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FUTURE FEASTING

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INTRODUCTION



Food choices are never just about meeting nutritional needs. They are a reflection on society.

In every era, the forces of the age - **political, economic, scientific, cultural, lifestyle** - quietly determine what ends up on the plate. We can already identify the building blocks of this era, that will shape how our food will taste, what ingredients will be used, and even what the act of eating means over the next few years.

Drivers of Behavioural Change:

Taking these drivers and arranging them into different combinations, we can begin to understand **how food is going to change** in the not too distant future.

HEALTHY FOOD REGULATIONS

Regulations on food, awareness of dietary impact.

ULTRA-PROCESSED FOOD

Industrially manufactured food products, linked to negative health effects.

**MAHA
(MAKE AMERICA HEALTHY AGAIN)**

A political movement based around ‘real food’ & ‘healthier lifestyle choices’.

GLP-1 AGONISTS

Weight loss drugs, such as Ozempic, affecting appetite by making users feel fuller.

BIOHACKING

Self-improvement as lifestyle, focused on the body, health, and nutrition.

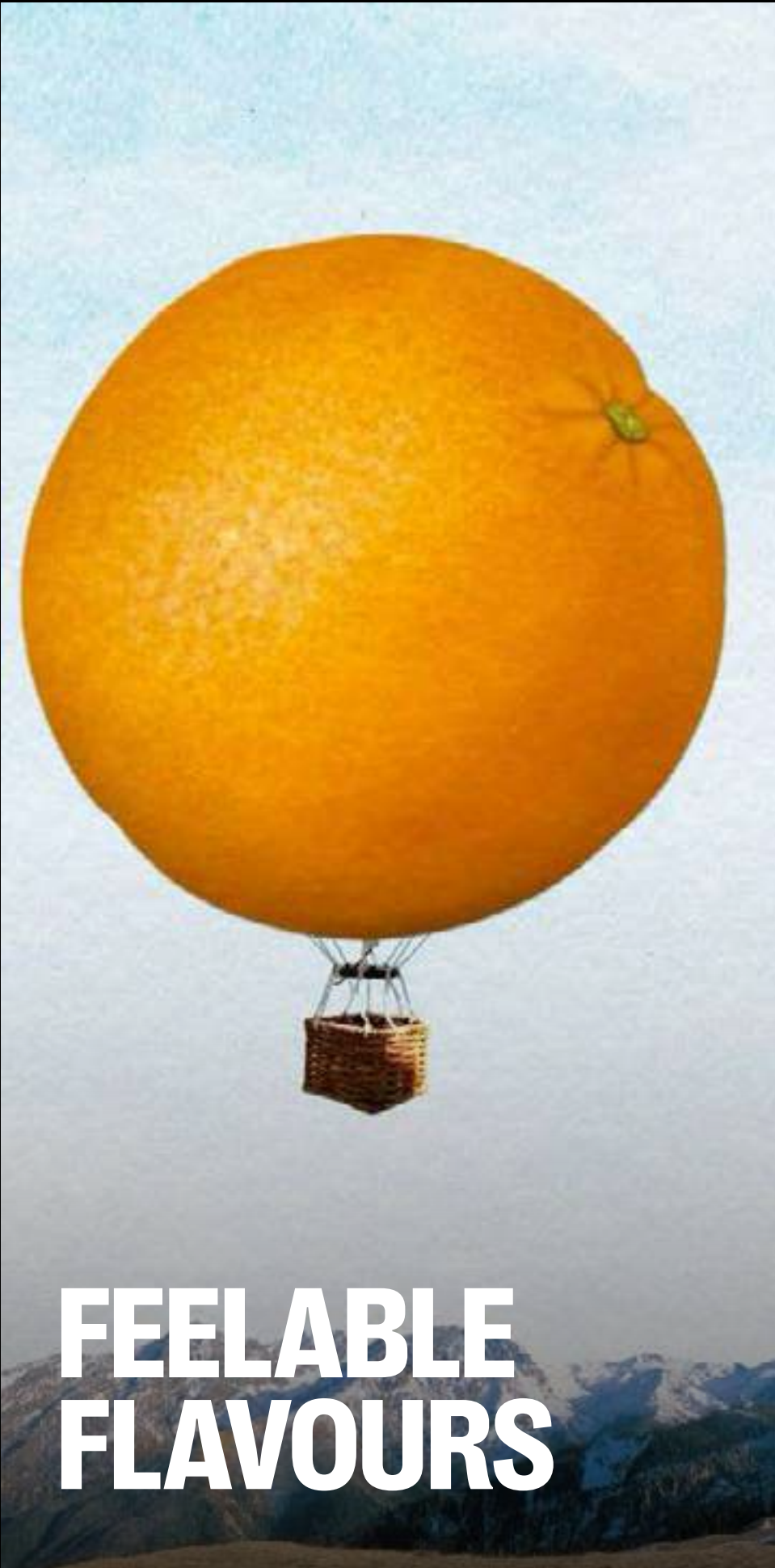
CLIMATE

Impact of our food system on the planet, and the planet on the food system.

COST OF LIVING

How pricing is making people prioritise their purchases.

The fields of play:



**FEELABLE
FLAVOURS**



**PHARMA
APPETITE**



**POLYCRISIS
PALATES**



**SYNTHETI-
CULTURAL
REVOLUTION**



**DEATH OF THE
DINNER TABLE**

FEELABLE FLAVOURS

● HEALTHY FOOD REGULATIONS

● GLP-1 AGONISTS



With **shrinking portion sizes** and indulgence in moderation, impactful flavour and experience are the new King and Queen of snacking.

As people seek more bang for their buck in meals and snack moments, creating big flavours will be crucial for brands to navigate progressively particular palates.

We are already seeing a rise in increasingly **esoteric flavours** and formats when it comes to consumables.

Last year we saw the launch of 9-Volt Battery flavour crisps from Dutch company Rewind, which employ “a mix of citric acid, sodium bicarbonate, and mineral salts to create a tangy, tongue tingling hit” according to the company’s “Flavourologist”. Flavours are also getting the hype:

24%

higher consumer interest in salmon jerky has been recorded this year, according to The Times.



This appetite for intensity and curiosity extends beyond novelty.

Look at the meteoric rise of brands like Melinda's Hot Sauce and **Ayoh's** condiment range, where the sauce becomes less about accompaniment and takes its place as the main event.

Combine this with the success of **Anya Hindmarch's** now yearly ice cream pop up, featuring flavours including Soy Sauce, Bisto Gravy and Pickled Onion, and we start to see how **consumers are hungry for taste experiences that transcend the merely delicious**. Even mainstream brands like **McDonald's** jumped on the trend for curiosity and flavour exploration, with the launch of their contentious '**Grinch**' flavour **collabs** for the 2025 festive season.



We can see the mirror of this interest in the drinks industry



Absolut Tabasco

Pickle Soda



Jalapeño-infused Sauvignon Blanc in partnership with Sarah Jessica Parker



Cointreau chilli variant

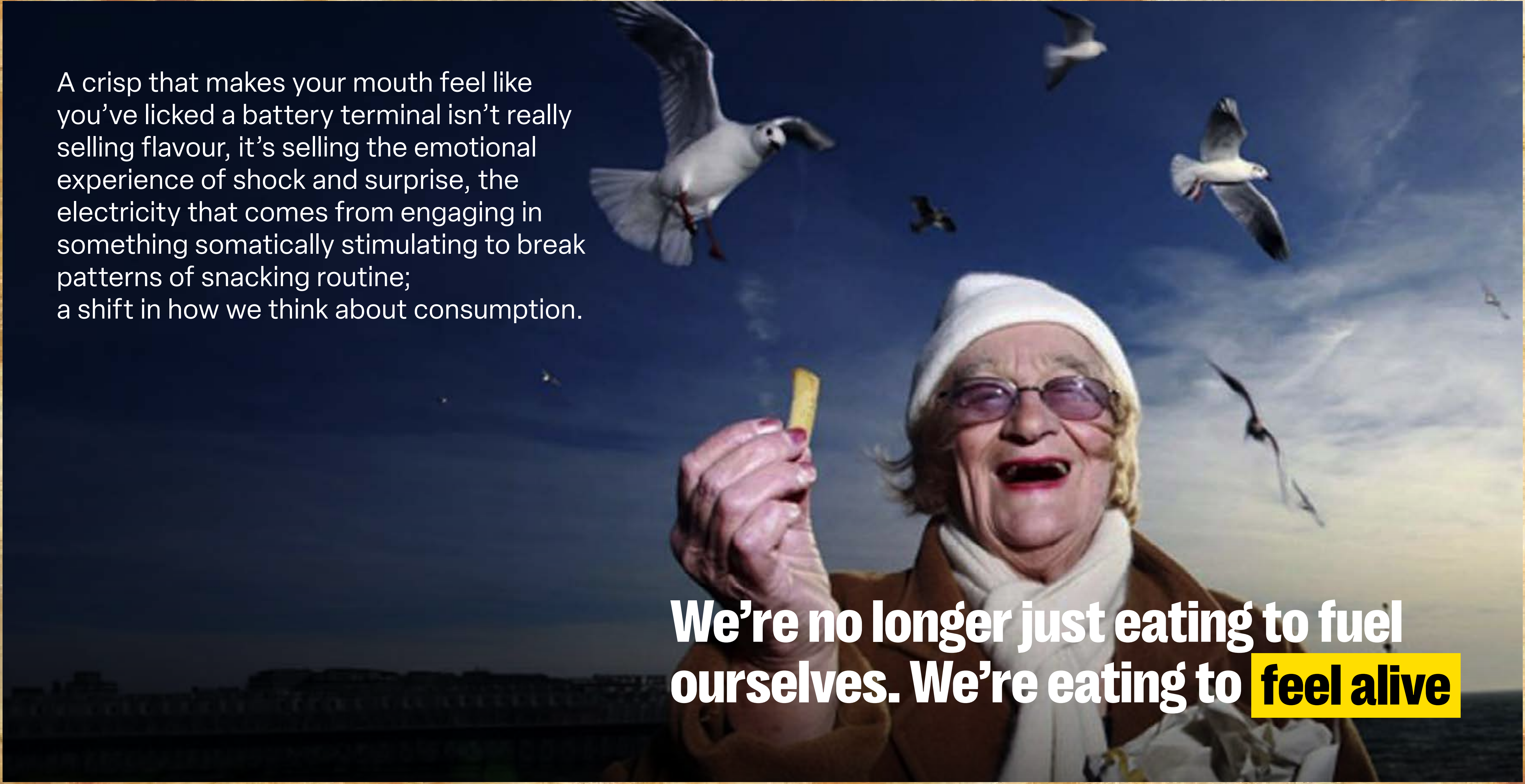
In 2026, we're heading somewhere stranger than simply **“more intense”**

