

FLAVOR
ATLAS
**WHITE
PAPER**
BY MARLIN NETWORK
2018

FIND YOUR FLAVOR

MACRO FLAVOR TRENDS IN FOODSERVICE



FLAVOR
—ATLAS—
BY MARLIN NETWORK



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INTRODUCTION

Consumers today are obsessed with food. And the trend has staying power—Generation Z now represents 27 percent of the U.S. population and has the highest food IQ of any demographic.¹ It makes some sense. Social media feeds are saturated with beautifully rendered recipe videos, while patron-captured photos of everything from burgers to baos have drawn more consumers out to eat. The net effect: our collective culinary curiosity has been broadened, and consumers are constantly chasing their next favorite flavor.

So how do you navigate consumer preference in this shifting culinary terrain? How do you find the flavor they're chasing before they do? It can be difficult—at times overwhelming. But it is possible, and it's worth your while. It requires a comprehensive understanding of rapidly evolving consumer tastes, emerging menu trends and broader category shifts.

This white paper offers a snapshot of existing flavor trends contextualized with real-market examples so you can discover the smartest next stop on your culinary voyage.

THE VALUE OF ATTENTION

Why pay attention at all? Isn't it easier to let flavor trends come and go and stick with what you're already doing? It is easier, but it's also costly. Think about how consumers are interacting with food today—the sheer volume of information around food styles and flavors vastly surpasses anything we would have imagined twenty years ago. The more they learn about food, the more their curiosity dictates their choices. Consider this:

- Menu incidence of kaffir lime has increased +41%.¹
- Miso is appearing in more menus, increasing by +20% in the last 2 years.²
- Menu incidence of the claim “Hawaiian Style” has seen a 76% increase over the past two years.³
- Lemon is the fastest-growing appetizer ingredient in full service restaurants.⁴

The growth of these flavors, ingredients and styles originates with the consumer, eager for something new. Of course, not every flavor is right for every audience or every brand. Those who stay attuned to culinary movements, while also staying true to core brand values, have an opportunity to grow in three key areas:

Relevance

No news is bad news. When a consumer sees the same things on a menu, their eyes tend to turn elsewhere. The same is true of operators. By keeping an eye on present and future food movements, you have a place to start the conversation. You can become a player in the culinary landscape.

Revenue

By letting a culinary moment pass, you're letting revenue pass. Brands that identify and act on meaningful flavor trends can create products that effectively elevate an operator's menu. That translates to new and reinforced revenue channels.

Resolve

When you have something to say that's rooted in research and real-time, real-world examples, people in the industry will listen. And they'll remember. Expertise is a long-game that helps you overcome economic lulls and generate more, better relationships.

*The bottom line: consumers are paying close attention.
The leaders of the foodservice industry who listen, anticipate
and accommodate are rewarded now and over time.*

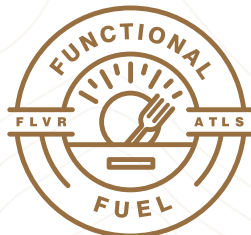


THE

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FLAVOR THEMES OF 2018

In most cases, the meteoric rise of a flavor or ingredient doesn't happen in a vacuum. These trends occur as parts of a larger movement in the culinary world. Based on a mix of chef-driven observation, market evidence and consumer behavior analysis, we have identified seven key flavor themes at the center of culinary influence across the U.S.





MAIN SQUEEZE

Citrus has become popular in both seasonal and permanent menu items across all segments. Consumers are starting to try **more adventurous citrus flavors**.



MAIN SQUEEZE



DEFINITIONS

CARA CARA ORANGES – A type of red-fleshed navel orange. Due to their low acidity, they have a sweeter taste than most varieties.

MEYER LEMONS – A deep yellow citrus fruit native to china, and thought to be a cross between a lemon and orange variety. They're sweeter than lemons, with a thinner peel, less acid and more floral scent.

FINGER LIME – An Australian variety of limes with pebbled skin and an acidic, tangy flavor. Often used as a garnish due to their delicacy in nature, the peel can also be dried and used as a spice.

YUZU – Mainly cultivated in Asia, it's an incredibly fragrant citrus but also very sour and tart. Rarely eaten as a fruit, it is often used as a citrus component to dressings or vinaigrettes.

EVIDENCE



Panera Bread
National Fast Casual Chain
Blood Orange Lemonade



Elizabeth Street Cafe
Austin, TX
Kaffir Lime Fried
Chicken Bahn Mi



Lemonade
West Coast Fast Casual Chain
Seared Pepper Crusted Ahi Tuna
with Crushed Orange-Ginger Ponzu



Baco Mercat
Los Angeles, CA
Yellowtail Collar flavored with
yuzu kosho and walnut vinaigrette.

