



# tastewise

## Culture Shift

# 2026

Food & Beverage Trend Forecast



# Letter from the CEO

As our industry continues to grow and evolve, I'm excited to share the 2026 Food & Beverage Trend Forecast, our 7th annual edition.

At Tastewise, we're proud to support 150 forward-thinking clients - from the world's biggest brands to rising innovators - driving faster, smarter execution in food and beverage. Our \$50 million raise in 2025 reflects their confidence and the momentum we've built together, and the creativity and sophistication our clients bring keep us at the cutting edge.

Progress today comes from blending human insight with artificial intelligence. Human expertise reveals the nuances that drive consumer connection, while AI delivers the scale and speed to act. Together, they're setting a new standard for resilient, defensible businesses in a market defined by constant change.

The industry is shifting fast: brands are rethinking how they create, market, and sell with customers at the center and new technologies in hand. That momentum is clear in the global conversation; this year, Tastewise was trusted by more than 200 press publications, from Forbes and the Wall Street Journal to CNN and Food & Wine, to shape the future of food and beverage culture.

The takeaway for 2026 is clear: the brands that embrace these shifts with agility and vision won't just keep pace. They'll define what comes next.



All the best for 2026,  
**Alon Chen**  
CEO & Co-founder, Tastewise

# 2026's food & beverage trends



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# Our methodology

What people want on their plates changes fast. To stay ahead, we dive into the deeper motivations behind emerging trends to explore the “why” behind consumer decisions. This allows us to confidently identify the dishes, concepts, ingredients, and claims that matter most to today’s consumers.

Understanding this “why” empowers brands to spot, and define, the next “what” – a strategy that anchors the daily practices of our customers leveraging Tastewise AI.

We track billions of consumption moments across consumer, operator, retail, and non-commercial data, then use AI to create actionable opportunities for growth. All data in this report is sourced from Tastewise’s proprietary data unless otherwise noted.

The trends identified in this report rely on several criteria. **Trends must:**

- Surpass a critical ‘consumer interest’ threshold to demonstrate trend ‘stickiness’ and longevity.
- Show consistent, data-backed growth over the past 1-2 years.
- Demonstrate growth and engagement across multiple data sources, including foodservice, home cooking, and beyond.

**Questions about the insights in this US-focused report? Reach out to [info@tastewise.io](mailto:info@tastewise.io).**



Real-time consumer and operator insights



Rapidly-generated, personalized content for today's market



Data-backed insights on claims, trends, & behaviors through self-serve Gen AI and AI surveys



Efficient collaboration tools and market integrations



Streamlined dashboards to save time and boost productivity

# In review: Tastewise's 2025 trend predictions

For the past five years, our trend predictions have hit the mark; 2025 continues the pattern.



## Asian Street Snacks

**+44%**

Increase in street snack menu items in restaurants nationwide. Japanese strawberry sandos & katsu sandos went viral at Coachella and H-E-B. Trader Joe's debuted frozen okonomiyaki + katsu onigiri.



## GLP-1

**62.9B**

Size of the GLP-1 receptor agonist market in 2025, fueled by drugs like Ozempic, Wegovy, and Mounjaro. Kroger shelf tags for GLP-1-friendly products.



## Hydration Heroes

**1.95B**

PepsiCo's \$1.95B Poppi deal, plus launches of Pepsi Prebiotic Cola and Coca-Cola Simply Prebiotic, made prebiotic sodas a 2025 breakthrough



## Filipino Cuisine

**+20%**

Pandan lattes growth in consumer interest. From NYC ube donuts craze to Jollibee's North America breakfast line, Gen Z demand made Filipino flavors mainstream.



## Wine Sustainability

**+26%**

Of soil discussions grew in restaurants. +10% in consumer convos. 500M product packs with carbon labels.



## Celtic Salt & Hydration

**+9.5YOY**

Electrolyte mixes grew from \$39.9B in 2024 to \$43.7B in 2025, driven by growing demand for salty hydration formats like powders. Celtic Salt named a top Tik Tok sleep hack; now a featured SKU in Hydrant & Elemental Lab's nighttime hydration mixes.



## Hawaiij & Black Lime

**+150%**

Hawaiij consumer interest YoY. Menus up 92% with new café & coffee adoption. Black lime named a "Flavor of the Year" by Yankee Magazine. Diaspora Co. + NYT Cooking spotlight hawaij as the next turmeric-style pantry staple.



## Hormone Health

**163B**

Women's health supplements are surging, reflecting growing consumer focus on hormone balance, menopause, and overall wellness. Brands like Supergut, Thorne, and Ritual launched hormone aware supplements.

# Tastewise: the trusted choice for turning market insights into revenue in food & beverage.

In-Home & eRetail

 **1 Trillion**  
Data Points

Social Media

 **72B**  
Observed F&B moments

Restaurants & Food Delivery

 **4M+**  
locations and best-selling menu items



**FERRERO**

Givaudan



KraftHeinz



**MARS**



and many more

# Executive Summary

The food and beverage industry is entering 2026 in the middle of a cultural reset. Consumers aren't just buying flavors or formats — they're buying meaning, agency, and alignment with identity. What we eat is now how we say who we are.

Three forces drive this shift. First, authenticity beats artificial. From protein to cocktails, people are turning away from "fakeness" in processed formats and choosing real, crafted, culturally rooted products. Second, health has become a personal operating system. Post-GLP-1, consumers are no longer asking "is this healthy?" but "what job does this food do for me *literally right now?*" This reprogramming spans fertility, metabolic balance, and cognitive fuel, turning everyday eating into functional calibration. Third, choice itself has become power. From portion play to build-your-own bowls, customization is rewriting the menu and dismantling fixed meal structures, especially for Gen Z.

Layered on top is sensory maximalism: louder textures, deeper flavors, and multisensory experiences that turn small moments into shareable events. Together, these shifts don't just point to new products — they redefine how brands must show up: as enablers of authenticity, empowerment, and cultural resonance.

**For operators, manufacturers, and distributors, the winning portfolios of 2026 will be those that help consumers express identity, manage their personal body "OS," and choose on their own terms. CPG marketers should double down on the very same concepts. The market isn't waiting — it's already rewarding brands that align with this cultural momentum.**

Section 1:

# Food as Identity Reconnection



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# Food as Identity Reconnection