We're approaching **food as a sensory hack**, a way to manipulate our nervous systems in increasingly precise ways.

In an era where the GLP-1 induced weight loss boom threatens to shrink appetites literally and figuratively, brands are responding by making every bite count emotionally.

Brands will start positioning products around the sensations they produce rather than their taste profiles alone.

A crisp that makes your mouth feel like you've licked a battery terminal isn't really selling flavour, it's selling the emotional experience of shock and surprise, the electricity that comes from engaging in something somatically stimulating to break patterns of snacking routine; a shift in how we think about consumption.

A photograph of an elderly woman with short blonde hair, wearing a white knit beanie, glasses, and a brown coat with a white scarf. She is holding a single potato chip in her right hand and has a joyful, open-mouthed expression. The background is a bright blue sky with several seagulls in flight. The overall scene suggests a coastal or beach setting.

We're no longer just eating to fuel ourselves. We're eating to **feel alive**

“

Consumers are increasingly adventurous, craving new flavours and exciting combinations.

While timeless classics remain beloved, there is a noticeable shift towards experimental pairings”

says **Rhea Agarwal** director of business development UK & EU at Indian snacks maker **Haldiram's**.

When it comes to the bagged snacks aisle, creating excitement should be a key focus for suppliers.



We predict a rise in somatically sensational flavours that tickle, tease and tantalise in equal measure.

Think portioned meals paired with clips of music for the ultimate snack and savour pairing, 'fifth sense' eating through gustatory nerve stimulation, and extravagant meals centred around an 'emotional menu'.

The next frontier might instead be foods calibrated to induce ASMR, or snacks that create the oral equivalent of a jump scare through the use of ingredients such as electric daisies (buzz buttons) or miracle berries, gamifying the senses as a new approach to the

world of snacking.

We are becoming more physically numb as our lives move behind screens, yet we are more particular about what we put in our mouths than ever before. People want to eat less to look better, but they want to feel more to stay sane.



SOMATIC SENSATIONS

The product promise is **shifting from taste to feeling.**

Battery-tang crisps, buzz buttons, miracle berries: these aren't really about flavour profiles.

They're about triggering a specific physical response. The mouth as an instrument, an organ we can play, not a destination.

We predict that we'll increasingly decouple 'flavour' from 'nutrition', a move that treats food like a drug where we want the 'hit' (the smell, the burn, the tingle) without the 'baggage' (calories, sugar, processing).

This might come about through snacks that incorporate biotechnology to deliver unique flavour bursts triggered by specific enzymes activated in your digestive tract 20 minutes after consumption, or set by sensation-triggering pouches placed in the mouth prior to eating, following the boom of caffeine pouches over the last 12 months. We foresee brands leaning into using playfulness as a tool for provocation; amplifying the weird, ownable aspects that make a brand unique.

**MICRO
TREND**



EMOTIONAL ENGINEERING

Snacking is being repositioned around mood states. Not “this tastes good” but “this makes me feel a specific way.”

ASMR pairings and music-matched meals all point to food as a tool for emotional manipulation. We foresee mini dining experiences where the meal's taste is tailored to a diner's emotional state, with subtle shifts to light or temperature, savoury to sweet as the emotional journey progresses.

Consider how those seeking a mid-morning snack might be presented with an 'emotional menu' they can

use to select which product they consume, based on the emotional outcome they feel the need for in the moment.

Brands should seek to create copy and design worlds that signal emotion over occasion, flavour as a proxy for feeling.

**MICRO
TREND**



SENSORY LAYERING

As we see snack formats shift to adapt for a changing food regulatory landscape we predict that we'll see other senses being brought in to replace pure taste."

Perhaps through snacks that emit curated aerosolised scents, rather than solid sustenance, designed to trigger fullness signals without a bite ever being taken.

In a world where hunger is often seen as an inconvenience, we're seeing an increasing interest in other senses taking the reins when it comes to gustatory satisfaction.

Brands can use this to focus on sensations beyond pure flavour, consider sonic branding opportunities and how the brand world might be expressed through different sensorial stimuli.

**MICRO
TREND**

PHARMA APPETITE



● BIOHACKING

● GLP-1 AGONISTS

● COST OF LIVING



Whether it's drug-related reduced appetites, or part of what WGSN has called the **'Fauxempic' trend**

where consumers seek the sculpted look associated with GLP-1 agonists without using medication, the rise in weight management medications have fundamentally reshaped how people relate to, and consume, food.

According to **Mintel**...

22%

of global food/drink/healthcare introductions with a digestive health claim in the past five years also had an immune health claim.

This is significant.

When you only eat 800 calories a day because of Ozempic, every gram must be a 'super-macro'. This creates a market for 'medicalised Indulgence'.

We are now seeing **nutrient density** such as M&S' latest F&B range, becoming a major selling point, especially as the calorie is losing relevance (evidenced clearly by **Weight Watchers** filing for bankruptcy in 2025).

M&S's latest range



Teeny cocktails





The gap is the stigma vs. status. Taking the jab is becoming a **wealth signal** that changes what **luxury** food looks like (tiny, expensive, hyper-fortified).

“

The consumer right now is asking, “What is the value of that calorie and what do I want my food to do for me?”

Keith Albright, Senior Consumer Insight Manager for the agricultural and food giant Cargill, *Is America Breaking Up With the Calorie?* (Jan 2026, NYT)

This shift drives optimisation; eating less means **every mouthful matters more**

We have more data than ever on how to stay alive, but less time than ever to actually live.

Brands are reflecting this pattern:

Two Spoons makes GLP-friendly ice cream with 30g protein, **Huel** sells complete drinkable nutrition, **AG1** compresses daily micro nutrients into powder, even **Beyond Meat** has launched a protein drink (though met with varying criticisms including being called a 'cry for help').



These all compete with the idea of the **meals as we know it.**

People want the biological benefits of “perfect” nutrition, but they hate the logistical boredom of “perfect” eating. Dietitian Melanie Murphy Richter described the emerging mindset as focused on “**timing, nutrient quality, and metabolic outcomes**” rather than macros alone. The future, she suggested, belongs to eating in rhythm with circadian biology.

Fibre shows a parallel trend. The **Waitrose Food & Drink Report 2026** found 76% said fibre mattered, yet only 20% knew recommended intake. Most consume under 20g versus a 30g target. TikTok’s **#fibremaxxing** has 157 million uses, and consumers seek specific fibres like psyllium and inulin. **ProperCorn** has based their latest brand campaign entirely around this trend.



“Popcorn provides 10 times more fibre (by weight) than spinach. Propercorn is perfectly positioned to tap the growing fibremaxxing trend.”

Alex Brittain, The Grocer Magazine, (May 2026)

Similar thinking applies to **creatine.**

The BBC reported research linking creatine to cognitive benefits and neurogenesis, pushing it from bodybuilding into brain health.

Man Cereal now sells cereal with creatine (complete with manosphere-coded branding), and Joyburst is set to launch a creatine soda, leaning hard on the nostalgia trend.

On the more radicalised side of the sphere, **SternVitamin** is set to launch

a new longevity premix, **SternVita** Longevity, at Vitafoods Europe 2026 in Barcelona, a formula containing vitamins B, C, D3, K2 B12, B6, pantothenic acid, folic acid, selenium, coenzyme Q10, magnesium, green tea extract and taurine.

