recipes

Greek-style yogurt's astronomical growth in the U.S. is a trend we've been following since it first took hold five years ago. With Packaged Facts estimating that U.S. retail sales of all yogurt will increase from \$7.3 billion in 2012 to \$9.3 billion by 2017, there's no doubt that yogurt has been adopted into our food culture.

Despite the increase, Americans still consume far less yogurt



We like how GRK Fresh Greek in New York City serves thick, strained yogurt as a snack, topped with basil, apples, lentils and extra virgin olive oil.

than Europeans per capita, indicating real potential for continued growth. With a host of commercial and small-batch companies racing to market, there's a push toward giving yogurt its due in the kitchen. Using it with a culinary mindset—as Chefs **Bobby Flay** and **Michael Symon** endorse as industry spokespeople—can transform it from an on-the-go snack into a kitchen staple that essentially takes the place of sour cream or mayonnaise.

While yogurt has been a mainstay of ethnic independents serving Greek, Middle Eastern and Indian foods, tangy sauces for sandwiches and salads are appearing at fast-casual restaurants, like in **The Counter's** tzatziki sauce for burgers. In particular, Greek-style (strained) yogurt is an ingredient that carries wholesome, authentic and

nutritional cachet and we're seeing it on retail product labels for hummus, French onion dip, nutrition bars and more.

At fine dining restaurants like **Local Mission Eatery** in San Francisco, house-made yogurt is the latest indicator of a farm-to-table ethos. Elegant takes such as mint, black sesame and brown butter yogurt are trending in everything from salad dressing to béchamel sauce. In **Bon Appétit** and **Food & Wine** magazines, we've also spotted sweet recipes including yogurt cheesecake and pie dough.

Greek-style yogurt can provide a substantial protein boost with most varieties providing 10-20 grams per six-ounce serving, making it an attractive ingredient beyond the great taste. Many people perceive that protein-rich foods like yogurt offer healthful benefits that can



Homemade yogurt with vegetables

contribute to increased energy and satiety for weight management. Specialized yogurt products are hitting the market and provide an appealing option for men seeking to boost their protein intake and for parents seeking healthy options for children.

Greek-style yogurt started the trend, and with this widening audience now onboard, we are looking forward to seeing more cultured dairy products emerge, including Icelandic styles, drinking yogurts, quark (fresh cheese) and artisan buttermilk.

BEVERAGE-INSPIRED FLAVORS



4 MAINSTREAM

Mixologists have been borrowing ingredients from the kitchen the past few years to create elaborate, hand-crafted cocktails, and now we're seeing chefs flip that trend on its side. It's the kitchen's turn to borrow inspiration from the bar, and chefs are looking for much more than just a shot of flavor from a bottle.

Barrel-aged hot sauces, like the one served at Imperial in Portland, Oregon, are the best example of this trend, though it's just one of many examples inspired by the **Distinctive Flavor** profiles of trendy beverages such as craft beers and spirits. Our team loves that people are being introduced to a new flavor vocabulary borrowed from the bar, including terms like smoke, oak, char, wood, toast, hops and malt.

TRENDSCAPE



• **Datassential** - Barrel-Aged Foods and Sauces

1



• **Manresa, Los Gatos, CA** - Verbena & Chamomile-Poached Sea Bream Collar
 • **Saxon & Parole, NYC** - S'mores with Whiskey Barrel Smoke



• **Smith & Wollensky, Boston** - Coffee & Cocoa-Rubbed Filet

2



• **Food & Wine** - Recipe: Pork Tenderloin Marinated in Amber Ale
 • **Tasting Table** - Barrel-Aged Tea



• **Tavern Vinegar Co.** - Craft Beer and Japanese Sake Vinegars



• **The Cheesecake Factory** - Lemoncello Cream Torte
 • **T.G.I. Friday's** - Jack Daniel's Grill
 • **Red Robin** - Whiskey River BBQ Chicken Burger

3



• **Cooking Channel** - Dave Lieberman's Chocolate Stout Cupcakes
 • **GQ Recipe** - Sazerac Cured Salmon



• **The Spice & Tea Exchange, Portland, OR** - Chardonnay Oak-Smoked Sea Salts



• **CampbellsKitchen.com** - Recipe: Slow Cooker Melt-in-your-Mouth Short Ribs with Dark Ale
 • **The Chew** - Carla Hall's Coffee Rub
 • **Cooking Light** - Food Trend: Boozy Desserts

4



• **California Pizza Kitchen** - Frozen Pizza Chicken with Cabernet
 • **Häagen Daaz** - Limited Edition Bourbon Pecan Praline Ice Cream
 • **Kettle Brand** - Cheddar Beer Potato Chips

Brews & BARRELS

ADD CHARACTER



The entire beverage category is lighting up the TrendScape, and the popularity in craft beers and small-batch spirits—whiskey and bourbon in particular—have ignited interest

in the art and science of beer and liquor production. Savvy people are beginning to understand that these beverages offer an endless array of layered and complex flavors, and keywords like oak, aged, floral, malt, mash, hops, rye, ale and stout are creeping into the food vernacular.