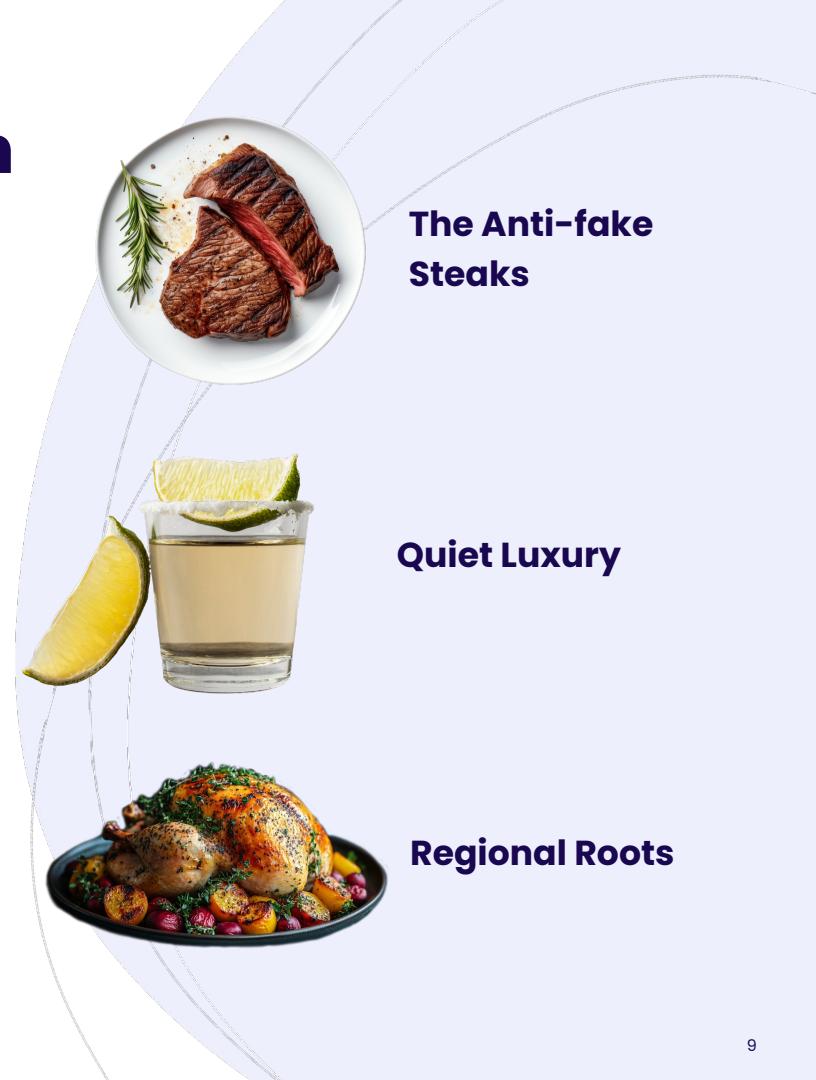
**Amid endless noise, food and drink are regaining their role as anchors of identity. Eating becomes more than fuel or flavor; it's a daily act of self-expression, a pause to remember who we are — or to declare who we want to be.**

This is more than nostalgia. It is the pursuit of personal truth, whether through cultural heritage, chosen communities, or evolving values around health and sustainability. Consumers are seeking products that mirror their inner lives, not just their tastes.

For brands, this shift is profound. Loyalty now extends beyond price or flavor to the emotional resonance of brand identity itself.

Success lies in building offerings that feel aligned with how people see themselves — because when consumers choose a product, they're also choosing a story about their own place in the world.

**The trends in this category, give brands a window into how consumers think of themselves... and how to be part of that story.**



# Raising the steaks: Protein's shift back to meat

Protein has moved firmly into the mainstream, with demand accelerating across categories. 61% of Americans increased their protein intake in 2024 (up from **48%** in 2019), and **85%** say they want to eat more protein, yet just **24%** feel they're consuming enough<sup>1</sup>. That gap has fueled innovation in everything from protein waffles and candy to RTD alcoholic drinks.

**But the clearest signal is meat.** Protein interest is growing 3x faster within the meat category than in plant-based alternatives. Foodservice is aligned with this shift: meat menu items in U.S. restaurants have grown **+12% YoY**, with particularly strong gains in **QSRs (+11% YoY)** even as fast casual and fine dining menu mentions decline.

Consumers are actively seeking restaurant-quality cuts at home while rewarding operators who deliver meat-centered value, and rejecting plant-based alternatives that rely on processed ingredients.

This shift is about a return to foods that feel real, where authenticity is the new measure of value.

## Trend Snapshot

Faster growth in interest for meat protein than plant-based, YoY

**3x**

Growth in meat-based menu items

**+12% YoY**

Growth in demand for protein

**+20% YoY**

Kroger's Simple Truth line emphasizes protein, affordability, and taste.



## Food as Identity Reconnection > The Anti-fake Steaks

# Authenticity outmuscles the pretenders as meat becomes an identity choice

The growth of protein is not just about quantity. It's about quality and authenticity. Consumers are turning away from "fakeness" in ultra-processed substitutes, seeking foods that feel simple, transparent, and true to their origins. Interest in **authenticity** is up **+31% YoY** in consumer conversations and **+18%** on menus, and the cultural momentum is strongest in meat.

Craftsmanship cues in meat have earned **+62% YoY** in consumer interest and **+40%** grown in menu mentions, while premium cuts are seeing **+157%** growth in interest. Consumers want protein that feels real. "Authentic" formats and preparations are growing across cuisine types, signaling that the push for "real food" is reshaping how protein shows up across cultural palates.

**Brands and operators respond:** Archer's 2025 **"Stick to Real"** campaign drove a **+90% YoY sales increase**.<sup>1</sup>



## Consumer interest in authentic meat

**+38% YoY**



## Menu call outs of authentic dishes across cuisine types



# Quiet luxury takes over

Cocktails and spirits become ground zero for premium, thoughtful innovation

In today's uncertain economy, quiet luxury captures the move toward products that signal refinement through authenticity and craft rather than flash. At the same time, "lipstick economy" behavior shows that even under pressure, people reach for relatively 'small' luxuries that feel worth the spend. This tension makes alcohol a natural site for quiet luxury, offering sophistication, social connection, and aestheticism.

To be worth the expense, quiet luxury drinking must offer more than enjoyment.

For example: though **weekly drinking is down among Gen Z**, **celebratory drinking for the audience is up +29% YoY**.

However, it's not just about what's in the bottle; it's about how it fits into modern consumption. Consumers are tired of the marketing smoke and TikTok trends (for example, trendy Clase Azul interest is down **-8.5% YoY**) and want simple, clean, high-quality experiences that bring them together.

## Top Trending Drivers in Alcohol Consumption

Clean	<b>+25% YoY</b>
Aesthetic	<b>+41% YoY</b>
Authentic	<b>+24% YoY</b>
Premium	<b>+20% YoY</b>
Intense Flavor	<b>174% YoY</b>
Sweet & Smoky	<b>109% YoY</b>
Indulgence	<b>+13% YoY</b>



## Little luxuries, big meaning: Cocktails go quiet luxury



**1/3**

Of American alcohol consumption is in cocktail format



**55%**

growth in cocktails on menus nationwide in the last year



**34%**

of total spirits value in the U.S. on-premise channel are mixed drinks\*



**\$13.91**

Avg. US cocktail price



**+12%**

Avg. US cocktail price increase over two years

# Agave wine is the new “it drink” for cocktails or straight sips

Enter agave wine – the new “premium tequila”. With its lower ABV, bold flavor, and cultural authenticity, it's premium, without the performance.

Trends signals point to agave wine at a time when tequila, the USA's 3rd most popular spirit, is growing in interest – yet consumers are tiring of celebrity tequilas' ultra-premium positioning and lack of transparency.

From bold margaritas to botanical spritzes to simple pours on the rocks, agave wine is carving out its place in quiet luxury flavor-forward, experience-driven, and refreshingly accessible.

+42% YoY

Growth in **consumer interest** in agave wine

+20% YoY

Growth in **restaurants carrying agave wine**

+73% YoY

Growth in **menu items involving agave wine**



Love Tequila? Try these premium agave wine products!



## Quiet luxury: The language of taste at home and away



3,738

Say hello to your new summer crush 🍉. Watermelon Paloma is here! A fizzy, citrusy blend of **agave wine**, grapefruit, lime & juicy watermelon. It's the perfect drink for sunny days and patio vibes. Who are you gonna share a bottle with?