With food labels increasingly reading like a medicine insert, it's not a huge stretch to see where the optimisation trend is.





Taken far enough, this has the potential to render meals inefficient. If every nutrient can be isolated and optimised, why even eat food?

Continuous glucose monitors like Dexcom, microbiome testing from Zoe, and blood panels from Rythm create feedback loops that treat the body as a system to tune. The Yuka app scans products for UPF content and nutrients.





“

In the next five to ten years, wearables won't just be tracking our health; they'll connect to AI agents that shape what goes into our shopping baskets...”

Naeem Lakhani, Founder & Managing Partner, First Thirty Ventures



We predict that these broadened definitions will continue to grow, pushing us into areas once reserved for the realm of science fiction.

It's not a huge stretch to see how the traditional idea of 'meals' might become null and void in the near future, with targeted snacking taking centre stage.

A molecular model with food items as atoms. The atoms are connected by thin, translucent rods. The food items include a brown, fibrous, spherical cluster (top center), a white, oval-shaped object (top right), a purple, cube-shaped object (bottom left), a green, round object (bottom center), and a yellow, cube-shaped object (bottom right).

But what disappears when food becomes fuel?

“Meal in a pill” and “no food diets” **might sound fantastical, but the cultural scaffolding is already beginning to exist.**

The Wolverine peptide stack (BPC-157 and TB-500 for muscle recovery) shows bio-hacking communities already treat the body as programmable.

The cost-of-living crisis accelerates this: if you can only afford less, optimising feels rational.

We’re seeing a new class divide emerge: not between those who eat well and poorly, but between those who eat food and those who consume nutrients.

Do we reach a point where efficiency undermines proper meals? Parts of the population are already there.

The rest are browsing the menu.



DEATH OF THE EMPTY CALORIE

The calorie is being dethroned as the primary unit of food measurement, replaced by **“Nutrient Velocity”**.

In a GLP-1 world where appetite is scarce, every bite must work overtime.

We are shifting from volume-based eating to a high-density “Value-Per-Mouthful” economy where high fat or sugary food isn’t purely placed in the treat category but re-imagined as

a delivery vehicle for optimised nutrition.

Brands can play into this by repositioning food and drink occasions as indulgent-coded, functionally elite moments of optimisation.



**MICRO
TREND**

BIOLOGICAL PROGRAMMING (BIO-SYNCING)

Eating is moving from a social act to a systems-management task.

Driven by the #fibremaxxing and peptide subcultures, consumers are treating their bodies as hardware to be optimised. This is “Input-Output” dining: matching nutrient intake to circadian rhythms and real-time blood panels to achieve specific metabolic or cognitive outcomes. In a regulated world where brands can’t easily advertise indulgence,

health itself becomes the new indulgence signal.

Brands should consider neuroaesthetic design to stand out, with the creation of neuroscience-led packaging and activations that spark genuine chemical reactions from consumers.

**MICRO
TREND**



THE GREAT NUTRI-DIVIDE

A new socio-economic class system is emerging based on the “Purity of Fuel.”

The divide isn't just about organic vs. processed; it's between those who still eat traditional, inefficient “meals” for pleasure and the elite “optimisers” who consume precision-engineered micro meals. If portions shrink, brands need iconic single bites/sips with maximum recognition and satisfaction.

Where possible, offer permissible options crafted deliberately to enhance pleasure with less guilt.

**MICRO
TREND**



POLYCRISIS PALATES

● CLIMATE ● MAHA ● UPF



**Perhaps it's time we stop
being squeamish and start
embracing the weird.**

From the carcass of the Nose to Tail eating trend, we're seeing an evolution in meat consumption and what parts we see as culturally acceptable to consume.



A PMC report from 2024 found that the global increase in demand for meat has lead to **substantial quantities of by-products.**

This includes edible offal from both wild and domesticated animals raised for diversified consumption products within an agricultural framework.

The findings indicate that edible offal is characterised by a nutrient concentration often surpassing that found in skeletal muscle. Offal also has potential health benefits. It's packed with

protein, vitamins, minerals and essential fatty acids and often contains more nutrients than the meat that we would usually eat.

For example, **100 grams of liver provides around 36% of your recommended daily iron** but eating the same amount of **minced meat would provide around 12%.**



Beef tallow (fat), a fat that both cardiologists and the federal government told Americans to avoid for nearly half a century, has become an unexpected breakout star in the new federal dietary guidelines, so much so in fact that consumers spent

\$9.9m on food-grade beef tallow in 2025

with **sales up 96%** from the previous year, and **Whole Foods** naming the **‘Tallow Takeover’** one of its top trends for 2026.



We need to pay attention to where the tallow is actually going.

Not into virtuous salad dressings. Into frying. Into snacks. Into the kind of food that makes your fingers shine.

Fat Brothers sells beef tallow for home cooking. **Chomps** sells meat sticks - high-protein, high-fat, portable, the kind of thing you eat with one hand while scrolling.

The nutritional halo of “ancestral eating” is quietly laundering indulgence.



A rose-shaped snack made of salami, with green leaves and a stem, positioned in the top left corner.

This is the tension at the heart of the animal trend:

A rose-shaped snack made of salami, with green leaves and a stem, positioned in the top right corner.

offal and by-products carry genuine nutritional density, but the formats that will bring them to mass consumer adoption look a lot like HFSS. Bone marrow is nutrient-rich. Bone marrow butter spread on sourdough and grilled until it pools is also spectacularly high in saturated fat. Tallow-fried chips are, by any regulatory measure, still chips.

Blood sausage crisps (and they're coming, make no mistake) will sit in

the same HFSS category as any other savoury snack. The ingredient story changes, but the macro nutrient profile often doesn't.

And that might be exactly the point. The anti-UPF movement has created a permission structure where provenance trumps nutrition labels.

A large rose-shaped snack made of salami, with green leaves and a stem, positioned in the bottom right corner.



“

Consumers won't just be buying bone marrow or liver - they'll be **buying the farming system behind it.** If brands want to sell these foods as authentic and regenerative, they'll need to demonstrate that the animals were raised to standards that reflect those values”

Honor May Eldridge

Author of The Future of Food: Issues and Innovations in the 21st Century and Beyond (Bloomsbury, June 2026)



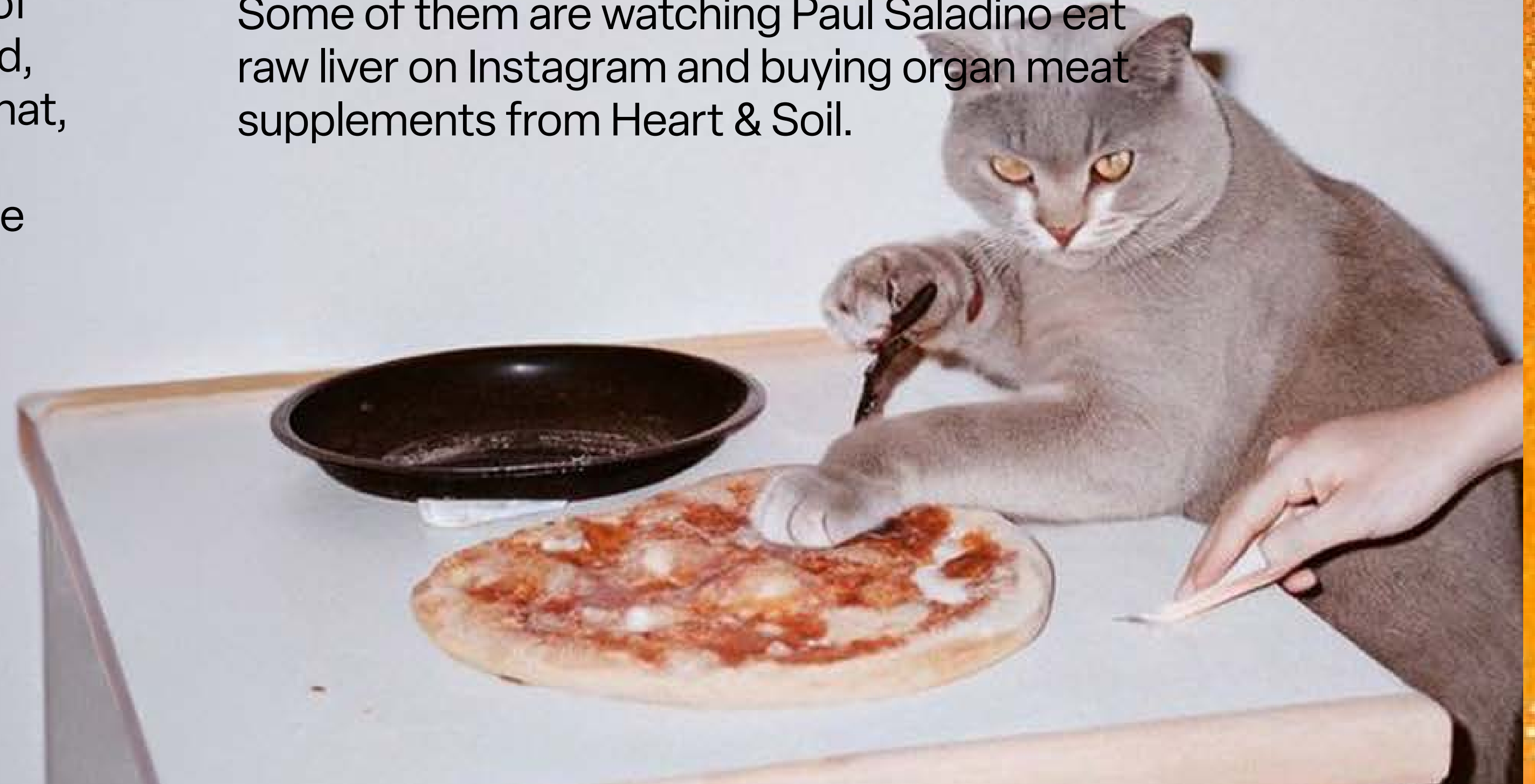
A tallow-fried doughnut from a regenerative farm feels morally different from a seed-oil-fried doughnut from a factory, even if the calorie count is identical. “**Primal nutrition**” gives consumers a narrative that lets them eat rich, fatty, salty food and feel righteous about it. Stretching the Dionysian into the realm of the home, **Primal Pastures** creates luxified, beautifully photographed offal packages that, according to the reviews, seem to blur the lines between luxury pet food and exclusive human food.

