



YOU ARE *WhAt* YOU *&* EAT

TRENDS BEHIND *FOOD* & *BEVERAGE* TRENDS

COOKED UP BY

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INTELLIGENCE
ZENO

Intr^oduction

ONE SATURDAY AFTERNOON IN FEBRUARY, NEARLY 10 YEARS AGO, I STOOD IN A QUEUE, IN LITERALLY FREEZING TEMPERATURES, IN THE ARSE-END OF NOWHERE, FOR OVER AN HOUR, TO EAT A PIZZA.

ACTUALLY, TWO PIZZAS: ONE MARGHERITA, AND ONE MARINARA. The most basic pizzas there are. Practically the same pizza. It had been so cold in the queue I'd brought a flask with me.

Not for the first time, and certainly not for the last, I thought to myself "Why on earth am I doing this?"

Because, gentle reader, they were magnificent. And they looked amazing. They were the Platonic ideal of "pizza". You couldn't book a table, so you had to show up. Which was sort of a fun activity for a February afternoon. And the place had just opened so almost no one had been. But mainly because they were magnificent.

That recurring thought - **"WHY ON EARTH AM I DOING THIS?"** - sits behind this report into food trends.

Food is big business, and one of the dominant forces in modern culture - what you eat, how you eat, what you cook, where you dine, which ingredients you use, how it makes you look, how it makes you feel.

AND IT'S THAT CULTURAL ELEMENT ZENO IS INTERESTED IN. There's a whole industry dedicated to predicting what the trends are; what we're interested in, as a communications agency, is *why* they trend.

So this isn't a series of predictions about food trends for the year ahead. We may have opinions on that, but we don't have the data.

Instead, **it's an attempt to understand the deeper currents that make food trends trend.** Understand that and you're not reacting to fads or betting on guesswork; you're actually planning with a degree of intelligence.

They say don't sell the steak; sell the sizzle. Well, this is about understanding why the sizzle whets our appetite, and how you can make your own at home. (A really hot pan; don't dry your meat too much.)

WE'VE DIGESTED A 12-COURSE FEAST of social data and years of trend reports to find five macro trends and a whole bunch of supporting data and insight.

THE AIM IS TO GIVE PEOPLE LOOKING TO COMMUNICATE ABOUT FOOD AND BEVERAGES FOUNDATIONS TO BUILD ON WHEN PLANNING CAMPAIGNS THIS YEAR. SO LET'S TUCK IN.

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MORAL FIBRE



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SPICE UP YOUR LIFE



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WTAF?



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GOTTA (MATCHA) CATCH 'EM ALL



05

THE CONVENIENT TRUTH



MORAL Fibre: Functional Food

HELP A GENERATION PURSUING WELLNESS WITH FOOD THAT DOES YOU GOOD, AS WELL AS TASTING GOOD.



THE TWO OF THE MOST-TALKED ABOUT FOODS IN EUROPE LAST YEAR WERE:

Gut-friendly kombucha (#2) and kefir (#6).

“Mealprep” and “Protein” were #4 and #5 of the top food trends in the UK TikTok, with “High Protein” #4 in Germany.

Functional consumables are never far from the foodie zeitgeist – they’re just constantly evolving. By functional, we mean food that contributes to health, fitness and physical or emotional wellbeing, particularly if there’s a talkable pop-science element to it.

This is driven by the sheer vastness of health and wellbeing as broader, long-term cultural trends, which super-charges foods that complement it: “wellness” as a hashtag receives 104m views on TikTok a month.

Underpinning this are forces of (self-)optimisation; the emphasis on looking, and performing, “healthy”, driven by the always-on eye of social media; and the increased prominence of sports and serious fitness in wider culture. There’s also the promise of magic potions as simple solutions to complex problems – if only you could sort out your gut microbiome, you’d be slimmer, get ill less often and have better mental health.

THIS PROBLEM / SOLUTION NARRATIVE TURN IS KEY:

What makes functional food a trend is in the telling of the tale. Ideally there should be something surprising or unexpected in it, or else it needs to be part of a story, the inevitable “journey”, be that weight-loss, gut health or #gains.

Search volumes for products as varied as protein donuts, bagels and ice cream have all doubled over the last year, in pursuit of more toothsome ways of getting #swole.

25x

“increase in articles about **PROTEIN-MAXXING**” between 2024 and 2025”

+124%

social mentions of **PROTEIN-MAXXING** between 2024 and 2025.



trending

PROTEINMAXXING

ADAPTOGENS

FERMENTS

CBD

FIBRE

ELECTROLYTES

CABBAGE

GUMMIES

WHAT YOU CAN DO:

LOOK FOR THE UNEXPECTED WELLNESS BENEFIT TIED TO A CULTURALLY RESONANT HEALTH TOPIC.