21

Today we found ourselves dreaming about the incredible cocktail we had when we were staying at Los Poblanos Inn...Did you know that when you pair lavender with **agave wine** and lime something magical happens?! We can't get enough of the tart citrus from the zesty lime that then mixes with the aromatic floral sweetness of the lavender."



506

It's a beautiful day to sip some cider on the patio or in the taproom! ...Watermelon Margarita made with house **agave wine**, watermelon, and lime. Drop by and say Hi to @mufasa.ferguson who will be behind the bar #houston to the core #houstonbeer #htx #houston #htxfoodie



1,568

A tiny, tiny omakase sushi spot is coming to Barrio Logan. It will be in the kinda-secret rafters of one of the great little arrivals in San Diego—the sustainable seafood fish sandwich-and-taco shop, @fishguts\_sd. There, one of Austin's rising star sushi chefs—@chef\_ambrely\_ouimette,—will serve sustainable sushi, piece after piece. To six guests. That's it...A sake program is in the works and there will be **agave wine-based cocktails** available

# Unlocking agave wine's high-value segments

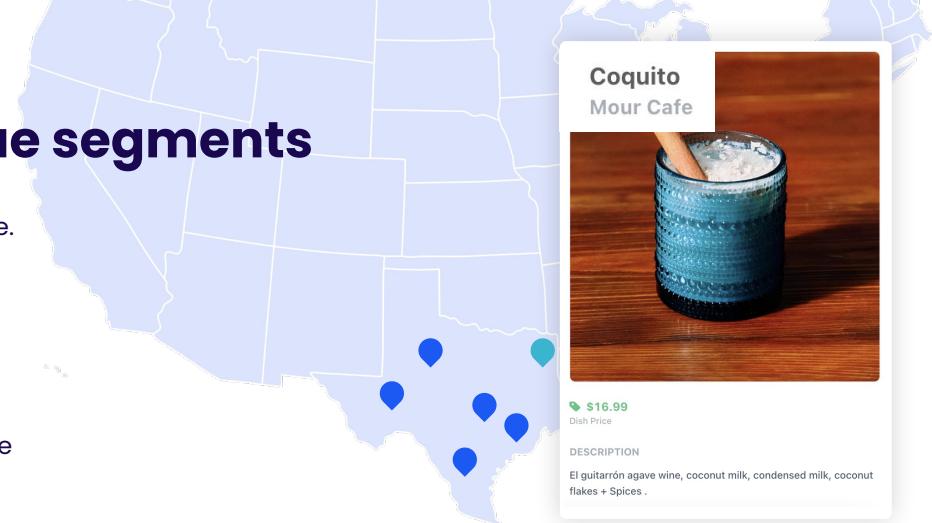
Regional interest and cultural resonance are driving real menu change. For brands and teams focused on premiumization, moderation, or culturally rooted innovation, agave wine opens that door. Quick wins:

**Mexican restaurants have added 115% more cocktails to their menus over two years;** consider agave wine for a powerful sell-in story.

**In Texas, cocktail prices have climbed 11% in the last year;** agave wine can premiumize the cocktail menu.

## Key Takeaways:

- ✓ Focus on regions where cultural relevance drives consumer adoption.
- ✓ Build premium tiers that showcase authenticity and craft.
- ✓ Balance exclusivity and accessibility to maximize growth.
- ✓ Create agave wine concepts that play on indulgent flavors and ingredients.



AI generated

60 Score

Aged Plum Almond Agave Cocktail

What

This aged agave wine cocktail features plum and almond, offering a mellow, nutty complexity reminiscent of barrel-aged spirits. The combination creates a sophisticated drink for connoisseurs.

Why

- Plum brings a rich, mellow fruitiness. It has shown a year-over-year growth of 6.59%, reflecting its rising popularity.
- Almond adds a subtle nutty undertone. It appears in 4.13% of posts about aged agave wine cocktails, indicating notable interest.
- Aged preparation method is valued for its depth. It appears 3.41 times more often in discussions about agave wine cocktails compared to the food & beverages category, underscoring its trendiness.

Plum  
Almond  
Aged

Marketing opportunities Recipe Product visualizer Blog

Like Dislike

# America's culinary map is splintering, and it's a good thing.



Cultural division? Bad. Food that brings people together? Good. After decades of chain-driven homogenization and Instagram aesthetics flattening everything into sameness, diners are craving food with an accent, a point of view, a sense of place. This isn't "farm-to-table 2.0"—it's a movement toward micro-identity cuisine, where chefs and communities are reclaiming their roots, deepening local connection, and flexing their terroir.

This culture timing intersects with the era of international tariffs, and operators are making choices of what to stock and highlight on menus. Leaning into local ingredients, preparations, and traditions are an opportunity for not only *premiumization* but for *connection*; an invitation to diners to spend their dollars and their time on food that connects them to themselves.

## Trend snapshot:

Interest in food & beverage connected to **local history**

**+30% YoY**

Menu growth of savory dishes featuring **local ingredients**

**+15% YoY**

Average price increase in **local menu items**

**+4% YoY**

Average price of local menu items nationwide

**\$14.99**

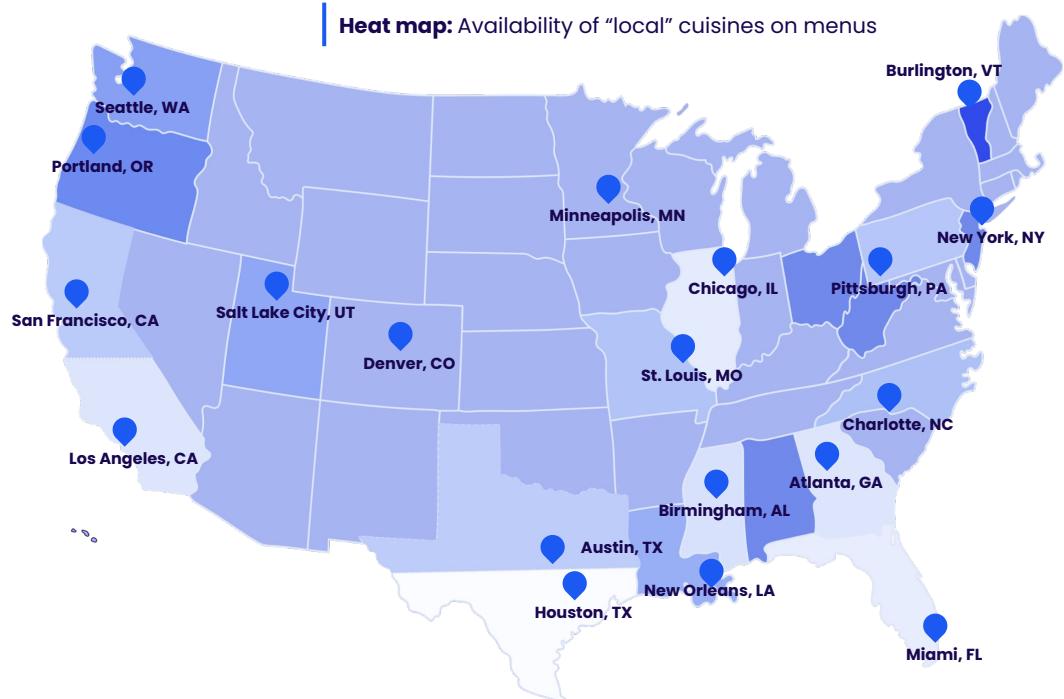
# Regional identity redefines premium

One-size-fits-all descriptors like “Southern” or “New England” no longer capture the story diners expect.