VML’s **Future 100** report notes that meat has been culturally repositioned as a counterweight to industrial food systems.

67%

of Gen Z say they’ve eaten more meat or the same in the past six months, they’re not all grilling chicken breasts.

Some of them are watching Paul Saladino eat raw liver on Instagram and buying organ meat supplements from Heart & Soil.



The real commercial opportunity
sits in the **gap between the wellness
story and the sensory experience.**



Consider what happens when you apply HFSS product development to **unused animal parts.**

Crispy chicken skin seasoned with MSG and sold in foil packets. Liver pâté repositioned as a high-protein dip competing with hummus. Marrow bones packaged for roasting at home, positioned somewhere between a ready meal and a ritual. Spleen and kidney slowly entering the supply chain through pet food (already happening) before crossing over into human snacking.

The podcast **Freakonomics Radio** recently questioned the ‘reductionist’ approach to nutrition, arguing that you can’t reduce a herring to its omega-3 and call it equivalent. The same logic protects these products: if the ingredient is “whole” and “ancestral,” the fat and salt become features, not bugs.

Where it gets properly strange is further out.

Fermented organ meats (think nduja made from offcuts), or a shelf-stable liver spread with the tang of kimchi, occupy a space between health food and dare food that social media loves. Courses in home butchery and meat preservation are selling out, teaching skills that sit halfway between survivalism and sourdough-era hobbyism.



And we're here for it.

The aesthetic for the future of HFSS is part wartime rationing, part hunter-gatherer fantasy, part content creation opportunity.





Consumers are increasingly willing to eat strange, rich, fatty animal products if you give them a story that sidesteps the guilt.



The story right now is anti-industrial, pro-ancestral, and wrapped in the language of whole-animal respect.

The format is indulgent. The margin on by-products is enormous: you're literally selling the bits the industry used to throw away. And the cultural window is wide open, held apart by the unlikely alliance of carnivore influencers, climate pragmatists, and grandmothers who never stopped making black pudding.

**Nose-to-tail is “less waste,”
but carnivore content often
ignores climate.**

Expect a split:

CLIMATE PRAGMATIST =

*“use the whole animal if
we’re eating it”*

CLIMATE PURISTS =

“this is regression”

Brands need a stance or they’ll get shredded from both sides.

VIRTUOUS INDULGENCE (THE ANCESTRAL HALO)

Offal and tallow are being sold as “clean” because they’re **whole and traditional**, not because they’re light.

Provenance is replacing the nutrition label as the moral scoreboard. Expect to see this rise as a form of resistance to HFSS regulations, a powerful counter-current toward food systems that predate all of it: diasporic supper clubs, grandmother-cooking, and ingredients with deep geographical lineage (heritage grains, indigenous chillies, native dairy cultures).

People want to eat rich, salty, fatty

food and still feel like they’re resisting Big Food. Brands acting in this space should bring in genuine scientific claims to back up what consumers already intuit - whole ingredients are superior to those created in a lab.

In a world where food is increasingly engineered, the most premium positioning available may be “this dish has been eaten in this form for 400 years.”

**MICRO
TREND**



BY-PRODUCT GOES PREMIUM: SURPLUS TO SUSTENANCE

The bits once hidden (liver, hearts, skin, marrow, fat) are getting luxe packaging, chef cues, and **“regenerative storytelling”**

It's nose-to-tail, but through the language of modern wellness and status snacking. We foresee this continuing to rise, with consumers seeking out the weird and wonderful as a form of cultural flex.

Consider how language and packaging can turn the 'yuckiness' of animal products and offcuts can be reframed into something clean and Instagram-friendly.

**MICRO
TREND**



SNACKIFICATION OF THE ANIMAL

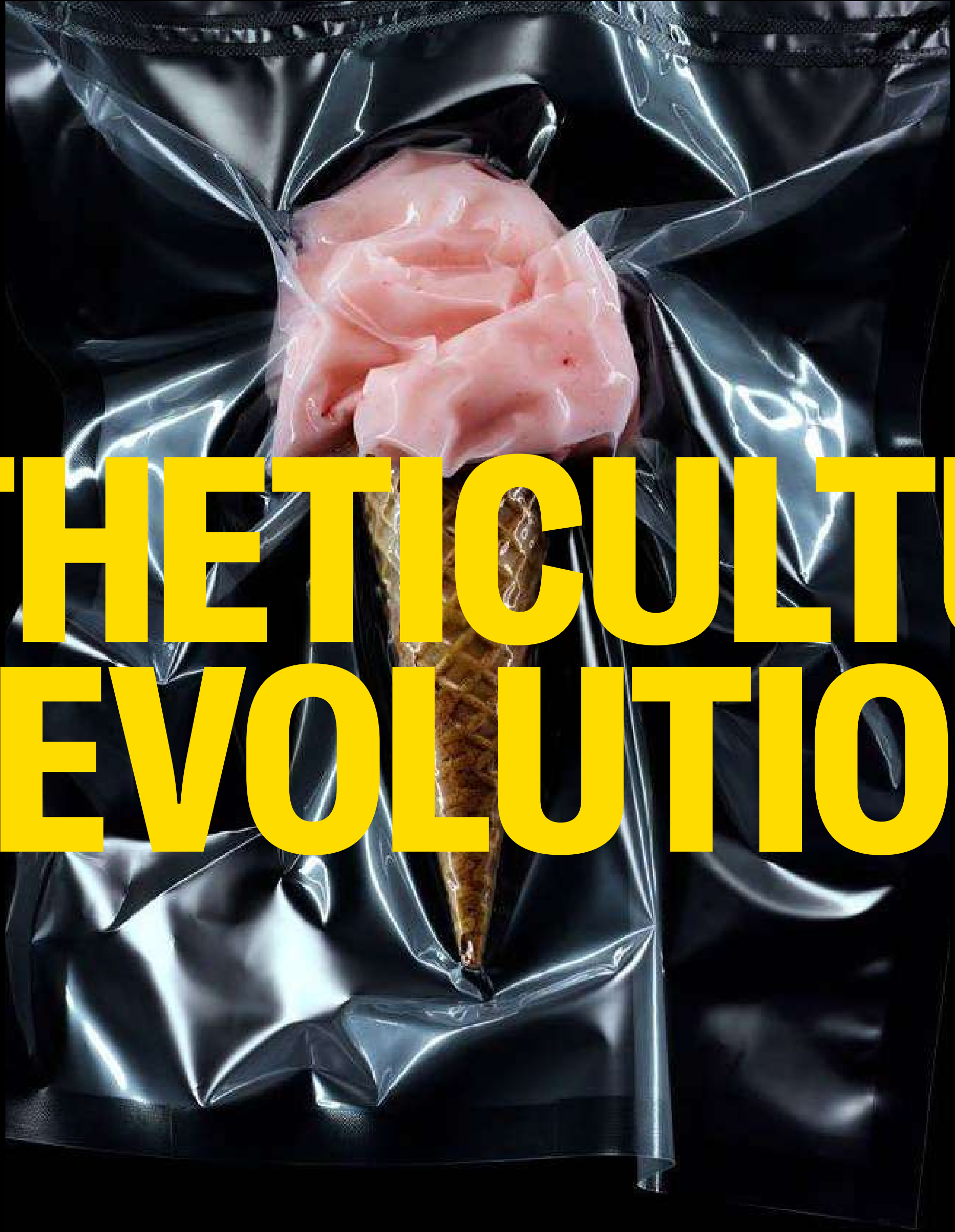
Mass adoption won't come via home cooking.