Spice up your life

EDUCATE, ENTERTAIN AND INFORM PEOPLE WHO MAKE SPICE THEIR ENTIRE PERSONALITY.



FOOD AND DRINKS TREND BECAUSE OF WHAT THEY SAY ABOUT THE EATER.

And spicy food says a lot. Spice is an addictive sensation. It transcends flavours and food cultures – but it's not for everyone, which means spice can be your whole personality.



SPICE IS CONSISTENTLY HOT. BUT...

65%

of consumers report eating spicier foods today than a year ago.¹ The 2010s sriracha explosion (which is a great name for a band) was arguably the start of it.



Spicy food was the third-biggest food conversation we found in 2025, spanning hot sauce culture and spice challenges, with “hot honey” the seventh.

It's part of longer-term macro trend of food being more sensorial which touches on our Exclusive trend. Chilli peppers contain a compound that triggers endorphins and dopamine (after setting your tastebuds on fire) creating a foodie equivalent akin to Runner's High. So it's literally feel-good food. This also gives spice a content-friendly in-built narrative. Hot Ones is a great watch in the way that Sour Ones just wouldn't be.

134 MILLION

Sosig

No of times Gordon Ramsay's Hot Ones episode has been viewed since its debut in 2019



And because spice isn't for everyone it **creates an in-group**. Anyone who's received a presentation set of chilli sauces for Christmas knows what it's like to be The Grandchild Who's Into Spicy Food. This encourages self-identity, through participation. The Marmite effect is the lamb madras effect.

Spice is also a food heuristic. Because it's not a flavour, it cuts across food cultures. But if you like spice, you know you'll probably like a spicy marg, 'nduja on your pizza, a spice bag for your chips and Buldak noodles, even if you don't know what they are exactly. Put spice on the menu, which is relatively easy, and people will want it.

trending

BULDAK NOODLES

GOCHUJANG

'NDUJA ON EVERYTHING

HOT HONEY

HOT ONES

SWICY

CHILLI CRISP

WHAT YOU CAN DO:

LOOK FOR SENSATIONS THAT WILL DELIGHT SOME AND UNDERSTAND YOUR IN-CROWD VERSUS THE OUT-CROWD.

¹ <https://www.kalsec.com/natural-flavor-ingredients/insights/spicy-food-more-than-trend>

Wtaf? (Why not Try Avocado and Fish-sauce)

CREATE FLAVOUR COMBINATIONS SO CRAZY THEY MIGHT JUST WORK.



FISH SAUCE IN GUACAMOLE. DO IT. WHY?

Because the complex, umami flavours of fish sauce make your guac deeper and richer, without adding particularly fishy notes.

Surprise grabs attention but suspense keeps it. Which is why unusual flavour combinations are so effective at penetrating culture: they create an immediate visceral reaction to the reveal, but then the explanation keeps us hanging around.

"THAT CAN'T WORK!" becomes

"BUT MAYBE IT CAN..." becomes

"DARLING, YOU WON'T BELIEVE WHAT I'VE MADE FOR DINNER; NO, TRUST ME."



One of life's most difficult questions is "What shall we make for dinner?" We're crying out for inspiration - the second biggest food trend on UK TikTok is "dinnerideas".

And culture - not to mention hospitality and retail - need the new to progress. But for trends to take hold they need the familiar for reassurance and repetition. Which is why **flavour combinations trend where the familiar and unfamiliar intermingle.** Think olive oil in ice cream or tahini in banana bread or dipping McDonald's fries in milkshake.

One in four people say they're attracted to interesting and exotic flavour combinations.² This is a minority, but a sizeable one - and enough to make something trend, if you can coax the early majority on board.

As with spice, it's all about identity. Maybe you need reassuring, which requires social proof from other people like you successfully using the combination.

And then when you know it works, and brag about it, it creates social capital, a sense of privileged knowledge. And that reinforces your self image for having a curiosity, taste and sophistication others don't.

It's an upward curve of adventurousness - chocolate becomes caramel chocolate, which becomes a salted caramel, which becomes a miso caramel.

Crucially, we're now equipped for this. Post-Ottolenghi food culture is more open to unusual ingredients. Our general 21st century cultural magpie-ism means people are more familiar with, and **more willing to pick and mix, flavours from different parts of the globe.** (Gochujang, BTS, Korean skincare and KPop Demon Hunters are symbiotically linked. Gangnam Style really and truly changed the world.) When a food influencer makes miso carbonara with udon and Szechuan pepper, we get it.