Local food & beverage is reshaping foodservice, with smaller cities leading the charge. **Portland** (with 9% of menus calling out local ingredients), **Salt Lake City** (7.5%), and **Burlington** (nearly 3x the national benchmark of 4.6%) far exceed the average. These aren't the largest U.S. metros but ‘secondary markets’ where local identity is becoming a competitive edge. In contrast, **New York, LA**, and **Miami** fall below average, where chain density, cuisine diversity, and tourism dilute the definition of “local”.

For distributors and manufacturers, the takeaway is clear: local is no longer rustic or niche — it's a **premium attribute**. Diners increasingly expect menus to reflect their region's terroir, history, and foodways, from heritage crops to distinctive flavor profiles.

**Supporting operators in 2026 means knowing what's “local” at a city level, and tailoring portfolios to complement or enrich.**



**Section 2:**

## The New **Body OS**



## Section 2:

# The New Body OS

Health reprogrammed through everyday eating

Consumers in 2026 aren't chasing generic wellness or rigid optimization—they're designing living blueprints for their bodies. Health goals like fertility, metabolic balance, or cognitive stamina aren't siloed anymore; they're woven into everyday food choices with a fluency that feels almost second nature. Instead of asking "is this healthy?" people are asking "**what job does this food do for me right now?**"

In this New Body OS, food becomes a tool for calibration. People are selecting ingredients and formats not to "optimize" endlessly, but to feel aligned with their bodies at different stages and moments: specific ingredients for flow state work, condiments designed for fertility, or pantry staples built for life after GLP-1s.

Health is no longer a vague aspiration, and functional foods are just the start of the story. 2026 is all about customizable blueprints, updated meal by meal, daypart by daypart.

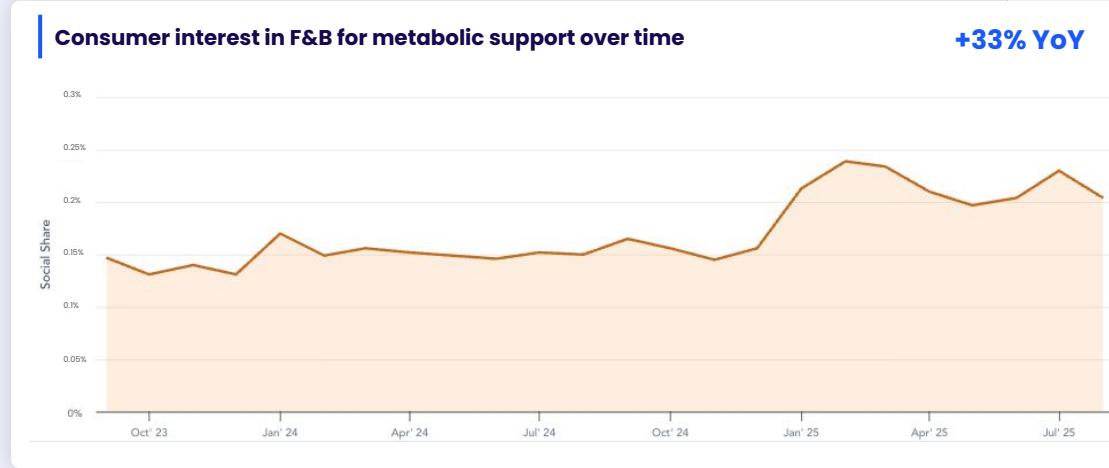


**Post GLP1 Pantry 2.0 O**

**Baby-boosting Bites**

**Digital Brain Fuel**

# Metabolic wellness isn't niche, it's the new pantry standard for the GLP-1 era



The GLP-1 wave has widened the conversation. What began with weight loss drugs is now expanding into a universal health culture centered on **metabolic wellness: energy, digestion, satiety, blood sugar balance, and hydration**. This shift isn't limited to people on medication; it's becoming a shared language of everyday food choices.

Consumers are no longer just calorie-counting; they're building flexible, functional pantries that help stabilize metabolism and support whole-body health. In 2026, consumers will want to use these pantry staples *together*.

## Consumer appetite is growing for hosting concepts that support metabolic health.

High Protein Dips  
**+30% YoY**

High Fiber Dips  
**+40% YoY**

Hydrating Bevs  
**+25% YoY**

Anti-bloat Snacks  
**+19% YoY**



Interest in GLP-1 friendly food and drink at social gatherings is up

**144% YoY**

# The future of hosting is metabolic comfort for all

Hosting is re-emerging as a cultural anchor. People want gatherings where everyone, regardless of diet, medication, or lifestyle, feels at ease. The new “hosting kit” is built around functional abundance: protein, fiber, hydration, and lower-alcohol options that signal care, not restriction.

## Within social occasions, consumers crave:

Metabolism support  
**+20%** YoY

Blood sugar balance  
**+18%** YoY

Bloating relief  
**+25%** YoY

Togetherness at home  
**+46%** YoY

Mini concepts  
**+25%** YoY

## What this will look like in 2026:



**Yogurt-based dips**  
**+6% YoY**

Protein + Probiotic halo,  
easy substitute



**Hydration mocktails**  
**+31% YoY**

Ritual of the drink, without alcohol, featuring added electrolytes or botanicals



**Cottage cheese desserts**  
**+44% YoY**

Yes, it's still growing in consumer interest, so yes, we're still talking about it! Shareable, high-protein, delicious.



**Mini protein bombs**  
**+110% YoY**

Sweet or savory, protein/fat bombs offer quick satiety and high flavor value.

# Fertility & reproductive support: The next functional frontier

Fertility health is moving beyond supplements into food and beverage, opening a new functional territory for innovation. In the U.S., ~13% of reproductive-age women face impaired fecundity, with nearly **5 million pregnancies** and **~1 million losses** annually\*. Access is uneven: 15% of pregnant people lack adequate prenatal care<sup>2</sup>, and 20% live in food deserts\*, with **409,000** women in overlapping maternity and food deserts\*.

At the same time, culture is reframing fertility as everyday wellness. Conversations linking seed-oil free (**+208% YoY**) and hormone balance (**+62% YoY**) to reproductive health are surging, especially among Millennials and Gen Z. These shifts connect directly to MAHA-era narratives on metabolic and reproductive health. The market is moving in parallel: fertility supplements are set to **double** between 2025–2034 (CAGR ~8%)\*, while U.S. functional foods will grow from **\$320B** to **\$384B** by **2028\***.