It comes via formats people already buy: sticks, crisps, dips, spreads, frozen bites, “protein” snacks.

Offal moves in under familiar shapes: HFSS behaviour in a different costume.

Brands in the snackosphere should start here if they want to bridge the gap between ‘eww’ to ‘ohh’

**MICRO
TREND**



SYNTHETICULTURAL REVOLUTION

- BIOHACKING
- CLIMATE
- HEALTHY FOOD REGULATIONS

Twelve thousand years ago, humans stopped following their food and started growing it. That decision, modest, incremental, world-altering as it was, is what we now call the First Agricultural Revolution. Everything since has been a refinement of the same basic idea: field, seed, animal, harvest.

**With the impact of HFSS regulations,
we are about to leave that idea behind.**





The pressure is real and the numbers are unambiguous.

The combined mass of agricultural livestock is now 1.8 times bigger than all the humans on Earth.

Around 1.3 billion animals are slaughtered for food each year. Methane released by ruminant animals is one of the major contributors to global warming, and unlike CO₂, methane does decay, with a 12-year atmospheric

lifespan. Meanwhile, global population is approaching its ceiling. Projections place the peak at around **10.3 billion** people in 2084.

Getting there will require a **26%** increase in global protein supply just to feed everyone adequately.

Today, **75%** of our calories come from only 12 crops and 5 animals. The portfolio is dangerously narrow.



So the question becomes urgent: **where does our sustenance come from?**

Some answers are ancient. Beans and pulses have been cultivated for more than **3,000 years**; they deliver **20–30%** protein alongside dietary fibre, and they've fed civilisations. Brands like Hodmedod are recovering that tradition with quietly radical intent.

Other answers are arriving from an entirely new direction. Impossible Foods ferments soy leghemoglobin - the same heme iron that gives meat its distinctive, bloody taste - in tanks, then blends it into plant-based products.





Perhaps the answer might instead be hidden at a microscopic level;

Cellular agriculture companies like **Upside** and **Hoxton Farms** are **growing meat from cells** rather than slaughter. Across the **FoodTech 500**, around **12%** of finalists are working in protein fermentation or cellular agriculture alone.

Evolution is life's oldest problem solver, and **AI is giving it a serious speed boost.**

While the Syntheticultural Revolution leverages advanced technology to create new paths forward; **Avalo's "Rapid Evolution Platform"** uses AI to evolve plants the way nature has for millennia (through high-diversity genetic recombination). They use Interpretable Machine Learning to direct and accelerate natural evolution at unprecedented speed and scale.

The result is crops with nature-based genetic resilience, ready for market in a few years rather than decades, and without the synthetic solutions that push up R&D costs. While their first crop is a fiber (a new variety of cotton evolved for the increasingly arid weather of

Texas's cotton region), they are working on innovative food crops like broccoli that matures before pests can eat it, tomatoes that can withstand more extreme heat, and staple crops that need fewer inputs like synthetic nitrogen and pesticides.

For brands, this points to a version of food innovation that leans on AI to deliver produce that feels more natural, rather than less; opening up questions about how we can utilise technology in a more meaningful way.



On the drinks side of things...

Hopkind combines traditional brewing with functional ingredients for muscle recovery and hydration.



Branch & Barrel created with field peas



Sylva non-alcoholic whisky made from wood.

Julian Schildknecht, Head of Brand and Growth at **MicroHarvest**, thinks the answer could rest in fermentation.



We caught up with him to discuss the future of the alternative protein industry, a topic on which he had much to say:

“

At MicroHarvest, we take agri-food side streams, and place them in fermenters with microorganisms.

Twenty-four hours later, we have natural, very tasty protein. It's the only alternative protein technology that has proven to scale already,”

Schildknecht says.

“Precision fermentation and cultivated meat are also exciting innovations with real potential, but they are still earlier in their scale-up journey. What makes biomass fermentation particularly compelling is that it has already proven it can scale.”

Nonfood

makes nutrition bars from it (7g of protein in a single 35g bar).



Algae Cooking Club

makes oil from algae.



Solar Foods

has developed Solein, a complete protein grown from a single-cell organism using CO₂, hydrogen, and water: protein, quite literally, made from air.



Day8's Rubisco

extracts protein from the leaves left behind after conventional harvests, a bridge between farming as we know it and something we don't yet have a name for...

Perhaps that's the point

'Agri' means field. But what we're building now doesn't belong to the field. It belongs to the lab, the fermentation tank, the thin air above us. If the word agriculture can no longer hold what we're doing, it may be time to coin a new one. Something more scalable, faster, with the scientific credentials to match the speed of change that technology enables.

We see the syntheti-cultural revolution (from syntheticus: put together) as the fourth agricultural revolution, and the first that breaks from the logic of all three before it.

**Not a change in method.
A change in medium.**



**Twelve thousand years is a long time
to farm the same way. The transition,
when it comes, will feel fast.**

For brands operating in or adjacent to the **alt-protein space**, the strategic takeaway here is that naming is adoption infrastructure. Contrasted with fermentation, insect protein, struggles precisely because it has no equivalent cultural shorthand to lean on.

**You can't put “insect”
on the front of pack and
expect the same warmth
as “fermented.”**



The products that cross over from niche to mainstream will be the ones that find their “**fermentation**,” a single word that makes the unfamiliar feel inherited.

Novel products meets ancestral heritage

Consider how your ingredient story (whatever it may be) connects to something consumers **already do, already eat, already trust**.

The gap between a fermenter in Hamburg and a sourdough starter in Hackney is enormous in engineering terms, but from a consumer psychology perspective, it barely exists.

CRETACEOUS CUISINE:

Sometimes the most prevalent future trends can be found by **analysing the past.**

In March 2023, Australian cultured meat company Vow unveiled a lab-grown meatball made from reconstructed woolly mammoth DNA.

This time last year, in a laboratory at the University of Liverpool, scientists discovered living collagen tissue in a hip bone from an Edmontosaurus (a duck-billed dinosaur that roamed the earth 66 million years ago).

We expect this interest in cell-culturing to continue, with once seemingly extinct food gracing the plates of the uber wealthy. It's not a

stretch to assume that somewhere right now there is a brand seeking to replicate the dinosaur collagen discovery for a next-gen gym supplement; marketed with phrases like **“Cretaceous-grade Creatine”** or **“Palaeontologically-verified formula.”**

After all, nothing says heavy lifting quite like an apex predator (move over Bear Grip).

**MICRO
TREND**

EDIBLE AUGMENTED REALITY (EAR):

Originally in the realms of Sci-Fi fantasy, the future of 3D printed food is very much here, with a recent report by Zion Market Research predicting the value of the global 3D food printing market to triple to \$1.65bn (£1.29bn) by 2030.

Whilst still primarily being explored by innovative tech-savvy bakeries and manufacturers, we envision a future where you can download and 3D-print your favourite flavours at home (a la Star Trek replicator) using “taste cartridges,” paving the way for infinite flavour possibilities in your kitchen. With new EU regulations mandating

that only traditional meat-based products can be called a ‘burger’ or ‘sausage’, brands should take that as a challenge: novel products need novel names.

What if your brand offered ‘protein discs’ or ‘nutrition cylinders’? How might those product names affect the TOV or packaging?

**MICRO
TREND**

SYNTHETIC TERROIR:

Terroir is one of the most protected concepts in food culture.

It is, in essence, the argument that geography is flavour, and taste is the passport. Entire economies and legal frameworks (PDO, PGI, AOC) are built on the premise that you cannot separate what something tastes like from where it was grown.

If flavour is a function of which microorganism meets which substrate under which conditions, then terroir is no longer a geographical fact, but a bioengineered recipe.

One that can be written, rewritten, and distributed anywhere in the world.

If a fermentation facility in Hamburg can produce proteins with an umami depth usually associated with the funk of a decades-aged Lombard Bitto Storico, then the question becomes whether terroir will continue to have meaning at all. We foresee a world in which a startup could develop a proprietary “Terroir” that exists only as a set of biological parameters: strain, substrate, temperature, time.

Flavour as intellectual property, taste as software.