Whiskey and bourbon barrels are being repurposed as a flavor agent that offers tannins and sweet, smoky flavors from the charred oak. We've spotted barrel-aged cocktails before, at **Clyde Common** in Portland, Oregon, but this year the trend has really taken off with food. Upscale restaurants including **Vesta Dipping Grill** in Denver are making their own barrel-aged hot sauce. **Bluegrass** brand soy sauce, **Noble Tonic** 01 maple syrup and **BLiS** fish sauce are just a few examples of barrel-aged products that have hit the specialty food markets. Barrel-aged beers are gaining favor for the nuances they add to the brew, as well, and it's exciting to see **Avery Brewing** experimenting with everything

from bourbon to rum to Zinfandel barrels.

Craft brewing is a Stage 6 trend our chefs have been following closely, and beer-flavored foods are just beginning to appear at Stage 4 in sauces at casual dining restaurants, like in **Applebee's** Brew Pub Pretzels and Beer-Cheese Dip, and at bakery-cafes like **Panera**, where you can find a sun-dried tomato and ale mustard.

While beer flavors are enjoying the mainstream spotlight, we're also seeing coffee and even tea flavors being used in new ways. There's renewed interest in

rubs and seasonings made with ground coffee beans, spurred by barbeque joints like **Smoke** in Dallas. As high-end teas gain in popularity, we're also keeping an eye on the rise of tea-smoked fish and foods touched with just a hint of masala chai or chamomile.



Barrel-aged food products and cocktail kit

REGIONAL MEXICAN

4 MAINSTREAM



There's growing interest in exploring all things local and regional, both at home and abroad, and Mexico's regional culinary traditions continue to inspire. Fast-casual concepts have hit their stride on the TrendScape and many diners are now interested in exploring what lies beyond (and inside) the beloved burrito.

Mexican torta and mollete sandwiches have stayed under the radar for far too long, though we've spotted them recently at Rick Bayless's *Torta Frontera* in Chicago's O'Hare airport. We are also excited to see second-generation Mexican-American chefs like Aarón Sánchez from *Mestizo* in Kansas City

preserving regional **Authenticity** at casual independents.

Our chefs are eager to learn even more about the culinary legacy of each region in Mexico, to understand the cultural heritage behind Oaxacan mole sauces, tomatillo-pumpkin seed sauces from Puebla, Guadalajara pozole stews and crispy tortilla panuchos from the Yucatán. Of course, there's also the endless varieties of chile peppers worth exploring, which offer both flavor and heat in the kitchen.



Our chefs love using Mexican chile peppers to balance flavor.

TRENDSCAPE

- Restaurant**
- **Casa Rayna, Pittsburgh** - Elote Corn on the Cob
 - **Empellón Cocina, NYC** - Squid with Black Mole, Potatoes, Chorizo Mayo
 - **Fonda, NYC** - Enchiladas de Mole Negro Oaxaqueño

1

- Culture & Cuisine**
- **Diana Kennedy** - *Oaxaca al Gusto*
 - **Maricel Presilla** - *Gran Cocina Latina*

- Media**
- **NY Times** - [Mexico City for Tamales, Tortas, Tacos](#)
 - **Saveur** - [The Mexico Issue](#)

2

- Restaurant**
- **Nopalito, San Francisco** - Panucho de Pollo al Pibil
 - **Malo Cantina, Los Angeles** - Echo Park Corn on the Cob with Cotija, Mayo, Chili Lime Salt

- Culture & Cuisine**
- **Culinary Institute of America** - San Antonio Campus
 - **Rick Bayless** - *Mexico One Plate at a Time* (PBS)

- Restaurant**
- **The Cheesecake Factory** - Baja Chicken Tacos
 - **T.G.I. Friday's** - Chipotle Yucatán Chicken Salad
 - **Seasons 52** - Red Mole Braised Beef Tacos