## Trend Snapshot

Demand for seed oil-free **+208% YoY**

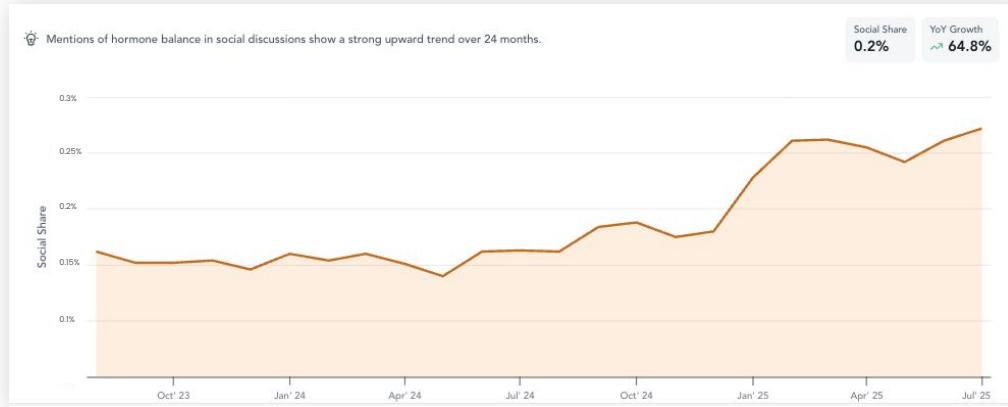
Demand for hormone balance **+62% YoY**

American pregnancies every year **5M+**

Projected growth in fertility supplements category over the next 10 years **2X**

# The Fertility Revolution Will Be Drizzled, Not Pilled

Condiments emerge as a surprising entry point for functional benefits tied to reproductive health, as demand for hormone balance rises **+65% YoY**.



Within the condiment space, consumers are looking for:

Nourishment  
**+21% YoY**

High protein  
**+40% YoY**

Healthy fat  
**+25% YoY**

Gut health  
**+11% YoY**

Versatility  
**+6% YoY**



## Did you know?

Gen Z are **43% more likely** to turn to condiments for hormone balance support than Millennials.

Women are **3x more likely than men** to consider the health impact of condiments and **45% more likely to try new condiments overall**.

Condiments carry unique advantages as a functional fertility format. They are easy, versatile “last touch” foods, affordable to experiment with, easy to align with life cycle needs, and inherently social and shareable.

Ingredients like lemon already appear in 5% of condiments—proof of how simple, comfort-forward additions can scale.

# Fertility Condiments Turn Everyday Eating Into Functional Support

For food and beverage innovators, hormone-focused condiments are a **fresh, credible, and emotionally resonant white space**:

## Food-first access:

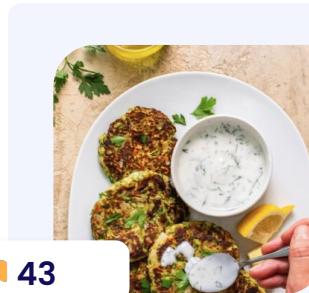
Condiments can help fill small gaps in food and care deserts, offering accessible formats when other options are scarce.

## Ritual, not regimen:

Fertility condiments can slip seamlessly into daily eating, offering whole-ingredient support without feeling clinical. If creatine's recent rise from gyms to grocery proved anything, it's that niche functions can scale fast. Fertility foods are next.

## Emotional storytelling:

Package and name with sensitivity to resonate with people navigating family planning challenges and opportunities.



43

Zucchini Herb Fritters with dairy-free dill yogurt sauce are a great option for a PFF breakfast: the trifecta of Protein, Fat, and Fiber that makes a perfect hormone balancing breakfast. PFF meals help sustain blood sugar levels throughout the day and give us the building blocks for our hormones (amino acids).



538

spinach tahini wrap recipe | healthy spinach wrap Indian style | spinach wrap with tahini spread | healthy spinach roll | healthy recipe for pregnancy | spinach tahini wrap is a healthy one dish meal which can be served f...

# 130M consumers are looking for support with mood, focus, stress, and productivity in one product

**US\$20.71 Billion**

Current value of the US Energy drinks market\*

**US\$41.36 Billion**

Projected value in 2032\*

**7.9%**

Estimated CAGR 2024–2031\*

The U.S. energy drink market is firmly in a new phase, beyond caffeine jolts and sugar highs. Consumers want focus, clarity, calm, and mood support, fueled by remote work, gaming, and mental health awareness. This shift has opened the door to neurofunctional drinks that blend energy with brain benefits. ~130M Americans in gaming and other digital deep-work activities make this whitespace worth watching<sup>1,2</sup>.

Brands like Kin Euphorics, AGI, and Trip are gaining traction with mood-enhancing, wellness-forward blends. Meanwhile, concerns over excessive caffeine, sugar, and side effects are driving demand for cleaner, smarter formulas from both consumers and regulators.

The momentum is clear: the global nootropics market will reach \$5.7B in 2025 and grow to \$15.2B by 2032\*, with beverages among the fastest-rising formats. Social conversations about **adaptogenic energy drinks are up +39% in the past year**, underscoring that consumers are ready for this shift.

## What's driving interest in functional energy drinks?



Refined sugar free  
**+35% YoY**



Blood sugar support  
**+25% YoY**



No artificial sweeteners  
**+22% YoY**

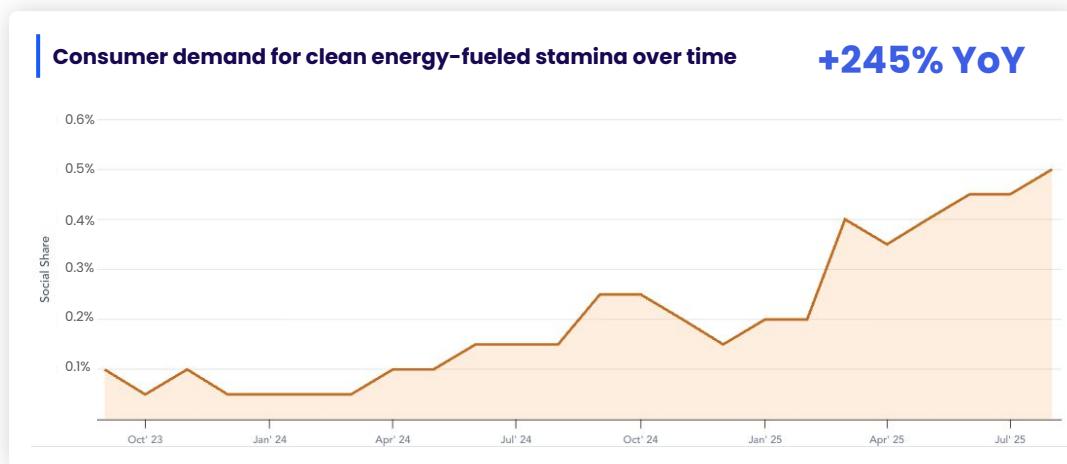


Natural  
**+15% YoY**



# The energy drink arms race has gone digital – and uncovers a new daypart

Gaming, streaming, and digital deep-work are where the demand for sharper focus and sustained energy is most visible. With ~200M Americans gaming\* and esports continuing to mainstream, consumers actively seek fuel that enhances cognitive stamina without the crash. This is where functional energy drinks shift from lifestyle accessory to performance essential.



## Digital afternoon burnout: A new energy drink product concept for 2026

Afternoon screen fatigue is common among Gen Z and remote workers. This is a drink for screen breaks that support focus, mood, and recovery, **making brain health a core claim**.

### Ingredients:

L-theanine (+156% YoY), magnesium (+51% YoY), and lions mane (+19% YoY)

### Format:

Smaller 250ml cans or sachets for continued use.

### Launch opportunity:

Workplace programs that offer functional drinks during the afternoon slump



**Section 3:**

# Lifestyle Power Plays



## Section 3:

# Lifestyle Power Plays

Lifestyle Power Play is about choice as a form of control. Food is no longer just fuel or function; it's a way people design their daily rhythms, deciding what fits into their version of health, convenience, and pleasure. The act of choosing becomes as important as the food itself.