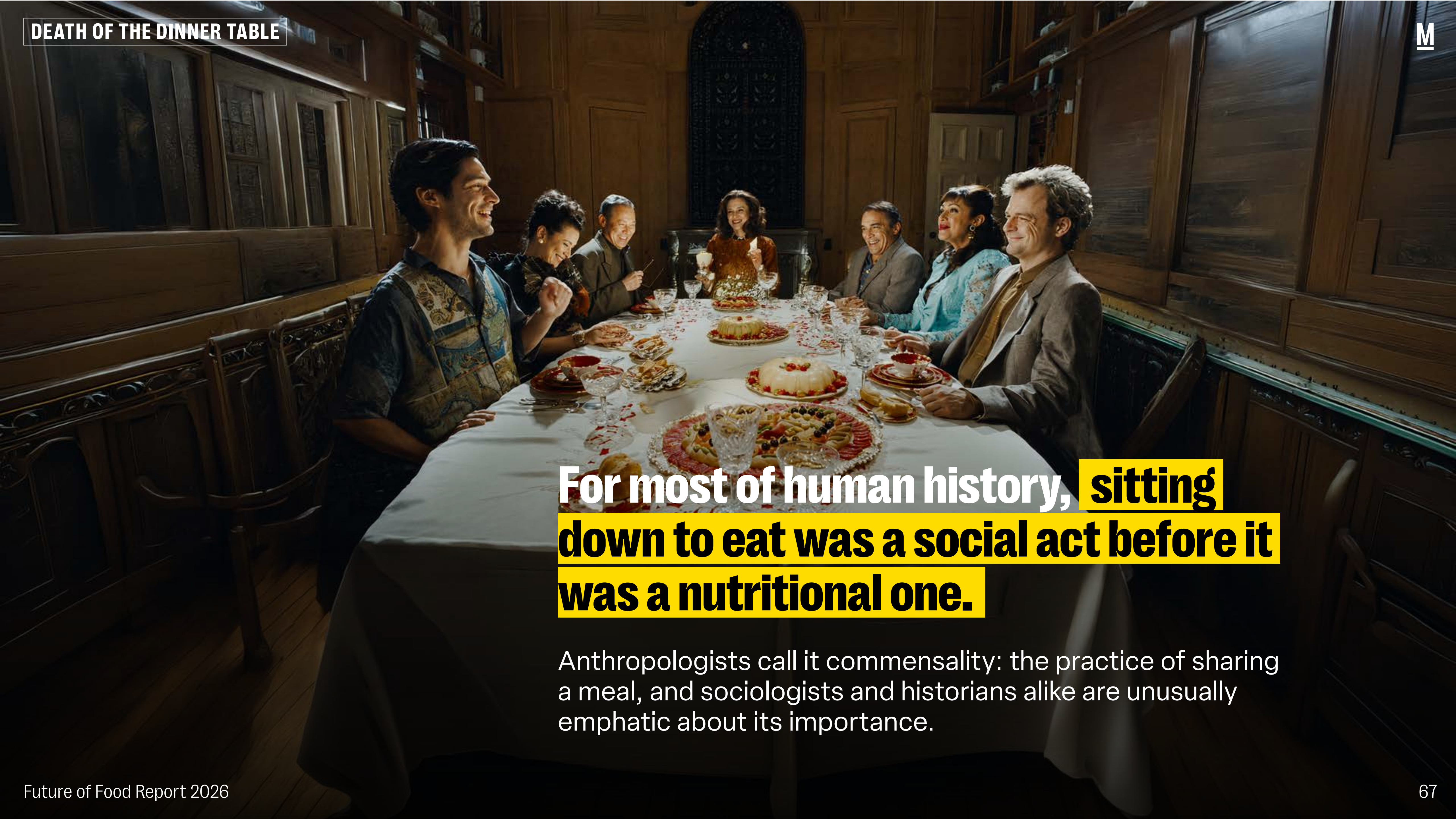
MICRO TREND



DEATH OF THE DINNER TABLE



● GLP-1 ● COST OF LIVING

A group of seven people are seated around a long, white-clothed dining table in a room with extensive wood paneling. The table is set with various dishes, including a large platter of food, several glasses, and plates. The people are engaged in conversation and eating. The lighting is warm and focused on the table.

For most of human history, sitting down to eat was a social act before it was a nutritional one.

Anthropologists call it commensality: the practice of sharing a meal, and sociologists and historians alike are unusually emphatic about its importance.



Evolutionary anthropologists at The University of Oxford frame commensality as a primary driver of social bonding; the *Journal for the Theory of Social Behaviour* goes further and calls it a “social tool”, an “innovation for the organisation of complex behaviour” that built civilisation alongside language and reciprocity. Simply put, we are social to satisfy nutritional needs, but we also eat to satisfy social needs.

The dinner table, in many ways, across many cultures, has been doing far more for us over the centuries than just holding the plates.

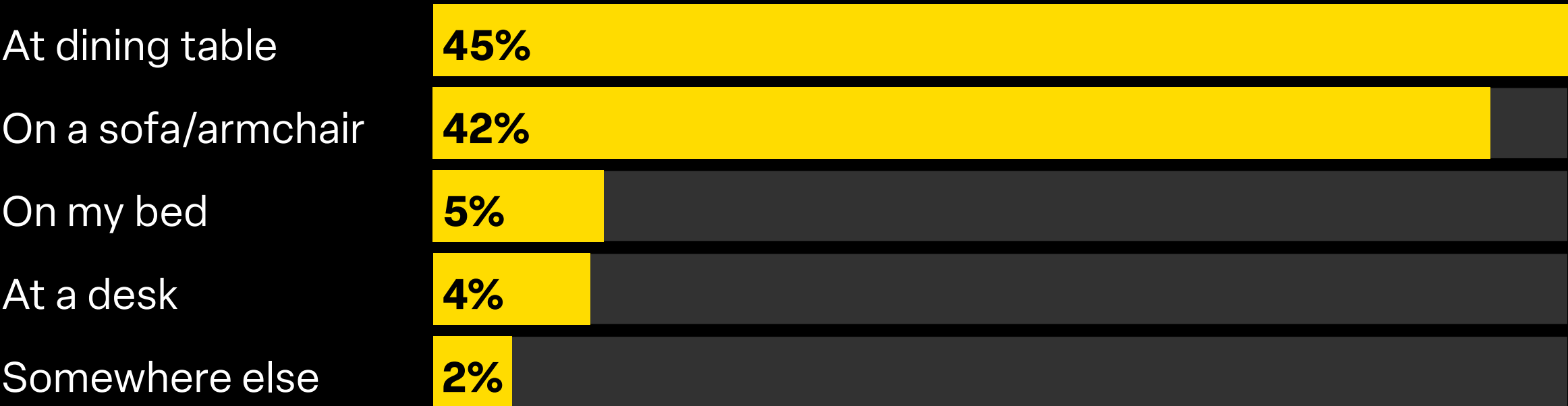
In 2026, it is in danger of disappearing entirely.



The lowest of any Western country **YouGov** surveyed. According to the **2026 Food Trends Report** from **Yum! Brands** and **Collider Lab**, once social foods like pizza and chicken wings are now being reimagined for one (The Me-Me-Me Economy), with solo-dining more likely to centre around convenience and function rather than style and taste.

Britons are as likely to eat their dinner on the sofa as they are the dining table

When you eat your main evening meal at home, where do you tend to eat it? %



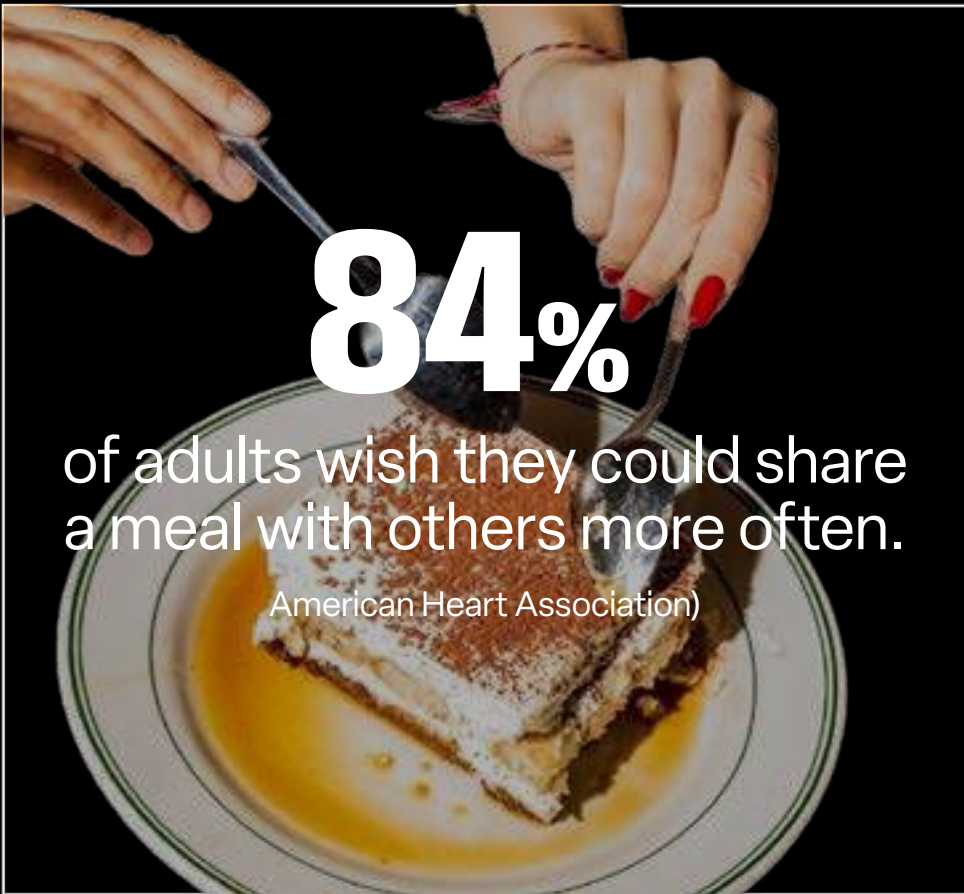
Source: *YouGov*

Time for some stats...