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ETHNIC ADVENTURE

Today's more receptive palates are open to more **worldly flavors**, and global cuisines provide the sense of adventure and experimentation consumers seek.



ETHNIC ADVENTURE



DEFINITIONS

FURIKAKE – A dry Japanese seasoning that is typically used to season cooked rice, vegetables, and fish. The mixture usually consists of dried and ground fish, sesame seeds, chopped seaweed, sugar, and salt.

GOCHUJANG – This savory, spicy and pungent condiment is made from red chili, rice, salt, and fermented soybeans.

SHICHIMI TOGARASHI – A dry Japanese seasoning usually used for noodles, soups and rice. Togarashi is made up of ground red chili pepper, roasted orange peel, black & white sesame seeds, ground sichuan pepper, ground ginger, and ground nori seaweed.

ZA'ATAR – A middle eastern blend of seasonings that are used to add brightness and complexity to a variety of items including bread, poultry, seafood, and yogurt. The seasoning mixture can include dried oregano, sesame seeds, ground sumac, and dried thyme.

EVIDENCE



Jack in the Box

National QSR Chain

The Food Truck Series features an ethnic inspired Asian Fried Chicken Sandwich with Asian slaw and bold gochujang mayo.



Tartine Manufactory

San Francisco, CA

Coddled egg with Trout roe, and za'atar toast.



Noodles & Company

National Fast Casual Chain

Spicy Korean Beef: ramen noodles tossed with a sweet and spicy Korean-style Gochujang sauce, marinated steak, napa and red cabbage, Asian sprouts, spinach, topped with cucumber, green onions and cilantro.



The Optimist

Atlanta, GA

Serving whole grilled octopus with aji amarillo peppers, poblano peppers and charred onion.

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TURN UP THE HEAT

Consumers like the “wow” factor and heat certainly adds it. The desire for traditional “warming” spices and sweet heat is continuing to grow—not just in food, but in beverage too.



TURN UP THE HEAT



DEFINITIONS

HATCH GREEN CHILI – A variety of chilies that refers to the Hatch Valley region they originate from, in southwestern New Mexico. This region produces 50 to 70 million pounds of chili a year.

HARISSA – A spicy North African spice blend consisting of dried peppers, cumin, coriander, caraway, paprika, and other spices. This blend is served traditionally as a powder and as a paste.

KIMCHI – A traditional Korean dish of fermented vegetables, the most common of which are napa cabbage and daikon radish.

AJI AMARILLO – A vibrant orange chili pepper popular in Peruvian cuisine.

SHISHITO PEPPERS – Native to Japan, they typically rate around 100 SHUs (Scoville Heat Units), although an occasional outlier can be substantially hotter.

EVIDENCE



Fuddrucker's
National Casual Dining Chain
Hatch Chile burgers are on a rotating LTO menu since 2012



Del Posto
NYC
Pistachio Semifreddo made with cranberries, lemon meringue & pink peppercorn



Greyfield Inn
Cumberland Island, GA
Biscuits with Spicy Tomato Gravy and Greens made with harissa and kale



Chi'Lantro
Austin, Tx
Original Kimchi Fries served with choice of protein, caramelized kimchi, cheddar + Monterey jack, onions, cilantro, magic sauce, sesame seeds and sriracha

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A LITTLE FUNKY

That's right. We said funky. From fermented chili paste to fish sauce to stinky cheese, people are boldly exploring the edges of umami to experience a **new depth of flavor**.



A LITTLE FUNKY



DEFINITIONS

BLACK GARLIC – Black garlic comes from fermenting heads of fresh garlic under special humidity and temperature conditions. This results in cloves literally black in color, sticky and soft in texture that takes on an umami-filled, earthy flavor.

FISH SAUCE – An amber-colored liquid extracted from the fermentation of fish with sea salt. Fish sauce is a staple ingredient in numerous cultures in Southeast Asia and the coastal regions of East Asia, and features heavily in Burmese, Cambodian, Filipino, Thai, Lao and Vietnamese cuisines.

YUZU KOSHO – A Japanese paste made from fresh chiles that are fermented along with salt and zest and juice from yuzu.

EVIDENCE



Panda Express

National QSR Chain

Five Flavor Shrimp: Panda chefs wok-toss the dish to perfection in a Chinese-inspired sauce, to balance sweet, sour, bitter, salty and umami notes in one single bite.