Small but telling shifts point to this power of choice. Snackified seafood offers protein and flavor in formats that feel elevated and portable. Gen Z is drawn to hyper-customizable dishes that let them build exactly what they want, while portion sizes are becoming negotiable in foodservice. Each reflects the desire to **curate, not just consume.**

This is the essence of Lifestyle Power Play. It's food positioned as an enabler of agency—supporting how people want to eat, host, parent, or signal care. **The macro trend is less about the product and more about the empowerment that comes with choosing it.**



## Snackified Seafood



## Made-to-order Mindset



## Portion Play

# Simple, clean, real: Seafood is the new power snack

Seafood snacks are making a comeback, driven by new formats, growing demand for healthy on-the-go options, and consumers' interest in upgrading simple staples with a luxe vibe.

Why seafood snacks? They're affordable, accessible, familiar, functional, and ready when you are, with a layer of status symbol. Brands like Fishwife are already making the most of this with bright, high-end packaging and effective sustainability storytelling.

Seafood snacks are redefining what it means to snack well, blending comfort, health, and status in every bite. 2026 will see an expansion of seafood types available tinned, and new mainstream snack forms.



## | Trend Snapshot:

Consumer discussions of seafood-based snacks

**+31% YoY**

Gen Z interest in seafood snacks

**+23% YoY**

Menu mentions of tinned fish

**+14% YoY**

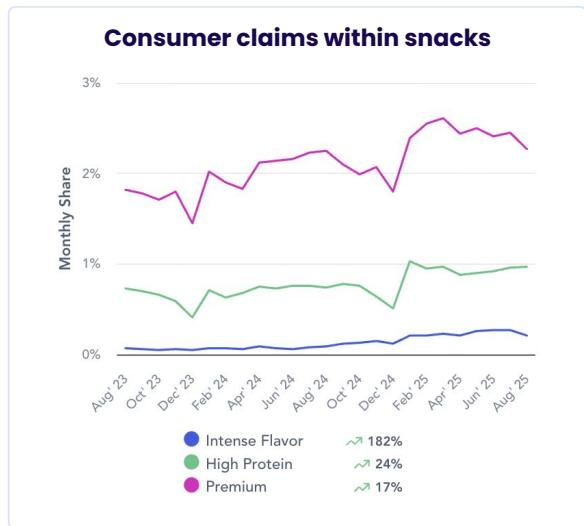
Consumer interest in seafood jerky

**+10.6% YoY**

Interest in Fishwife products is up +28% YoY, thanks to the brand's aesthetic, elevated, "hot girl food" positioning...and callouts from Vogue, Eater, and Bon Appetit.

# Mussels, mackerel, and sardines: Where snack cravings meet seafood demand

In 2026, the most powerful foods are those that can check multiple consumer boxes at once. Mussels, mackerel, and sardines can deliver on the top claims driving both snacks (protein, premium, intense flavor) and seafood (sustainability, tinned, salty). These species are culturally familiar and nutrient-dense, showing double-digit interest growth in social media discussion but a slight decline on menus, showing the increased growth of the snacking and take-home market.



Consumers demand:

**+12% YoY**

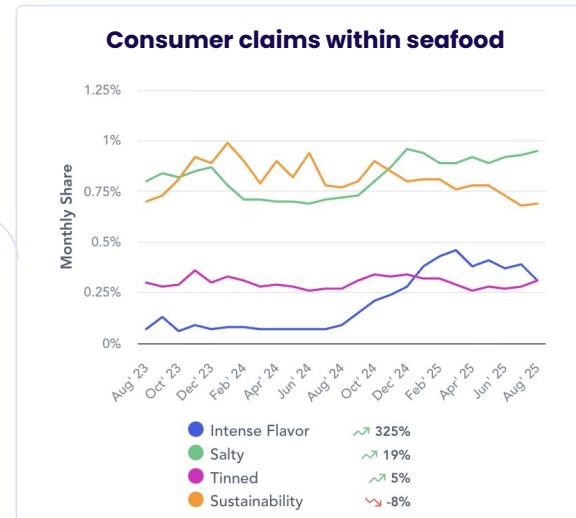
Mussels

**+7.2% YoY**

Mackerel

**+13% YoY**

Sardines



Note: demand for sustainable seafood is in decline, indicating an opportunity to recapture attention through premiumization

# America's favorite fish step up to the plate in new snackable formats

Salmon, tuna, and white fish offer familiar tastes in new formats for the savvy snacker.



## Tuna and whitefish jerky

meet the demand for shelf-stable, high-protein snacks with a clean-label edge.



## Salmon Skin Crisps

Upcycled, crunchy, and protein-rich **salmon skin** is set to become a **pork-free**, sustainable alternative to crackling.



## Candied Seafood

Combining the massively growing interest of both flavor and texture contrasts, **candied salmon** snacks bring the excitement and experimentation of the restaurant experience on-the-go

## Consumer demand:



Salmon Jerky  
**+24% YoY**



Tuna Jerky  
**+15% YoY**



Salmon Skin  
**+41% YoY**



Candied Salmon  
**+34.5% YoY**  
(+16% as a snack)

# Portion play tosses out the menu hierarchy

Not long ago, “portion choice” meant cobbling together a meal from sides and appetizer, or ordering off the kids menu. Today, that choice is becoming more sophisticated. Whether it’s **GLP-1 users seeking tighter control** (+111% YoY), **late-night eaters adjusting intake** (+69%), or **Boomers demanding flexibility** (+20%), consumers are pushing operators to rethink the very structure of meals.

At the same time, the old cadence of breakfast-lunch-dinner is expanding with grazing, snacking, and anytime eating. Even dinner – the most “fixed” of dayparts – now sees 11% of portion size conversations, the largest share of the discussion.

The result: menus are under pressure to flex. Portion Play isn’t about shrinking plates, upselling add-ons, or promoting disordered eating; it’s **about rewriting how people engage with food across the day**, turning portion choice into a cultural marker of control and customization.

## Trend snapshot

Alignment between GLP-1 drugs and portion sizing

+111% YoY

Discussions of portion size happening at dinner

11%

Interest in late night portion size control

+69%

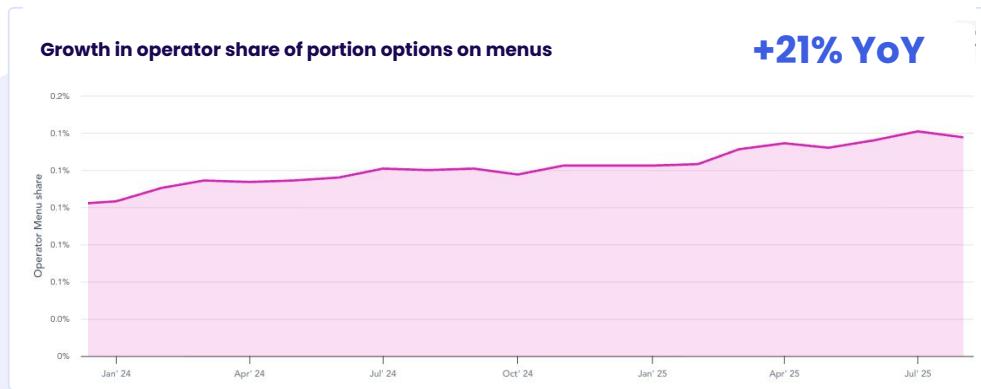
Baby Boomer demand for portion flexibility

+20%

# Flexibility will be foodservice's biggest flex in 2026

Today, 98 chains now offer portion options, and menu items designed around size choice have grown +27% YoY. Restaurants are moving past the one-size-fits-all model, making portion flexibility a visible feature of the dining experience. In 2026, portion choice will evolve into a full spectrum of custom options.