42%

eat from a sofa or armchair.



of adults wish they could share a meal with others more often.

(American Heart Association)

1 in 5

people within co-habiting households say they eat in a different room or at a different time from the people they live with.

A figure that climbs to **38%** among **18-24-year-olds**.

10/21

The average adult eats 10 out of their 21 weekly meals alone.



91%

of parents say their family is less stressed when they do share meals.

(American Heart Association)



39%

eat with their TV on.

The hunger for the impact of the dinner table as a social tool has not gone anywhere.

The dinner table has.

What broke the table?

Meals are, at heart, part of our social architecture. Dinner tables host family negotiations, dates, business deals.

Cooking as an act is sensory and tied to memory, yet maximally efficient diets risk reducing this to logistics.

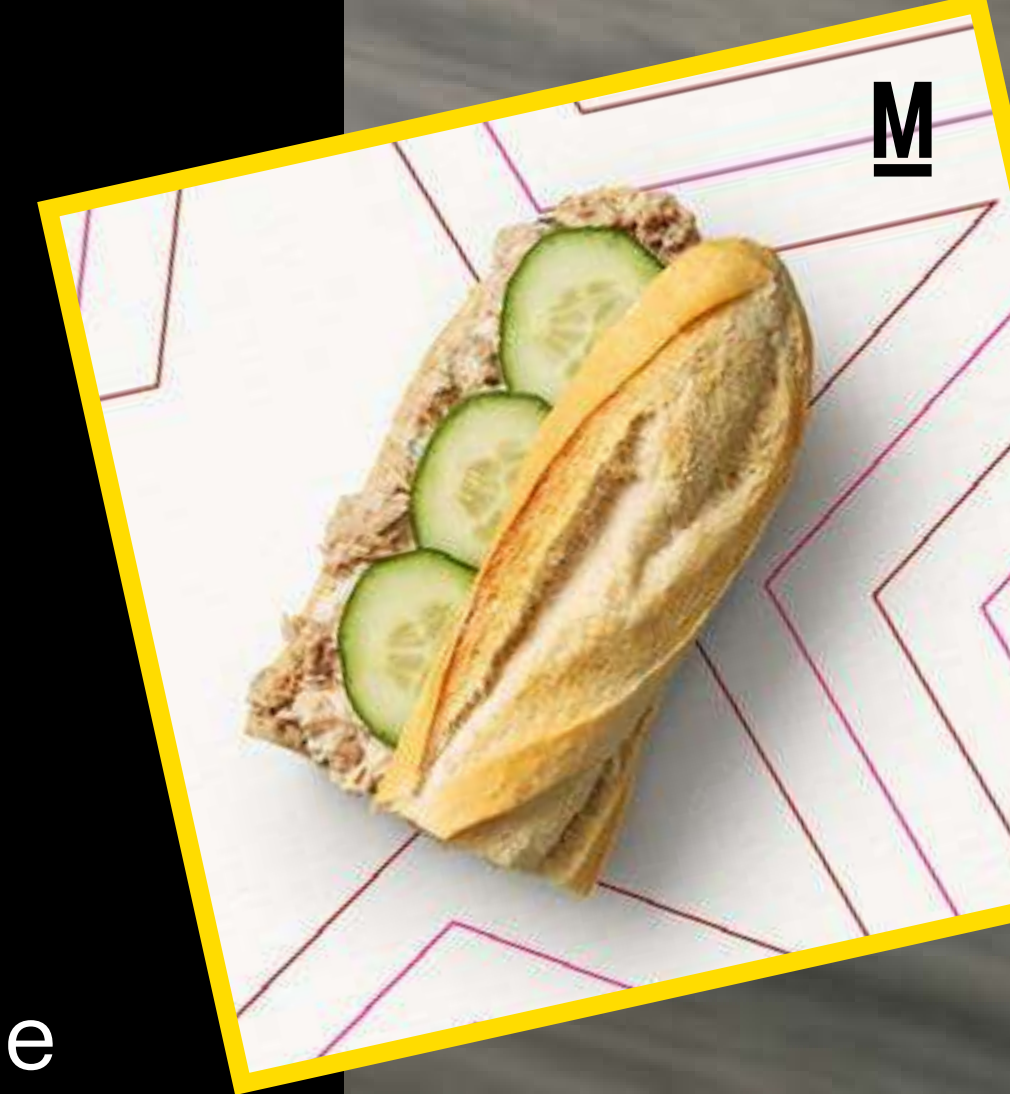
The dinner table was killed by the same set of forces shaping the rest of this report. As GLP-1 medication hollows out the quantity of the meal, the societal value of the dinner table as a pivotal space has likewise undergone shrinkage.

A recent Bloomberg Intelligence survey found that more than half of users dine out less since starting the drugs, and one Manhattan restaurateur described diners on Ozempic taking “one or two bites of food and a couple of sips of drinks” before they were done.



Adding to this, hybrid work combined with weight jab related hunger needs has systematically rebuilt the lunch occasion around smaller portions and ‘picky bits’, with food-to-go companies like **Greggs launching mini versions** of their sausage rolls across select stores and a new range of healthy salad options. **Pret also relaunched their ‘half’ range**, now including half flatbreads and baguettes, and mini soups.

Furthermore, **app-based ordering has stripped service from casual dining**: as **Creative Brief** observes, you are shown to the table, handed a QR code, given your food in under 45 minutes and asked to settle the bill via an app you didn’t want to download.



A gloved hand holding a fork over a plate of food, with a television screen in the background showing a woman's face.

The slower moments (the small talk with staff, the second glass, the lingering over coffee) have been efficiency-engineered out as **second screen eating becomes more prevalent.**

Across the casual-dining sector, the model that tried to be both convenient and convivial is being squeezed from both sides: out-priced by delivery and out-storied by experience-led restaurants. What is emerging in its place is a sharp bifurcation: the dining occasion is splitting into a hyper-functional pole and a hyper-ritualised one, and **brands that try to live in the middle are running out of room.**

The functional pole: food as fuel

At the functional pole, the meal is dissolving into the day. If we look at **Whole Foods 2026 Market Spotlight**, the rise in restaurant quality freezer food (Freezer Fine Dining) and improved quality of ‘instant’ options has radically shifted the meal from a sit down affair to a secondary thought, eaten on the sofa with one eye on a screen and another on the clock.

Food has become legible as fuel, as input, as nutrient-density per minute of preparation.

The dining ‘occasion’ in this register is barely an occasion at all, it is closer to refuelling.

The human equivalent of a race car in a pit-stop, here and gone in a moment, the more efficient the better.

The Ritualised Pole: Food as Glue

At the ritualised pole (a backlash to the speed and efficiency of functional food), the meal is becoming an event you have to earn. **Dishoom** is the perfect case study for this: turnover up from £116.8m to £137.1m in 2024, a US opening this year following a 10-day NYC pop-up that served 7,000 with another 20,000 on the waitlist. The playbook (storytelling, unhurried service, transporting interiors) demands attention from diners used to scan-and-dine experiences; it is the fundamental reason for the restaurant's success (along with their signature Black Daal of course!).



of this cultural backlash to speed perfectly in their Friction Reloaded report:

“when everything is available instantly, nothing feels earned”.

Friction has become luxury and service, theatre and lingering are what diners now happily pay extra for.

The home is now following the same logic with different infrastructure. Waitrose’s Dishpatch sells named-chef meal kits; La Rana reheat options; Ottolenghi’s spice blends that let people stage a curated dinner without the weeknight tax of decision-making; Dabba Drop translates the Mumbai tiffin into anti-convenience home delivery.

Even global drinks brands are starting to challenge this tension...



*Coca-Cola's Global campaign:
The World Will Wait*



*Coca-Cola's Working with content
creators to encourage people to step
AFK (away from keyboard)*

SYNCHRONISED DINING:

As eating physically alone becomes the default, the act of **eating together is migrating to the screen.**

This is mukbang going mainstream Western, but more than that, it's a wave of new formats where commensality is digital-first and long distance: Twitch chef-streams with synchronous chat, "co-watch" dinner Discords, ASMR eating channels with parasocial dinner companions, and apps that match strangers for video-call dinners the way Strava matches them for runs.

Brands could design products for the format: single-serve meal kit

episode-and-dinner drops with streaming platforms, ad-supported chef-dinners you tune into live. In the next five years, "having dinner with someone" may not require either of you to leave the sofa, and that may be a gain, not a loss.

The cultural campfire becomes literal; flickering, screen-shap



CHRONONUTRITION:

We aren't just eating alone; we are often eating at the wrong times according to some.

As wearable tech continues to optimise our health, many users are starting to pay closer attention to how the times they are eating are impacting their overall consumption statistics.