3

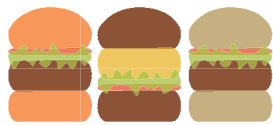
- Media**
- **Epicurious.com** - Recipe: Molletes
 - **LA Times** - [Taste of Mexico Restaurants Tout Authentic Flavors](#)

- Marketplace**
- **Bunches & Bunches** - Smoked Oaxacan Mole Sauce
 - **Frontera** - Oaxacan Red Chile Mole Simmer Sauce

- Restaurant**
- **Cosi** - Chicken Mole Sandwich
 - **Chipotle** - Barbacoa Beef and Pork Carnitas Fillings
 - **Taco Bell** - Smothered Burrito

4

- Marketplace**
- **Pace** - Barbacoa Smoked Beef Brisket
 - **World Market** - Yucatán Nut Mix



BOLDER BURGERS

5 ESTABLISHED

As the “Better Burger” category continues to thrive, it’s evolving into a bigger, bolder trend than we ever imagined. Casual dining newcomers such as Bareburger in New York and Farm Burger in Atlanta capture the spirit of the **New American** burger joint by differentiating menus with an array of new options including chicken, lamb, elk, brisket and freshly-made quinoa and bean patties.



Fried chicken burger on hashbrown bun

Globally-influenced sauces, farm-fresh vegetable toppings and artisan buns are the newest signifier of quality and value, nearly tipping the category into sandwich territory.

A side of specialty fries—make that Parmesan-dusted zucchini fries or panko-fried pickles—is what’s keeping the iconic category in check. What’s more, fast-growing chains like Fatburger and Smashburger are opening internationally, expanding the reach of this trend toward Stage 6. It seems there’s universal appeal to building a fabulous burger one layer at a time.



Stacked onion ring and roasted vegetable burger

TRENDSCAPE



- **QSR Magazine** - *The Beef Goes On*
- **Technomic** - *Market Research*

1



- **Burger Bar, Montreal** - *Poutine Burger*
- **Holsteins, Las Vegas** - *Big Fat Greek Burger with Lamb, Feta, Tzatziki*
- **Namu Gaji, San Francisco** - *Korean Burger*

2



- **Bareburger** - *Maui Wowie Wild Boar Burger on Tapioca Rice Bun*
- **Umami Burger** - *Pork Carnitas Burger with Guajillo Sauce, Tortilla Strips*



- **Bon Appétit** - *Recipe: Tuna Burger*
- **Food 52** - *Recipe: Grilled Pork Burgers with Romesco Sauce*



- **Keizo Shimamoto** - *Ramen Burger*
- **Sutter Home** - *Build a Better Burger Recipe Contest*

3



- **Applebee’s** - *Quesadilla Burger with Tortilla Bun*
- **Red Robin** - *Kuzuri Style Burger with Wonton Strips*
- **Ruby Tuesday’s** - *Spicy Jalapeño Pretzel Cheeseburger*



- **Jack in the Box** - *Jack’s Big Stack on Toasted Sourdough*
- **Smashburger** - *Spicy Baja Burger on Chipotle Bun, Smashfries*
- **Wendy’s** - *Pretzel Bacon Cheeseburger*
- **Whataburger** - *Avocado-Bacon Burger on Texas Toast*

4



- **All Recipes.com** - *Black Bean Quinoa Burger*
- **Rachel Ray Show** - *Bánh Mi Burger*



- **Burger King** - *French Fry Burger, Loaded Tater Tots*
- **McDonald’s** - *Bacon Habanero Ranch Quarter Pounder*

5



- **Campbell’s SpaghettiOs** - *CheeseburgerOs*
- **Doritos** - *Late Night Cheeseburger*
- **Pringles** - *Cheeseburger*



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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Last Year's Top Trends...

TOPTRENDS 2013

VEGETABLES

This trend continues to impact the TrendScape in 2014. Vegetables are getting star treatment at restaurants like Vedge in Philadelphia, and produce is getting as much center-of-plate attention as meat protein has traditionally received.

COFFEE CULTURE

Coffee trends continually evolve, and right now it's all about the four main factors: bean origin, roasting techniques and temperatures, brewing style and the flavor of the finished cup. Brewing methods including drip, siphon, press and pour-over each have a loyal following and provide character in their own way.

HAUTE DOUGHNUTS

Last year we reported on the new breed of doughnut shops, including Dynamo in San Francisco, where apricot-cardamom and lemon-Sichuan doughnuts are available. The trend toward grown-up flavor combinations has manifested itself in all forms of retro desserts, as noted on page 12.