And if nothing else, we need more than one thing to make with that bottle of pomegranate molasses we bought.

trending

COFFEE AS THE PERFECT MARINADE FOR DUCK

CHEDDAR CHEESE TO CUT THROUGH THE RICHNESS OF FRUIT CAKE.

CAVIAR AND WHITE CHOCOLATE

STRAWBERRIES AND BASIL

FRIES AND MILKSHAKE

WHAT YOU CAN DO:

GET A FLAVOUR WHEEL OR FLAVOUR THESAURUS AND SEE WHAT UNEXPECTED TASTES PARTNER WITH YOUR PRODUCT.

² <https://www.innovamarketinsights.com/trends/consumer-trends-for-global-flavor-adventure/>

233%

how much more likely than average food-lovers are to be early adopters

Source: GlobalWebIndex



46%

food-lovers who say they like to be the first to try new things

36%

food-lovers who say they like to take risks

Gotta (matcha) catch em ALL

WHEN CONSPICUOUS CONSUMPTION LENDS ITSELF TO CURATION AND COLLECTION.



IN 2024, THE MATCHA TEA MARKET WAS WORTH

\$4.23 BILLION³

By 2033, it's expected to hit \$7.86 billion . And it was far and away the **biggest food trend on social media in 2025.**

400x

increase in search volume for strawberry matcha since 2024

Source: Exploding Topics



PART OF THIS EXPLOSION IS DRIVEN BY THE UBIQUITY OF MATCHA PRODUCTS - AND CONSUMERS WANTING TO SAMPLE DIFFERENT ONES.

Key conversations driving the trend include "BEST MATCHA IN [CITY]"; matcha vs coffee comparisons; cafes promoting new matcha drinks and desserts; YouTube content such as "TRYING EVERY MATCHA DRINK AT [CHAIN]" and "HOW I MAKE MY DAILY ICED MATCHA LATTE".

Matcha has a strong brand. It is visually and flavourfully distinctive. That means it's easy for retailers, hospitality and the public to make variations of it, and for those variations to be both always different and always the same. Which encourages widespread sampling.

A trend won't always follow a classic adoption cycle bell curve. **It can follow a step curve** - with each step indicating a pause for innovation within the trend. That could be new brand adoption, more variants, greater available information, better accessibility, all quietly extending the trend's lifespan. (For our money, Dubai chocolate proved relatively short-lived because it's only really one thing; "pistachio" had 10% of the conversation volume of matcha because despite the same colour, it's a less versatile flavour.)

So what started as an ancient ritual established itself as superfood supplement. From there, it has become inescapable across all categories: classic matcha powders, ready-to-drink matcha latte bottles and cans, matcha flavoured baked goods, matcha cocktails, matcha energy drinks, matcha lip balm, matcha bubble bath, matcha hair dye, matcha soft furnishings. The bold green is everywhere.

And that variation is key. Innovation prevents a trend becoming stale. Discovery maintains its topicality and talkability. And range encourages even greater discovery, trial, preference and even **'fandom' style advocacy.**

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ICED COFFEE

BUBBLE TEA

CRONUTS

PUMPKIN SPICE



WHAT YOU CAN DO:

FIND VARIATIONS ON A THEME, WITHOUT LOSING THE ESSENCE OF WHAT MAKES THE PRODUCT UNIQUE.

³ <https://www.uren.com/news/flavour-trends-matcha-green-tea/>

the cOnvenient truth

KEEP IT SIMPLE, STEW(PID): MAKE PEOPLE'S LIVES EASIER SO THEY FEEL GOOD ABOUT THEMSELVES



WE END ON A FUNDAMENTAL POINT:

THREE OF THE TOP SIX FOOD TRENDS ON TIKTOK IN 2025 ARE RECIPE INSPIRATION (AND TWO OF THE OTHER THREE ARE WELLNESS RELATED), INCLUDING "EASYRECIPES".



105%

how much more likely food-lovers are to use social media to find out what's trending

Source: GlobalWebIndex



THIS UNDERLINES SOMETHING IMPORTANT ABOUT FOOD TRENDS, AND TRENDS IN GENERAL.

It's natural to hone in on the most new, the most different and the most interesting; the things that the tastemakers are doing. Some of these may become mainstream. But, for the most part, the public has no real exposure to these.

They want something that's quick, convenient, affordable and that makes them feel good about themselves.

A FAVOURITE STAT:

Most UK families make the same

six Meals

on repeat

Source: YouGov

This isn't at odds with being aspirational. In sustainability comms it's become common to talk about the intention / action gap or **the effort gap**. But that same gap, between who we picture ourselves to be and what our circumstances allow us to be, exists in every facet of our lives. Things that help people close that gap will trend. This lies behind the rise of the air fryer and, more recently, the ice cream maker.