Framed as lifestyle empowerment, portion sizing connects health goals, cost consciousness, and appetite management. What has long worked in packaged and frozen foods aisles is poised to cross over into foodservice, setting the stage for portion choice as a cultural macro trend.



## Portion Customization

Growth in menus with portion options

+21% YoY

Chains nationwide offering portion options

98

Growth in menu items with portion customization

+27% YoY



# Gen Z is killing the set menu

Food is personal. Now it's literally being built one bowl at a time.

Gen Z is reshaping dining through personalization, rejecting set menus and demanding customization. What started with a few personalized dishes is now scaling up, with customizable formats emerging as trend signals to watch.

## Flavor:

With flavor depth growing **+52% YoY in Gen Z interest**, build-your-own bowls like poke and noodle bars are growing in popularity; depth often means different things to different people.

## Solo Dining:

Solo dining is up **+32% YoY for Gen Z**. They are more likely to eat alone and want meals that are specifically catered to their tastes.

## DIY Cultural Context:

Broad consumer interest in build-your-own dish formats in restaurants is up **+35%** in the last year, setting the context for Gen Z's explorations.

## What's behind the shift?

## Gen Z Preferences

Solo dining

**+32% YoY**

Flavor depth

**+52% YoY**

Customization in savory dishes

**+24% YoY**



## Malatang is chaos, and that's the point

Depthful, intense, healthy and entirely customizable: Malatang is the dish that will capture Gen Z attention.

Malatang (literally “numbing-spicy boil”) is a Szechuan choose-your-own-bowl experience where diners hand-select meats, veggies, noodles, and spice levels. Staff simmer the picks in broth and serve them in minutes.

### Why malatang?

#### Hyper-customization:

Diners curate flavor, texture, and spice in real time making malatang is **6x more associated with personalization** than the average savory dish

#### It's authentic:

Gen Z demands comfort (+26%), authenticity (+26%), and warming foods (+42%). Malatang hits all three.

#### Sensory punch:

The malatang combo of numbing Sichuan peppercorns and fiery chili delivers intense flavor (+304% YoY in savory dishes) that demands attention.

### Malatang trend snapshot:

Consumer interest

**+88% YoY**

Interest for customizability

**+144% YoY**

Restaurant menu mentions

**+50% YoY**

Operator menu share

**+52.1% YoY**



## Welcome to the malatang era: The future of Gen-Z personalization



12,774

NEW Malatang in Convoy!  
Build your own hot pot bowl to  
your liking, and they weigh out and  
charge you by pound. Such a steal.



81,800

#tsip #malatang #heytea #bayarea



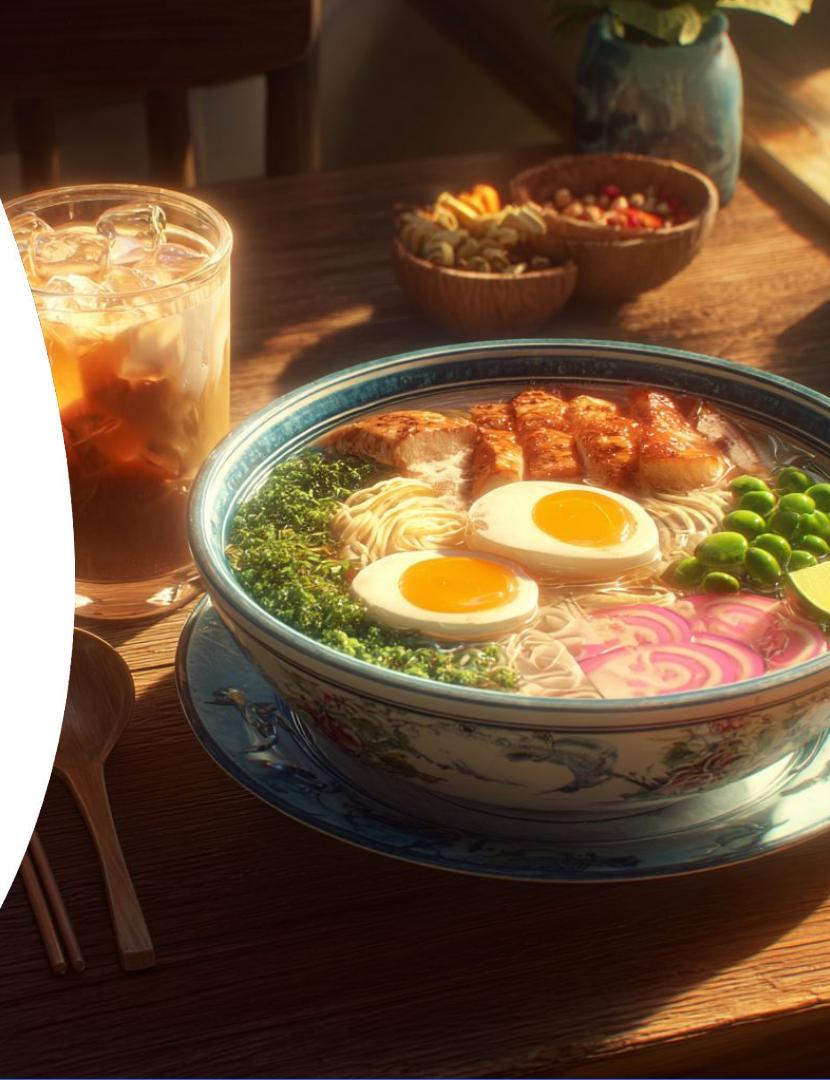
51,186

I love their seafood  
options here they have  
shrimp and baby octopus  
Build Your Own Hot Pot at YGF  
Malatang! 🍲✨



Section 4:

# Sensory Maximalism



## Section 4:

# Sensory Maximalism

Food and drink in 2026 will be richer, louder, and more layered – not in excess, but in detail. Consumers are looking for experiences where textures, aromas, and flavors work together to heighten enjoyment. From the crunch of freeze-dried candy to the complexity of a artisanal latte concept, consumption is more about fullness of sensation than restraint.

This is not simply indulgence; it's a recalibration of pleasure. People want to feel food – through crunch, contrast, and warmth – as much as they want to taste it. Everyday formats like breakfast, coffee rituals, and snacks are being reimagined through texture and multisensory cues. Consumers are rewarding products that surprise and delight their senses in small but memorable ways.

**For brands, the opportunity lies in designing products that go beyond flavor to deliver multi-sensory payoffs. It's time to get serious about play.**

The trends in this category—the Great Texture Boom, Foam as Function, and Bolder Breakfast Bowls—give brands a roadmap to create everyday moments that feel more alive, and more worth sharing.



## The Great Texture Boom (Crack, Pop)

## Foam as Function

## Bolder Breakfast Bowls

# Intense, Asian flavors are the new morning craving

Ramen is having a glow-up, from its late-night, cheap-eats roots in the US to becoming one of the hottest fusion playgrounds in foodservice. **Birria ramen**, for example, saw a +26% increase in menu mentions over the last two years, and was added to +3.5k menus nationwide last year alone.