CRAFT BREWING

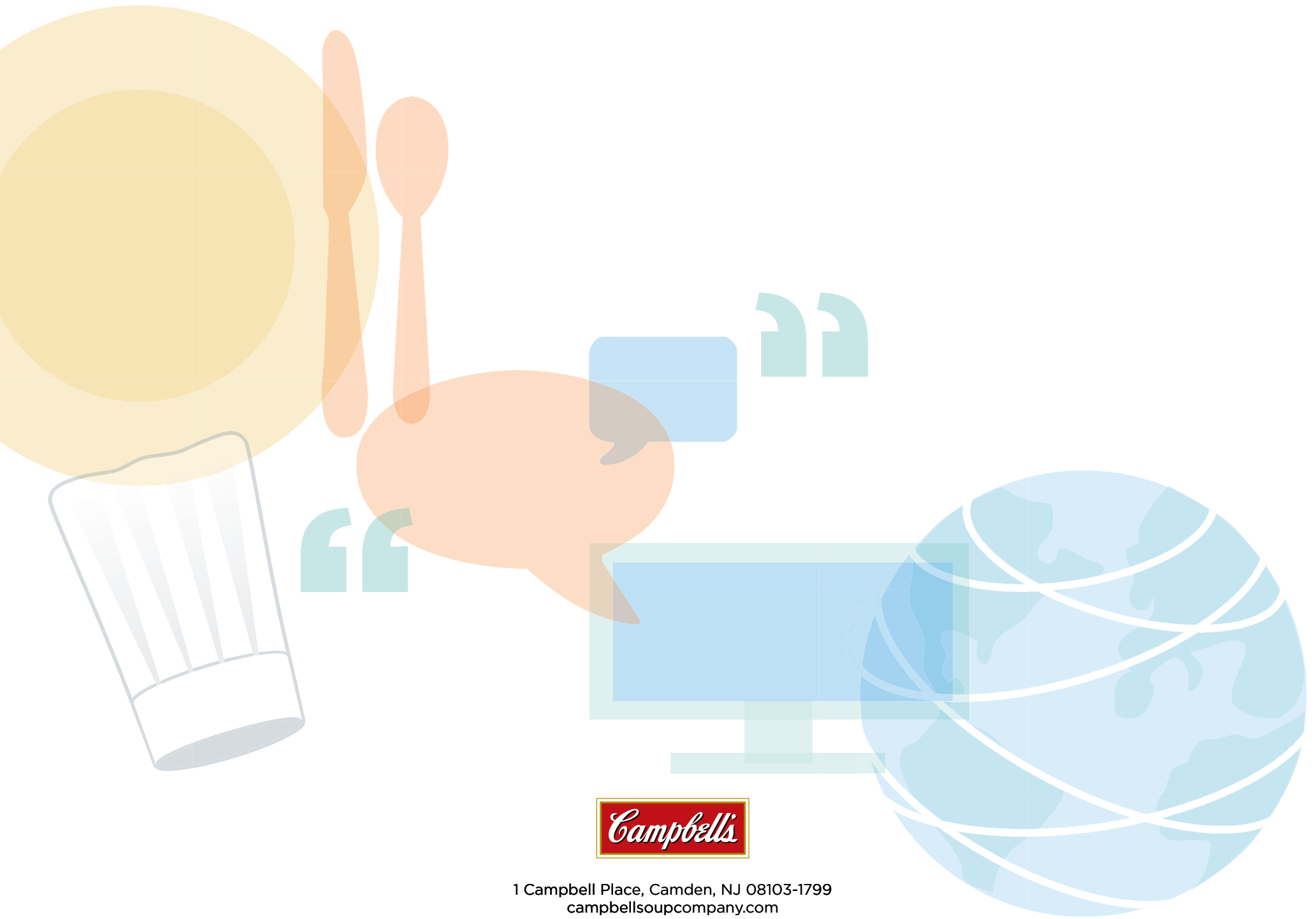
Craft brews have moved beyond the bottle this year, and into restaurants called gastropubs. Menus are being designed to complement the beer list and brews are also inspiring flavor twists, like beer-cheese sauces and ale-flavored condiments, as noted on page 16.

NEW ASIAN CUISINE

Ramen and pho joints, pork buns and bánh mi sandwiches continue to hit the spot. Despite the casual vibe of this trend, regional authenticity of countries like Japan and Myanmar remains a driving factor in New Asian's popularity with diners.

KOREAN CUISINE

Korean flavors are proving that they have staying power. Kimchi, bulgogi and bibimbap have been embraced by chefs, and casual dining restaurants are now introducing Korean tacos and Korean barbecue-themed dishes to a widening audience.



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