It also underpins what's particularly potent about short-form video in creating food trends. It's well established that TikTok is now a search engine. This is because a short-form video of a recipe is usually easier and more inspiring to browse than a written recipe and, as a short, low-effort medium, it makes the recipe feel more straightforward.

Based on that, it's no coincidence that recent ad campaigns for AI chat bots have been about effortlessly serving up recipes you need in certain circumstances.

One model we like for understanding human behaviour is the so-called **ARC of Happiness** - that what people really need to be happy is to feel Autonomous, a sense of Relatedness to other humans, and to be Competent in what they do.

Having go-to recipes ticks all three of those boxes: you have the know-how to cook a meal from scratch for your friends, partner or family.

AND THAT, REALLY, IS ALL FEEL GOOD FOOD NEEDS TO BE.

trending

SNACKY BITS

AIR FRYERS

JACKET POTATOES

MEAL DEALS

FREEZER FOOD

WHAT YOU CAN DO:

UNDERSTAND THE BARRIERS THAT STOP PEOPLE LIVING THE WAY THEY WANT; IGNORE HOW YOU THINK THINGS OUGHT TO BE AND HELP WITH HOW THEY REALLY ARE.

mmm... it tastes better: the key takeaway

When planning any food or drink campaign, start with the audience and consider our five key trend-driving forces:

- Does it help their health and wellbeing, in the broadest sense?
- Does it play into their differentiating identity?
- Does it combine the novel with the familiar in an unexpected way?
- Is there some kind of curation or collection element to it?
- Does it make something easy and accessible?

Reducing that down to a thick, flavourful jus, look for what we call the **VAR of trends**. Not that VAR, but it being **Visible, Accessible** and **Reproduceable**.

That is: You need to see it, through media or IRL; it needs to be something you can get your hands on; and it needs to be something that you yourself can create or recreate.

Think of the last few years' resurgence of a particular Irish stout. It became a certain kind of person's entire personality (**point 2**), they would sample different pubs' pours (**point 4**), and it solved the problem of which of the countless beers on offer to order (**point 5**).

People saw peers fetishising the perfect black and white pint or splitting the G, and the brand itself is in every pub, supermarket and corner shop in land (**V**). That latter point + being reasonably-priced meant it was easy to buy (**A**). And then you yourself could split the G or, with a bit of kit, get a perfect pour at home, which sustained the trend and drove visibility (**R**).

METHODOLOGY

This report was written by Zeno London's director of creative and strategy, Michael Sheen, and associate director Jess Beales, with data wrangled by analysts Ayushi Jain and Anes Motam. It's based on a digest of three years' trends reports, social listening and an online editorial review across the UK, France and Germany for 2025, and audience profiling through GlobalWebIndex.



after dinner mints



(HOT take)

**FEW THINGS HUMANS
DO ARE SO WRAPPED
UP IN CULTURE AND
IDENTITY AS FOOD.**

It's less important to keep abreast of food fads as they're plated, ladled, or wrapped up before us than it is to understand what underpins them.

THE IDEA OF AN EXPERIENCE ECONOMY IS NOT NEW.

And everything we eat, however simple or grand, frivolous or functional, is an experience and not a transaction. We eat to socialise, to comfort ourselves, to care for others, to enjoy ourselves, to feel fitter, healthier and happier.

Food is also one of the few areas of life where people can exercise choice - indeed, have to exercise choice - every day.

Douglas Adams categorised this as the three stages of civilisations or the How, Why and Where phases: "HOW CAN WE EAT?", "WHY DO WE EAT?" and "WHERE SHALL WE HAVE LUNCH?"

Consciously or unconsciously, what we choose to put into our bodies expresses more about us than, for instance, what we choose to put on them.

So the most important thing we need to understand when communicating about food is not what we want to turn out of the kitchen but what our audience's appetites are, and how we can help that.

AS ANTHONY BOURDAIN HAD IT IN KITCHEN CONFIDENTIAL:

***"Your body is not a temple;
it's an amusement park. Enjoy the ride."***

ZENO



ORDER FROM US

If any of this has sparked ideas (or stirred up a healthy debate), let's grab some time and talk it through properly. We'd love to walk you through the trends 1:1, pressure-test what they mean for your brand, and spot the gaps your competitors haven't clocked yet.

Drop the Zeno Intelligence team a note and we'll set it up - the kettle's on, the matcha's good, and we promise to make it worth your while. Find us at hello@zenolondon.com

Thank you