The next frontier? **Breakfast**. Japanese cuisine mentions are up 15% YoY in the morning daypart as diners chase bigger flavor, more texture, and stronger satiety. With cereal slipping—down 5.9% YoY among Gen Z—ramen (and sister soup dish, pho) are poised to crash the breakfast table as America's next staple.

## What's driving the trend?

**Bold umami (+26% YoY), aromatic herbs (+10% YoY), spiced (+23% YoY)** notes are finding acceptance in consumers' **breakfast** formats; **intense flavor** in breakfast climbs **273% YoY** in social discussion.

**8% more** consumers look for breakfasts that feel **satisfying**.

Hybrid menus and **all-day breakfast recipes (+5% YoY)** are changing the **"when"** as much as the **"what"** at home and on-premise.

## Breakfast Trend Snapshot:

Intense flavor **+273% YoY**

Umami **+26% YoY**

Silky **+68% YoY**

Japanese **+15% YoY**

Cereal for Gen Z **-5.9% YoY**



## Sensory Maximalism > Bolder Breakfast Bowls

# 2026 will see ramen, not cornflakes, in the cereal bowl.

Breakfast ramen and pho feel rich, familiar, and allow for rapid and effective experimentation, making it a leader in cuisine fusion, optimization and personalization.

## Ramen and Pho answer every shift:

- ✓ Combines intense umami-rich broths with toppings like soft eggs and savory proteins
- ✓ Soft yolks and chewy noodles meet demand for richness and texture
- Offers comfort and versatility for cold weather or as an all-day brunch item
- ✓ Adaptable for fusion formats, from birria broth to bagel-inspired toppings, expanding cultural and flavor play

Consumers are choosing:



### Ramen

Breakfast	+12% YoY
Morning	+19% YoY



### Pho

Breakfast	+28% YoY
Morning	+11% YoY

New on Menus in 2026:

Breakfast Ramen +43% YoY

# Coffee: From utility to luxury, with luxury expectations

Coffee isn't just fuel anymore. It's an experience consumers share, savor, and style. With prices rising and at-home tech catching up to cafés, coffee often functions as an affordable luxury, rather than just a utility.

Even when belts tighten, consumers will splurge on indulgences that feel like self-care. **As a result, coffee in 2026 is going maximalist, and it's all about texture.**

Maximalism can make price hikes easier to swallow; consumers are more likely to justify the cost when coffee offers more than a single function. Layered textures, micronutrient-rich ingredients, and smoky pours borrow from cocktails and desserts, turning a cup into a moment. During this era of tariffs, coffee brands can use the same playbook, turning supply-chain stress into brand equity.



## Trend Snapshot

Growth in avg. coffee menu prices nationwide

**+7% YoY**

US tariff imposed on Brazilian coffee\*

**50%**

Drop in instant coffee exports to the US\*

**-60%**

Decline in Brazilian raw coffee exports\*

**-46% YoY**

# Foam is the frontline of functional coffee

Inspired by Viennese einspänner, this thick, silky, flavored cream foam coffee topping has found virality online and on-premise. Expect to see functional twists in 2026.



Starbucks' cold foam sales **grew 23%** in Q3 2025<sup>1</sup>, and protein cold foam bevs are coming in hot, pointing to a new opportunity: Cold foam as the next canvas for functional health. Think stress relief lavender cold foam or hormone balance blends that pair function with indulgence.

## Why This Resonates

- ✓ Turns everyday coffee into a creamy, textured experience
- ✓ Serves as a canvas for seasonal, functional, or flavored twists
- ✓ Visually striking for menus, recipes, and social content



## Cold Foam:

Consumer interest  
**+57% YOY**

Menu items  
**+161% YOY**

## Opportunities:

Consumers demand functional cold foam:

Hormone balance  
**+55% YOY**

Stress relief  
**+30% YOY**

Metabolism  
**+24% YOY**

## Sensory Maximalism > Texture Boom (Crack, Pop)

# The texture boom (crack, pop): The next sensory innovation frontier

Today's snacks need to *feel* right: crisp edges with gooey centers, smooth melts with spicy kicks, or layers of airy crunch contrasted with thick, rich cream. TikTok loves it. So do today's consumers.

Texture is now central to snacking, and guides purchase decisions, leading brands like Ingredion to invest over \$100M into developing texture-preserving, clean-label ingredients\*.

## What's driving the shift

### Textural Contrast

Crispy and creamy. Melty and chewy. These pairings now define satisfaction, heighten emotion, and create memory.

### Function Meets Feel

Consumers want health without tradeoffs. Texture-rich formats make high-protein and clean-label snacks feel indulgent, with melty (+77% YoY) and fudgy (+71% YoY) textures growing the most in online discussion around high protein snacks.

### Social Platforms

Texture performs. Crunches, breaks, melts, and layers are central to content like ASMR, Mukbangs and more short-form, visually-driven content on platforms like Instagram and Tiktok.

Growth in snacking occasions nationwide

+17% YoY

Increase in interest in late night snacking

+12% YoY

Likelihood of consumers to turn to snacks for crunch than other F&B

4.2x

Increase in demand for textured snacks

+44% YoY



## Sensory Maximalism > Texture Boom (Crack, Pop)

If It doesn't snap, crack, squish, or pop - it's not 2026



### Freeze-Dried Crunchy Snacks

Freeze-dried sweet and savory snacks are louder, crispier, and more intense. TikTok views are in the billions. Expect more formats, kits, and launches.

Airy +43% YoY in consumer interest  
Crunchy +33% YoY



### Swicy Gummies

Skittles' new Gummies Fuego blends soft chew with chili powder, expanding the swicy trend into new formats.

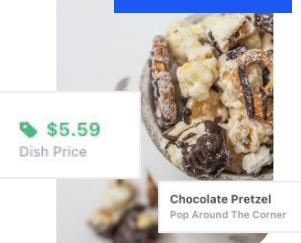
Chewy +27% YoY  
Sticky +20% YoY

### Foodservice best seller

### Pretzel-Popcorn Hybrids

Combining the crisp of pretzels with the pop of popcorn, these hybrids deliver layered mouthfeel in one snack.

Crispy +49% YoY  
Flaky +50% YoY



### Dessert Dips

Chocolate shards dipped in strawberry "salsa" create contrast. Hard with soft + sweet with fresh = a tactile eating experience.

Gooey +43% YoY  
Smooth +40% YoY  
Soft +29% YoY

# Key Takeaways

## **Authenticity outmuscles the artificial:**

Consumers are rejecting “fake” or over-processed products, rewarding meat, craftsmanship cues, and culturally rooted formats as the new markers of premium.

## **The New Body OS:**

Health has become a customizable operating system - from GLP-1-influenced pantries to fertility condiments and digital brain fuel.

## **Choice is power:**

Portion Play, build-your-own bowls, and customizable formats dismantle rigid menus, giving consumers agency to design meals around lifestyle and identity.

## **Sensory maximalism takes hold:**

Crunch, crack, fizz, and layered flavors turn small moments into shareable experiences, proving that food pleasure now lies in multi-sensory detail.

## **Local and cultural identity drive premiumization:**

Small/medium-sized cities and regional foodways are outperforming big metros, showing that hyper-locality is now a competitive edge.

## **The future portfolio is cultural:**

The future portfolio is cultural: Winning brands in 2026 will enable consumers to express identity, manage their body OS, and choose on their own terms — with authenticity and experience at the core.



# What does your 2026 shift look like?

Your brand, category, and product all have a place in 2026's food culture. Let's find it.

**Book a personalized  
strategy session**