Pok Pok

Portland, OR & NYC

Vietnamese Fish Sauce Wings feature Natural Draper Valley chicken wings marinated in fish sauce and sugar, deep fried, tossed in caramelized Phu Quoc fish sauce and garlic.



Ram Restaurant

Casual Dining Chain

Grilled Kahuna Tuna made with Ahi tuna on brioche with sweet and sour cucumber-onion relish, unagi sauce, wasabi mayo, sriracha mayo, avocado, fresh sliced jalapeños.



Umami Burger

National Casual Dining Burger Chain

K-BBQ Burger - Gochujang glaze, caramelized kimchi, sesame aioli, Korean ketchup, scallion-cilantro salad.

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FUNCTIONAL FUEL

Whether they're looking for a protein boost, extra fiber or heart-health-promoting vitamins, consumers are intrigued by foods and beverages that have a positive effect on specific health concerns.



FUNCTIONAL FUEL



DEFINITIONS

MACA – This cruciferous vegetable native to Peru is commonly found as a powder and is known as a superfood. The earthy-tasting root boasts several functional benefits including boosting energy and immunity.

SORGHUM – An ancient grain known for its mild, earthy flavor. It can be cooked like rice, popped like popcorn, or boiled down to make a sweet syrup similar to molasses. Sorghum is an excellent source of fiber and rich in protein. It's also a source of bone-building magnesium and phosphorus, immune-boosting iron and B vitamins such as niacin and B6 that help convert your food into energy.

MATCHA – Finely milled Japanese green tea leaves, traditionally prepped with hot water. This ingredient is known to be jammed packed with over 100-times the antioxidants of regular brewed tea and is naturally one of the most anti-oxidant dense foods on the planet.

BONE BROTH – While this ingredient is obviously nothing new to the culinary world, consuming it for its health benefits has taken off in recent years. Broth created with animal bones is especially increasing in popularity due to all the vitamins and minerals found in the broth.

EVIDENCE



Bliss Café

San Luis Obispo, CA

Almond Dream Smoothie is made with almond butter, maca root powder, raw hemp, and brown rice protein. Blended with housemade almond milk, bananas, and raw dates.



Mary's Pizza Shack

CA, Regional Chain

Smart Flour Gluten-Free Pizza - Made from several ancient grains including sorghum, amaranth, and teff.



Western Daughters Butcher Shoppe

Denver, CO

A butcher shop where "Whole animal is a whole lot better. It's better for the land, the animal, and the farmers and ranchers."



Cha Cha Matcha

NYC

Manhattan café dedicated to the stoneground tea, serving traditional matcha alongside signature specialty drinks as well as matcha soft-serve ice cream, scallion-cilantro salad.

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CONSCIOUS CONSUMPTION

Whether they're looking for a protein boost, extra fiber or heart-health-promoting vitamins, consumers are intrigued by foods and beverages that have a positive effect on specific health concerns.



CONSCIOUS CONSUMPTION



DEFINITIONS

BETTER VEGAN – Vegan has been elevated in the consumer’s mind eye and there are more ways than ever before to embrace vegan foods and beverages. PETA has called 2017 #TheYearofVegan.

HOMAGE TO REGIONAL CUISINE – Chefs and growers across the country are embracing tradition by bringing back lost ingredients, flavors and recipes fundamental to regional American Cuisines. Born out of thrift, sustainability, seasonality, cultural influences and a respect for all things local, regional American cuisines are being looked at in an elevated way as part of an emerging culinary scene. Modern chefs are proving their American ancestors to be creative and accomplished producers of food by bringing these cuisines to life with artistry and reverence.

PSEUDO MEAT – Vegetable substitutes that are made to look as much like the real “meat” cut or patty as possible. Some are shockingly similar, even mimicking meat characteristics such as “bleeding.”

ROOT TO STEM COOKING – Chefs utilize most, if not all, of a plant in their dishes. Using the entire vegetable helps keep food costs in check and cuts down on kitchen waste.

EVIDENCE



Le Pain Quotidien

Mid-Sized National Fast Casual Chain

Using “Sustainable Pole-Caught Yellowfin Tuna” along with tender forbidden black rice and farro, citrus, red cabbage, and avocado, topped with sesame-cashew sauce and a sprinkle of gomasio.



El Che

Chicago, IL

An independent Argentine-inspired restaurant with an expansive hearth serving food made ‘al asador’ on custom-built grills and chapas, based on primitive cooking and grilling techniques from South America.



Fatburger

West Coast Regional Chain

The Impossible Burger is now served at all locations with toppings like lettuce, tomato, onion and relish, and customers can also order non-vegan additions such as mayo, chili, and bacon.