With Dexcom changing the game for glucose monitoring, and the NeckSense wearable necklace capturing fine-grained information about an individual's eating activity and eating episodes,

the opportunity here isn't just 'snacking,' it's designing foods specifically for 11 PM or 6 AM that don't spike glucose, that aid digestion and fit within the needs laid out by our wearables.

This is already the entire brand mission for Cycle.

Me, a proprietary sustenance drink and food company from Japan.

**MICRO
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THE UNREPEATABLE TABLE:

As the dining occasion splits between sofa-side refuelling and high-ritual experiences, a more radical edge is forming:

Dining experiences designed around proximity to the ingredient source itself. Terrain-responsive dining is already emerging (**Under** in Norway, treetop restaurants in Thailand, multiverse omakase dining in Singapore, tide-to-table dining in the Southwest of the UK), but the next move is where the landscape stops being backdrop and starts becoming the menu.

Foraging-to-table guided walks where diners pick their own course from the forest floor. Glacier dining

where the ice meltwater forms part of the drink pairing. Coastal experiences where the tidal window dictates the length of the sitting. 'Return harvest' dining, where guests plant ingredients months in advance and come back to eat what grew. At the furthest edge, the table itself becomes part of the terrain: woodcarved on-site from fallen timber, assembled as a group before the first course is served, left behind when the meal is over.

**MICRO
TREND**



What unites these formats is that the experience cannot be repeated. The tide will be different, the forage will be different, the weather will be different. That unreproducibility is the entire value proposition, the direct inverse of a chain restaurant that promises consistency everywhere. In a food culture increasingly shaped by algorithm-driven efficiency and nutritional optimisation.

The most compelling counter-offer may be a meal that **only existed once, in one place, for the people who were there.**

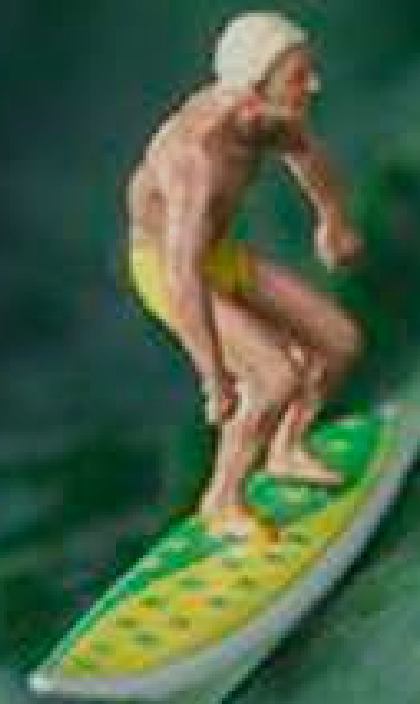
CONCLUSIONS AND PROVOCATIONS



The tides of change are rapidly turning around us. More than in previous decades, the impetus for change is coming from all sides; everything, everywhere, all at once.

The challenge for brands is identifying where to focus energy, and which wave to catch.

No one field of play exists in a vacuum; each is built from a combination of the same building blocks. We have identified three currents that run through each of the fields of play explored in this report, with provocations to spark productive conversations at brand level.



Transitional Camouflage

Geopolitical and environmental pressures are squeezing traditional food sources, and alternatives are rushing in. Some enhance the real thing (protein-fortified milk), while others mimic it using novel engineered alternatives.

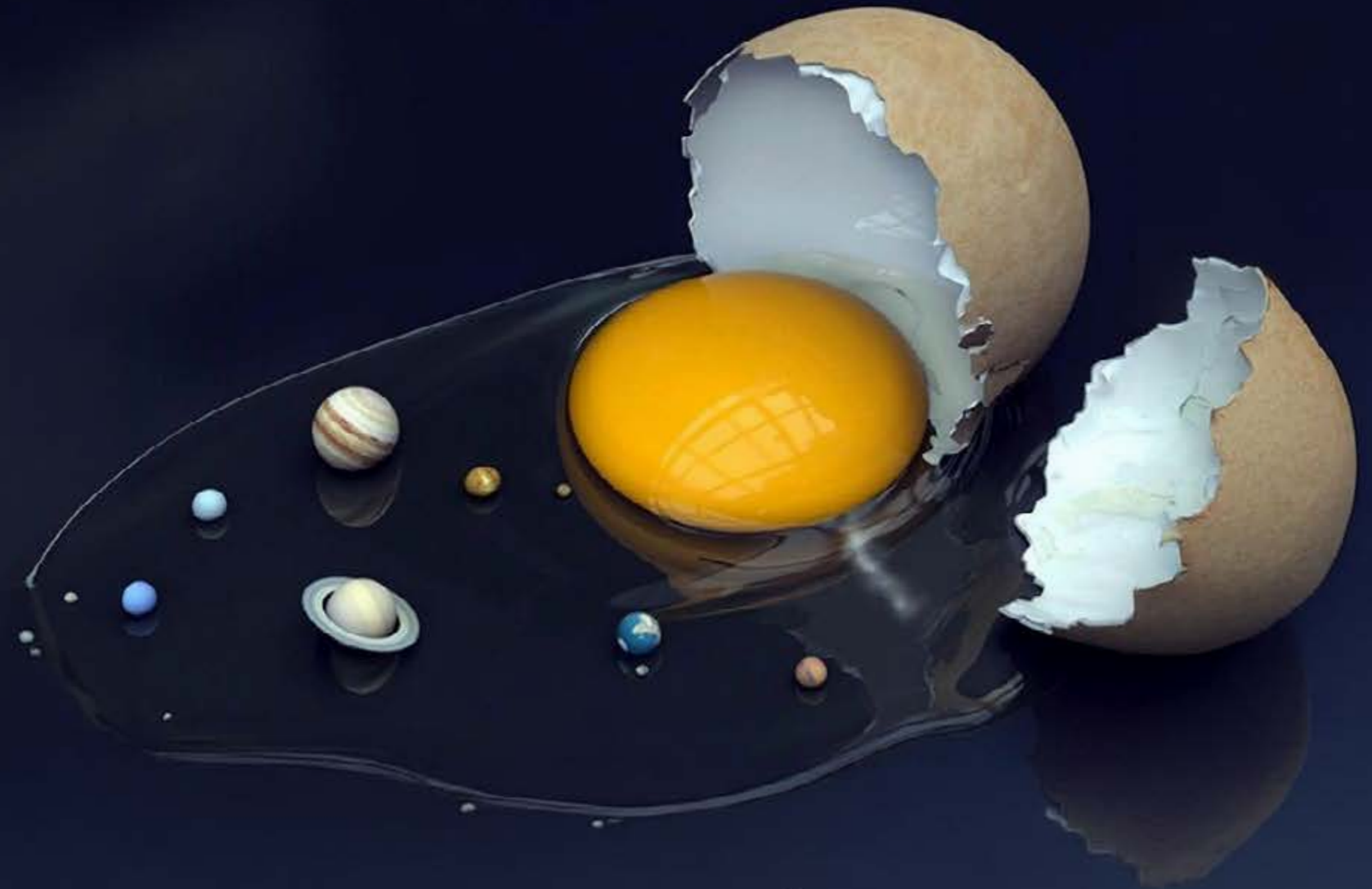
The danger for brands is that if it looks like a duck and quacks like a duck, consumers won't care that it's actually a lab-grown cell culture duck breast - **don't get left in the pond.**



Planetary Arithmetic

With consumers increasing concerns around ultra-processed foods, reading the back of the pack is becoming standard. It won't be long before this impulse broadens, with consumers becoming more educated on the food system's effects on the planet.

Metrics like methane impact, land and water usage, and carbon emissions will be genuine choice factors, and brands using more eco-friendly ingredients will start to leverage this as a challenger position.



Indulgence Maxxing

If our everyday eating is becoming more pared back and functional, **celebratory eating will become heightened**: more sensory, more experimental, more indulgent.

Intensity will become the centre of gravity for these letting loose occasions, and brands that can tap into this **‘everything, now’** mindset and make the experience feel worth the cost and calories will be able to build real connection with consumers.



THANK YOU

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ABOUT MISSOURI

We're a branding and design agency. We believe that strategic creativity and design can be the unifier of brand experiences, and the key to making everything a brand does more cohesive and effective, building equity and driving sales.

From positioning to platform and packaging to point of sale, we understand how to help brands show up in ways that make people stop, shop and share.

OUR FORESIGHT APPROACH

For us, the art of trend mapping is just that; mapping. In order to understand the future of any category, we track the contours, chiseling away each layer until a clearer picture is formed. Sometimes this means pushing through soil, sometimes rock. The important thing is to uncover the whole landscape so that we are able to gather the clearest view of the architecture that the future might rest upon.

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Julian Schildknecht / Microharvest

Naeem Lakhani / First Thirty Ventures

**Want to discuss
what this could
mean for
your brand?**

Get in touch with:

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MORE OF A LISTENER?

We presented a 45 minute summary of the report to a full house of F&B marketers and trend seekers. For the full webinar recording, click below:

CLICK TO WATCH 