Mitsitam

Austin, TX

Features indigenous food from the Western Hemisphere. Menus reflect Native American food and cooking techniques and change with each season.

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VEGETABLES TAKE THE LEAD

Vegetables are becoming the darlings of the plate as chefs feature them front and center and use “meat” preparation methods like roasting to give them more robust flavor.



VEGETABLES TAKE THE LEAD



DEFINITIONS

3rd WAVE PICKLING – The process of preserving food by pickling is becoming an experiment for many. Fruits and vegetables that have previously been unheard of in the pickling realm are being menued and served this way including onions, jalapeno peppers, carrots, daikon radishes, cabbage and kohlrabi.

SEAWEED – Seaweed encompasses many types of algae and are most edible from saltwater versus freshwater. Seaweed is loaded with nutrients including iron and calcium as well as minerals like sodium, potassium and iodine. Seaweed can be used in pasta, salads, stews or with meat protein.

KOHLRABI – It's a cool weather crop and is a version of cabbage. It has the texture of a radish. You can eat the bulb and the greens raw or cooked. You can use them in salads, soups or stews.

EVIDENCE



Chick-fil-A

National QSR

Superfood Side made with a broccolini and kale blend, maple vinaigrette dressing and dried sour cherries with roasted nut blend.



Girl & The Goat

Chicago, IL

The Kohlrabi Salad includes fennel, evalon, toasted almonds, roasted shiitake, and apples.



Nido Kitchen & Bar

Oakland, CA

Outlook Good – Gin, Ginger-Beet Simple Syrup, Lime, Absinthe, Small Cubes.



Herbivorous Butcher

Minneapolis, MN

A vegan butcher shop using small-batch, locally sourced, all natural meat alternatives which they call “meat-free meats”.

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FINDING YOUR FLAVOR

Those seven Flavor Themes are a great starting point toward a well-informed culinary strategy. But identifying the right opportunity for your brand takes knowing where those flavors fall on the cycle from obscurity to ubiquity.

In addition to placing specific flavors within broader themes, we have also classified them into one of three categories in order to discern the appropriate timing and segment placement of the opportunity.



EMERGING

- Flavors that are just starting to appear on menus and retail shelves with enough critical mass to be considered a trend
- Includes more 'farther out' flavors that are not mainstream
- These are flavors that are more 'cutting edge' and inspirational



BECOMING POPULAR

- Flavors that are just beginning to be embraced by a broad consumer set and are gaining acceptance
- Considered to be 'opportunity' flavors that will continue to grow in popularity



MAINSTREAM

- Flavors that are very widespread and commonly seen across foodservice and retail outlets
- Accepted by the masses

OUR PROCESS

EVERY SEASON, A COLLECTION OF CHEFS, CULINARY EXPERTS AND PLANNERS GET TOGETHER TO CHART THE COURSE OF FLAVORS AND FORMATS WITHIN THE CULINARY LANDSCAPE.

CREATIVE CULINARY OBSERVATION

We take inspiration from market visits, food industry conferences, creative menus from emerging independent restaurants as well as chains and general category trends to form the basis of our observations.



MARKET EVIDENCE

After gathering our observations, we validate them with market evidence from third party sources including menu analysis with a view to changes over time.

CONSUMER CHATTER

The final step in our process is leverage social listening tools to hear what consumers are saying about the flavors and themes we are tracking.

Through this process, we are able to identify key Flavor Themes—like Functional Fuel or Ethnic Adventure—based on the culmination of what’s happening in each category. Those themes are validated through the Social Score, which is a proprietary approach to gathering consumer insight on each theme.



FLAVOR
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Making the right move in the food industry takes knowing your audience, maintaining your core brand values but most importantly, it takes genuine attention to the things that excite consumers. By looking closely at the culinary environment as it shifts and shuffles around us, you can solidify your relevance in the world of food.

LET FLAVOR ATLAS™ BE A GUIDE.

It will help you identify macro culinary movements, the quantified scope of the social conversation and specific placement on the life cycle of flavors.



**FLAVOR
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FLAVOR ATLAS™

Flavor Atlas™ is Marlin Network's proprietary method of staying on top of current trends and flavors to prepare you to maximize every possible future opportunity. We publish quarterly reports with perspective on where flavors and formats are falling within Emerging, Becoming Popular and Mainstream categories.

MARLIN NETWORK

For marketers, chefs and business leaders striving to deliver exceptional food and beverage experiences away from home, Marlin Network is an innovative and accountable partner in driving the differentiation, growth and innovation your business requires, your customers demand and your consumers value.



Marlin Network

GUSTATORY

SIBO

